EUROPEAN PANEL FEDERATION
WOOD-BASED PANELS









EPF Annual General Meeting – Open Part

Clive Pinnington – EPF Managing Director
Kris Wijnendaele – EPF Technical Director

21 June, 2024 - Riga

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Agenda

1. End-use market developments in 2023
2. 2023 Wood-Based Panel Industry Results
3. 5 Strategic Directions Advocacy and Highlights

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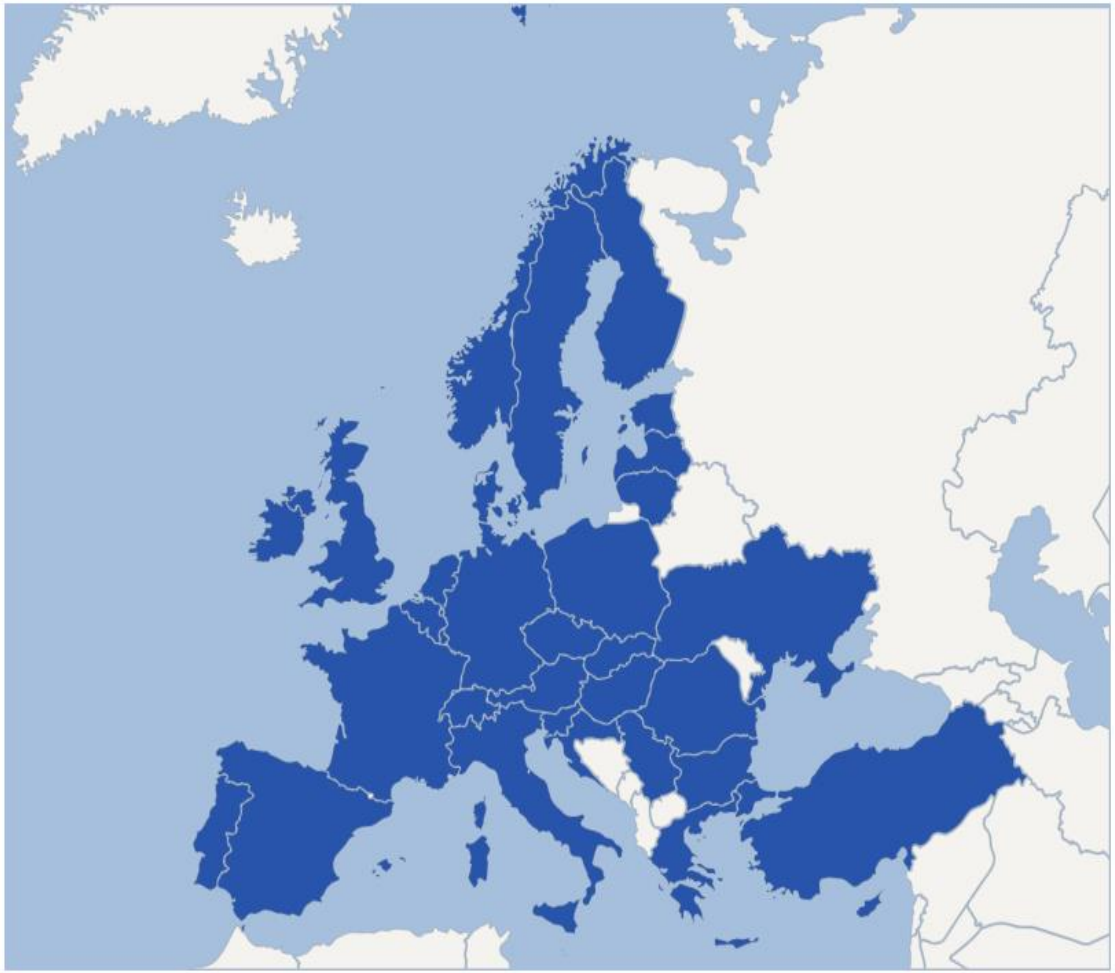
1. Who we are and end-use market developments



European Panel Federation



- All wood-based panel types (Particleboard, MDF, OSB, Hard- and Softboard, Plywood)
- Members in 30 European countries
- 100,000 jobs
- €25 billion turnover

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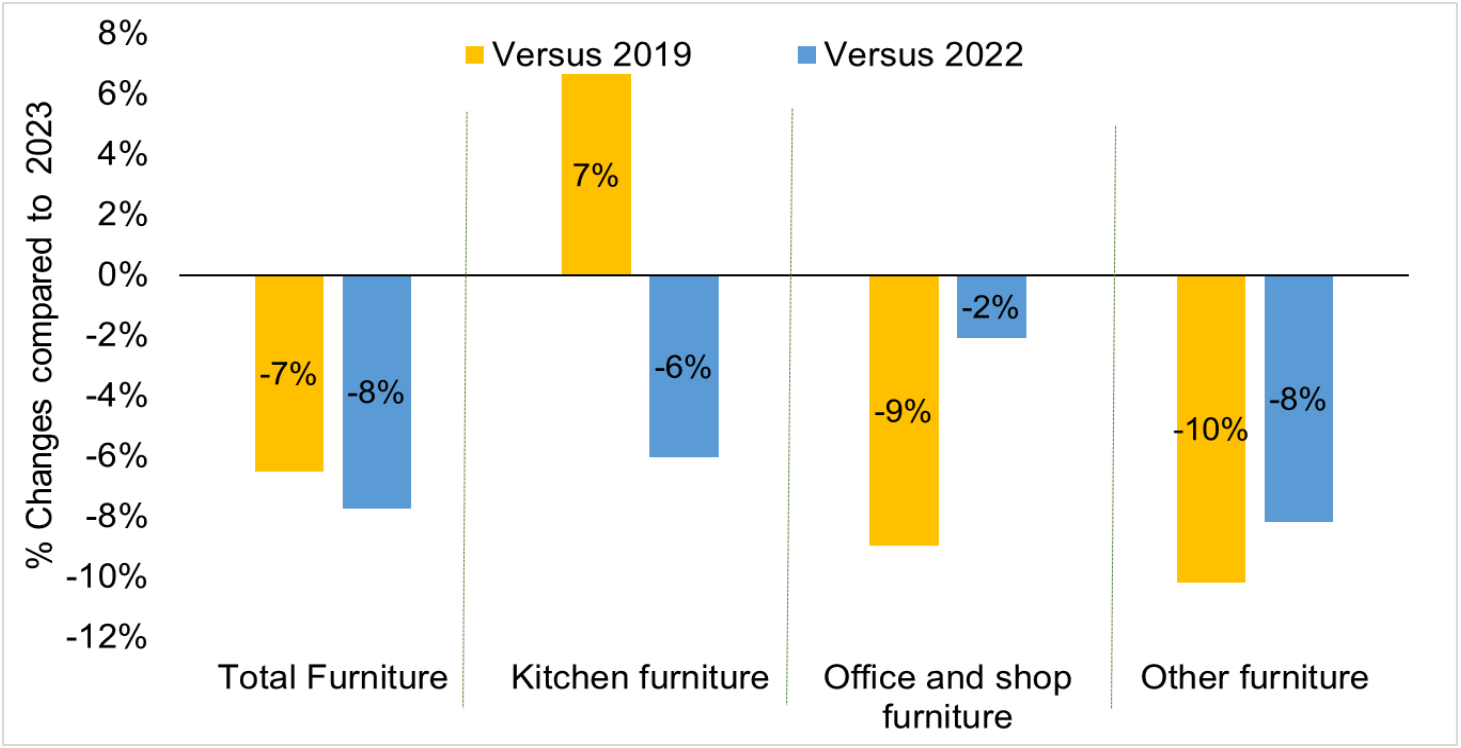
Manufacture of Furniture in EU-27 in 2023



% Changes compared to 2023 (volume wise: calendar and seasonally adjusted)



Source: Eurostat

- **All furniture segments contracted in 2023**
- **Sustained inflation limited the purchasing power of household**

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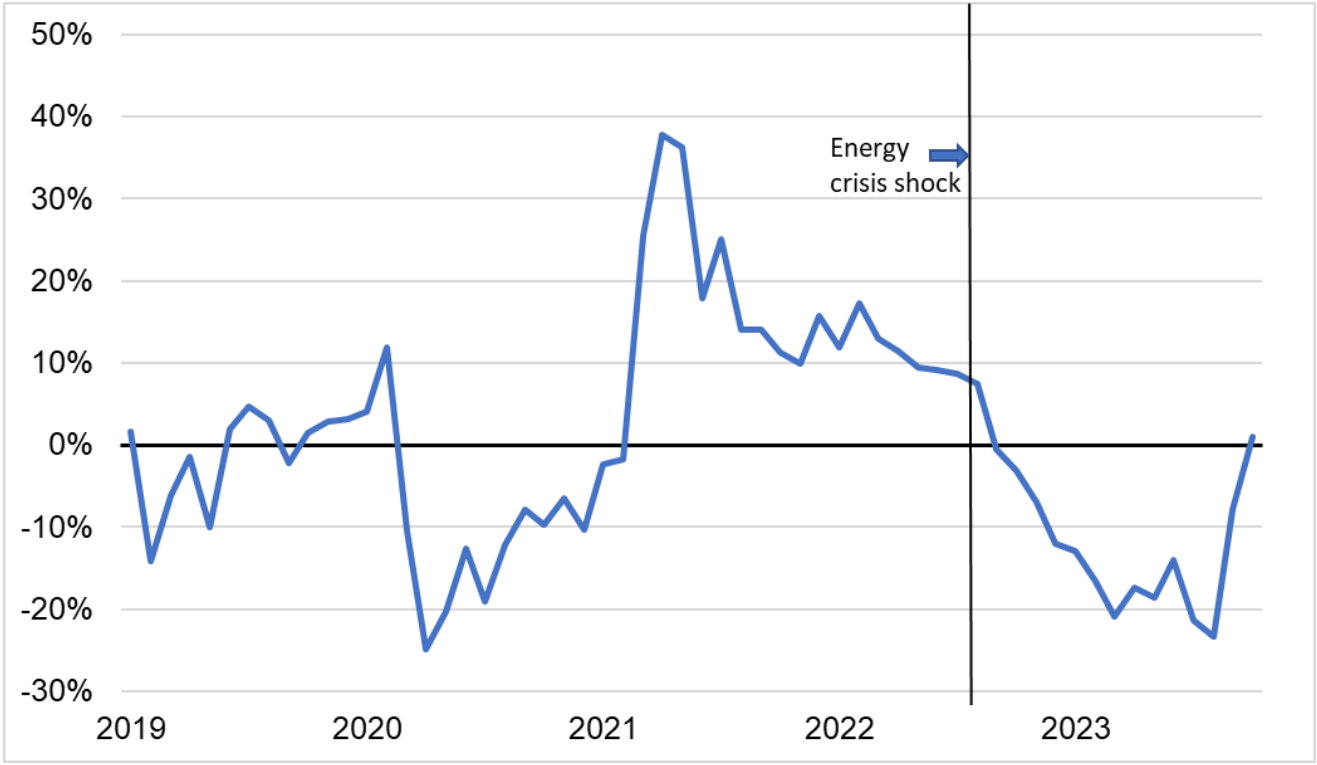
Construction sector in EU-27 in 2023
Building permits: number of dwellings



% Changes year-on-year



- **Sharp drop in building permits in 2023 (-15%)**
- **High interest rates reduced housing construction** Source: Eurostat
- **Civil engineering construction performed better thanks to public funds**

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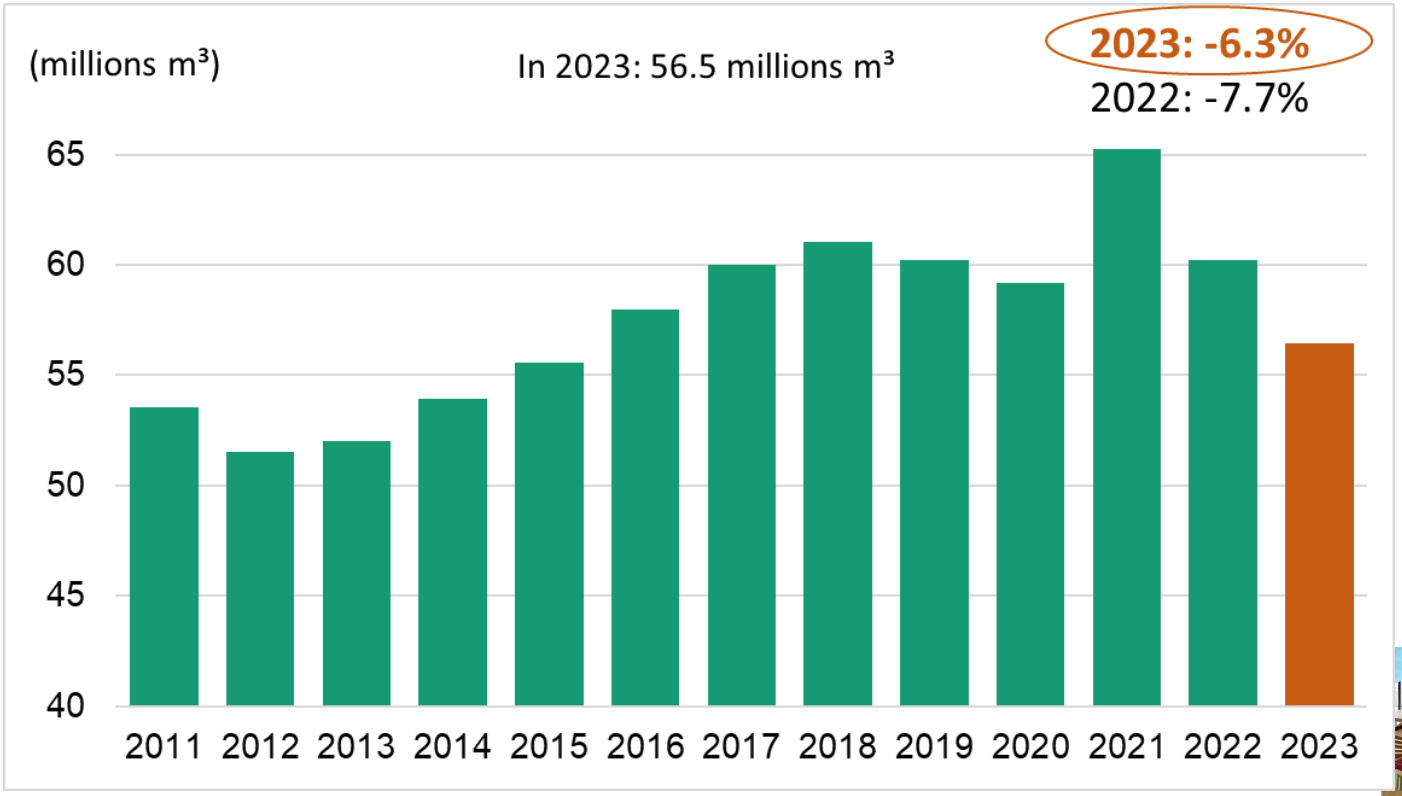
2023 Full Year Statistics



2023 WBP Production in EPF Countries down -6.3% towards 2015 levels



- **Output was affected by sustained economic situation**
- **A slowdown of contraction from -12% in H1-2023 to just -3% in H2 2023**



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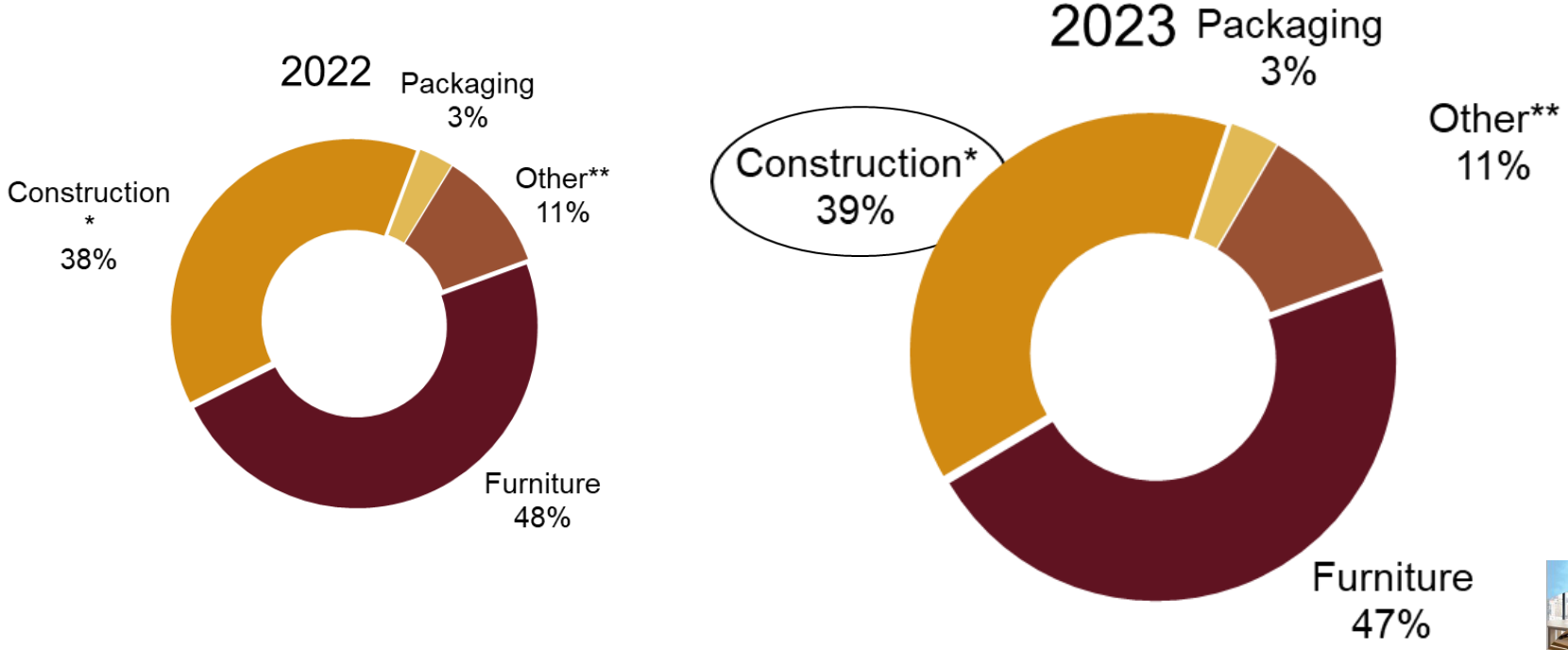
Wood-Based Panels (PB/MDF/OSB/HSB/PLY) End-Uses in EPF countries





- **Slight increase in construction end-uses**

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* Includes doors and flooring

** DIY, extra-EU exports, not specified, mouldings, other end-uses

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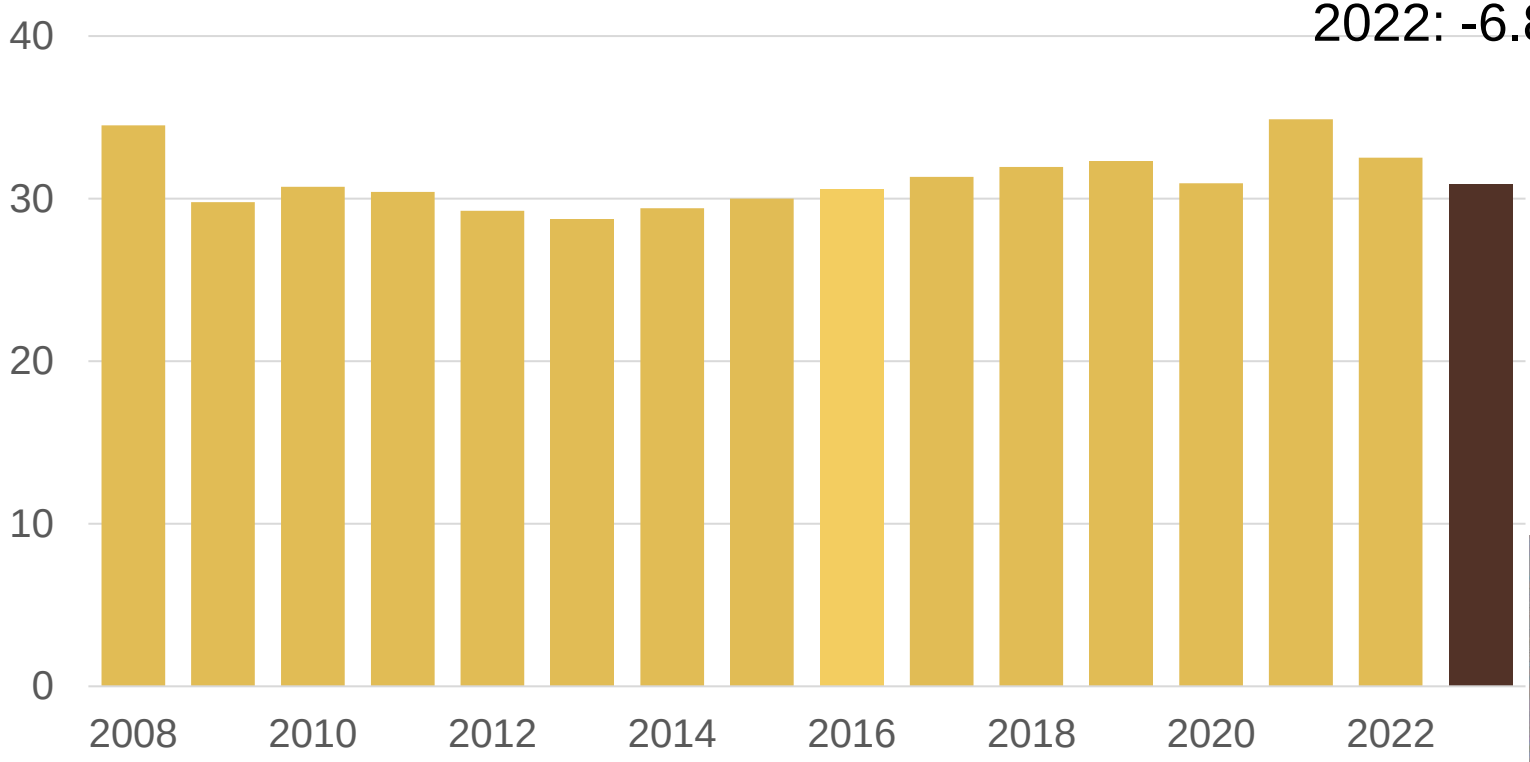
Particleboard



Particleboard Production in EU27+UK+EFTA

(millions m³)

2023: -5.1%
2022: -6.8%



In 2023: 30.9 millions m³



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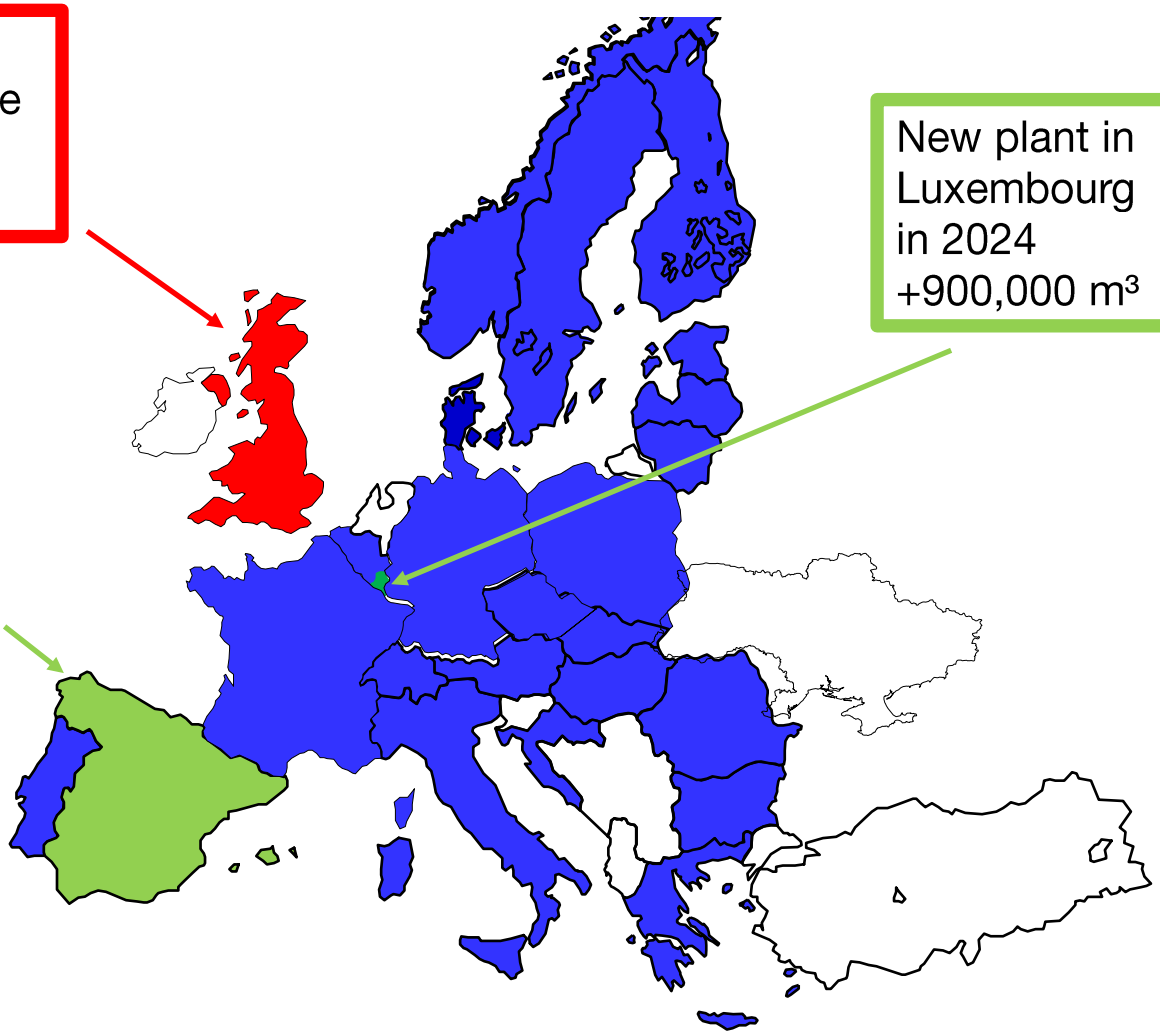
Particleboard announced projects in 2023 and beyond

Announced closure in the UK
-200,000 m³

New plant in Luxembourg in 2024
+900,000 m³

New plant in Spain in 2023
+720,000 m³





Total: +1.4 million m³ (+3.6%)

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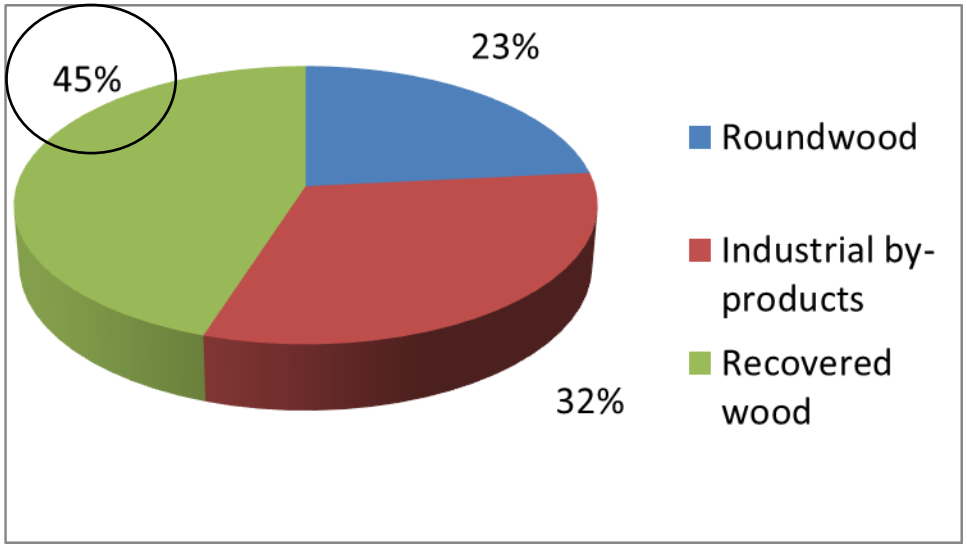
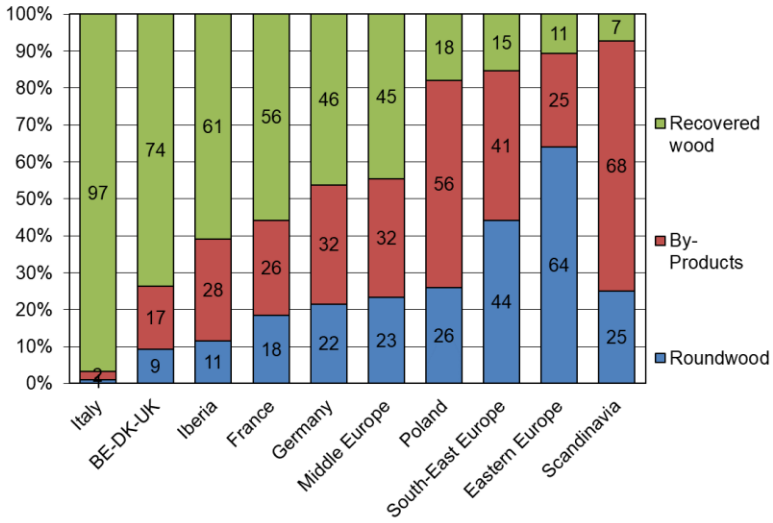
Composition of the raw wood products mix (%) in the European particleboard industry, 2023





- Higher share of recovered wood in PB production: 45%
- Industrial by-products down from 34% to 32%
- Stable usage of roundwood (less than ¼!)
- Saving +9 million dry tonnes of fresh wood



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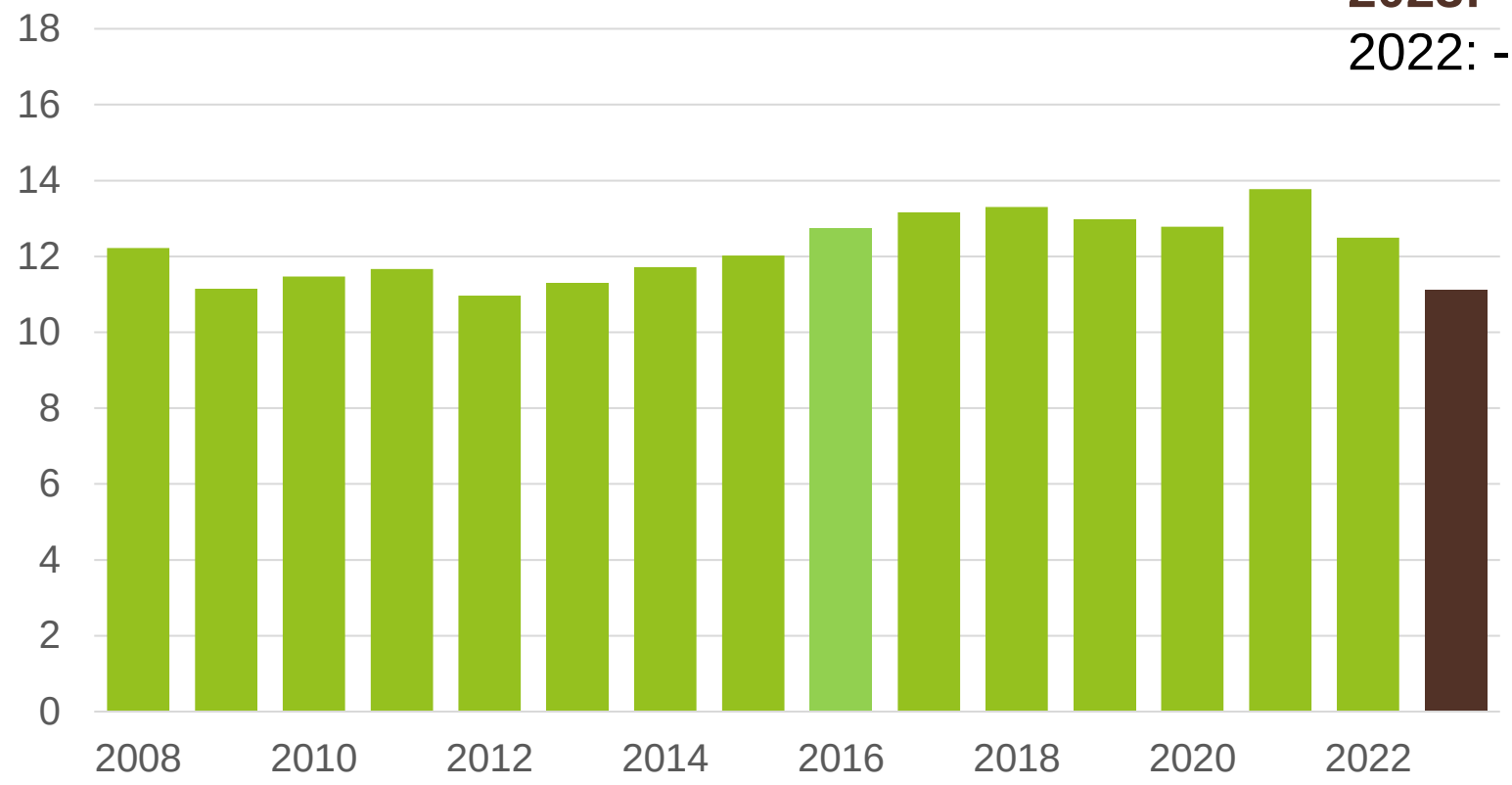
MDF



MDF – production in EU27+UK+EFTA

(millions m³)



2023: -11%

2022: -9.3%

In 2023: 11.1 millions m³



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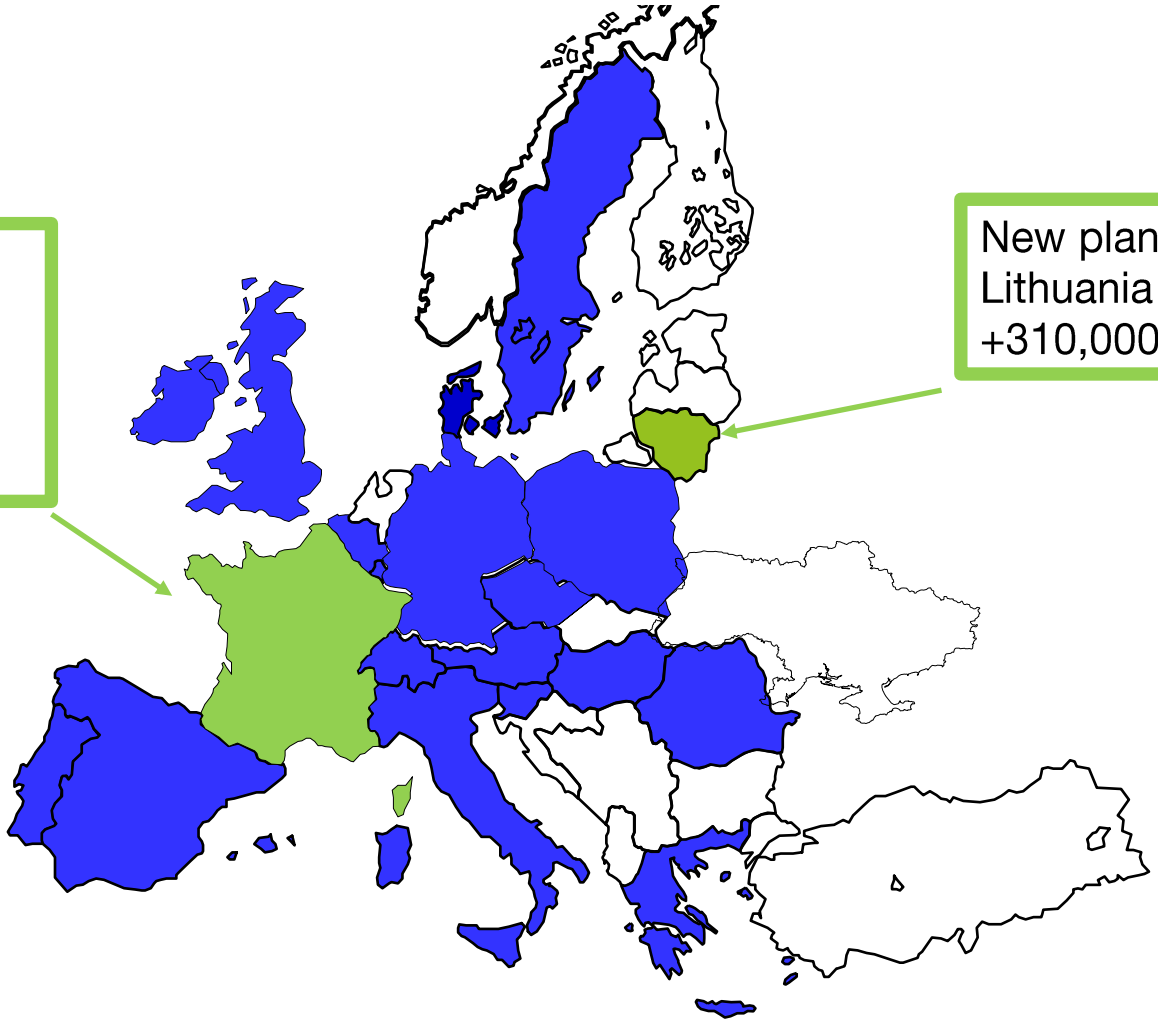
MDF announced projects in 2023 and beyond

Expansion project in France in 2024 +90,000 m³

New plant in Lithuania in 2023 +310,000 m³





Total: +400,000 m³ (+2.7%)

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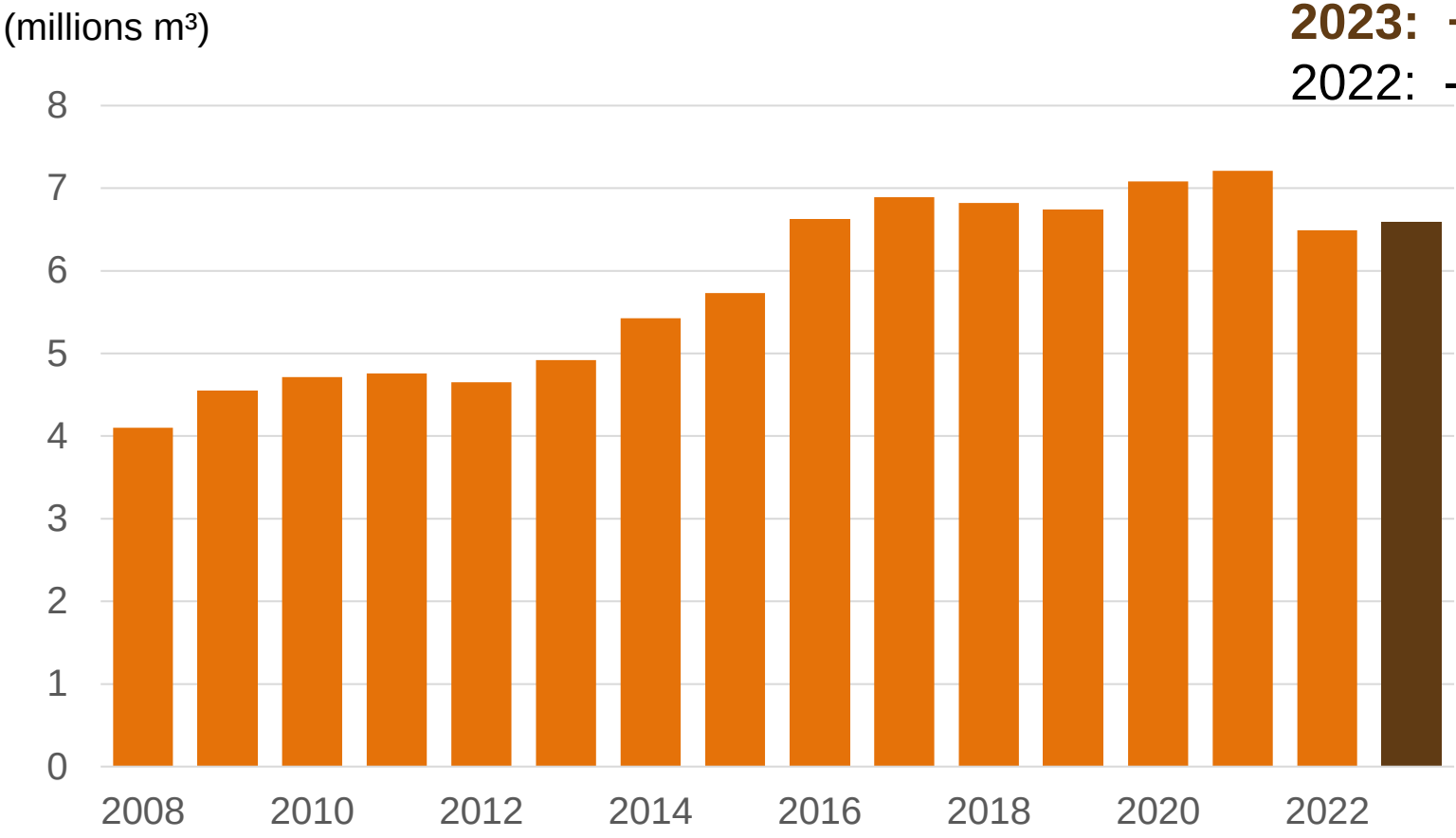
OSB



OSB
Production in EU27+UK+EFTA



2023: +2.1%
2022: -10.5%

In 2023: 6.6 millions m³

Easing pressure of coniferous plywood imports



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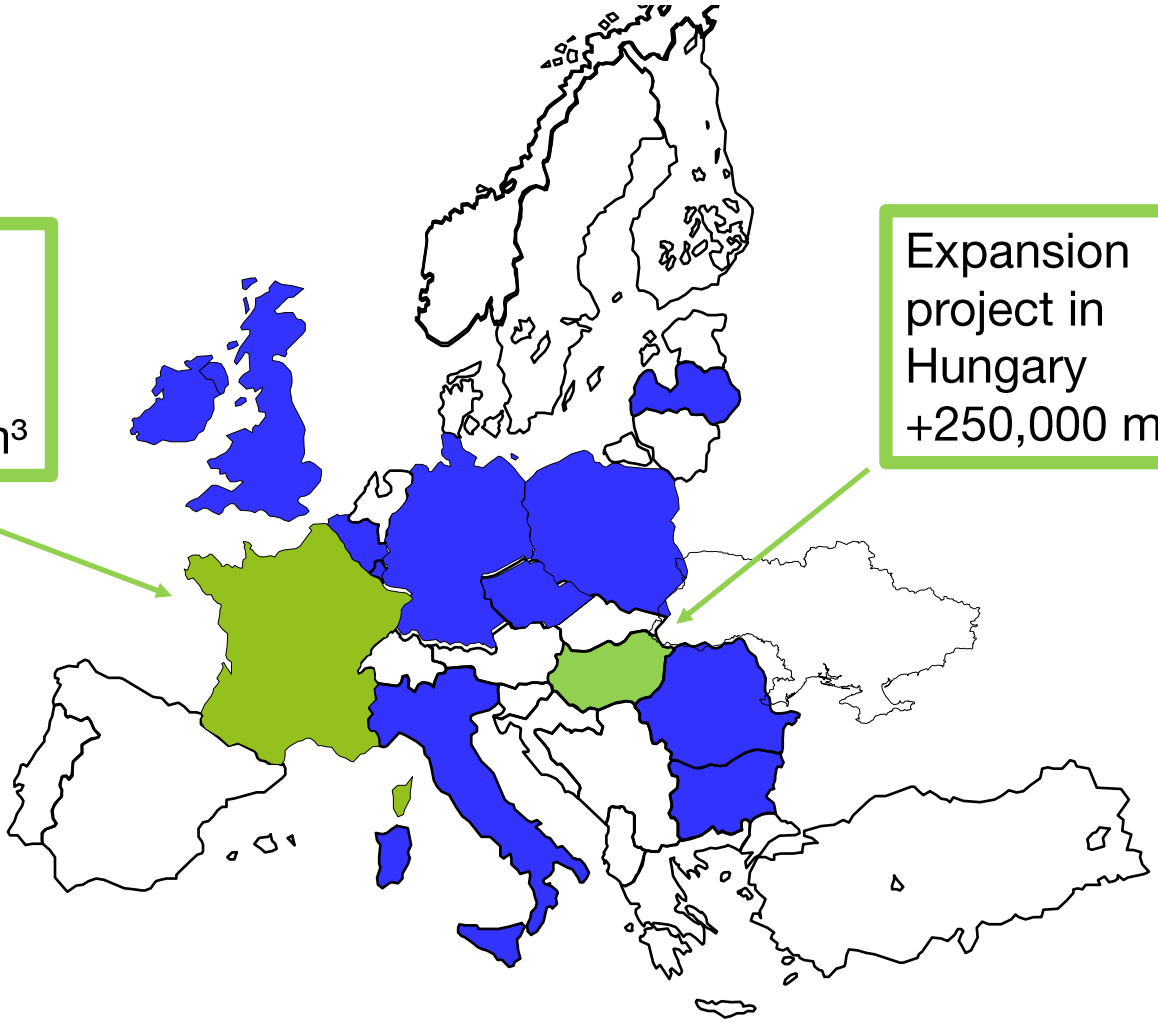
OSB announced capacity expansion projects in 2024

Expansion project in France +150,000 m³

Expansion project in Hungary +250,000 m³



Total: +400,000 m³ (+5.2%)



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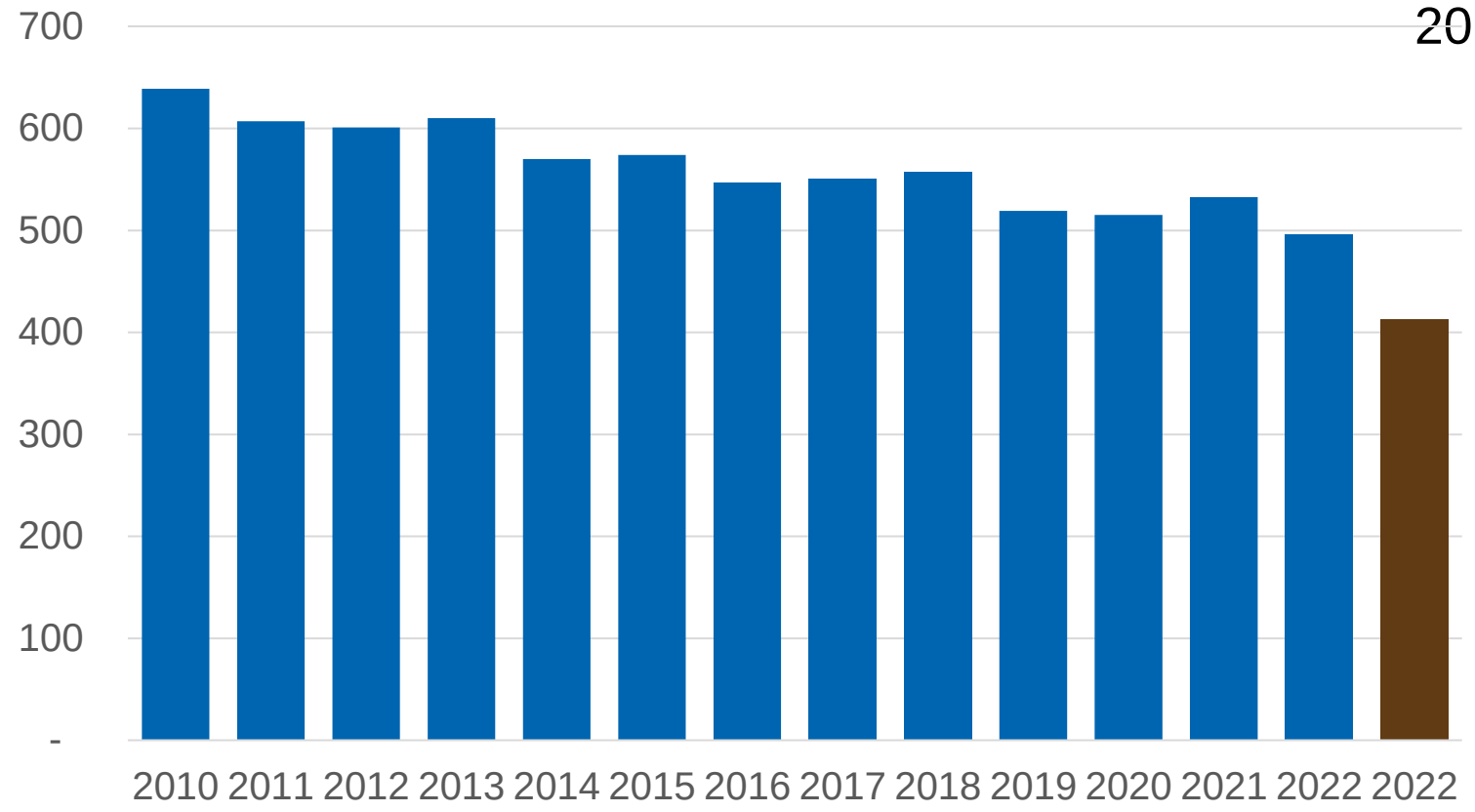
HARDBOARD



Hardboard – production in EU27+EFTA

(1,000 m³)



2023: -17%

2022: -7%



In 2023: 413,000 m³

EU27 capacity: 700,000 m³ (stable)

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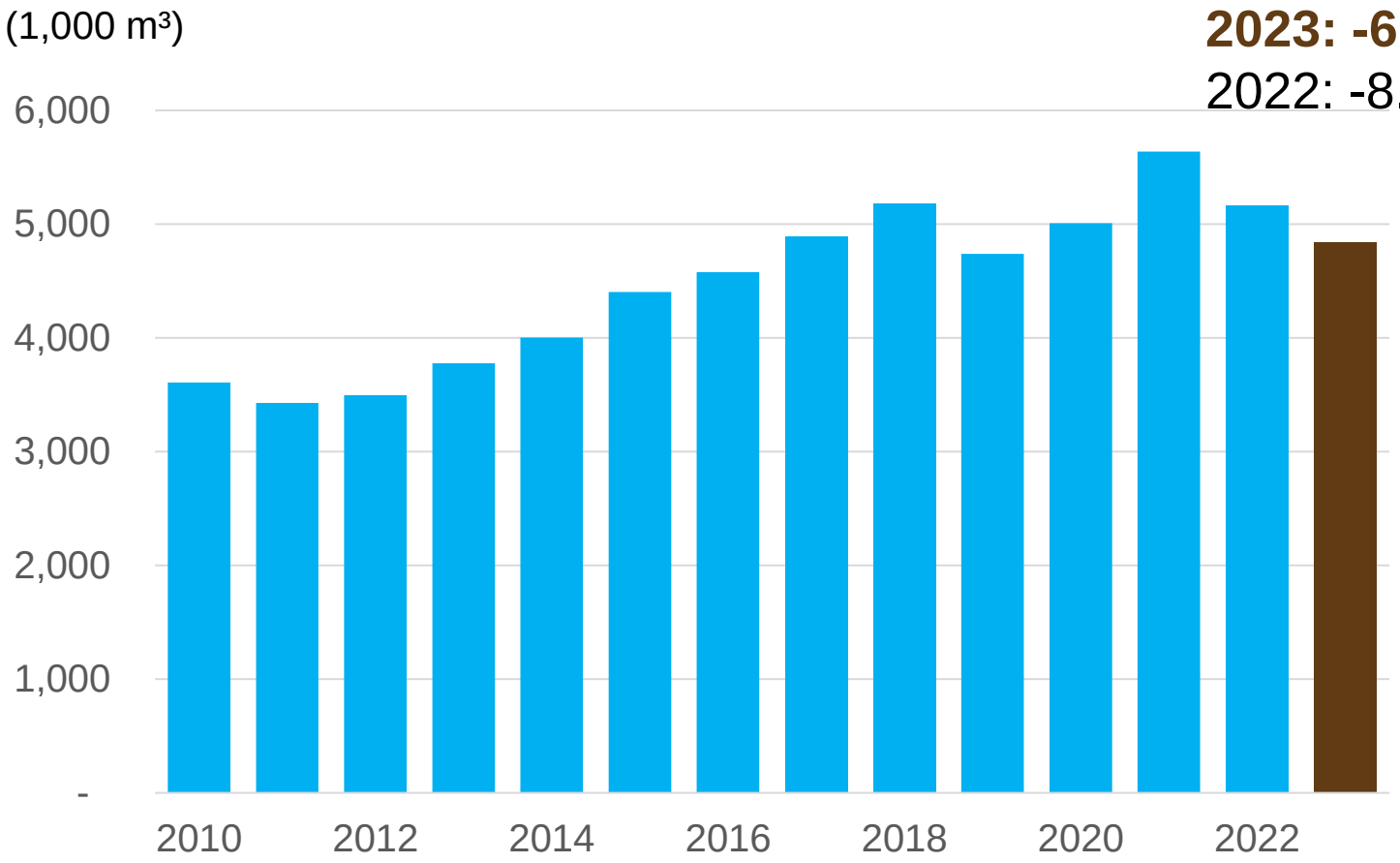
SOFTBOARD



Softboard Production in EU27+EFTA



2023: -6.3%

2022: -8.4%

In 2023: 4.8 millions m³

EU-27 capacity: 6.9 million m³



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Softboard announced new capacities in 2023 and beyond

New plant in **Germany in 2023**

+2 million m³

New plant in **Germany in 2024**

+1.5 million m³

New line in **Germany in 2025**

+500,000 m³

New plant in **France in 2024**

+110,000 m³

New plant in **Poland in 2023**

+1.5 million m³

New plant in **Switzerland in 2025**

+350,000 m³



Total: nearly 6 million m³

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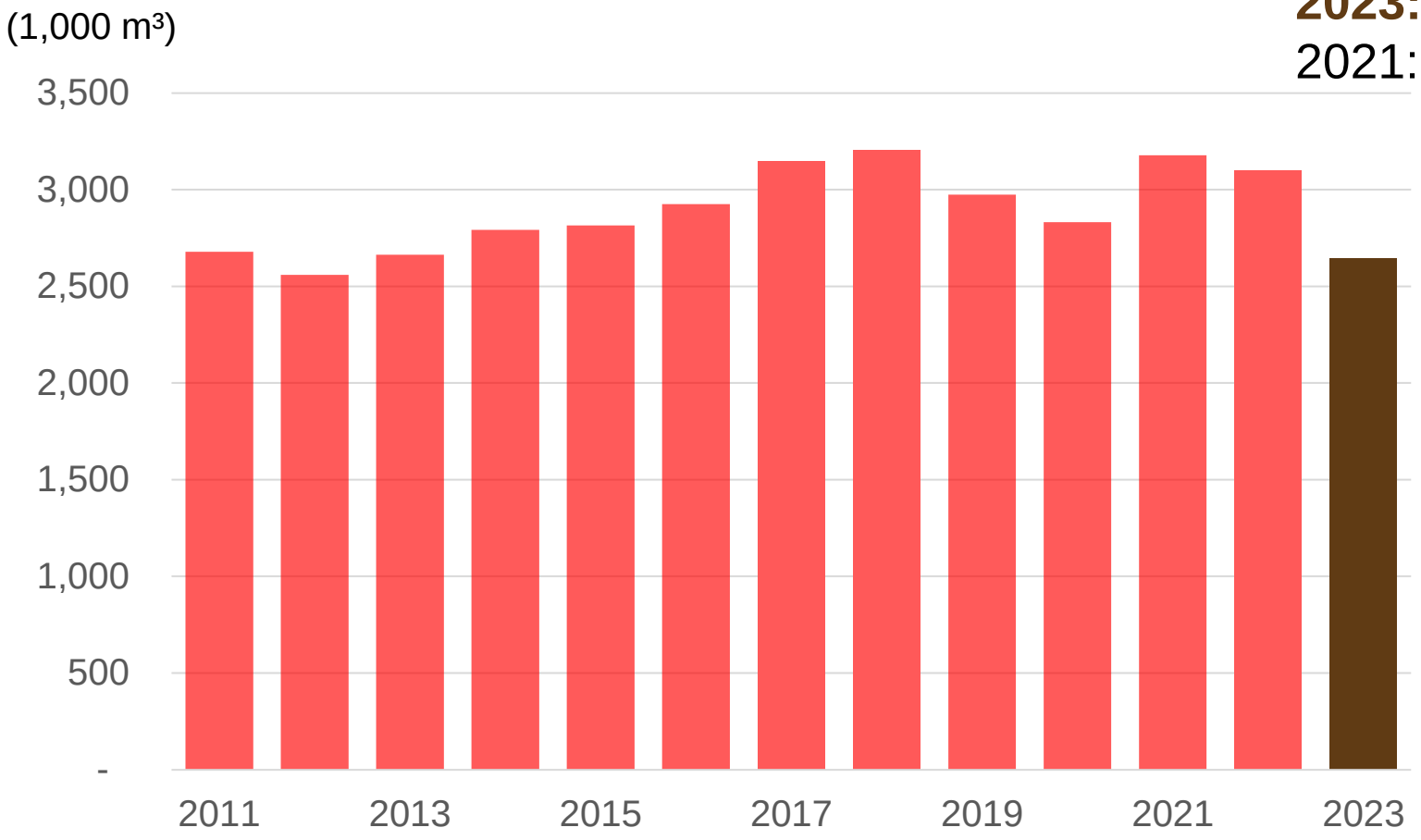
PLYWOOD



Plywood
Production in EU-27

2023: -15%
2021: -2.5%



In 2023: 2.6 millions m³



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Plywood capacity expansions in 2023 and beyond

Capacity expansion **in Latvia**

+35,000 m³

Capacity expansion in **Spain**

+20,000 m³

New capacity in **Hungary**

+17,000 m³



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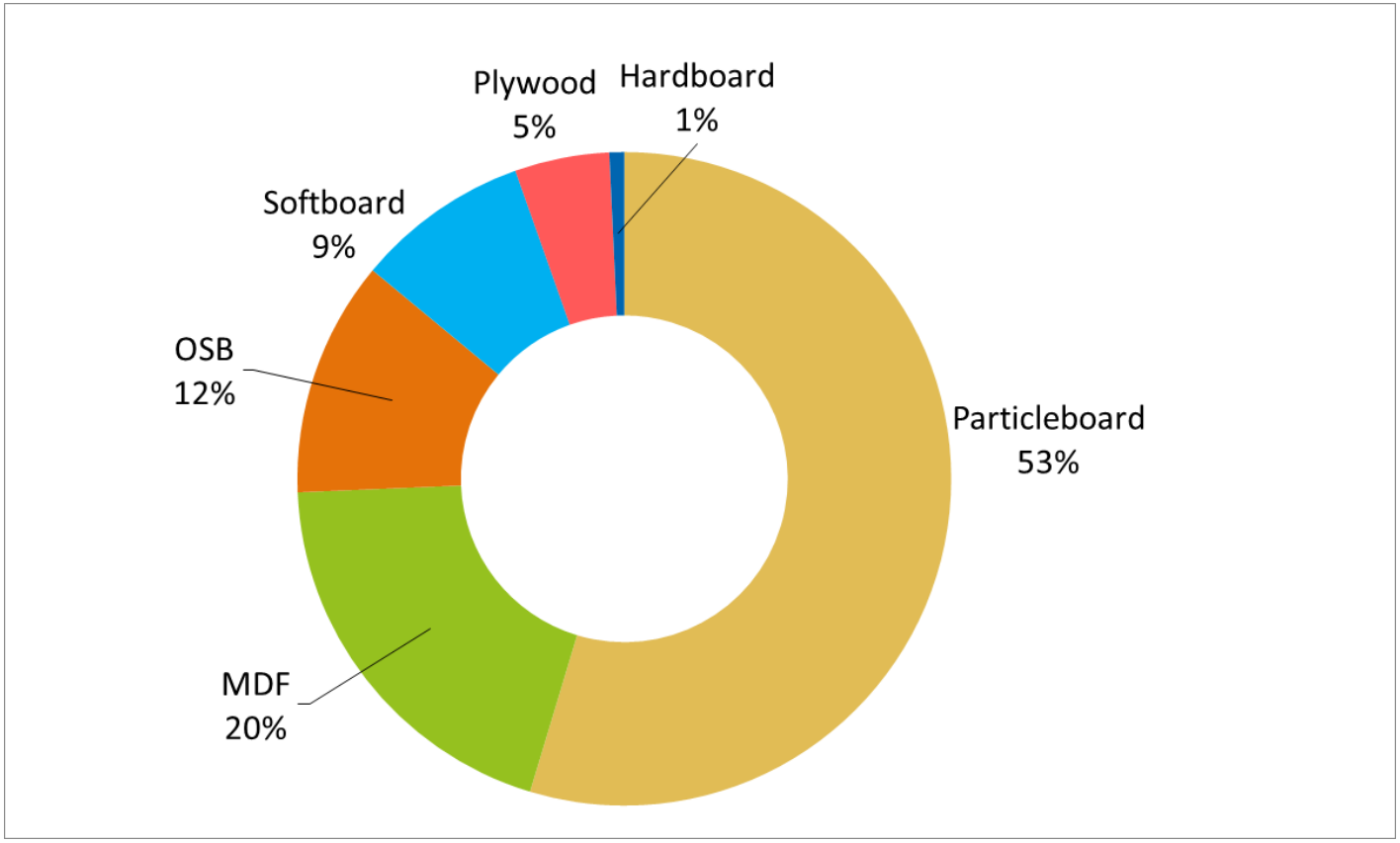
SUMMARY



Share of production per type in EU27+UK+EFTA, 2023





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Stable structure compared to 2022

Summary 2023

Production (million m^3)	Countries	2023	2022	23/22
Particleboard	EU27+UK+EFTA	30.9	32.5	-5%
MDF	EU27+UK+EFTA	11.1	12.5	-11%
OSB	EU27+UK+EFTA	6.6	6.5	2%
Hardboard	EU27+EFTA	0.4	0.5	-17%
Softboard	EU27+EFTA	4.8	5.2	-6%
Plywood	EU27	2.6	3.1	-15%
Total Wood-Based Panels		**56.5**	**60.2**	**-6.3%**



Output dropped to 2015 levels in 2023

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ADVOCACY
STRATEGIC DIRECTIONS
5 Highlights

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Highlight 1

Role Model Industry Advocacy 2024-2029

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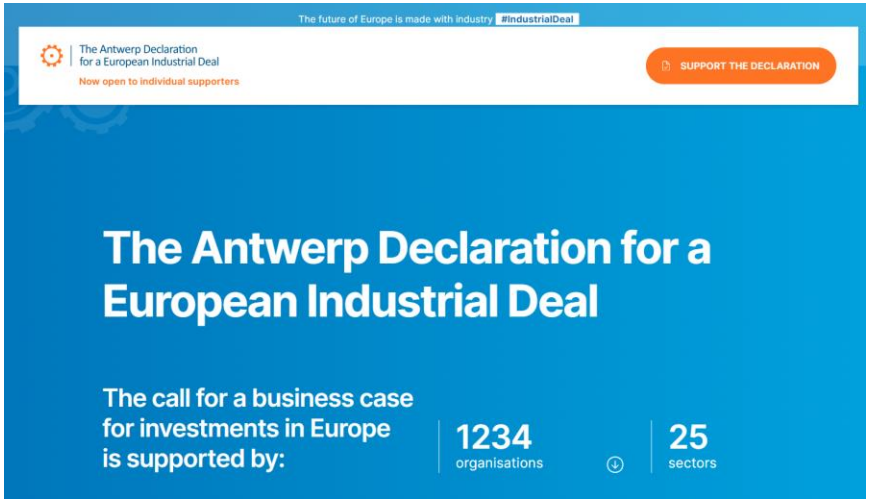
1) Advocacy 2024-2029
Role Model Industry

wood PoP

connect — exchange — collaborate

Circular Choices





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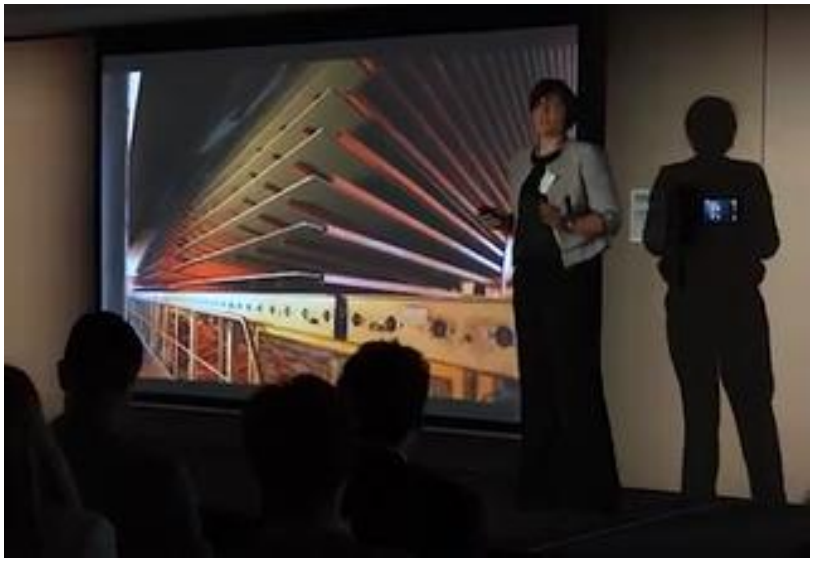
1) Advocacy 2024-2029
Role Model Industry

- Raise role 2024-2029 from wood, bioeconomy and industry
- Wood sector ("What we can contribute")
  - Circular Choices: Focus on wood, paper, fibre industries' contribution in period 2024-2029. 20% climate contribution (3S) -> 30% in 2030
  - WoodPoP: Member State led, Sector supported activity with much promise. Policy paper in development. 17.5 million jobs, 7% of GDP
- Bioeconomy sector ("A 7 billion euro opportunity")
  - Clean transition dialogues (Green Deal). Direct discussion with EVP Sefcovic. Emphasis on recycled wood/resource efficiency. Well received.
  - Need to give teeth to Bioeconomy in new mandate. Review end 2025.
- Industry sector ("Reindustrialise Europe")
  - Antwerp Declaration. European Industrial Deal to complement the Green Deal. keep high quality jobs for European workers in Europe.
  - 1235 organisations, 25 sectors, industry and trade unions. First, declaration, now movements. Highest level access yet.

1) Advocacy 2024-2029
Role Model Industry









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Highlight 2

(New European Bauhaus) and Wood Availability





2) Wood Availability
How much wood is there, what is it used for, is it enough?

- **How much wood is there?**
  - 500 million m^3 harvested in 2021 in EU-27 (Eurostat)
- **What is it used for?**
  - 40% products, 60% energy (EPF calculation from JRC)
  - 49% products, 51% energy (JRC, incl. secondary sources)
- **Is it enough?.....**
  - Major studies performed by AFRY and SLU
  - Change of course is needed (or there will be shortages)
  - Various scenarios and ways to debottleneck
  - Analysis by EPF then advocacy
- **Early hint on content?**
  - Yes.....
  - Cascade use/resource efficiency



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Highlight 3

Regulatory Affairs

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2) Regulatory Affairs
Formaldehyde & Melamine

- **Formaldehyde**
  - 2022 highlight with new limit value (1/2 E1)
  - Pan-European harmonisation (and also for imports)

    => "Sensible" regulation achieved with industry

- **Melamine**
  - Challenging dossier for industry to deal with
  - Outstanding value chain cooperation from the start
  - Legal opposition and also engagement in REACH process
  - Detailed scientific and economic feedback to consultations
  - EPF accepted as accredited stakeholder at ECHA
  - Advocacy to be pursued in Brussels, Helsinki and MSs

    => United industry targets similarly "sensible" outcome

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Highlight 4

EU Projects

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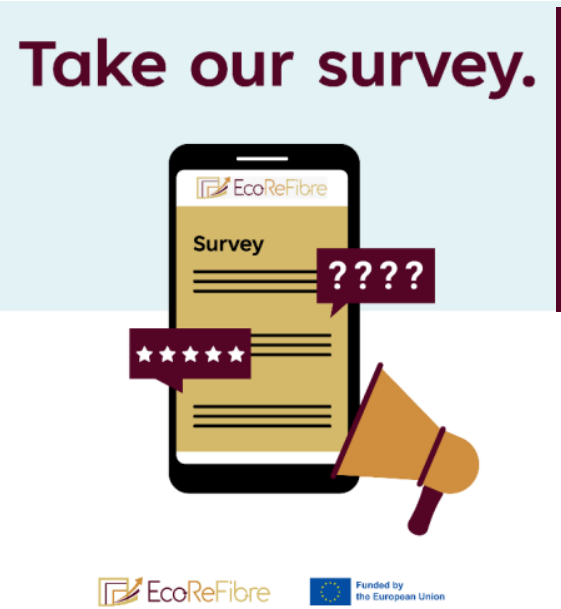
Highlight on Communications on the EU-funded project EcoReFibre

Interim survey conclusion: average life span of MDF products is about 12 years



Multilingual Survey to predict Fibreboard Waste in Europe (Crowd Wisdom methodology)

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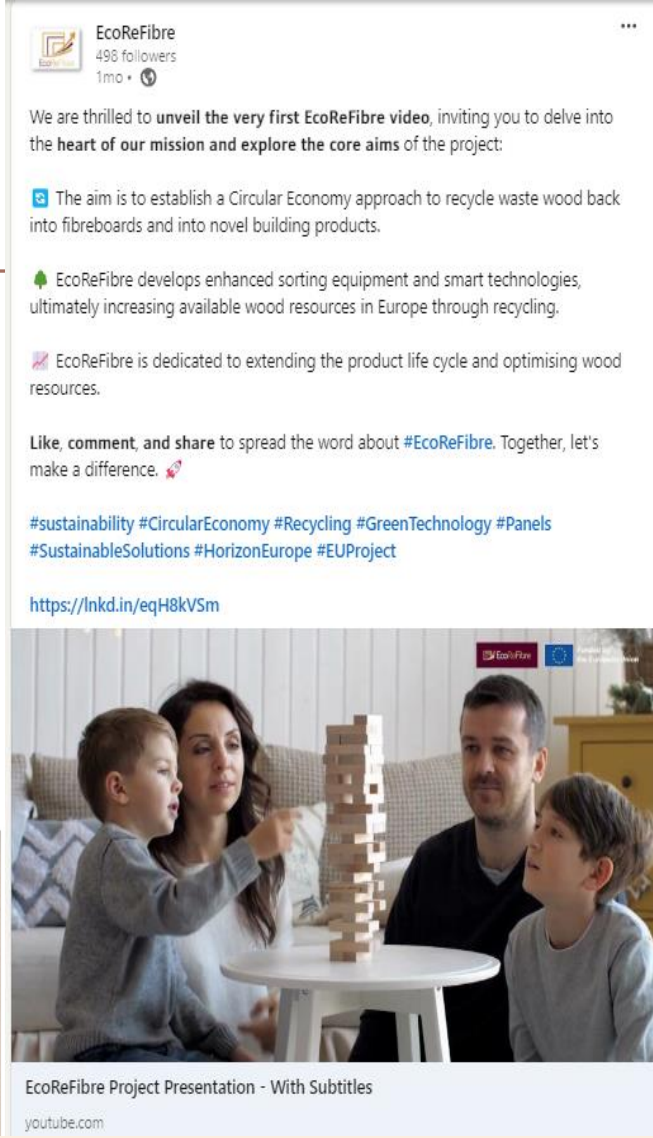
+/- 600 views

6000 impressions on LinkedIn post

Engagement rate: 23%



EcoReFibre launches first Video

Funded by the European Union

EcoReFibre latest meetings



M18 GA in France – November 2023

EcoReFibre First Review meeting



January 2024

EcoReFibre
Ecological Solutions for Recovery of Secondary Materials from Post-Consumer Fibreboards

Funded by the European Union

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M24 GA in Germany – April 2024

PANELS & FURNITURE ASIA

HOME NEWS MAGAZINE TRADE SHOWS EVENTS WEBINAR SUBSCRIBE

Dieffenbacher and Tomra showcase technology for "fibreboard-to-fibreboard" recycling

April 29, 2024



EcoReFibre meeting and live demonstration at Dieffenbacher's headquarters in Eppingen, Germany (Image: Dieffenbacher)

Successful demonstration pilots (Sorting Line and Impact Reactor Technology)

EPF visit to CLaminate Pilot Line (May 2024) and last CISUFLO GA (June 2024)

European Panel Federation • You
The voice of the EU wood-based panel industry
1mo •

EPF is delighted to share its recent visit to Unilin Bazeilles, where #innovation is at the forefront.

📌 Thursday's visit was tied to our involvement in the CISUFLO project, funded by Horizon 2020 Research and Innovation Programme, paving the way for advancements in our #woodbasedpanels industry.

♻️ At Unilin Bazeilles, we witnessed firsthand the intersection of cutting-edge technology and #sustainable practices. From state-of-the art machinery to eco-conscious processes, high-level contributions to #resourceefficiency prevail.

🔎 Observing innovative technologies recycling #MDF and #HDF waste back into MDF/HDF manufacture in the fully automated #Osiris pilot line was the main highlight of the tour, as the company has been investing for many years in such innovation, with the aim of replacing at least 25% of raw materials mix for MDF and HDF boards with recycled fibres in the future.

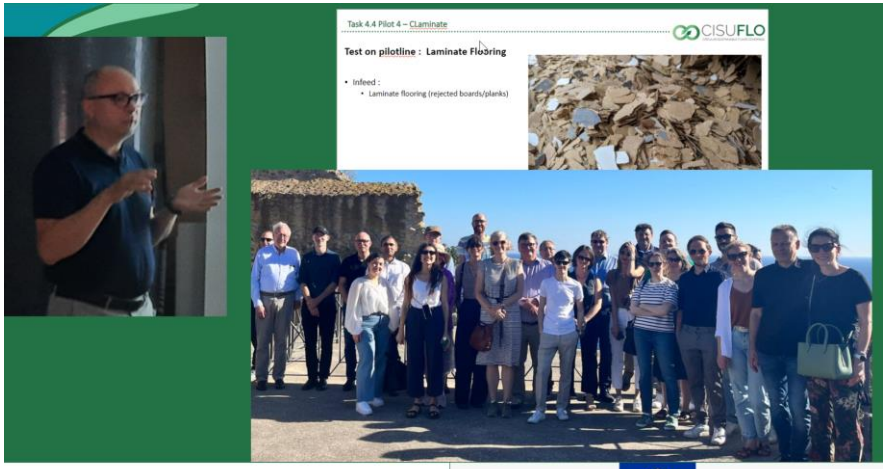
➡️ Recovering wood fibres from boards in an economically viable way and reusing them to produce high-quality fibreboards on an industrial scale.

Thank you very much again Geert Coudenys for these impressive and insightful explanations.

#CISUFLO #Osiris #Sustainability #Circularity



CISUFLO GA, June 2024 (Naples)



CISUFLO
CIRCULAR SUSTAINABLE FLOOR COVERINGS

This project has received funding from the European Union's Horizon 2020 Research and Innovation Programme under Grant Agreement No 101003893

UNILIN CISUFLO CIRCULAR SUSTAINABLE FLOOR COVERINGS EUROPEAN PANEL FEDERATION WOOD-BASED PANELS

PRESS RELEASE

Unilin Pilot Plant and innovative technology herald new level of recyclability for laminate flooring

This project has received funding from the European Union's Horizon 2020 Research and Innovation Programme under Grant Agreement No 101003893

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Highlight 5

EPF Way of Working

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5) EPF Way of Working
Evolution not Revolution

- **Changes 2024 EPF made**
  - New Chairman
  - New Vice-Chair
  - New Brussels Offices
  - Same 5 Strategic Direction

- **Keywords 2024-2029**
  - Priorities
  - Focus
  - Empowerment
  - Ambidexterity
  - Agility

    => Maximum efficiency



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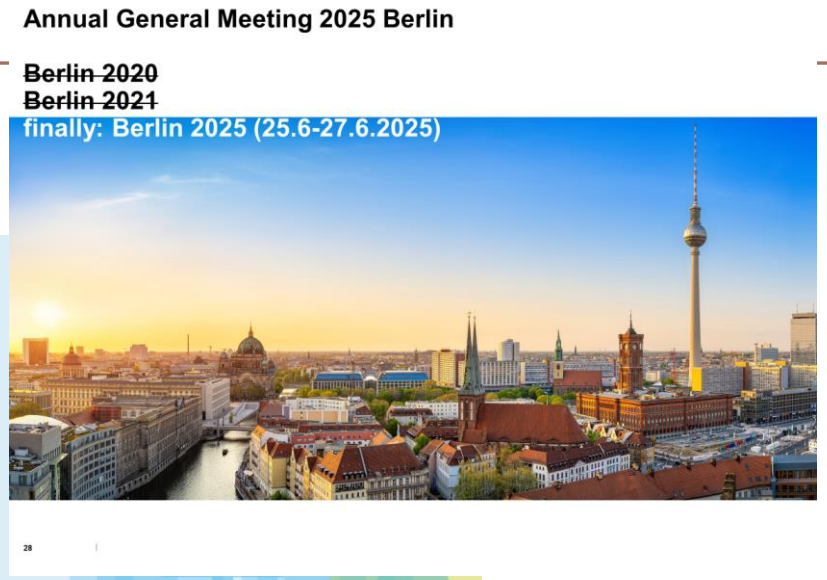
5) EPF Way of Working
Evolution not Revolution







- **And finally.....3 dates for your diaries!!**

• 13th EWBP Symposium	9-11 October 2024, Hamburg
• Wood Policy Info Workshop	7 November 2024, Brussels
• AGM 2025	25-27 June 2025, Berlin

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