



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

Agenda

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

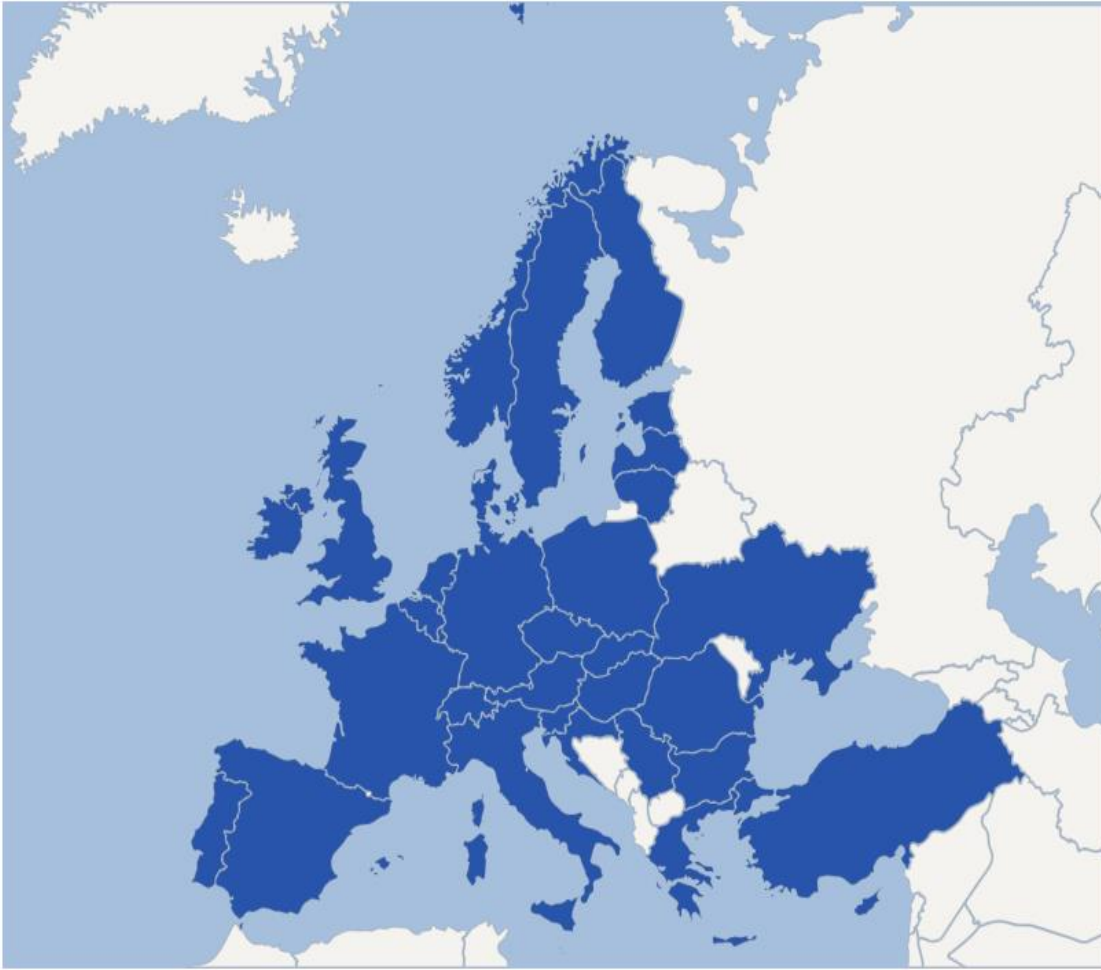


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1. Who we are and end-use market developments



European Panel Federation

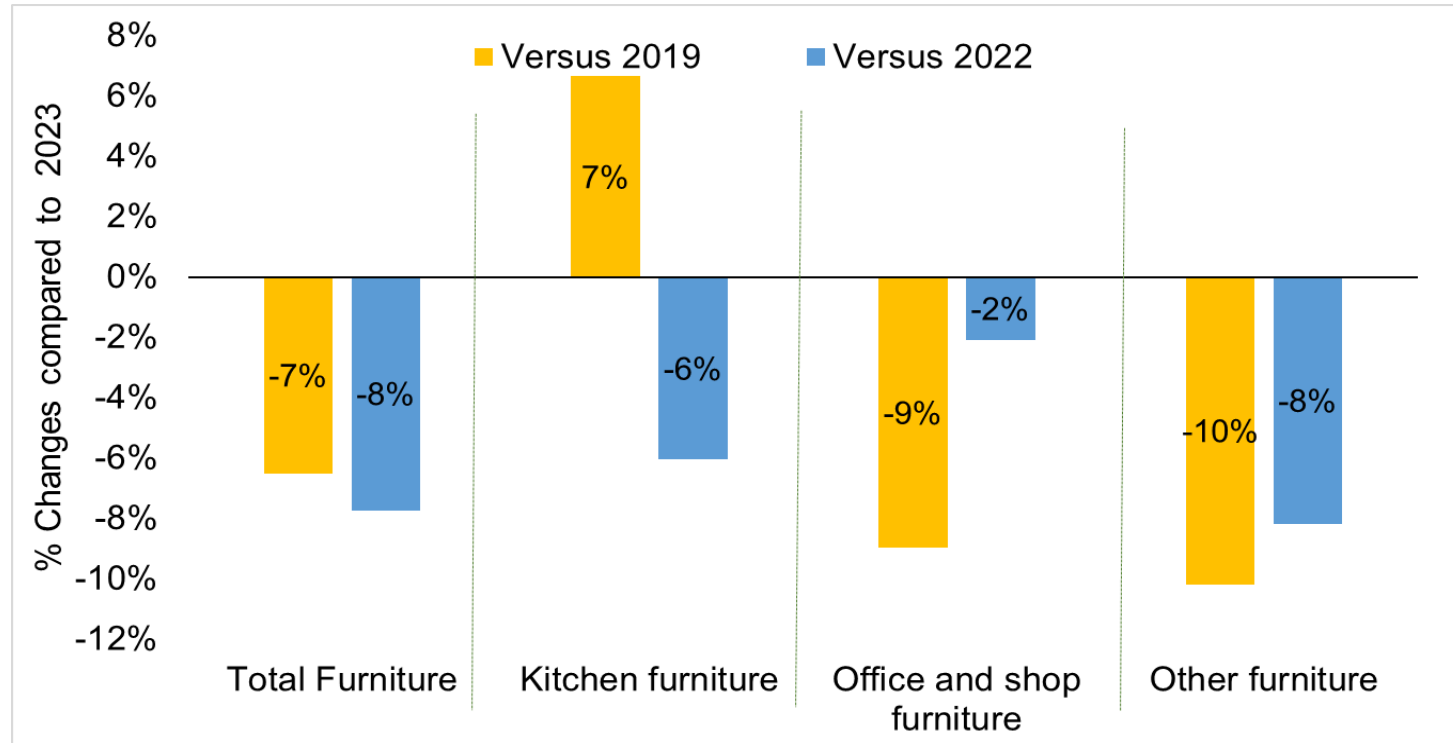


- **All wood-based panel types (Particleboard, MDF, OSB, Hard- and Softboard, Plywood)**
- **Members in 30 European countries**
- **100,000 jobs**
- **€25 billion turnover**



Manufacture of Furniture in EU-27 in 2023

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



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

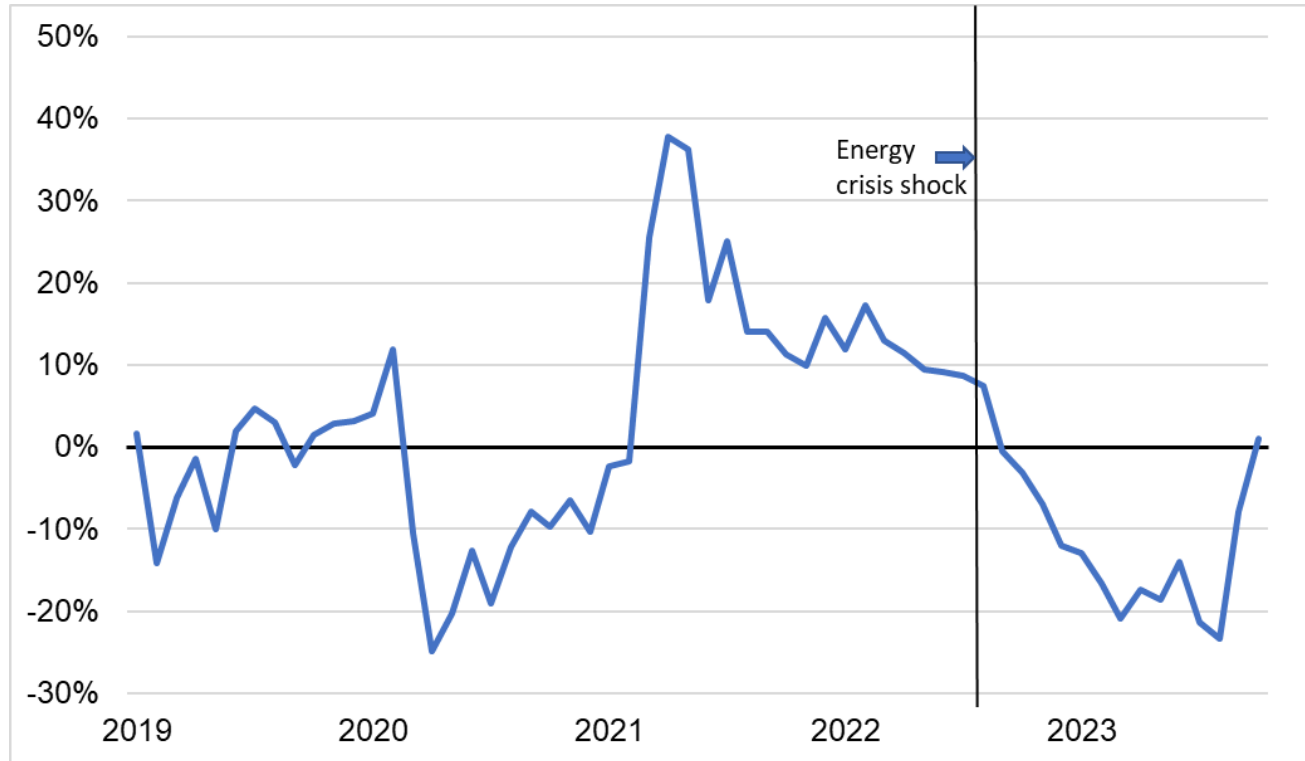
Source: Eurostat

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**

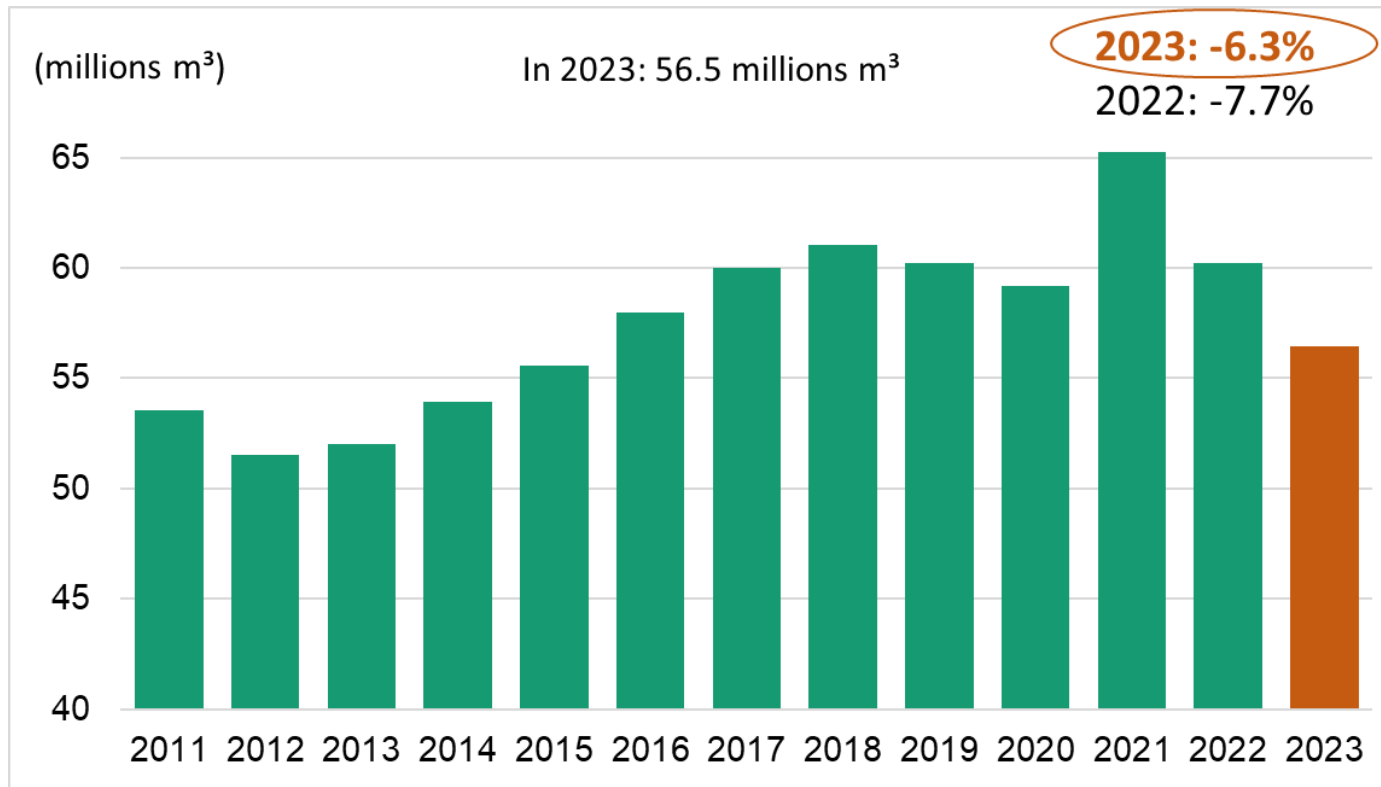


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2023 Full Year Statistics



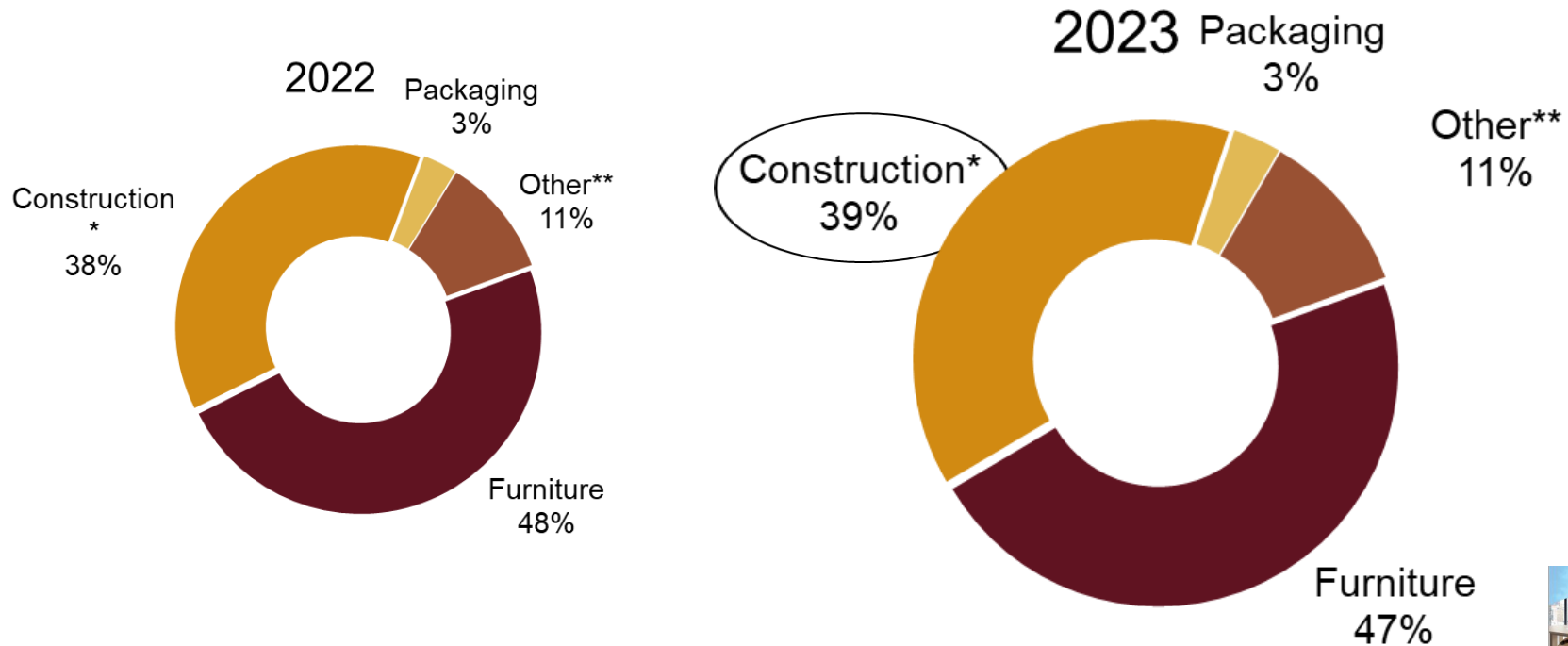
2023 WBP Production in EPF Countries down -6.3% towards 2015 levels



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



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



- Slight increase in construction end-uses

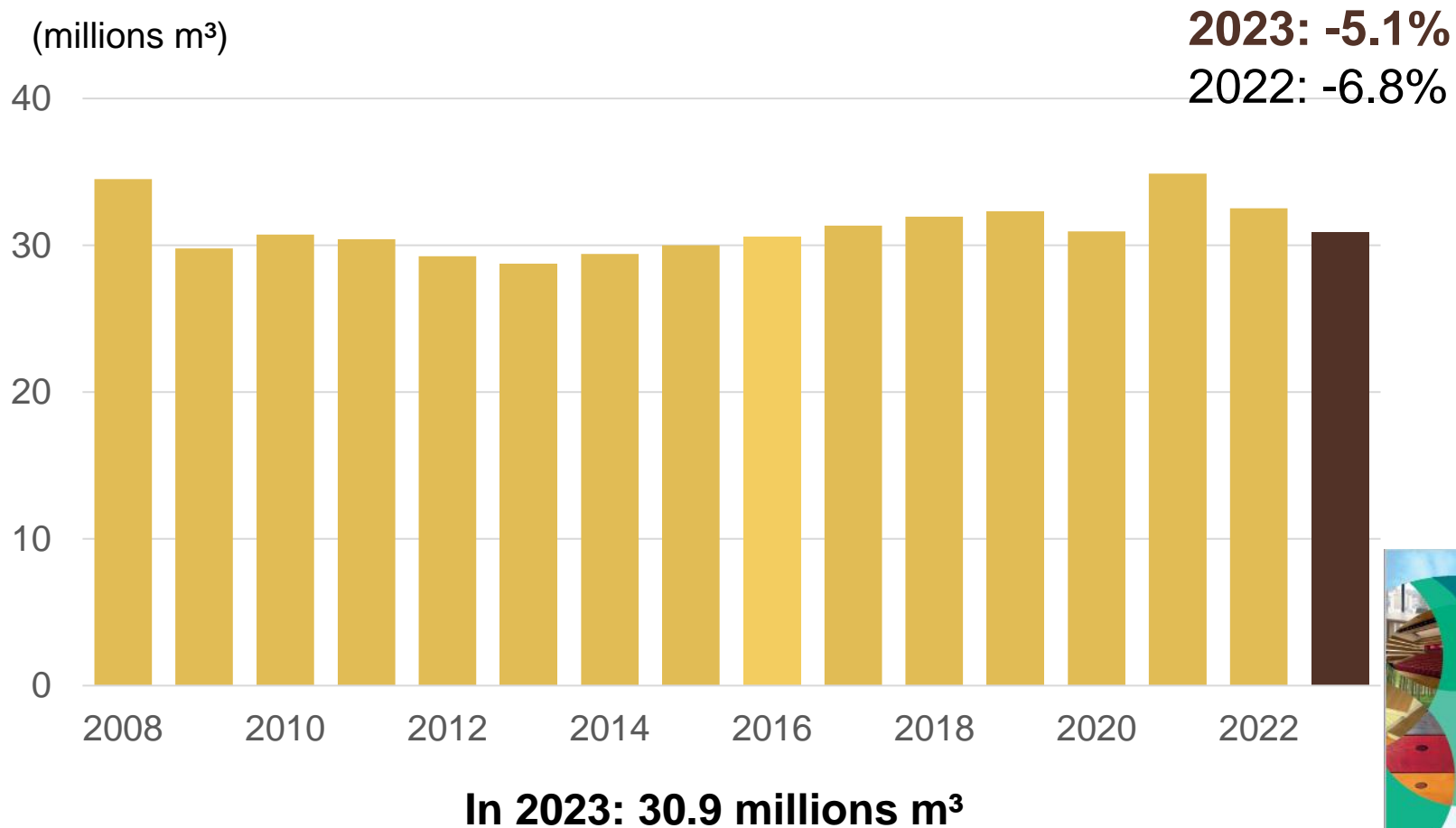


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Particleboard



Particleboard Production in EU27+UK+EFTA

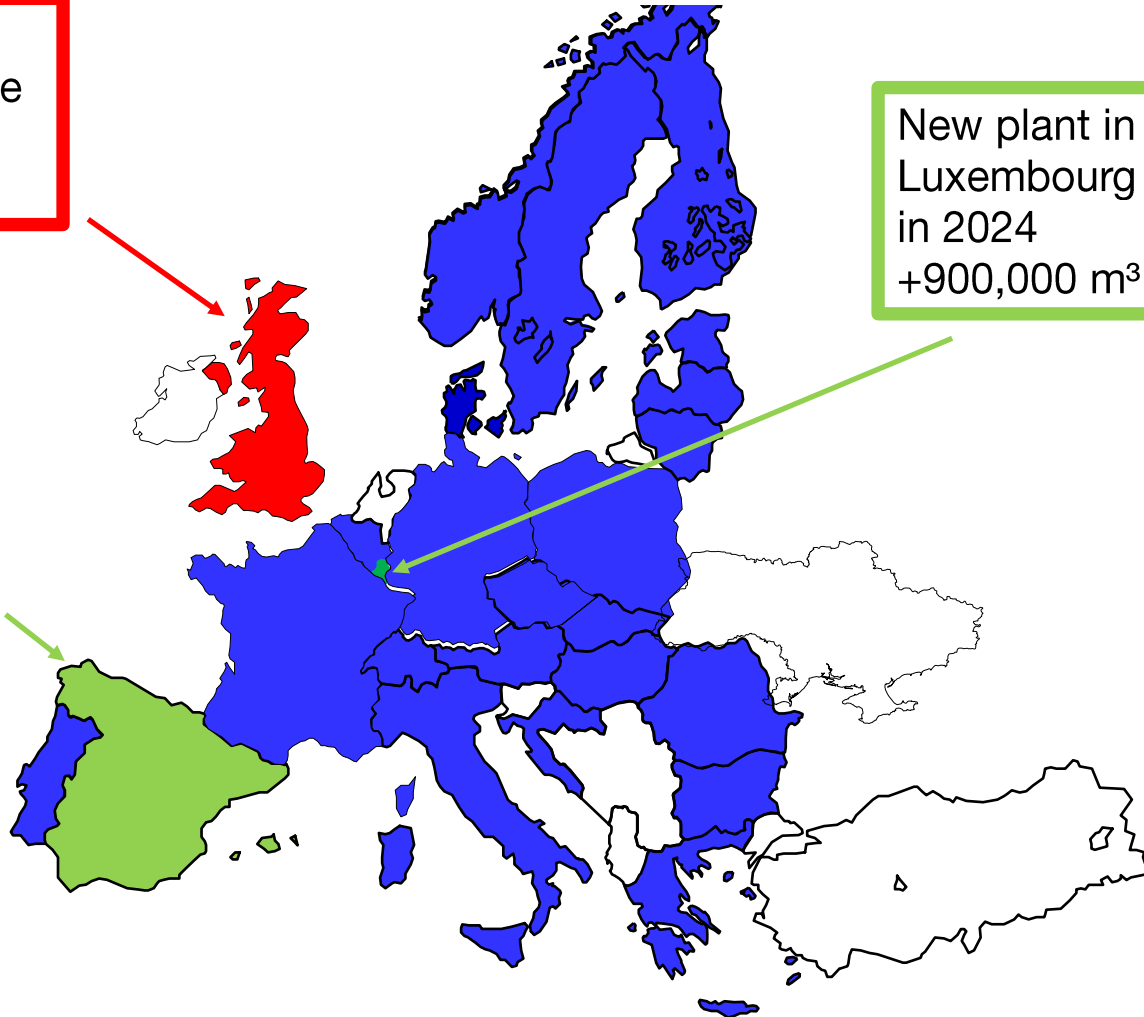


Particleboard announced projects in 2023 and beyond

Announced closure in the UK
-200,000 m³

New plant in Luxembourg in 2024
+900,000 m³

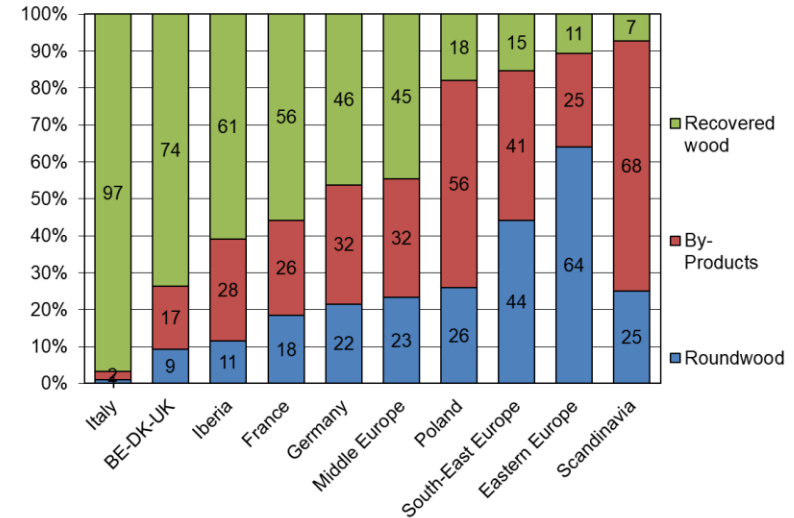
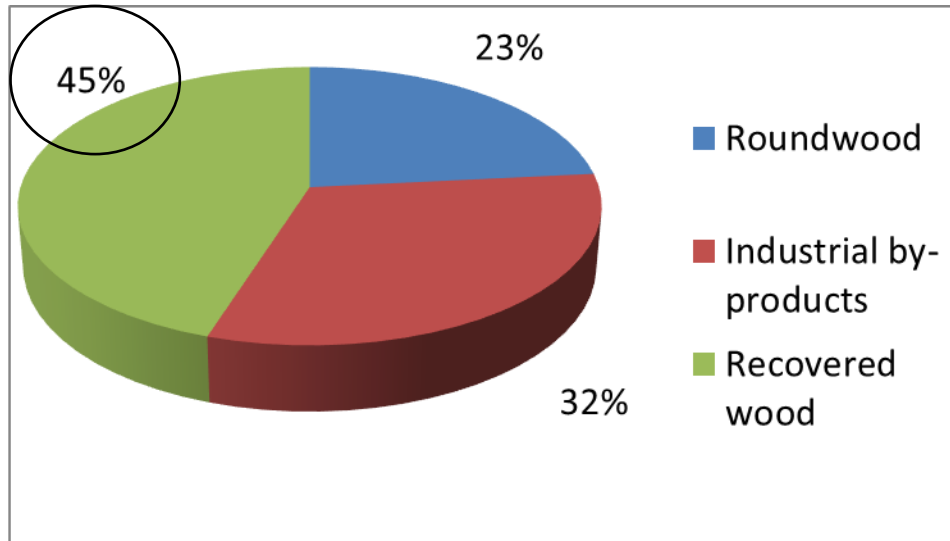
New plant in Spain in 2023
+720,000 m³



Total: +1.4 million m³ (+3.6%)



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





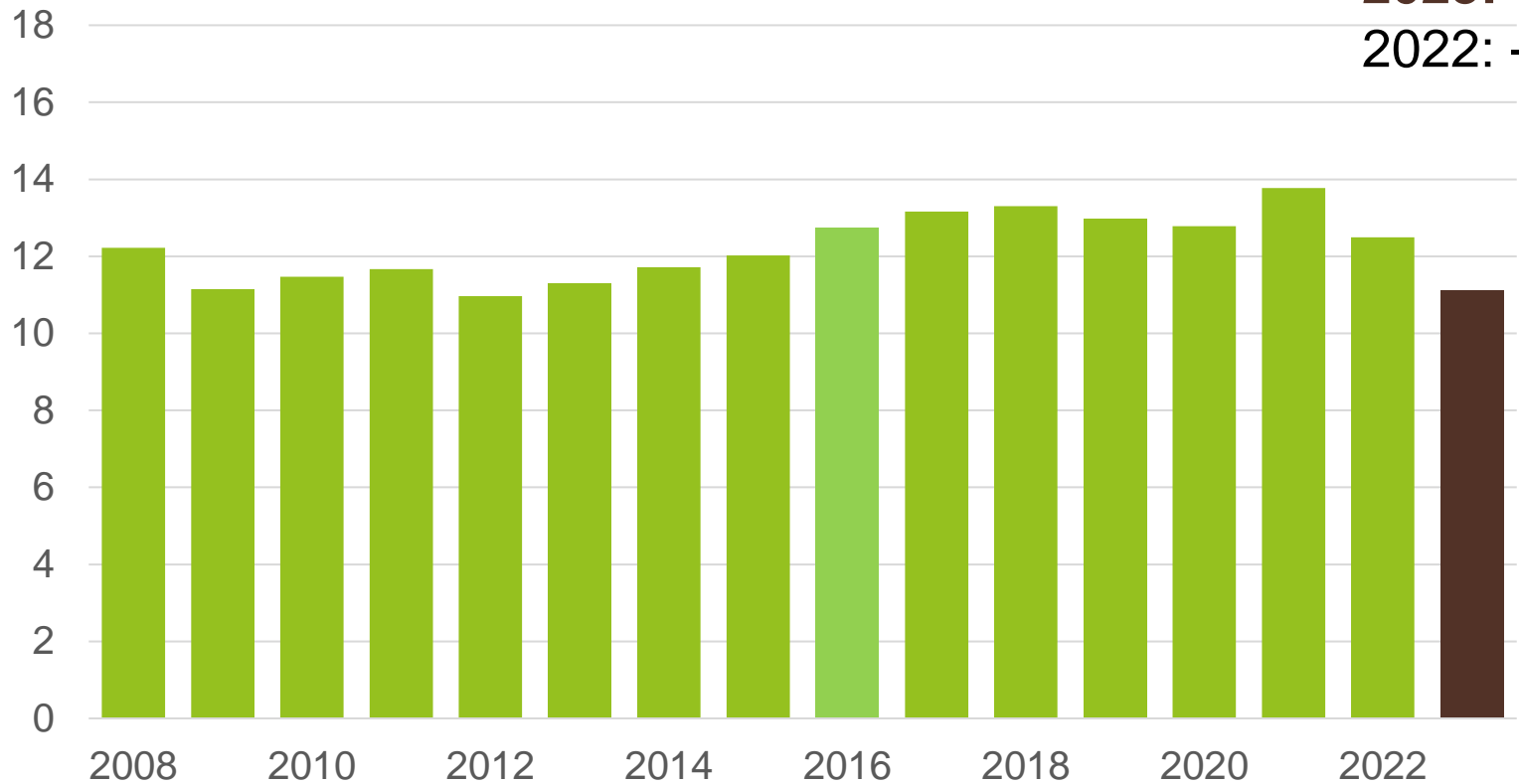
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MDF



MDF – production in EU27+UK+EFTA

(millions m³)



2023: -11%

2022: -9.3%

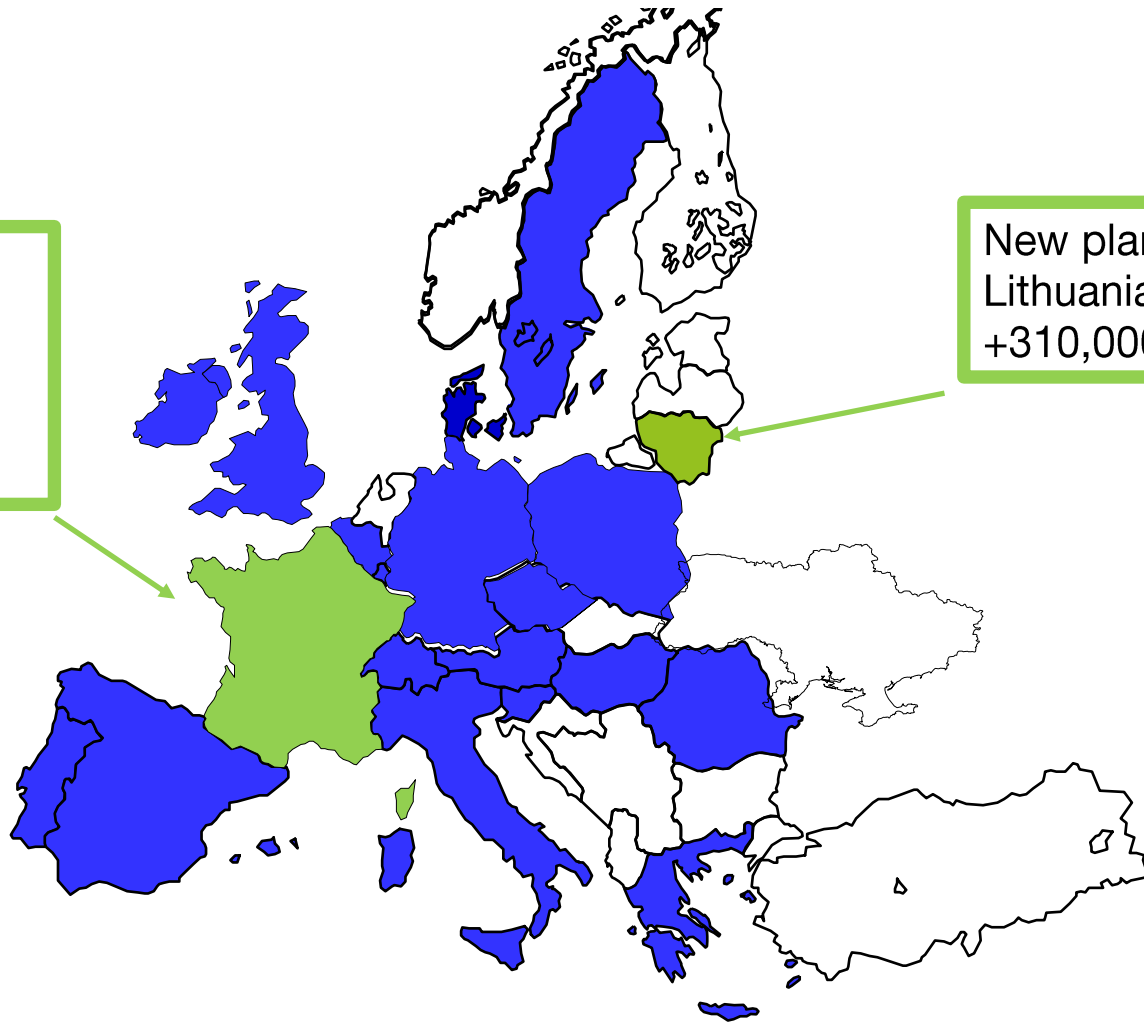
In 2023: 11.1 millions m³



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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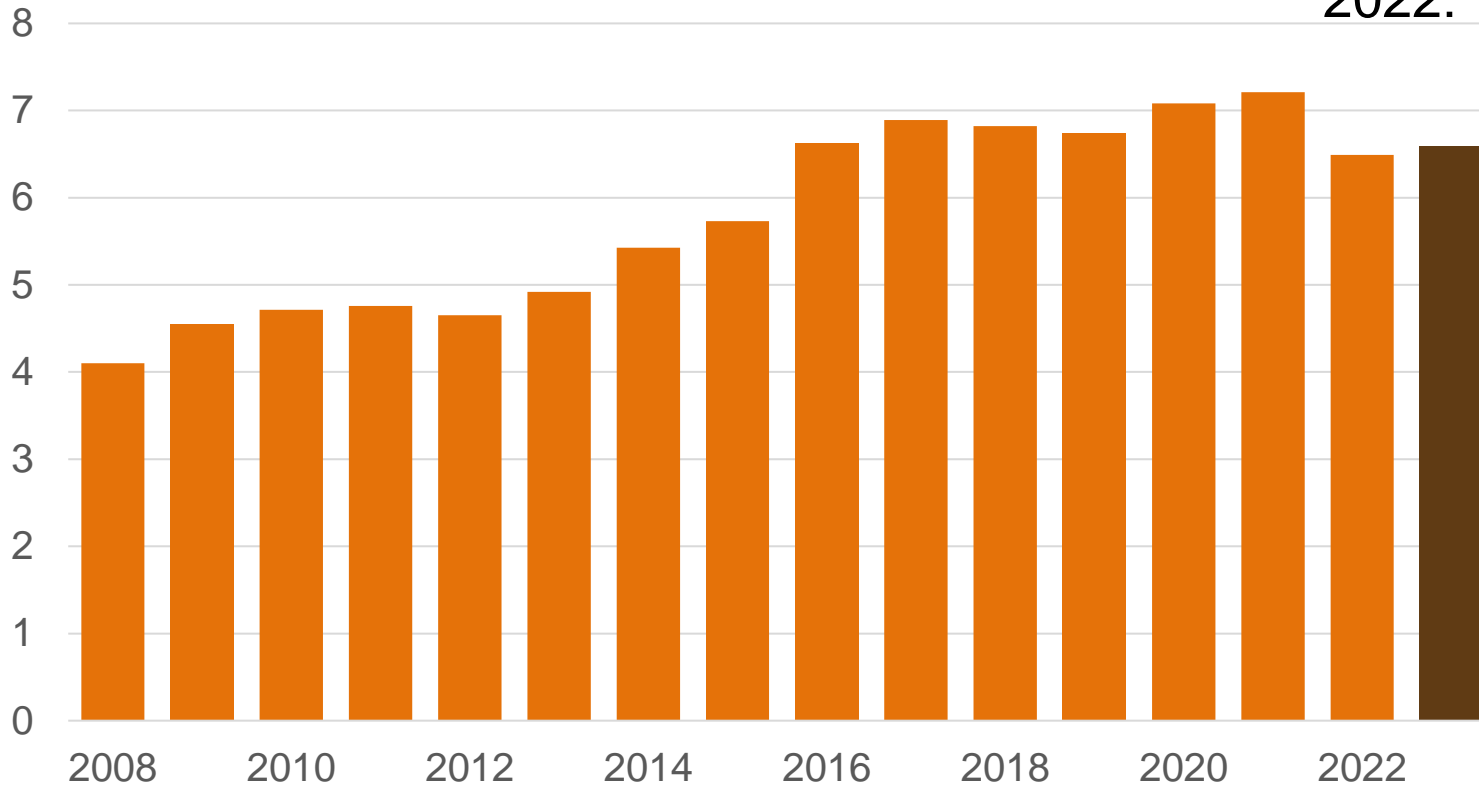
OSB



OSB Production in EU27+UK+EFTA

(millions m³)

2023: +2.1%
2022: -10.5%



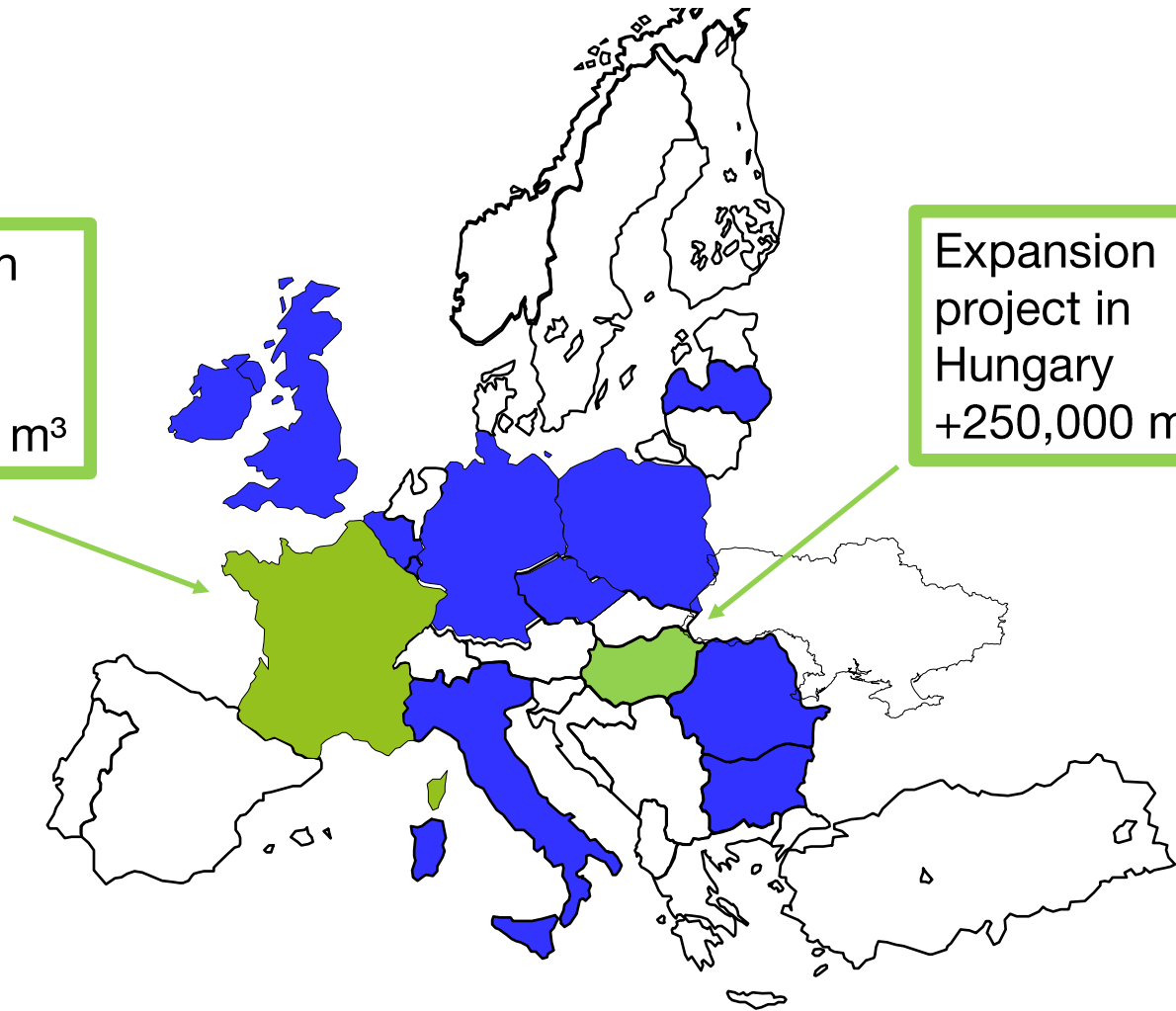
In 2023: 6.6 millions m³



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%)





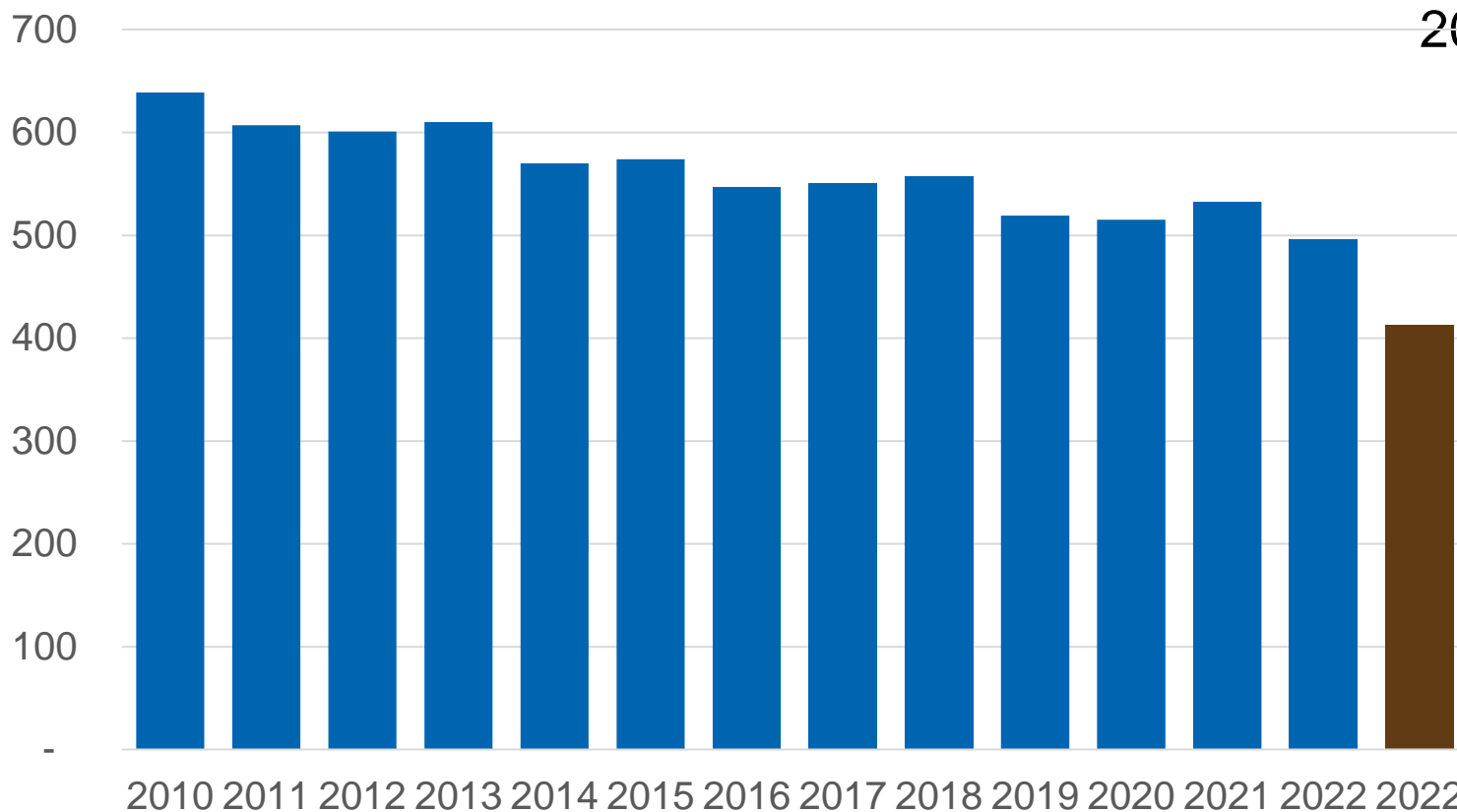
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HARDBOARD



Hardboard – production in EU27+EFTA

(1,000 m³)



2023: -17%

2022: -7%

In 2023: 413,000 m³

EU27 capacity: 700,000 m³ (stable)



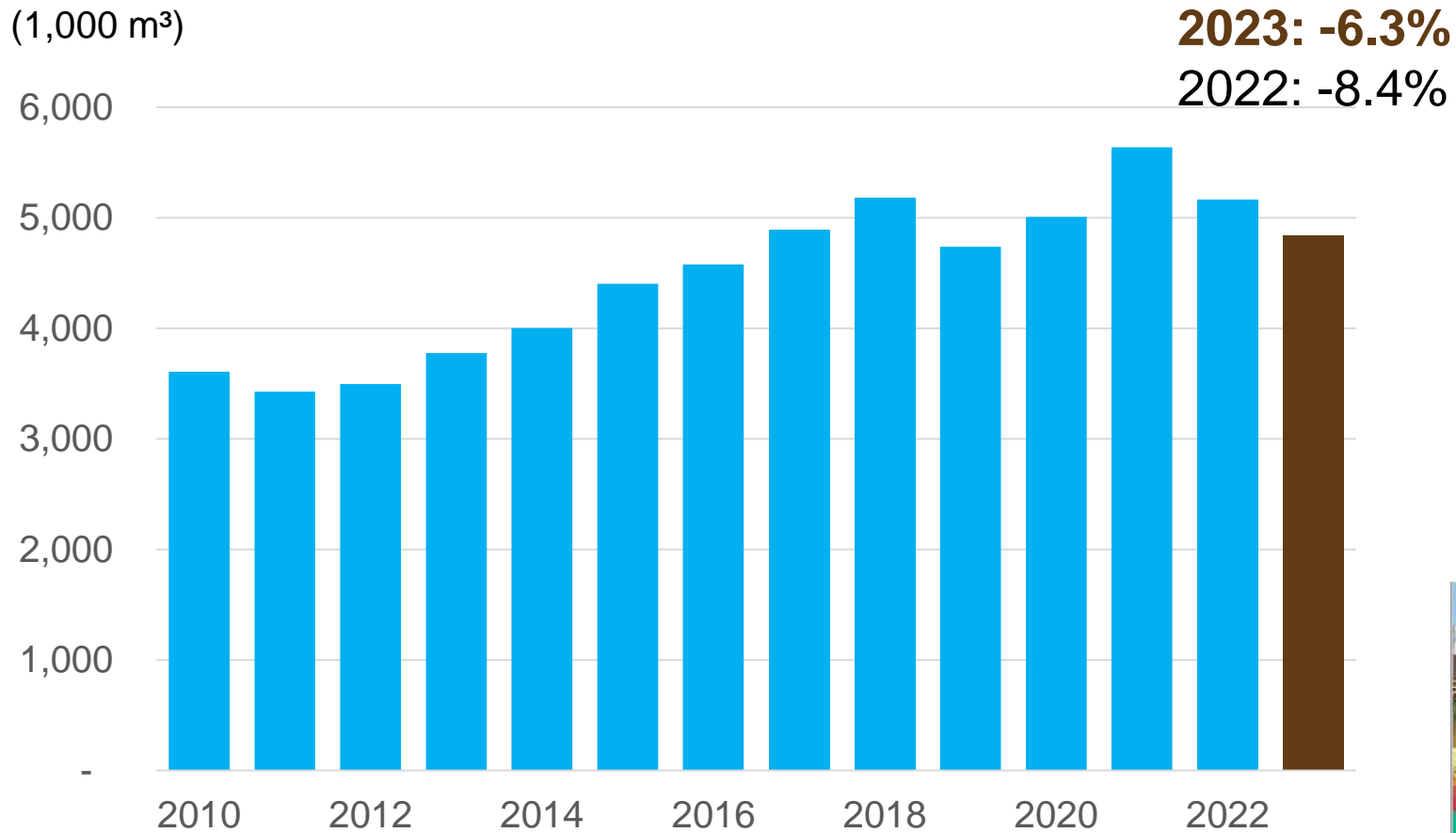


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SOFTBOARD



Softboard Production in EU27+EFTA

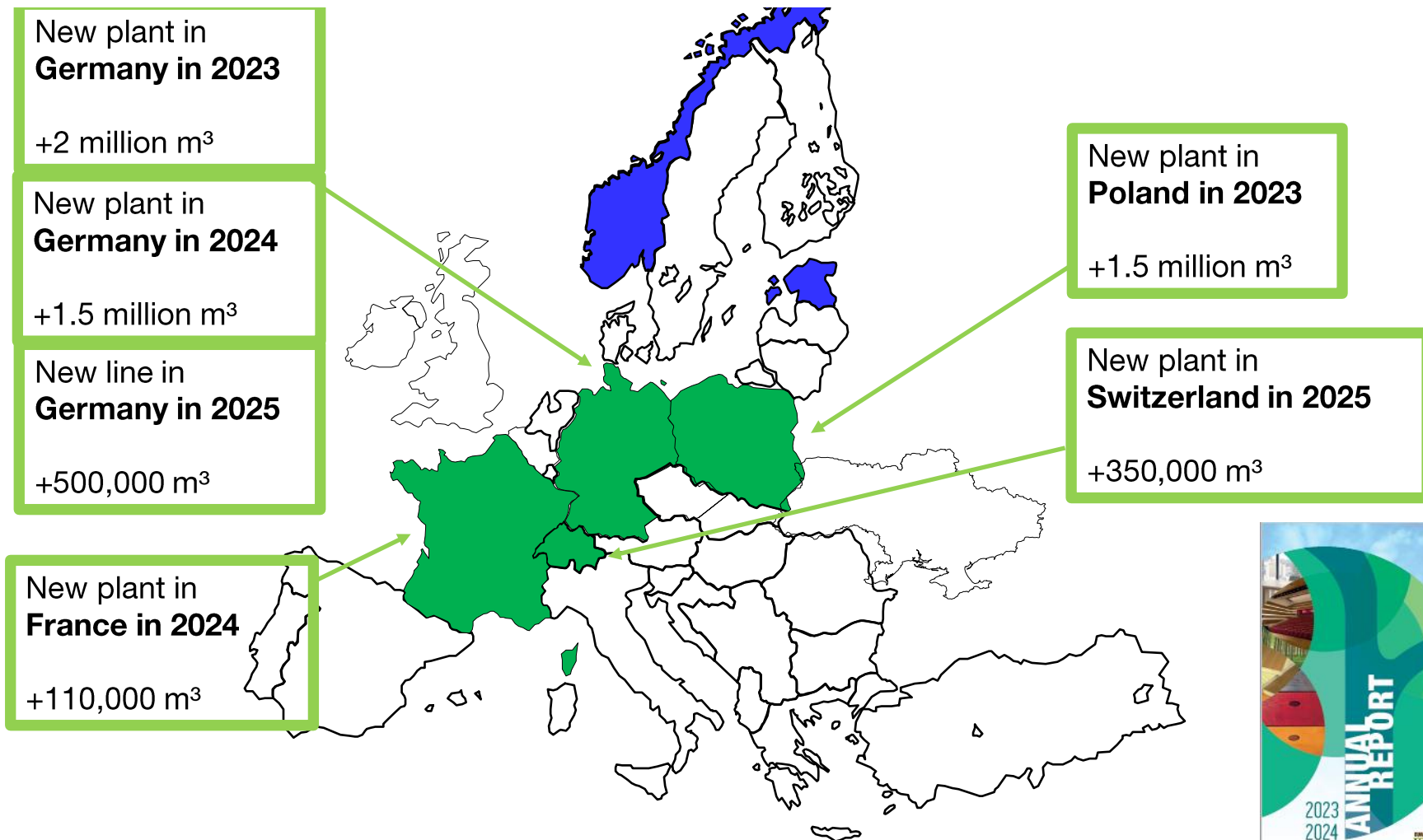


In 2023: 4.8 millions m³

EU-27 capacity: 6.9 million m³



Softboard announced new capacities in 2023 and beyond



Total: nearly 6 million m³



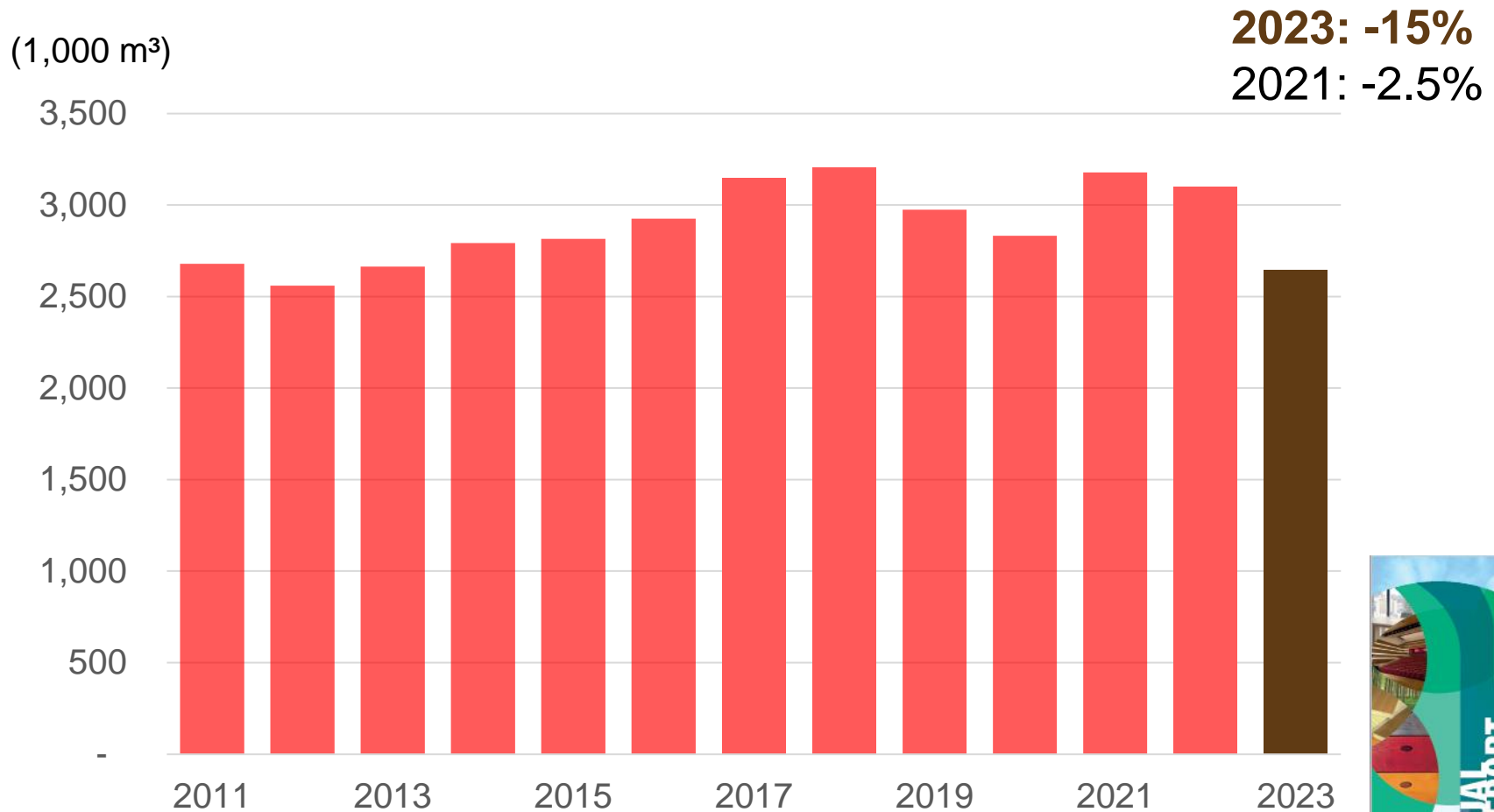


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PLYWOOD



Plywood Production in EU-27



In 2023: 2.6 millions m³



Plywood capacity expansions in 2023 and beyond

Capacity expansion in **Spain**

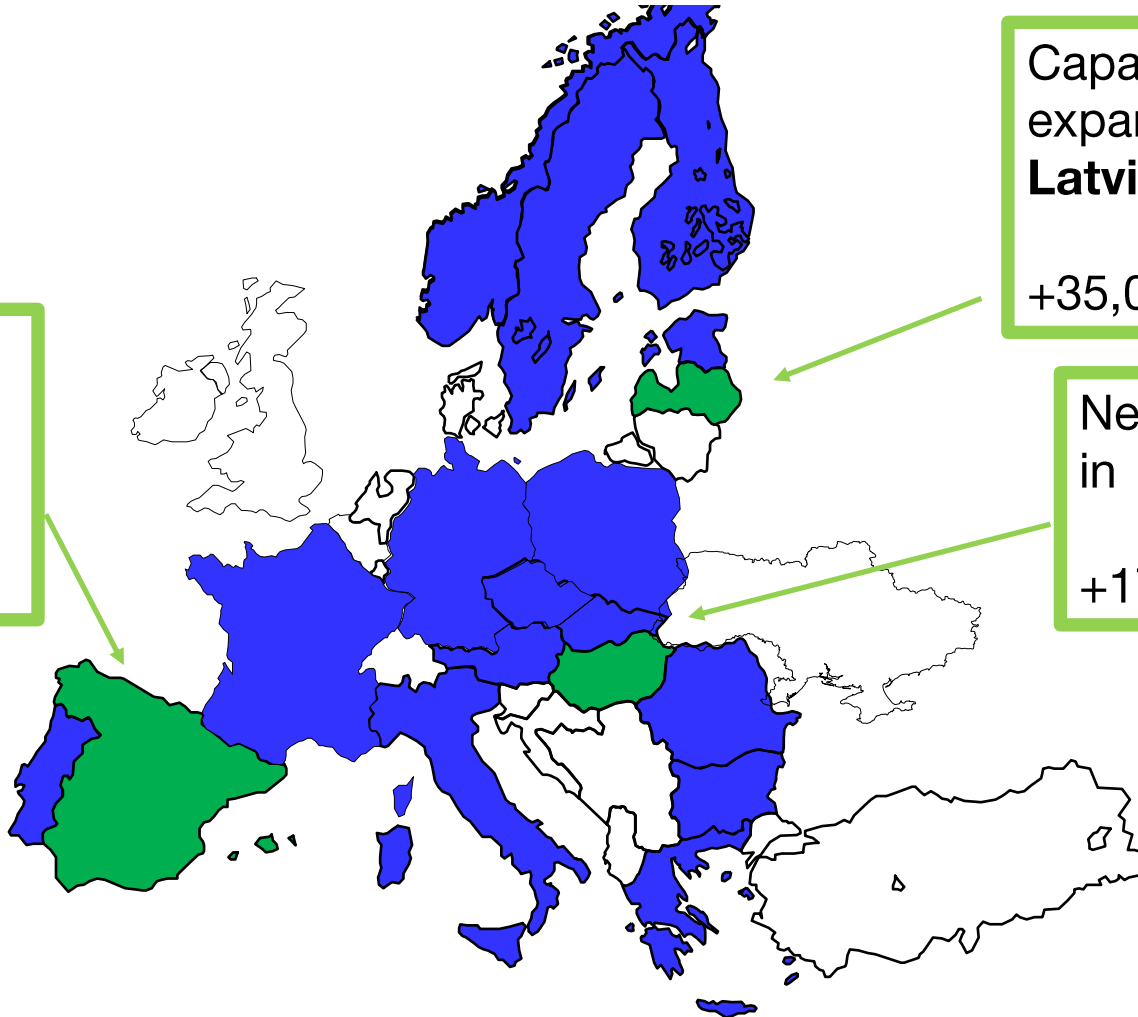
+20,000 m³

Capacity expansion in **Latvia**

+35,000 m³

New capacity in **Hungary**

+17,000 m³



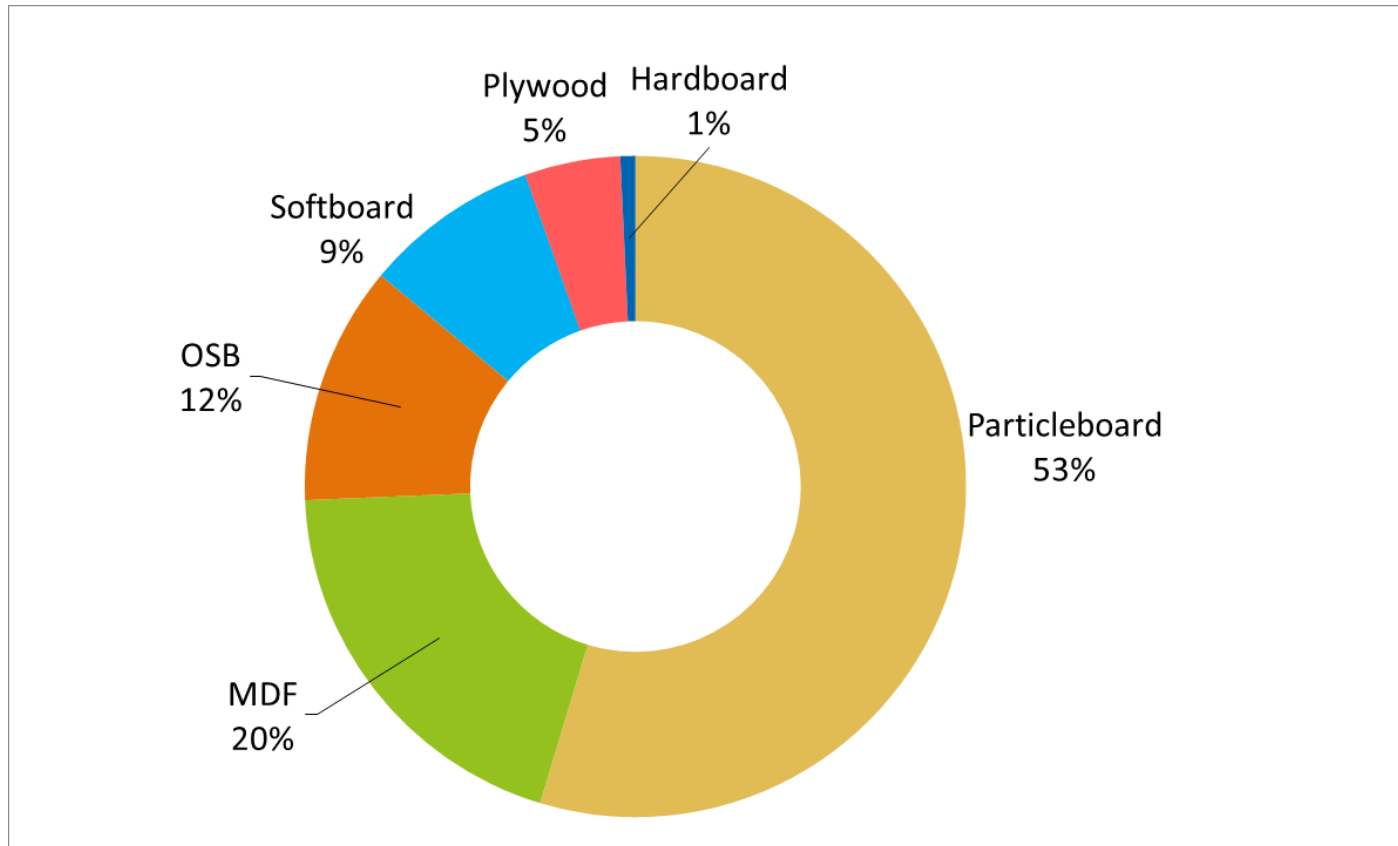


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SUMMARY



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



Summary 2023

Production (million m³)	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



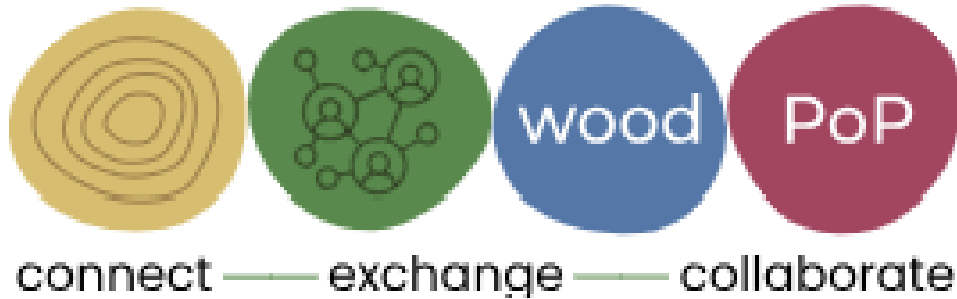
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Highlight 1

Role Model Industry Advocacy 2024-2029

1) Advocacy 2024-2029

Role Model Industry



The future of Europe is made with industry #IndustrialDeal

 The Antwerp Declaration for a European Industrial Deal
Now open to individual supporters

[SUPPORT THE DECLARATION](#)

The Antwerp Declaration for a European Industrial Deal

The call for a business case for investments in Europe is supported by:

1234 organisations	25 sectors
------------------------------	----------------------

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



New European Bauhaus
How to match sustainability with style

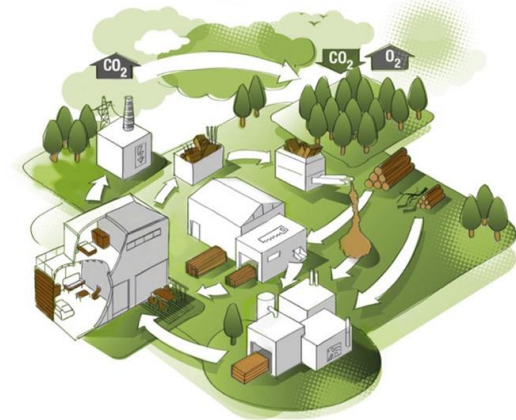
Beautiful | Sustainable | Together



2) Wood Availability

How much wood is there, what is it used for, is it enough?

- **How much wood is there?**
 - 500 million m³ 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

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

Highlight on Communications on the EU-funded project EcoReFibre

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

Take our survey.



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

+/- 600 views
6000 impressions on LinkedIn post
Engagement rate: 23%



EcoReFibre
498 followers
1mo •

We are thrilled to unveil the very first EcoReFibre video, inviting you to delve into the heart of our mission and explore the core aims of the project:

- The aim is to establish a Circular Economy approach to recycle waste wood back into fibreboards and into novel building products.
- EcoReFibre develops enhanced sorting equipment and smart technologies, ultimately increasing available wood resources in Europe through recycling.
- EcoReFibre is dedicated to extending the product life cycle and optimising wood resources.

Like, comment, and share to spread the word about #EcoReFibre. Together, let's make a difference.

#sustainability #CircularEconomy #Recycling #GreenTechnology #Panels #SustainableSolutions #HorizonEurope #EUProject

<https://lnkd.in/eqH8kVSm>



EcoReFibre Project Presentation - With Subtitles
youtube.com

EcoReFibre launches first Video



Funded by the European Union

EcoReFibre latest meetings

M18 GA in France – November 2023



EcoReFibre First Review meeting



January 2024



M24 GA in Germany – April 2024



HOME NEWS MAGAZINE TRADE SHOWS EVENTS WEBINAR SUBSCRIBE

Dieffenbacher and Tomra showcase technology for “fibreboard-to-fibreboard” recycling

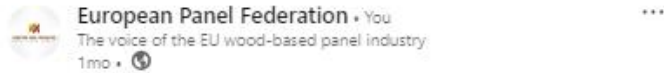
April 29, 2024



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)



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)

Task 4.4 Pilot 4 – CLaminate

Test on pilotline : Laminate Flooring

- Infeed :
 - Laminate flooring (rejected boards/planks)

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

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

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



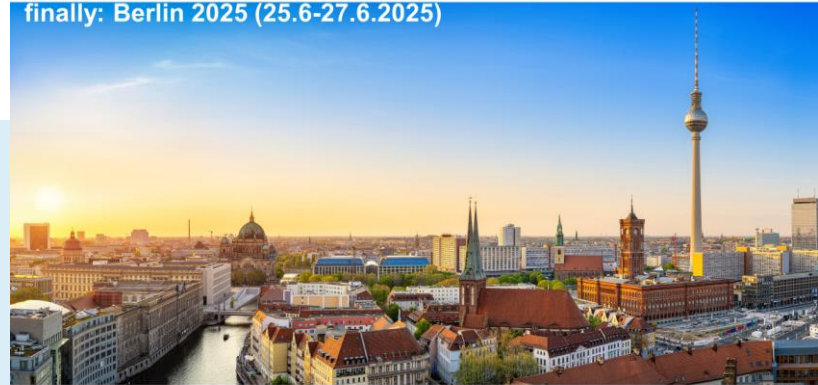
5) EPF Way of Working Evolution not Revolution

Annual General Meeting 2025 Berlin

Berlin-2020

Berlin-2021

finally: Berlin 2025 (25.6-27.6.2025)



28

European Wood-based Panel Symposium

Save the Date

13th European Wood-based Panel Symposium

October 9-11, 2024
Hamburg | Germany

SAVE THE DATE: Nov 7, 2024, Brussels

Europe`s wood sector as a driver for the green and digital transition of the built environment

Wood Policy and Innovation Workshop

- 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



Thank you to our
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