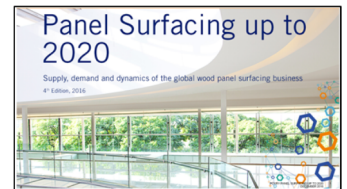


The future of wood-based panels and surfacing materials to 2025

We are pleased to announce the publication of our new 2020 global wood-based panel and surfacing material report. The last report was published in 2016 and was very well received among clients throughout the value chain. It has established itself as the point of reference for the wood-based panel and decorative surfacing materials industry.

In May 2020 our latest point of view, focusing on the impact of Covid-19 on the wood products industry, was published. Our new 2020 global wood-based panel and surfacing materials report will present an up-to-date market outlook, including three demand scenarios based on updated macroeconomic conditions and assumptions including Covid-19 impact and recovery, and commentary on the potential implications on market demand for particleboard, MDF/HDF and surfacing materials until 2025.

Our report will also include a section on the industry structure in panels and surfacing materials and how Covid-19 is likely to change the competitiveness and industry structure going forward. Who are the likely winners and losers?



In today's increasingly competitive environment, further accentuated by the major uncertainties introduced by Covid-19, it is difficult for CEOs to make decisions and anticipated future dynamics. By providing real global macroeconomic, supply, demand and industry insights, our report aims to be a supportive tool to management executives as well as sales and marketing managers.

AFRY will address the following questions in the Multi Client Report

What are the demand drivers for wood-based panels and surfacing materials?

How is demand for panel and surfacing demand projected to develop to 2025?

How is the Covid-19 pandemic projected to impact the demand outlook to 2025?

What is the development of capacity utilisation rates (production volumes) historically and going forward?

What does the manufacturing cost curve in wood-based panels look like?

How will announced new investments impact current industry actors?

What was the financial performance of the industry in recent years? What will be the financial impact of Covid-19?

Who are the likely winners and who will be under pressure?

The new Multi Client Report will include wood-based panels and surfacing materials in the following regions as listed below



PRODUCT SCOPE

Wood-based panels

- Particleboard/ MFC (TFL)
- MDF
- HDF
- THDF

Surfacing materials (paper based)

- LPM (Low Pressure Melamine)
- HPL/ CPL
- Finish Foil incl. LBWP (Low Basis Weight Paper)

Surfacing materials (non-paper based)

- Thermoplastic Foils
- Liquid Coating
- Veneer



GEOGRAPHICAL SCOPE

Global overview, focus and *deepdive* on

- Western Europe: *Germany, Italy, France, UK*
- Eastern Europe: *Russia, Turkey, Poland*
- Middle East: *Iran*
- North America: *USA, Canada*
- South America: *Brazil, Chile*
- China
- APAC: *Thailand, Malaysia, South Korea*

Rest of the World (only included in global overview)

- Oceania, excluded as a region
- Africa, excluded as a region
- Rest of Asia, excluded as a region

Note: single countries mentioned above will be profiled individually, country 1 pager

AFRY's Multi Client Report will include the following content, assumptions, analysis and key findings

Market Drivers	Market Mapping (supply)	Market Mapping (demand)	Industry structure	Multi Client Report
<ul style="list-style-type: none"> — GDP — Construction <ul style="list-style-type: none"> — Residential — Commercial — Furniture — Flooring <ul style="list-style-type: none"> — Laminate flooring — LVT — Impact of Covid-19 	<ul style="list-style-type: none"> — Installed capacity — Production volumes and values — Trade volumes and values — Particleboard and std. MDF supply cost curves as of Q2 2020 — Market share for top 3 producers/ suppliers 	<ul style="list-style-type: none"> — Demand volumes and values — End-use segmentation <ul style="list-style-type: none"> — For panels — For surfaces — Leading customers for decorative panels — Demand outlook to 2025 (3 scenarios) 	<ul style="list-style-type: none"> — Financial performance by industry <ul style="list-style-type: none"> — Wood-based panels — Surfacing materials — Leading producers, installed capacity — Consolidation levels and future trends — Investment outlook by player 	<ul style="list-style-type: none"> — Analysis and key findings <ul style="list-style-type: none"> — Market Drivers — Market mapping (supply/ demand) — Industry Structure — Conclusions/ point of view on financial performance and future industry consolidation

Time schedule

- Historic, 2018 to 2020E (last three years)
- Outlook, 2021 to 2025 (next five years)

Units

- Wood-based panels, m³ and EUR
- Surfacing materials, m², kt and EUR

ORDERFORM

The future of wood-based panels and surfacing materials to 2025, publication in November 2020

Section	Included	Fee	Your choice (please tick)
America	Wood-based panels and surfacing materials	8,000	<input type="checkbox"/>
Europe		10,000	<input type="checkbox"/>
China / Asia		12,000	<input type="checkbox"/>
Workshop		To be quoted	
Total		32,000	
Total if all section are ordered		26,000	<input type="checkbox"/>

Name and job title:

Company:

Date:

Contact

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