



# THE GLOBAL PANEL SURFACING BUSINESS

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Economic downturn, restructuring and  
new trends

WOOD-BASED PANELS AND VALUE ADDING



## BACKGROUND

Pöyry Management Consulting has published two well received panel surfacing business multiclient reports in the past – 1997 (European focus) and 2001 (Global focus). Since then, the global panel/surfacing landscape has undergone changes, new substitution dynamics have emerged and the sector is going through a period of restructuring. These developments are leading the industry to a new direction. Therefore Pöyry is launching a new multiclient report analysing these key fundamentals that will shape the future of this business. The report will build on our previous work and provide in-depth market and industry analysis for panel surfaces in all major markets worldwide. We trust that it will be a valuable source of reference for decision-making and strategic planning.



The geographic market coverage is global with the following breakdown:

### Western Europe

- Regional
- Germany
- Italy
- Spain

### Eastern Europe

- Regional
- Poland
- Russia
- Turkey

### North America

- Regional
- Canada
- United States

### South America

- Regional
- Argentina
- Brazil
- Chile

### Asia (incl. Middle-East)

- Regional
- China
- Republic of Korea
- Malaysia
- Thailand
- Japan
- Australia
- New Zealand

### The key issues:

- How and when will the sector emerge from global economic downturn?
- What are the materials of the future?
- How is the manufacturing landscape shaping?
- Which technologies are emerging?
- What is the impact of bioenergy/ environmental/ sustainability aspects on the value chain?

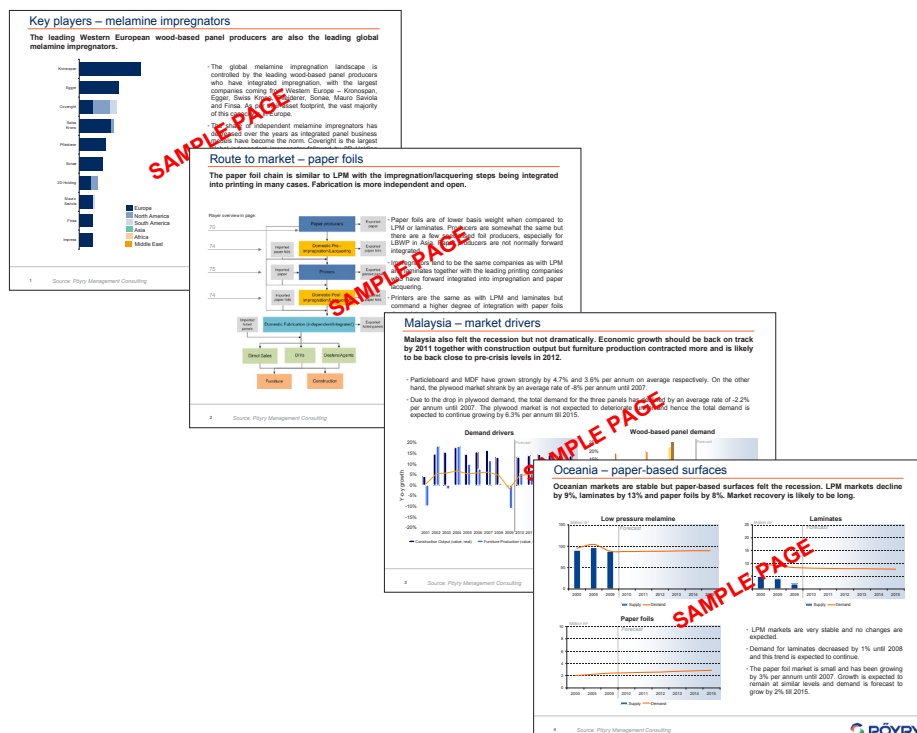
## Contents

The key elements of the report are:

- Products
  - Low pressure melamine, laminates, veneer, paper foils (incl LBWP), paints/lacquers and plastics (thermoplastics, PVC, PP, PET etc.)
- Markets
  - Supply/demand situation
  - Segmentation
  - Business cycle outlook
  - Market drivers (furniture/construction/flooring)
  - Design trends
  - Prices and costs analysis
  - Substitution dynamics
- Industry Structure
  - Key players
  - M&A/consolidation
  - Technology development
  - Profitability (selected companies)
  - Route-to-market
  - Profiles of key players
- New Trends
  - Bioenergy impact on the value chain
  - Product end-life assessment (waste, carbon etc.)

## SNAPSHOTS

Pöyry Management Consulting has undertaken more than 3,000 engagements within the global wood products and surfaces sector.



## Why Pöyry?

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Our expertise covers the entire panel surfacing value chain from procurement to technology, markets and customers. We are also active within the financial sector and have undertaken a number of sector related M&A assignments.

Furthermore, we work with the products and processes related to the panel surfacing sector – both downstream and upstream, e.g. wood-based panels, decor paper, chemicals (resins etc.), furniture to name a few. Our extensive international experience, in-depth industry knowledge and long-term practical experience are the cornerstones of our services.



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