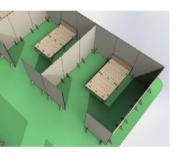


ANNUAL REPORT 2 0 1 9 - 2 0 2 0

2019-2020

EPF member companies provide help in the battle against COVID-19

The first pages of the EPF Annual Report are typically reserved for a picture of a factory belonging to the EPF Annual General Meeting host company, where the Annual Report is presented for the first time. In 2020, this would have been a German company, our General Assembly having been planned for 18 June in Berlin. Unfortunately, this physical meeting was cancelled due to the coronavirus outbreak. In place of such an image, it is deemed appropriate to share some stories from EPF member companies, and how they have supported the medical and care professions at this time of crisis. In respect of the bravery shown by all front line workers during the Covid-19 pandemic we are happy to present some of the ways in which wood-based panel manufacturers have also been able to contribute.



The company **Garnica** based in La Rioja, Spain saw an opportunity to help overcome the unprecedented crisis caused by coronavirus by contributing its industrial experience and resources. Setting up a project team and focusing on the natural properties of plywood, the company quickly designed and manufactured solutions made from plywood panels for rapid assembly in hospitals, healthcare centres and elderly care homes. These





included separation screens, ultralight strong beds and custom projects for field hospitals.

Based on a design and production process completed in very little time, these solutions from Garnica were made entirely from plywood panels and were especially suited to the adaptation and separation of spaces. Easily sanitised, these solutions were supplied free of charge. The donations went to different locations in Spain.

Speed of assembly, cleanliness of installation and hygiene were also key factors for **UNILIN Panels** of Belgium. Their Clicwall panels were used for walls and partitions within modular mobile units by a global company specialising in mobile medical units for emergency sites worldwide.

Delivering extra capacity that was urgently needed during the Covid-19 pandemic, the company selected UNILIN Panel's Clicwall system for its rapid click system installation and easy to clean surface finish.

The panel's innovative click profile allowed dust-free installation for the internal walls and partitions of the mobile medical units, allowing the room to be used for medical work immediately after installation.

With an impact-resistant and low-maintenance surface, Clicwall also proved durable and easy to care for during use.



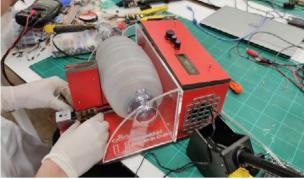


EPF ANNUAL REPORT 2019-2020

Spanish based **FINSA** engaged free of charge with partners and some of the most impressive results were protection masks made partially from HDF.

The company also collaborated with the University Juan Carlos III of Madrid to help produce intensive care ventilation equipment.







The rapid erection of brand new medical facilities to deal with the crisis, complete with the appropriate interior panelling was an opportunity for **EGGER** of Austria, and in particular its production site in Gifhorn Germany.



Under the motto: "Made in Gifhorn", EGGER was able to supply temporary hospitals in Finland, Israel and Japan. Key for the medical end users was the robustness of the panels as well as the ease with which they could be cleaned in order to assure the necessary level of hygiene.

A similar story came from **Norbord** in Scotland. At the height of the crisis in the UK, most infections were in London and it was decided to turn an exhibition arena, the Excel Centre, into the Nightingale temporary hospital. OSB was an ideal material for parts of this conversion and accordingly multiple lorry loads of Sterling OSB were sent from Inverness to London.

Wood-based panels plays its part

2020 will be grimly remembered in years to come for the devasting effects of the coronavirus Covid-19. The wood industry was not necessarily at the forefront of the struggle against this pandemic, with many production sites closed by national legislations as non-essential businesses. Precisely for this reason, EPF is proud to share these few, of what are surely many, examples of how the wood-based panels industry drew on the natural properties of the products, on the speed and innovation of the manufacturing teams behind them and on the determination of the companies themselves to contribute and to make a difference during this unique crisis.



2019-2020

TABLE OF CONTENTS

		page		
	Chairman's Report	4		
SPECIAL TOPIC: Future Two Billion Homes and Horizon Net-Zero Carbon: A turning point for pan-global increase in timber construction?7				
	Conversion of national currencies in EUR, general market data 2019	14		
I	Position of the European wood-based panels industry within the woodworking industry	15		
	 1.1 The woodworking industry in the European Union (EU-28) 1.2 Wood supply and consumption 1.2.1 Roundwood 1.2.2 Sawnwood 1.2.3 Wood Energy 1.2.4 Raw wood consumption by the European wood-based panels and paper industries 	15 25 25 26 27 27		
SPEC	CIAL TOPIC: Wood Products and Wood-based Panels (WBP) in Construction	31		
II	The wood-based panel industries in the EPF countries	36		
	 2.0 Introduction: Wood-based panels industry in 2019 2.1 The particleboard industry 2.2 The MDF industry 2.3 The OSB industry 2.4 The fibreboard industry 2.5 The plywood industry 2.6 Country by country report of the particleboard, MDF, OSB, fibreboard and plywood industries 	36 38 45 48 50 53 67		
SPECIAL TOPIC: Russian end-use market developments for wood-based panels 122				
III The wood-based panel industries in other parts of the world 130				
3.1	Other Europe and Middle East 3.1.1 Russia 3.1.2 Serbia 3.1.3. Turkey 3.1.4 Iran	131 131 136 139 141		
	3.2Asia and Oceania3.2.1China3.2.2Japan3.2.3Korea3.2.4Australia3.2.5New Zealand	144 144 147 149 152 155		
SPEC	 3.3 North and South America 3.3.1 Canada 3.3.2 USA 3.3.3 Brazil 3.3.4 Chile CIAL TOPIC: Plywood and Panel Industry in India – current scenario	158 158 161 164 167 170		

EPF ANNUAL REPORT 2019-2020

page

IV	User industries	175		
	 4.1 The construction industry in Europe 4.2 The furniture industry in the European Union 4.3 The European and world flooring material sector 4.3.1 Laminate flooring 4.3.2 Parquet flooring 	175 197 209 209 211		
SPE	PECIAL TOPIC: Thailand's Wood-Based Panels Industry	217		
V	V Trade issues			
	 5.1 Tariffs towards countries outside the EU within the framework of the WTO a 5.2 Duties by third countries on imports of particleboard, MDF, OSB, fibreboard 5.3 Update on trade issues and other trade agreements 5.4 The Harmonised System 5.5 The Combined Nomenclature 5.6 Natural Fibreboard - NFB 	•		
SPECIAL TOPIC: Malaysian Wood-Based Panels - A Diversity of Choice				
VI	High level advocacy	251		
	 6.1 EU Green Deal Executive Summary 6.2 Club du Bois 6.3 Forest-Based Industries' Vision 2050 6.4 Industry4Europe 6.5 Construction 2050 Alliance 6.6 EU Bioeconomy strategy 	251 251 255 257 260 261		
SPECIAL TOPIC: The European Green Deal - a once in a lifetime opportunity for wood-based panels? 264				
VII	I Environmental Topics	284		
	 7.1 Biomass 7.2 WoodCircus 7.3 Waste Wood – EPF Industry Standard & EPF Waste Wood Task Force 7.4 Formaldehyde and VOC related issues 7.5 Action Guide and Social Dialogue Project 7.6 Covid-19 statement with EPF social partner EFBWW 7.7 EUTR and Carbon Border Adjustment Mechanism 	284 286 289 291 331 334 339		
VIII	Organisation of the Federation			
	 8.1 Structure 8.2 Events 8.3 Publications 8.4 General Assemblies 8.5 Members of the Managing Board 	341 342 342 343 343 345		