

Glue-Laminated Timber Market Report by End Use (Floor Beams, Window and Door Header, Trusses and Supporting Columns, Roof Beams, and Others), Application (New Construction, Replacement), and Region 2024-2032

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Abstracts

The global glue-laminated timber market size reached US\$ 4.2 Billion in 2023. Looking forward, IMARC Group expects the market to reach US\$ 5.2 Billion by 2032, exhibiting a growth rate (CAGR) of 2.3% during 2024-2032. The sustainability demands, structural advantages, urbanization trends, stringent building codes, aesthetic appeal, design flexibility, speed of construction, and indoor air quality awareness are some of the major factors propelling the industry.

Glue-laminated timber, commonly known as glulam, is an engineered wood product used extensively in construction and architectural applications. It is created by bonding together individual layers of dimensioned lumber using high-strength adhesive, typically with the grain of all layers parallel. This process results in a versatile and strong structural material with a wide range of applications. Glulam offers several advantages, including superior load-bearing capabilities, resistance to warping and cracking, and the ability to span long distances. It is environmentally friendly as it utilizes sustainably harvested timber. Glulam's versatility and strength make it a popular choice for beams, columns, and arches in various building projects, including residential, commercial, and industrial construction.

The growing emphasis on sustainable construction practices and environmental consciousness has led to an increased demand for eco-friendly building materials such as glue-laminated timber, which is sourced from renewable forests and helps reduce the

carbon footprint of construction projects. In confluence with this, its exceptional strength-to-weight ratio and versatility have made it a preferred choice for architects and builders in various construction applications, creating a favorable outlook for industry expansion. Additionally, the rising urbanization and population growth worldwide have fueled the need for efficient and cost-effective construction solutions, such as glue-laminated timber due to its ease of installation and structural capabilities, which, in turn, is strengthening the market growth. Furthermore, stringent building codes and regulations promoting the use of fire- and earthquake-resistant materials have boosted the adoption of glulam in construction projects, thereby favoring the market growth.

Glue-Laminated Timber Market Trends/Drivers:

Sustainability and environmental awareness

One of the foremost factors fueling the growth of the global glue-laminated timber industry is the increasing emphasis on sustainability and environmental consciousness in the construction industry. Glue-laminated timber is derived from sustainably managed forests, where trees are replanted as they are harvested, ensuring a renewable and eco-friendly source of raw material. As environmental regulations and consumer preferences continue to prioritize green construction materials, glulam's eco-friendly credentials make it an attractive choice for builders and architects. Its low carbon footprint, when compared to traditional building materials like steel or concrete, aligns with the global push towards reducing greenhouse gas emissions and mitigating climate change. This eco-conscious approach drives the demand for glue-laminated timber in various construction projects, ranging from residential housing to commercial and industrial structures.

Structural advantages and versatility

Glue-laminated timber possesses exceptional structural characteristics that make it an appealing option in construction. Its strength-to-weight ratio surpasses that of many traditional building materials, allowing for efficient load-bearing capabilities. This inherent strength enables architects and builders to create innovative and cost-effective structural designs. Glulam's versatility further enhances its appeal, as it can be custom manufactured into a wide range of shapes and sizes, including beams, columns, and arches. This adaptability is crucial in accommodating diverse architectural requirements, whether in contemporary, traditional, or bespoke building designs. The ability of glue-laminated timber to span long distances without sagging or warping also adds to its attractiveness in construction, making it a preferred choice for projects with unique design challenges.

Urbanization and stringent building codes

The ongoing global trend of urbanization, coupled with population growth, has led to an increased demand for efficient and cost-effective construction solutions. Glue-laminated timber plays a pivotal role in meeting these demands. In rapidly growing urban areas, where space is often limited and construction needs are urgent, glulam's ease of installation and reduced construction time become advantageous. Moreover, stringent building codes and regulations governing construction safety have become prevalent worldwide. Glue-laminated timber meets many of these requirements, such as fire resistance and earthquake resistance, making it a suitable choice in regions prone to natural disasters or areas with strict safety standards. This compliance with building codes not only ensures the safety of occupants but also promotes the use of glue-laminated timber as a reliable construction material, further driving its market growth.

Glue-Laminated Timber Industry Segmentation:

IMARC Group provides an analysis of the key trends in each segment of the global glue-laminated timber market report, along with forecasts at the global and regional levels for 2024-2032. Our report has categorized the market based on end use and application.

Breakup by End Use:

Floor Beams

Window and Door Header

Trusses and Supporting Columns

Roof Beams

Others

Floor beams dominate the market

The report has provided a detailed breakup and analysis of the market based on the end use. This includes floor beams, window and door header, trusses and supporting columns, roof beams, and others. According to the report, floor beams represented the largest segment.

The increased utilization of glue-laminated timber in floor beams can be attributed to its unique properties and advantages in the context of modern construction. Beyond its sustainable and environmentally friendly characteristics, glulam's high strength-to-weight ratio makes it an ideal choice for floor beams, enabling the creation of sturdy and

reliable support structures. This quality not only reduces construction time but also minimizes the load on the building's foundation, leading to cost savings and enhanced structural integrity. Additionally, glulam's versatility in accommodating various architectural designs and long-span capabilities makes it particularly well-suited for open floor plans and large, open spaces, aligning with contemporary architectural trends, thereby bolstering the industry growth. Furthermore, as urbanization continues to drive the need for multi-story buildings, glulam floor beams offer the added advantage of being lighter and easier to transport and install compared to traditional materials, facilitating efficient construction processes in densely populated urban areas.

Breakup by Application:

New Construction

Replacement

New construction holds the largest share in the market

A detailed breakup and analysis of the market based on the application has also been provided in the report. This includes new construction and replacement. According to the report, new construction accounted for the largest market share.

The surging demand for glue-laminated timber in new construction applications owing to its natural aesthetic appeal and its popularity in applications, such as exposed structural elements, interior design, and facades, is primarily driving the segment growth. In addition to this, architects and designers appreciate the warmth and visual appeal of wood, which adds a touch of natural beauty to modern buildings, boosting the product adoption. Moreover, glulam's ability to provide uninterrupted and open interior spaces without the need for intrusive support columns enhances design flexibility. This feature is particularly attractive in commercial and residential buildings, where spacious, adaptable interiors are highly valued. Furthermore, the speed and ease of construction with glue-laminated timber accelerates project timelines, meeting the demands of fast-track construction schedules often associated with new developments, thus aiding in market expansion. Apart from this, the increasing awareness of indoor air quality and wellness in construction has led to a preference for wood as it contributes to a healthier indoor environment, free from off-gassing and pollutants, contributing to the increasing demand for glue laminated timber.

Breakup by Region:

Asia Pacific
North America
Europe
Latin America
Middle East and Africa

Europe exhibits a clear dominance, accounting for the largest glue-laminated timber market share

The market research report has also provided a comprehensive analysis of all the major regional markets, which include Asia-Pacific, North America, Europe, Latin America, and the Middle East and Africa. According to the report, Europe accounted for the largest market share.

Europe's strong commitment to sustainability and responsible forestry practices aligns perfectly with the environmentally friendly nature of glue-laminated timber, creating a favorable outlook for industry expansion. Moreover, as stringent regulations and eco-conscious consumers continue to prioritize sustainable construction materials, glulam's renewable sourcing and low carbon footprint make it a preferred choice, fueling the market's growth. In addition to this, the European construction sector is increasingly focused on energy-efficient and green building solutions, where glulam's excellent thermal insulation properties and capacity to sequester carbon contribute to its popularity. Concurrently, the region's rich architectural heritage places high value on timber as a traditional building material, fostering a cultural acceptance and preference for glulam in modern construction. Furthermore, Europe's commitment to innovative engineering and design further propels the use of glue-laminated timber, as it allows for creative and intricate structural solutions while meeting rigorous safety standards.

Competitive Landscape:

The global glue-laminated timber market exhibits a competitive landscape characterized by a mix of established players and emerging contenders. Leading companies have a significant market presence due to their extensive production capabilities, distribution networks, and diverse product portfolio, which includes various glulam grades and dimensions tailored to meet different construction needs. Moreover, market competitiveness is fueled by the continuous emphasis on research and development activities. Key players are investing in innovation to enhance the quality and performance of glue-laminated timber products, aiming to meet evolving customer demands and stringent building regulations. Furthermore, strategic partnerships and collaborations are a prevalent trend as companies seek to expand their global reach

and access new markets. Additionally, geographical expansion, mergers, and acquisitions are common strategies employed by these firms to reinforce their industry positions.

The report has provided a comprehensive analysis of the competitive landscape in the market. Detailed profiles of all major companies have also been provided. Some of the key players in the market include:

Structural Wood Systems, Inc.

Mayr-Melnhof Holz Holding AG

EcoCurves BV

Forest Timber Engineering Ltd

Boise Cascade Company

Recent Developments:

In August 2023, Boise Cascade Company announced that it has reached an agreement to purchase Brockway-Smith Company (BROSCO®), a leading wholesale distributor specializing in doors and millwork.

In June 2023, Mayr-Melnhof Holz Holding AG launched the world's first PEFC-certified cross-laminated timber plant at the sawmill site in Leoben with upstream re-sorting and planning plant and a fully automated high-bay warehouse for sawn timber.

Key Questions Answered in This Report

1. What is the market size for the global glue-laminated timber market?
2. What is the global glue-laminated timber market growth?
3. What are the global glue-laminated timber market drivers?
4. What are the key industry trends in the global glue-laminated timber market?
5. What is the impact of COVID-19 on the global glue-laminated timber market?
6. What is the global glue-laminated timber market breakup by application?
7. What is the global glue-laminated timber market breakup by end-use?
8. What are the major regions in the global glue-laminated timber market?
9. Who are the key companies/players in the global glue-laminated timber market?

Contents

1 PREFACE

2 SCOPE AND METHODOLOGY

- 2.1 Objectives of the Study
- 2.2 Stakeholders
- 2.3 Data Sources
 - 2.3.1 Primary Sources
 - 2.3.2 Secondary Sources
- 2.4 Market Estimation
 - 2.4.1 Bottom-Up Approach
 - 2.4.2 Top-Down Approach
- 2.5 Forecasting Methodology

3 EXECUTIVE SUMMARY

4 INTRODUCTION

- 4.1 Overview
- 4.2 Key Industry Trends

5 GLOBAL ENGINEERED WOOD INDUSTRY

- 5.1 Market Overview
- 5.2 Market Performance
 - 5.2.1 Volume Trends
 - 5.2.2 Value Trends
- 5.3 Price Trends
- 5.4 Market Breakup by Product Type
- 5.5 Market Breakup by Application
- 5.6 Market Breakup by Region
- 5.7 Market Forecast

6 GLOBAL GLUE-LAMINATED TIMBER MARKET

- 6.1 Market Overview
- 6.2 Market Performance
 - 6.2.1 Volume Trends
 - 6.2.2 Value Trends
- 6.3 Impact of COVID-19
- 6.4 Price Trends
 - 6.4.1 Key Price Indicators
 - 6.4.2 Current and Historical Price Trends
 - 6.4.3 Price Forecast
- 6.5 Market Breakup by Region
- 6.6 Market Breakup by End Use
- 6.7 Market Breakup by Application
- 6.8 Market Forecast
- 6.9 SWOT Analysis
 - 6.9.1 Overview
 - 6.9.2 Strengths
 - 6.9.3 Weaknesses
 - 6.9.4 Opportunities
 - 6.9.5 Threats
- 6.10 Value Chain Analysis
 - 6.10.1 Overview
 - 6.10.2 Forest Owners
 - 6.10.3 Sawmills
 - 6.10.4 Glue-Laminated Timber Manufacturers
 - 6.10.5 Distributors and Retailers
 - 6.10.6 Exporters
 - 6.10.7 End-Use Industries
- 6.11 Porter's Five Forces Analysis
 - 6.11.1 Overview
 - 6.11.2 Bargaining Power of Buyers
 - 6.11.3 Bargaining Power of Suppliers
 - 6.11.4 Degree of Competition
 - 6.11.5 Threat of New Entrants
 - 6.11.6 Threat of Substitutes
- 6.12 Key Success and Risk Factors

7 MARKET BREAKUP BY REGION

7.1 Asia Pacific

- 7.1.1 Market Trends
- 7.1.2 Market Forecast
- 7.2 North America
 - 7.2.1 Market Trends
 - 7.2.2 Market Forecast
- 7.3 Europe
 - 7.3.1 Market Trends
 - 7.3.2 Market Forecast
- 7.4 Latin America
 - 7.4.1 Market Trends
 - 7.4.2 Market Forecast
- 7.5 Middle East and Africa
 - 7.5.1 Market Trends
 - 7.5.2 Market Forecast

8 MARKET BREAKUP BY END USE

- 8.1 Floor Beams
 - 8.1.1 Market Trends
 - 8.1.2 Market Forecast
- 8.2 Window and Door Header
 - 8.2.1 Market Trends
 - 8.2.2 Market Forecast
- 8.3 Trusses and Supporting Columns
 - 8.3.1 Market Trends
 - 8.3.2 Market Forecast
- 8.4 Roof Beams
 - 8.4.1 Market Trends
 - 8.4.2 Market Forecast
- 8.5 Others
 - 8.5.1 Market Trends
 - 8.5.2 Market Forecast

9 MARKET BREAKUP BY APPLICATION

- 9.1 New Construction
 - 9.1.1 Market Trends
 - 9.1.2 Market Forecast
- 9.2 Replacement

- 9.2.1 Market Trends
- 9.2.2 Market Forecast

10 COMPETITIVE LANDSCAPE

- 10.1 Market Structure
- 10.2 Key Players

11 GLUE-LAMINATED TIMBER MANUFACTURING

- 11.1 Product Overview
- 11.2 Detailed Process Flow
- 11.3 Various Types of Unit Operation Involved
- 11.4 Mass Balance and Raw Material Requirements

12 PROJECT DETAILS, REQUIREMENTS AND COSTS INVOLVED

- 12.1 Land Requirements and Expenditures
- 12.2 Construction Requirements and Expenditures
- 12.3 Plant Machinery
- 12.4 Machinery Pictures
- 12.5 Raw Material Requirements and Expenditures
- 12.6 Raw Material and Final Product Pictures
- 12.7 Packaging Requirements and Expenditures
- 12.8 Transportation Requirements and Expenditures
- 12.9 Utilities Requirements and Expenditures
- 12.10 Manpower Requirements and Expenditures
- 12.11 Other Capital Investments

13 LOANS AND FINANCIAL ASSISTANCE

14 PROJECT ECONOMICS

- 14.1 Capital Cost of the Project
- 14.2 Techno-Economic Parameters
- 14.3 Product Pricing and Margins Across Various Levels of the Supply Chain
- 14.4 Taxation and Depreciation
- 14.5 Income Projections

14.6 Expenditure Projections

14.7 Financial Analysis

14.8 Profit Analysis

15 KEY PLAYER PROFILES

15.1 Structural Wood Systems, Inc.

15.2 Mayr-Melnhof Holz Holding AG

15.3 EcoCurves BV

15.4 Forest Timber Engineering Ltd

15.5 Boise Cascade Company

List Of Tables

LIST OF TABLES

Table 1: Global: Engineered Wood Market: Key Industry Highlights, 2023 and 2032

Table 2: Global: Glue-Laminated Timber Market: Key Industry Highlights, 2023 and 2032

Table 3: Global: Glue-Laminated Timber Market Forecast: Production Breakup by Region (in Million Cubic Metres), 2024-2032

Table 4: Global: Glue-Laminated Timber Market Forecast: Production Breakup by End-Use (in Million Cubic Metres), 2024-2032

Table 5: Global: Glue-Laminated Timber Market Forecast: Production Breakup by Application (in Million Cubic Metres), 2024-2032

Table 6: Global: Top Glue-Laminated Timber Producers

Table 7: Glue-Laminated Timber Manufacturing Plant: Raw Material Requirements (in CBM/Day)

Table 8: Glue-Laminated Timber Manufacturing Plant: Costs Related to Land and Site Development (in US\$)

Table 9: Glue-Laminated Timber Manufacturing Plant: Costs Related to Civil Works (in US\$)

Table 10: Glue-Laminated Timber Manufacturing Plant: Machinery Costs (in US\$)

Table 11: Glue-Laminated Timber Manufacturing Plant: Raw Material Requirements (in CBM/Day) and Expenditures (in US\$/CBM)

Table 12: Glue-Laminated Timber Manufacturing Plant: Costs Related to Salaries and Wages (in US\$)

Table 13: Glue-Laminated Timber Manufacturing Plant: Costs Related to Other Capital Investments (in US\$)

Table 14: Details of Financial Assistance Offered by Financial Institutions in India

Table 15: Glue-Laminated Timber Manufacturing Plant: Capital Costs (in US\$)

Table 16: Glue-Laminated Timber Manufacturing Plant: Techno-Economic Parameters

Table 17: Glue-Laminated Timber Manufacturing Plant: Income Projections (in US\$)

Table 18: Glue-Laminated Timber Manufacturing Plant: Expenditure Projections (in US\$)

Table 19: Glue-Laminated Timber Manufacturing Plant: Taxation (in US\$/Year)

Table 20: Glue-Laminated Timber Manufacturing Plant: Depreciation (in US\$/Year)

Table 21: Glue-Laminated Timber Manufacturing Plant: Cash Flow Analysis Without Considering the Income Tax Liability

Table 22: Glue-Laminated Timber Manufacturing Plant: Cash Flow Analysis on Considering the Income Tax Liability

Table 23: Glue-Laminated Timber Manufacturing Plant: Profit and Loss Account (in US\$/Year)

List Of Figures

LIST OF FIGURES

Figure 1: Global: Glue-laminated Timber Market: Major Drivers and Challenges

Figure 2: Global: Engineered Wood Market: Volume Trends (in Million Cubic Metres), 2018-2023

Figure 3: Global: Engineered Wood Market: Value Trends (in Billion US\$), 2018-2023

Figure 4: Global: Engineered Wood Market: Average Price Trends (in US\$/Cubic Metre), 2018-2023

Figure 5: Global: Engineered Wood Market: Breakup by Product Type (in %), 2023

Figure 6: Global: Engineered Wood Market: Breakup by Application (in %), 2023

Figure 7: Global: Engineered Wood Market: Production Breakup by Region (in %), 2023

Figure 8: Global: Engineered Wood Market Forecast: Volume Trends (in Million Cubic Metres), 2024-2032

Figure 9: Global: Engineered Wood Market Forecast: Value Trends (in Billion US\$), 2024-2032

Figure 10: Global: Engineered Wood Market Forecast: Average Price Trends (in US\$/Cubic Metre), 2024-2032

Figure 11: Global: Glue-Laminated Timber Market: Volume Trends (in Million Cubic Metres), 2018-2023

Figure 12: Global: Glue-Laminated Timber Market: Value Trends (in Billion US\$), 2018-2023

Figure 13: Glue-Laminated Timber Manufacturing: Price Structure Analysis

Figure 14: Global: Glue-Laminated Timber Market: Average Price Trends (in US\$/Cubic Metre), 2018-2023

Figure 15: Global: Glue-Laminated Timber Market Forecast: Average Price Trends (in US\$/Cubic Metre), 2024-2032

Figure 16: Global: Glue-laminated Timber Market: Production Breakup by Region (in %), 2023

Figure 17: Global: Glue-laminated Timber Market: Breakup by End Use (in %), 2023

Figure 18: Global: Glue-Laminated Timber Market: Breakup by Application (in %), 2023

Figure 19: Global: Glue-laminated Timber Market Forecast: Volume Trends (in Million Cubic Metres), 2024-2032

Figure 20: Global: Glue-Laminated Timber Market Forecast: Value Trends (in Billion US\$), 2024-2032

Figure 21: Global: Glue-Laminated Timber Industry: SWOT Analysis

Figure 22: Global: Glue-Laminated Timber Industry: Value Chain Analysis

Figure 23: Global: Glue-Laminated Timber Industry: Porter's Five Forces Analysis

Figure 24: Europe: Glue-Laminated Timber Market (in Million Cubic Metres), 2018 & 2023

Figure 25: Europe: Glue-Laminated Timber Market Forecast (in Million Cubic Metres), 2024-2032

Figure 26: Asia-Pacific: Glue-Laminated Timber Market (in Million Cubic Metres), 2018 & 2023

Figure 27: Asia-Pacific: Glue-Laminated Timber Market Forecast (in Million Cubic Metres), 2024-2032

Figure 28: North America: Glue-Laminated Timber Market (in Million Cubic Metres), 2018 & 2023

Figure 29: North America: Glue-Laminated Timber Market Forecast (in Million Cubic Metres), 2024-2032

Figure 30: Latin America: Glue-Laminated timber Market (in Million Cubic Metres), 2018 & 2023

Figure 31: Latin America: Glue-Laminated timber Market Forecast (in Million Cubic Metres), 2024-2032

Figure 32: Middle East and Africa: Glue-Laminated timber Market (in Million Cubic Metres), 2018 & 2023

Figure 33: Middle East and Africa: Glue-Laminated timber Market Forecast (in Million Cubic Metres), 2024-2032

Figure 34: Global: Glue-Laminated Timber (Floor Beams) Market: Volume Trends (in Million Cubic Metres), 2018 & 2023

Figure 35: Global: Glue-Laminated Timber (Floor Beams) Market Forecast: Volume Trends (in Million Cubic Metres), 2024-2032

Figure 36: Global: Glue-Laminated Timber (Window and Door Header) Market: Volume Trends (in Million Cubic Metres), 2018 & 2023

Figure 37: Global: Glue-Laminated Timber (Window and Door Header) Market Forecast: Volume Trends (in Million Cubic Metres), 2024-2032

Figure 38: Global: Glue-Laminated Timber (Trusses and Supporting Columns) Market: Volume Trends (in Million Cubic Metres), 2018 & 2023

Figure 39: Global: Glue-Laminated Timber (Trusses and Supporting Columns) Market Forecast: Volume Trends (in Million Cubic Metres), 2024-2032

Figure 40: Global: Glue-Laminated Timber (Roof Beams) Market: Volume Trends (in Million Cubic Metres), 2018 & 2023

Figure 41: Global: Glue-Laminated Timber (Roof Beams) Market Forecast: Volume Trends (in Million Cubic Metres), 2024-2032

Figure 42: Global: Glue-Laminated Timber (Others) Market: Volume Trends (in Million Cubic Metres), 2018 & 2023

Figure 43: Global: Glue-Laminated Timber (Others) Market Forecast: Volume Trends (in

Million Cubic Metres), 2024-2032

Figure 44: Global: Glue-Laminated Timber (New Construction Applications) Market: Volume Trends (in Million Cubic Metres), 2018 & 2023

Figure 45: Global: Glue-Laminated Timber (New Construction Applications) Market Forecast: Volume Trends (in Million Cubic Metres), 2024-2032

Figure 46: Global: Glue-Laminated Timber (Replacement Applications) Market: Volume Trends (in Million Cubic Metres), 2018 & 2023

Figure 47: Global: Glue-Laminated Timber (Replacement Applications) Market Forecast: Volume Trends (in Million Cubic Metres), 2024-2032

Figure 48: Glue-Laminated Timber Manufacturing Plant: Detailed Process Flow

Figure 49: Glue-Laminated Timber Manufacturing: Conversion Rates of Feedstocks

Figure 50: Glue-Laminated Timber Manufacturing Plant: Breakup of Capital Costs (in %)

Figure 51: Glue-Laminated Timber Industry: Margins Across Various Stages of the Supply Chain

Figure 52: Glue-Laminated Timber Production: Manufacturing Cost Breakup (in %)

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