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Global Panel Furniture Machinery Market Growth 2026-2032

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Abstracts

The global Panel Furniture Machinery market size is predicted to grow from US$ 4664 million in 2025 to US$ 7651 million in 2032; it is expected to grow at a CAGR of 7.4% from 2026 to 2032.

Panel furniture machinery is a special equipment used to produce panel furniture. Panel furniture is mainly made of man-made boards and is widely popular for its simple structure, easy assembly and flexible design. Panel furniture machinery covers a variety of equipment types, including panel saws, edge banding machines, drilling machines, CNC machining centers, etc., each of which undertakes different processing tasks such as cutting, edge banding, drilling, grooving and decoration. These mechanical equipment usually have highly automated and precise processing capabilities, which can improve production efficiency and reduce labor costs. They are suitable for various production scales in the furniture manufacturing industry, from small workshops to large factories. With the increasing demand for customized and diversified products in the furniture market, the intelligence and automation of panel furniture machinery are also constantly improving, providing more flexible and efficient solutions for the manufacturing industry.

Key Findings

In 2025, global Panel Furniture Machinery production reached approximately 17k units, with an average global market price of around US$280k per unit

Panel cutting edge banding drilling and CNC machining form the core equipment chain for panel furniture production

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Flexible batch-size-one production is becoming increasingly important in customized furniture manufacturing

Edge banding and CNC processing are moving toward higher speed greater automation and digital integration

European suppliers remain strong in high-end systems while Chinese manufacturers compete increasingly in cost and automation

Market Trends

The Panel Furniture Machinery industry is shifting from isolated standalone machines toward digitally connected, flexible and increasingly automated production systems. Customized furniture and batch-size-one manufacturing are driving demand for CNC nesting, automatic drilling, barcode-based workpiece identification, intelligent edge banding, automated handling and software integration. HOMAG's nesting platforms combine optimized panel cutting, drilling and routing in one process and support 3-, 4- and 5-axis machining, while its drilling systems are designed for flexible batch-size-one production without conventional setup time. Edge banding technology is also becoming faster and more flexible: HOMAG's current range spans entry-level machines at single-digit or low-double-digit feed speeds through high-performance double-sided systems reaching substantially higher industrial throughput, with support for EVA, PUR, hot-air and laser-based edge technologies on selected platforms. Another important direction is factory-level integration. Nesting software, CAD/CAM, barcode or RFID tracking, MES connectivity, automatic loading and unloading, robotic handling and intelligent storage are increasingly linking individual machines into continuous production cells. Biesse likewise emphasizes the migration from manually loaded nesting machines toward automated loading and unloading configurations as furniture producers pursue higher efficiency and lower labor dependence.

Market Dynamics

Drivers

Demand is primarily driven by the expansion of customized and modular furniture, shorter product cycles, labor-cost pressure and the need for higher material utilization. Panel furniture production involves large numbers of standardized but frequently changing components, making CNC-controlled cutting, drilling and edge processing particularly suitable for digital manufacturing. Nesting technology can optimize part

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layouts and reduce material waste while combining cutting, drilling and routing within one setup, directly supporting flexible order-based production. HOMAG positions nesting specifically for carcass furniture, cabinet fronts and modular furniture, while optimization software can balance objectives such as material waste, throughput time and total production cost. At the same time, furniture factories increasingly require consistent edge quality, precise drilling and rapid product changeovers, strengthening demand for servo control, automatic tool changes, recipe management and connected software. Growth in kitchen cabinets, wardrobes and whole-house customization further supports investment in flexible panel-processing equipment.

Restraints

The market is constrained by relatively high capital requirements for complete automated lines, software integration complexity and differences in return on investment between large and small furniture producers. A standalone saw, drill or edge bander can be adopted relatively easily, but a connected flexible line may require automated storage, conveying, labeling, drilling, edge processing, sorting and software integration, significantly increasing project cost and commissioning complexity. Smaller workshops may also lack the production volume or technical staff needed to justify advanced automation. Equipment utilization is sensitive to factory layout, product mix and order planning, meaning that highly automated machinery can underperform if upstream design data or downstream material flow is poorly organized. Maintenance requirements also increase as mechanical systems, CNC controls, servo drives, software and automation modules become more tightly integrated.

Opportunities

The strongest opportunities lie in customized furniture, flexible manufacturing and brownfield factory automation. Many furniture producers still operate mixed fleets of standalone machines, creating demand for modular automation that can be added progressively rather than through complete factory replacement. HOMAG's nesting systems, for example, support multiple automation concepts and can be linked with material-handling solutions, while its edge-processing portfolio includes return systems and automated workpiece circulation for increasingly connected production. Another opportunity comes from high-quality edge finishing, where PUR, hot-air and laser-type technologies support premium visual appearance and moisture resistance. Automated six-sided drilling, intelligent fitting insertion and integrated routing also create opportunities by reducing secondary handling and setup. In emerging manufacturing regions, medium-sized furniture factories upgrading from manual or semi-automatic production to CNC and flexible systems represent a particularly attractive demand pool.

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Challenges

The main challenge is balancing flexibility, throughput, precision and total investment cost. Furniture manufacturers increasingly require batch-size-one capability while still expecting industrial productivity, which places high demands on software scheduling, automatic workpiece identification and machine changeover. CNC and nesting systems must maintain accuracy across varying panel sizes and materials, while edge banders must deliver consistent bonding and trimming across different edge materials and glue technologies. Automated lines additionally require reliable synchronization between storage, cutting, drilling, edge banding, sorting and assembly. If one machine becomes a bottleneck, overall line efficiency can deteriorate quickly. Suppliers therefore need not only mechanical engineering capabilities but also software, automation, application engineering and after-sales service expertise.

Industry Chain Analysis

The upstream industry chain includes CNC controls, servo motors and drives, high-speed spindles, saw blades, cutters and drills, linear guides, vacuum pumps, pneumatic systems, adhesives and glue systems, sensors, industrial computers and automation components. Midstream manufacturers integrate these components into panel saws, edge banders, drilling and boring machines, CNC nesting centers, machining centers and automated production cells. HOMAG, Biesse and SCM represent leading European equipment groups with broad panel-processing portfolios, while Chinese manufacturers such as Nanxing compete across CNC cutting, drilling, edge banding and automation. HOMAG's official machinery portfolio illustrates the breadth of the industry, spanning CNC machining, drilling, edge banding, panel dividing, storage, automation and sorting. Downstream customers include household furniture manufacturers, office furniture producers, kitchen and cabinet companies, wardrobe manufacturers, interior-fit-out businesses and customized furniture factories. Value creation is increasingly moving beyond machine hardware toward production software, optimization, digital integration, automation engineering and lifecycle service.

Segment Insights

Panel Cutting Machinery forms the front end of panel furniture production and includes beam saws, panel dividing saws and related sizing equipment. Key parameters include maximum cutting length, cutting height, saw-blade diameter, feed speed, stack height and optimization capability. These machines remain important in high-volume standardized production, especially where multiple panels can be stacked and cut

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simultaneously. CNC Nesting & Machining Centers, by contrast, are particularly suitable for customized production because a single setup can combine optimized panel division, drilling, grooving and routing. HOMAG's nesting centers currently support 3-, 4- and 5-axis processing, with working fields extending into large-format panel dimensions and automation options for material handling.

Edge Banding Machinery and Drilling & Boring Machinery are equally critical downstream of cutting. Edge banders range from lower-speed standalone machines to industrial single- and double-sided lines, with current HOMAG systems spanning feed speeds from entry-level configurations to high-performance equipment reaching around 50 m/min. Drilling systems are moving toward flexible six-sided processing, automatic doweling and fitting insertion, while vertical CNC drilling centers reduce floor-space requirements and support batch-size-one production. For market analysis, the proposed categories of Panel Cutting Machinery, Drilling & Boring Machinery, Edge Banding Machinery, CNC Nesting & Machining Centers and Others provide a more complete structure than a simple cutting-drilling-edge-banding framework.

Downstream Market Opportunities

Household furniture represents a major downstream market because wardrobes, cabinets, storage systems and other modular furniture rely heavily on panel cutting, drilling and edge processing. Kitchen cabinets and whole-house customized furniture are particularly automation-intensive because each order contains many unique parts that must be tracked accurately from cutting through assembly. Office furniture provides another important application, especially for desks, cabinets and storage systems produced in medium or large batches. Demand is also expanding from furniture factories toward interior-fit-out and contract manufacturing companies that require flexible machining of varying panel shapes and short production runs. As customized furniture penetration increases, factories are more likely to invest in connected CNC nesting, automatic edge banding, six-sided drilling and sorting systems rather than isolated conventional machines.

Regional Insights

Europe remains a major technology center for high-end Panel Furniture Machinery, supported by established suppliers such as HOMAG, Biesse and SCM and a strong base of automated furniture manufacturers. European suppliers are particularly strong in complete production lines, advanced edge processing, CNC machining, digital software and factory automation. HOMAG's portfolio spans standalone equipment

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through fully networked production lines and solution engineering for industrial furniture plants. China is another major manufacturing and demand center, supported by the scale of its furniture industry and rapid adoption of CNC and flexible manufacturing in customized furniture. Chinese suppliers have improved substantially in CNC nesting, six-sided drilling, automatic edge banding and integrated production lines, competing through pricing, local service and faster customization. North America remains important in kitchen cabinets, office furniture and woodworking, while Southeast Asia is an important furniture production base where manufacturers are gradually upgrading from labor-intensive processes toward automated panel-processing equipment.

Competitive Landscape Analysis

The Panel Furniture Machinery market is characterized by competition between broad-line European technology suppliers and increasingly capable Chinese equipment manufacturers. HOMAG is representative of the integrated-system approach, with products covering panel cutting, CNC nesting, edge banding, drilling, storage, automation and software, while Biesse and SCM also compete strongly across CNC processing and complete furniture-production solutions. Chinese manufacturers such as Nanxing compete particularly effectively in standardized CNC cutting, edge banding, drilling and automated production configurations, supported by lower equipment cost and proximity to the world's largest furniture-manufacturing base. Competitive differentiation is increasingly moving from basic machine specifications toward production flexibility, processing speed, edge quality, drilling accuracy, software integration, automation capability and total lifecycle service. Suppliers able to combine mechanical equipment with nesting optimization, MES connectivity, automatic handling and application engineering are better positioned as furniture manufacturers move toward digital and flexible factories.

Report Scope

LP Information, Inc. (LPI) ' newest research report, the “Panel Furniture Machinery Industry Forecast” looks at past sales and reviews total world Panel Furniture Machinery sales in 2025, providing a comprehensive analysis by region and market sector of projected Panel Furniture Machinery sales for 2026 through 2032. With Panel Furniture Machinery sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US$ millions of the world Panel Furniture Machinery industry.

This Insight Report provides a comprehensive analysis of the global Panel Furniture

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Machinery landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Panel Furniture Machinery portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Panel Furniture Machinery market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Panel Furniture Machinery and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Panel Furniture Machinery.

This report presents a comprehensive overview, market shares, and growth opportunities of Panel Furniture Machinery market by product type, application, key manufacturers and key regions and countries.

Market Segmentation

Segmentation by Type:

Cutting Machine

Drilling Machine

Edge Banding Machine

Others

Segmentation by Automation Level:

Semi-Automatic

Fully Automatic

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Segmentation by Spindle Speed:

?18000 rpm

18000–24000 rpm

?24000 rpm

Others

Segmentation by Application:

Home Furniture

Office Furniture

Others

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

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- Korea
- Southeast Asia
- India
- Australia

Europe

- Germany
- France
- UK
- Italy
- Russia

Middle East & Africa

- Egypt
- South Africa
- Israel
- Turkey
- GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

- Homag

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IMA Schelling

Weinig Group

Altendorf

Biesse

SCM Group

Bacci

Copenstick

KDT Machinery

Nanxing Furniture Equipment Manufacturing

Hold Machinery

New Mas Woodworking Machinery & Equipment

Qianghong Board Furniture Machine

Yiming CNC Machinery

Yongqiang Woodworking

Hans SMC

Xiaofeng CNC Equipment

Woodworking Machinery

Excitech CNC Technology

SaiYu Technology

JIABANG CNC

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XIANG DIAO SHU KONG

Key Questions Addressed in this Report

What is the 10-year outlook for the global Panel Furniture Machinery market?

What factors are driving Panel Furniture Machinery market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Panel Furniture Machinery market opportunities vary by end market size?

How does Panel Furniture Machinery break out by Type, by Application?

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Contents

1 SCOPE OF THE REPORT

1.1 Market Introduction
1.2 Years Considered
1.3 Research Objectives
1.4 Market Research Methodology
1.5 Research Process and Data Source
1.6 Economic Indicators
1.7 Currency Considered
1.8 Market Estimation Caveats

2 EXECUTIVE SUMMARY

2.1 World Market Overview
  2.1.1 Global Panel Furniture Machinery Annual Sales 2021-2032
  2.1.2 World Current & Future Analysis for Panel Furniture Machinery by Geographic Region, 2021, 2025 & 2032
  2.1.3 World Current & Future Analysis for Panel Furniture Machinery by Country/Region, 2021, 2025 & 2032
2.2 Panel Furniture Machinery Segment by Type
  2.2.1 Cutting Machine
  2.2.2 Drilling Machine
  2.2.3 Edge Banding Machine
  2.2.4 Others
  2.2.5 Panel Furniture Machinery Sales by Type
    2.2.5.1 Global Panel Furniture Machinery Sales Market Share by Type (2021-2026)
    2.2.5.2 Global Panel Furniture Machinery Revenue and Market Share by Type (2021-2026)
    2.2.5.3 Global Panel Furniture Machinery Sale Price by Type (2021-2026)
2.3 Panel Furniture Machinery Segment by Automation Level
  2.3.1 Semi-Automatic
  2.3.2 Fully Automatic
  2.3.3 Panel Furniture Machinery Sales by Automation Level
    2.3.3.1 Global Panel Furniture Machinery Sales Market Share by Automation Level (2021-2026)
    2.3.3.2 Global Panel Furniture Machinery Revenue and Market Share by Automation Level (2021-2026)

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2.3.3.3 Global Panel Furniture Machinery Sale Price by Automation Level (2021-2026)
2.4 Panel Furniture Machinery Segment by Spindle Speed
2.4.1 ?18000 rpm
2.4.2 18000–24000 rpm
2.4.3 ?24000 rpm
2.4.4 Others
2.4.5 Panel Furniture Machinery Sales by Spindle Speed
2.4.5.1 Global Panel Furniture Machinery Sales Market Share by Spindle Speed (2021-2026)
2.4.5.2 Global Panel Furniture Machinery Revenue and Market Share by Spindle Speed (2021-2026)
2.4.5.3 Global Panel Furniture Machinery Sale Price by Spindle Speed (2021-2026)
2.5 Panel Furniture Machinery Segment by Application
2.5.1 Home Furniture
2.5.2 Office Furniture
2.5.3 Others
2.5.4 Panel Furniture Machinery Sales by Application
2.5.4.1 Global Panel Furniture Machinery Sale Market Share by Application (2021-2026)
2.5.4.2 Global Panel Furniture Machinery Revenue and Market Share by Application (2021-2026)
2.5.4.3 Global Panel Furniture Machinery Sale Price by Application (2021-2026)

3 GLOBAL BY COMPANY

3.1 Global Panel Furniture Machinery Breakdown Data by Company
3.1.1 Global Panel Furniture Machinery Annual Sales by Company (2021-2026)
3.1.2 Global Panel Furniture Machinery Sales Market Share by Company (2021-2026)
3.2 Global Panel Furniture Machinery Annual Revenue by Company (2021-2026)
3.2.1 Global Panel Furniture Machinery Revenue by Company (2021-2026)
3.2.2 Global Panel Furniture Machinery Revenue Market Share by Company (2021-2026)
3.3 Global Panel Furniture Machinery Sale Price by Company
3.4 Key Manufacturers Panel Furniture Machinery Producing Area Distribution, Sales Area, Product Type
3.4.1 Key Manufacturers Panel Furniture Machinery Product Location Distribution
3.4.2 Players Panel Furniture Machinery Products Offered
3.5 Market Concentration Rate Analysis

+357 96 030922
info@marketpublishers.com

3.5.1 Competition Landscape Analysis
3.5.2 Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)
3.6 New Products and Potential Entrants
3.7 Market M&A Activity & Strategy

4 WORLD HISTORIC REVIEW FOR PANEL FURNITURE MACHINERY BY GEOGRAPHIC REGION

4.1 World Historic Panel Furniture Machinery Market Size by Geographic Region (2021-2026)
4.1.1 Global Panel Furniture Machinery Annual Sales by Geographic Region (2021-2026)
4.1.2 Global Panel Furniture Machinery Annual Revenue by Geographic Region (2021-2026)
4.2 World Historic Panel Furniture Machinery Market Size by Country/Region (2021-2026)
4.2.1 Global Panel Furniture Machinery Annual Sales by Country/Region (2021-2026)
4.2.2 Global Panel Furniture Machinery Annual Revenue by Country/Region (2021-2026)
4.3 Americas Panel Furniture Machinery Sales Growth
4.4 APAC Panel Furniture Machinery Sales Growth
4.5 Europe Panel Furniture Machinery Sales Growth
4.6 Middle East & Africa Panel Furniture Machinery Sales Growth

5 AMERICAS

5.1 Americas Panel Furniture Machinery Sales by Country
5.1.1 Americas Panel Furniture Machinery Sales by Country (2021-2026)
5.1.2 Americas Panel Furniture Machinery Revenue by Country (2021-2026)
5.2 Americas Panel Furniture Machinery Sales by Type (2021-2026)
5.3 Americas Panel Furniture Machinery Sales by Application (2021-2026)
5.4 United States
5.5 Canada
5.6 Mexico
5.7 Brazil

6 APAC

6.1 APAC Panel Furniture Machinery Sales by Region

+357 96 030922
info@marketpublishers.com

6.1.1 APAC Panel Furniture Machinery Sales by Region (2021-2026)
6.1.2 APAC Panel Furniture Machinery Revenue by Region (2021-2026)
6.2 APAC Panel Furniture Machinery Sales by Type (2021-2026)
6.3 APAC Panel Furniture Machinery Sales by Application (2021-2026)
6.4 China
6.5 Japan
6.6 South Korea
6.7 Southeast Asia
6.8 India
6.9 Australia
6.10 China Taiwan

7 EUROPE

7.1 Europe Panel Furniture Machinery by Country
7.1.1 Europe Panel Furniture Machinery Sales by Country (2021-2026)
7.1.2 Europe Panel Furniture Machinery Revenue by Country (2021-2026)
7.2 Europe Panel Furniture Machinery Sales by Type (2021-2026)
7.3 Europe Panel Furniture Machinery Sales by Application (2021-2026)
7.4 Germany
7.5 France
7.6 UK
7.7 Italy
7.8 Russia

8 MIDDLE EAST & AFRICA

8.1 Middle East & Africa Panel Furniture Machinery by Country
8.1.1 Middle East & Africa Panel Furniture Machinery Sales by Country (2021-2026)
8.1.2 Middle East & Africa Panel Furniture Machinery Revenue by Country (2021-2026)
8.2 Middle East & Africa Panel Furniture Machinery Sales by Type (2021-2026)
8.3 Middle East & Africa Panel Furniture Machinery Sales by Application (2021-2026)
8.4 Egypt
8.5 South Africa
8.6 Israel
8.7 Turkey
8.8 GCC Countries

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info@marketpublishers.com

9 MARKET DRIVERS, CHALLENGES AND TRENDS

9.1 Market Drivers & Growth Opportunities
9.2 Market Challenges & Risks
9.3 Industry Trends

10 MANUFACTURING COST STRUCTURE ANALYSIS

10.1 Raw Material and Suppliers
10.2 Manufacturing Cost Structure Analysis of Panel Furniture Machinery
10.3 Manufacturing Process Analysis of Panel Furniture Machinery
10.4 Industry Chain Structure of Panel Furniture Machinery

11 MARKETING, DISTRIBUTORS AND CUSTOMER

11.1 Sales Channel
  11.1.1 Direct Channels
  11.1.2 Indirect Channels
11.2 Panel Furniture Machinery Distributors
11.3 Panel Furniture Machinery Customer

12 WORLD FORECAST REVIEW FOR PANEL FURNITURE MACHINERY BY GEOGRAPHIC REGION

12.1 Global Panel Furniture Machinery Market Size Forecast by Region
  12.1.1 Global Panel Furniture Machinery Forecast by Region (2027-2032)
  12.1.2 Global Panel Furniture Machinery Annual Revenue Forecast by Region (2027-2032)
12.2 Americas Forecast by Country (2027-2032)
12.3 APAC Forecast by Region (2027-2032)
12.4 Europe Forecast by Country (2027-2032)
12.5 Middle East & Africa Forecast by Country (2027-2032)
12.6 Global Panel Furniture Machinery Forecast by Type (2027-2032)
12.7 Global Panel Furniture Machinery Forecast by Application (2027-2032)

13 KEY PLAYERS ANALYSIS

13.1 Homag
  13.1.1 Homag Company Information

+357 96 030922
info@marketpublishers.com

13.1.2 Homag Panel Furniture Machinery Product Portfolios and Specifications
13.1.3 Homag Panel Furniture Machinery Sales, Revenue, Price and Gross Margin (2021-2026)
13.1.4 Homag Main Business Overview
13.1.5 Homag Latest Developments
13.2 IMA Schelling
13.2.1 IMA Schelling Company Information
13.2.2 IMA Schelling Panel Furniture Machinery Product Portfolios and Specifications
13.2.3 IMA Schelling Panel Furniture Machinery Sales, Revenue, Price and Gross Margin (2021-2026)
13.2.4 IMA Schelling Main Business Overview
13.2.5 IMA Schelling Latest Developments
13.3 Weinig Group
13.3.1 Weinig Group Company Information
13.3.2 Weinig Group Panel Furniture Machinery Product Portfolios and Specifications
13.3.3 Weinig Group Panel Furniture Machinery Sales, Revenue, Price and Gross Margin (2021-2026)
13.3.4 Weinig Group Main Business Overview
13.3.5 Weinig Group Latest Developments
13.4 Altendorf
13.4.1 Altendorf Company Information
13.4.2 Altendorf Panel Furniture Machinery Product Portfolios and Specifications
13.4.3 Altendorf Panel Furniture Machinery Sales, Revenue, Price and Gross Margin (2021-2026)
13.4.4 Altendorf Main Business Overview
13.4.5 Altendorf Latest Developments
13.5 Biesse
13.5.1 Biesse Company Information
13.5.2 Biesse Panel Furniture Machinery Product Portfolios and Specifications
13.5.3 Biesse Panel Furniture Machinery Sales, Revenue, Price and Gross Margin (2021-2026)
13.5.4 Biesse Main Business Overview
13.5.5 Biesse Latest Developments
13.6 SCM Group
13.6.1 SCM Group Company Information
13.6.2 SCM Group Panel Furniture Machinery Product Portfolios and Specifications
13.6.3 SCM Group Panel Furniture Machinery Sales, Revenue, Price and Gross Margin (2021-2026)
13.6.4 SCM Group Main Business Overview

+357 96 030922
info@marketpublishers.com

13.6.5 SCM Group Latest Developments
13.7 Bacci
13.7.1 Bacci Company Information
13.7.2 Bacci Panel Furniture Machinery Product Portfolios and Specifications
13.7.3 Bacci Panel Furniture Machinery Sales, Revenue, Price and Gross Margin (2021-2026)
13.7.4 Bacci Main Business Overview
13.7.5 Bacci Latest Developments
13.8 Copenstick
13.8.1 Copenstick Company Information
13.8.2 Copenstick Panel Furniture Machinery Product Portfolios and Specifications
13.8.3 Copenstick Panel Furniture Machinery Sales, Revenue, Price and Gross Margin (2021-2026)
13.8.4 Copenstick Main Business Overview
13.8.5 Copenstick Latest Developments
13.9 KDT Machinery
13.9.1 KDT Machinery Company Information
13.9.2 KDT Machinery Panel Furniture Machinery Product Portfolios and Specifications
13.9.3 KDT Machinery Panel Furniture Machinery Sales, Revenue, Price and Gross Margin (2021-2026)
13.9.4 KDT Machinery Main Business Overview
13.9.5 KDT Machinery Latest Developments
13.10 Nanxing Furniture Equipment Manufacturing
13.10.1 Nanxing Furniture Equipment Manufacturing Company Information
13.10.2 Nanxing Furniture Equipment Manufacturing Panel Furniture Machinery Product Portfolios and Specifications
13.10.3 Nanxing Furniture Equipment Manufacturing Panel Furniture Machinery Sales, Revenue, Price and Gross Margin (2021-2026)
13.10.4 Nanxing Furniture Equipment Manufacturing Main Business Overview
13.10.5 Nanxing Furniture Equipment Manufacturing Latest Developments
13.11 Hold Machinery
13.11.1 Hold Machinery Company Information
13.11.2 Hold Machinery Panel Furniture Machinery Product Portfolios and Specifications
13.11.3 Hold Machinery Panel Furniture Machinery Sales, Revenue, Price and Gross Margin (2021-2026)
13.11.4 Hold Machinery Main Business Overview
13.11.5 Hold Machinery Latest Developments

+357 96 030922
info@marketpublishers.com

13.12 New Mas Woodworking Machinery & Equipment
13.12.1 New Mas Woodworking Machinery & Equipment Company Information
13.12.2 New Mas Woodworking Machinery & Equipment Panel Furniture Machinery Product Portfolios and Specifications
13.12.3 New Mas Woodworking Machinery & Equipment Panel Furniture Machinery Sales, Revenue, Price and Gross Margin (2021-2026)
13.12.4 New Mas Woodworking Machinery & Equipment Main Business Overview
13.12.5 New Mas Woodworking Machinery & Equipment Latest Developments
13.13 Qianghong Board Furniture Machine
13.13.1 Qianghong Board Furniture Machine Company Information
13.13.2 Qianghong Board Furniture Machine Panel Furniture Machinery Product Portfolios and Specifications
13.13.3 Qianghong Board Furniture Machine Panel Furniture Machinery Sales, Revenue, Price and Gross Margin (2021-2026)
13.13.4 Qianghong Board Furniture Machine Main Business Overview
13.13.5 Qianghong Board Furniture Machine Latest Developments
13.14 Yiming CNC Machinery
13.14.1 Yiming CNC Machinery Company Information
13.14.2 Yiming CNC Machinery Panel Furniture Machinery Product Portfolios and Specifications
13.14.3 Yiming CNC Machinery Panel Furniture Machinery Sales, Revenue, Price and Gross Margin (2021-2026)
13.14.4 Yiming CNC Machinery Main Business Overview
13.14.5 Yiming CNC Machinery Latest Developments
13.15 Yongqiang Woodworking
13.15.1 Yongqiang Woodworking Company Information
13.15.2 Yongqiang Woodworking Panel Furniture Machinery Product Portfolios and Specifications
13.15.3 Yongqiang Woodworking Panel Furniture Machinery Sales, Revenue, Price and Gross Margin (2021-2026)
13.15.4 Yongqiang Woodworking Main Business Overview
13.15.5 Yongqiang Woodworking Latest Developments
13.16 Hans SMC
13.16.1 Hans SMC Company Information
13.16.2 Hans SMC Panel Furniture Machinery Product Portfolios and Specifications
13.16.3 Hans SMC Panel Furniture Machinery Sales, Revenue, Price and Gross Margin (2021-2026)
13.16.4 Hans SMC Main Business Overview
13.16.5 Hans SMC Latest Developments

+357 96 030922
info@marketpublishers.com

13.17 Xiaofeng CNC Equipment
13.17.1 Xiaofeng CNC Equipment Company Information
13.17.2 Xiaofeng CNC Equipment Panel Furniture Machinery Product Portfolios and Specifications
13.17.3 Xiaofeng CNC Equipment Panel Furniture Machinery Sales, Revenue, Price and Gross Margin (2021-2026)
13.17.4 Xiaofeng CNC Equipment Main Business Overview
13.17.5 Xiaofeng CNC Equipment Latest Developments
13.18 Woodworking Machinery
13.18.1 Woodworking Machinery Company Information
13.18.2 Woodworking Machinery Panel Furniture Machinery Product Portfolios and Specifications
13.18.3 Woodworking Machinery Panel Furniture Machinery Sales, Revenue, Price and Gross Margin (2021-2026)
13.18.4 Woodworking Machinery Main Business Overview
13.18.5 Woodworking Machinery Latest Developments
13.19 Excitech CNC Technology
13.19.1 Excitech CNC Technology Company Information
13.19.2 Excitech CNC Technology Panel Furniture Machinery Product Portfolios and Specifications
13.19.3 Excitech CNC Technology Panel Furniture Machinery Sales, Revenue, Price and Gross Margin (2021-2026)
13.19.4 Excitech CNC Technology Main Business Overview
13.19.5 Excitech CNC Technology Latest Developments
13.20 SaiYu Technology
13.20.1 SaiYu Technology Company Information
13.20.2 SaiYu Technology Panel Furniture Machinery Product Portfolios and Specifications
13.20.3 SaiYu Technology Panel Furniture Machinery Sales, Revenue, Price and Gross Margin (2021-2026)
13.20.4 SaiYu Technology Main Business Overview
13.20.5 SaiYu Technology Latest Developments
13.21 JIABANG CNC
13.21.1 JIABANG CNC Company Information
13.21.2 JIABANG CNC Panel Furniture Machinery Product Portfolios and Specifications
13.21.3 JIABANG CNC Panel Furniture Machinery Sales, Revenue, Price and Gross Margin (2021-2026)
13.21.4 JIABANG CNC Main Business Overview

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13.21.5 JIABANG CNC Latest Developments
13.22 XIANG DIAO SHU KONG
13.22.1 XIANG DIAO SHU KONG Company Information
13.22.2 XIANG DIAO SHU KONG Panel Furniture Machinery Product Portfolios and Specifications
13.22.3 XIANG DIAO SHU KONG Panel Furniture Machinery Sales, Revenue, Price and Gross Margin (2021-2026)
13.22.4 XIANG DIAO SHU KONG Main Business Overview
13.22.5 XIANG DIAO SHU KONG Latest Developments

14 RESEARCH FINDINGS AND CONCLUSION

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List Of Tables

LIST OF TABLES

Table 1. Panel Furniture Machinery Annual Sales CAGR by Geographic Region (2021, 2025 & 2032) & ($ millions)
Table 2. Panel Furniture Machinery Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & ($ millions)
Table 3. Major Players of Cutting Machine
Table 4. Major Players of Drilling Machine
Table 5. Major Players of Edge Banding Machine
Table 6. Major Players of Others
Table 7. Global Panel Furniture Machinery Sales by Type (2021-2026) & (Units)
Table 8. Global Panel Furniture Machinery Sales Market Share by Type (2021-2026)
Table 9. Global Panel Furniture Machinery Revenue by Type (2021-2026) & ($ million)
Table 10. Global Panel Furniture Machinery Revenue Market Share by Type (2021-2026)
Table 11. Global Panel Furniture Machinery Sale Price by Type (2021-2026) & (US$/Unit)
Table 12. Major Players of Semi-Automatic
Table 13. Major Players of Fully Automatic
Table 14. Global Panel Furniture Machinery Sales by Automation Level (2021-2026) & (Units)
Table 15. Global Panel Furniture Machinery Sales Market Share by Automation Level (2021-2026)
Table 16. Global Panel Furniture Machinery Revenue by Automation Level (2021-2026) & ($ million)
Table 17. Global Panel Furniture Machinery Revenue Market Share by Automation Level (2021-2026)
Table 18. Global Panel Furniture Machinery Sale Price by Automation Level (2021-2026) & (US$/Unit)
Table 19. Major Players of ?18000 rpm
Table 20. Major Players of 18000–24000 rpm
Table 21. Major Players of ?24000 rpm
Table 22. Major Players of Others
Table 23. Global Panel Furniture Machinery Sales by Spindle Speed (2021-2026) & (Units)
Table 24. Global Panel Furniture Machinery Sales Market Share by Spindle Speed (2021-2026)

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Table 25. Global Panel Furniture Machinery Revenue by Spindle Speed (2021-2026) & ($ million)
Table 26. Global Panel Furniture Machinery Revenue Market Share by Spindle Speed (2021-2026)
Table 27. Global Panel Furniture Machinery Sale Price by Spindle Speed (2021-2026) & (US$/Unit)
Table 28. Global Panel Furniture Machinery Sale by Application (2021-2026) & (Units)
Table 29. Global Panel Furniture Machinery Sale Market Share by Application (2021-2026)
Table 30. Global Panel Furniture Machinery Revenue by Application (2021-2026) & ($ million)
Table 31. Global Panel Furniture Machinery Revenue Market Share by Application (2021-2026)
Table 32. Global Panel Furniture Machinery Sale Price by Application (2021-2026) & (US$/Unit)
Table 33. Global Panel Furniture Machinery Sales by Company (2021-2026) & (Units)
Table 34. Global Panel Furniture Machinery Sales Market Share by Company (2021-2026)
Table 35. Global Panel Furniture Machinery Revenue by Company (2021-2026) & ($ millions)
Table 36. Global Panel Furniture Machinery Revenue Market Share by Company (2021-2026)
Table 37. Global Panel Furniture Machinery Sale Price by Company (2021-2026) & (US$/Unit)
Table 38. Key Manufacturers Panel Furniture Machinery Producing Area Distribution and Sales Area
Table 39. Players Panel Furniture Machinery Products Offered
Table 40. Panel Furniture Machinery Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)
Table 41. New Products and Potential Entrants
Table 42. Market M&A Activity & Strategy
Table 43. Global Panel Furniture Machinery Sales by Geographic Region (2021-2026) & (Units)
Table 44. Global Panel Furniture Machinery Sales Market Share Geographic Region (2021-2026)
Table 45. Global Panel Furniture Machinery Revenue by Geographic Region (2021-2026) & ($ millions)
Table 46. Global Panel Furniture Machinery Revenue Market Share by Geographic Region (2021-2026)

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Table 47. Global Panel Furniture Machinery Sales by Country/Region (2021-2026) & (Units)
Table 48. Global Panel Furniture Machinery Sales Market Share by Country/Region (2021-2026)
Table 49. Global Panel Furniture Machinery Revenue by Country/Region (2021-2026) & ($ millions)
Table 50. Global Panel Furniture Machinery Revenue Market Share by Country/Region (2021-2026)
Table 51. Americas Panel Furniture Machinery Sales by Country (2021-2026) & (Units)
Table 52. Americas Panel Furniture Machinery Sales Market Share by Country (2021-2026)
Table 53. Americas Panel Furniture Machinery Revenue by Country (2021-2026) & ($ millions)
Table 54. Americas Panel Furniture Machinery Sales by Type (2021-2026) & (Units)
Table 55. Americas Panel Furniture Machinery Sales by Application (2021-2026) & (Units)
Table 56. APAC Panel Furniture Machinery Sales by Region (2021-2026) & (Units)
Table 57. APAC Panel Furniture Machinery Sales Market Share by Region (2021-2026)
Table 58. APAC Panel Furniture Machinery Revenue by Region (2021-2026) & ($ millions)
Table 59. APAC Panel Furniture Machinery Sales by Type (2021-2026) & (Units)
Table 60. APAC Panel Furniture Machinery Sales by Application (2021-2026) & (Units)
Table 61. Europe Panel Furniture Machinery Sales by Country (2021-2026) & (Units)
Table 62. Europe Panel Furniture Machinery Revenue by Country (2021-2026) & ($ millions)
Table 63. Europe Panel Furniture Machinery Sales by Type (2021-2026) & (Units)
Table 64. Europe Panel Furniture Machinery Sales by Application (2021-2026) & (Units)
Table 65. Middle East & Africa Panel Furniture Machinery Sales by Country (2021-2026) & (Units)
Table 66. Middle East & Africa Panel Furniture Machinery Revenue Market Share by Country (2021-2026)
Table 67. Middle East & Africa Panel Furniture Machinery Sales by Type (2021-2026) & (Units)
Table 68. Middle East & Africa Panel Furniture Machinery Sales by Application (2021-2026) & (Units)
Table 69. Key Market Drivers & Growth Opportunities of Panel Furniture Machinery
Table 70. Key Market Challenges & Risks of Panel Furniture Machinery
Table 71. Key Industry Trends of Panel Furniture Machinery
Table 72. Panel Furniture Machinery Raw Material

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Table 73. Key Suppliers of Raw Materials
Table 74. Panel Furniture Machinery Distributors List
Table 75. Panel Furniture Machinery Customer List
Table 76. Global Panel Furniture Machinery Sales Forecast by Region (2027-2032) & (Units)
Table 77. Global Panel Furniture Machinery Revenue Forecast by Region (2027-2032) & ($ millions)
Table 78. Americas Panel Furniture Machinery Sales Forecast by Country (2027-2032) & (Units)
Table 79. Americas Panel Furniture Machinery Annual Revenue Forecast by Country (2027-2032) & ($ millions)
Table 80. APAC Panel Furniture Machinery Sales Forecast by Region (2027-2032) & (Units)
Table 81. APAC Panel Furniture Machinery Annual Revenue Forecast by Region (2027-2032) & ($ millions)
Table 82. Europe Panel Furniture Machinery Sales Forecast by Country (2027-2032) & (Units)
Table 83. Europe Panel Furniture Machinery Revenue Forecast by Country (2027-2032) & ($ millions)
Table 84. Middle East & Africa Panel Furniture Machinery Sales Forecast by Country (2027-2032) & (Units)
Table 85. Middle East & Africa Panel Furniture Machinery Revenue Forecast by Country (2027-2032) & ($ millions)
Table 86. Global Panel Furniture Machinery Sales Forecast by Type (2027-2032) & (Units)
Table 87. Global Panel Furniture Machinery Revenue Forecast by Type (2027-2032) & ($ millions)
Table 88. Global Panel Furniture Machinery Sales Forecast by Application (2027-2032) & (Units)
Table 89. Global Panel Furniture Machinery Revenue Forecast by Application (2027-2032) & ($ millions)
Table 90. Homag Basic Information, Panel Furniture Machinery Manufacturing Base, Sales Area and Its Competitors
Table 91. Homag Panel Furniture Machinery Product Portfolios and Specifications
Table 92. Homag Panel Furniture Machinery Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 93. Homag Main Business
Table 94. Homag Latest Developments
Table 95. IMA Schelling Basic Information, Panel Furniture Machinery Manufacturing

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Base, Sales Area and Its Competitors
Table 96. IMA Schelling Panel Furniture Machinery Product Portfolios and Specifications
Table 97. IMA Schelling Panel Furniture Machinery Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 98. IMA Schelling Main Business
Table 99. IMA Schelling Latest Developments
Table 100. Weinig Group Basic Information, Panel Furniture Machinery Manufacturing Base, Sales Area and Its Competitors
Table 101. Weinig Group Panel Furniture Machinery Product Portfolios and Specifications
Table 102. Weinig Group Panel Furniture Machinery Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 103. Weinig Group Main Business
Table 104. Weinig Group Latest Developments
Table 105. Altendorf Basic Information, Panel Furniture Machinery Manufacturing Base, Sales Area and Its Competitors
Table 106. Altendorf Panel Furniture Machinery Product Portfolios and Specifications
Table 107. Altendorf Panel Furniture Machinery Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 108. Altendorf Main Business
Table 109. Altendorf Latest Developments
Table 110. Biesse Basic Information, Panel Furniture Machinery Manufacturing Base, Sales Area and Its Competitors
Table 111. Biesse Panel Furniture Machinery Product Portfolios and Specifications
Table 112. Biesse Panel Furniture Machinery Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 113. Biesse Main Business
Table 114. Biesse Latest Developments
Table 115. SCM Group Basic Information, Panel Furniture Machinery Manufacturing Base, Sales Area and Its Competitors
Table 116. SCM Group Panel Furniture Machinery Product Portfolios and Specifications
Table 117. SCM Group Panel Furniture Machinery Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 118. SCM Group Main Business
Table 119. SCM Group Latest Developments
Table 120. Bacci Basic Information, Panel Furniture Machinery Manufacturing Base, Sales Area and Its Competitors
Table 121. Bacci Panel Furniture Machinery Product Portfolios and Specifications

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Table 122. Bacci Panel Furniture Machinery Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 123. Bacci Main Business
Table 124. Bacci Latest Developments
Table 125. Copenstick Basic Information, Panel Furniture Machinery Manufacturing Base, Sales Area and Its Competitors
Table 126. Copenstick Panel Furniture Machinery Product Portfolios and Specifications
Table 127. Copenstick Panel Furniture Machinery Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 128. Copenstick Main Business
Table 129. Copenstick Latest Developments
Table 130. KDT Machinery Basic Information, Panel Furniture Machinery Manufacturing Base, Sales Area and Its Competitors
Table 131. KDT Machinery Panel Furniture Machinery Product Portfolios and Specifications
Table 132. KDT Machinery Panel Furniture Machinery Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 133. KDT Machinery Main Business
Table 134. KDT Machinery Latest Developments
Table 135. Nanxing Furniture Equipment Manufacturing Basic Information, Panel Furniture Machinery Manufacturing Base, Sales Area and Its Competitors
Table 136. Nanxing Furniture Equipment Manufacturing Panel Furniture Machinery Product Portfolios and Specifications
Table 137. Nanxing Furniture Equipment Manufacturing Panel Furniture Machinery Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 138. Nanxing Furniture Equipment Manufacturing Main Business
Table 139. Nanxing Furniture Equipment Manufacturing Latest Developments
Table 140. Hold Machinery Basic Information, Panel Furniture Machinery Manufacturing Base, Sales Area and Its Competitors
Table 141. Hold Machinery Panel Furniture Machinery Product Portfolios and Specifications
Table 142. Hold Machinery Panel Furniture Machinery Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 143. Hold Machinery Main Business
Table 144. Hold Machinery Latest Developments
Table 145. New Mas Woodworking Machinery & Equipment Basic Information, Panel Furniture Machinery Manufacturing Base, Sales Area and Its Competitors
Table 146. New Mas Woodworking Machinery & Equipment Panel Furniture Machinery Product Portfolios and Specifications

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Table 147. New Mas Woodworking Machinery & Equipment Panel Furniture Machinery Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 148. New Mas Woodworking Machinery & Equipment Main Business
Table 149. New Mas Woodworking Machinery & Equipment Latest Developments
Table 150. Qianghong Board Furniture Machine Basic Information, Panel Furniture Machinery Manufacturing Base, Sales Area and Its Competitors
Table 151. Qianghong Board Furniture Machine Panel Furniture Machinery Product Portfolios and Specifications
Table 152. Qianghong Board Furniture Machine Panel Furniture Machinery Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 153. Qianghong Board Furniture Machine Main Business
Table 154. Qianghong Board Furniture Machine Latest Developments
Table 155. Yiming CNC Machinery Basic Information, Panel Furniture Machinery Manufacturing Base, Sales Area and Its Competitors
Table 156. Yiming CNC Machinery Panel Furniture Machinery Product Portfolios and Specifications
Table 157. Yiming CNC Machinery Panel Furniture Machinery Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 158. Yiming CNC Machinery Main Business
Table 159. Yiming CNC Machinery Latest Developments
Table 160. Yongqiang Woodworking Basic Information, Panel Furniture Machinery Manufacturing Base, Sales Area and Its Competitors
Table 161. Yongqiang Woodworking Panel Furniture Machinery Product Portfolios and Specifications
Table 162. Yongqiang Woodworking Panel Furniture Machinery Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 163. Yongqiang Woodworking Main Business
Table 164. Yongqiang Woodworking Latest Developments
Table 165. Hans SMC Basic Information, Panel Furniture Machinery Manufacturing Base, Sales Area and Its Competitors
Table 166. Hans SMC Panel Furniture Machinery Product Portfolios and Specifications
Table 167. Hans SMC Panel Furniture Machinery Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 168. Hans SMC Main Business
Table 169. Hans SMC Latest Developments
Table 170. Xiaofeng CNC Equipment Basic Information, Panel Furniture Machinery Manufacturing Base, Sales Area and Its Competitors
Table 171. Xiaofeng CNC Equipment Panel Furniture Machinery Product Portfolios and Specifications

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Table 172. Xiaofeng CNC Equipment Panel Furniture Machinery Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 173. Xiaofeng CNC Equipment Main Business
Table 174. Xiaofeng CNC Equipment Latest Developments
Table 175. Woodworking Machinery Basic Information, Panel Furniture Machinery Manufacturing Base, Sales Area and Its Competitors
Table 176. Woodworking Machinery Panel Furniture Machinery Product Portfolios and Specifications
Table 177. Woodworking Machinery Panel Furniture Machinery Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 178. Woodworking Machinery Main Business
Table 179. Woodworking Machinery Latest Developments
Table 180. Excitech CNC Technology Basic Information, Panel Furniture Machinery Manufacturing Base, Sales Area and Its Competitors
Table 181. Excitech CNC Technology Panel Furniture Machinery Product Portfolios and Specifications
Table 182. Excitech CNC Technology Panel Furniture Machinery Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 183. Excitech CNC Technology Main Business
Table 184. Excitech CNC Technology Latest Developments
Table 185. SaiYu Technology Basic Information, Panel Furniture Machinery Manufacturing Base, Sales Area and Its Competitors
Table 186. SaiYu Technology Panel Furniture Machinery Product Portfolios and Specifications
Table 187. SaiYu Technology Panel Furniture Machinery Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 188. SaiYu Technology Main Business
Table 189. SaiYu Technology Latest Developments
Table 190. JIABANG CNC Basic Information, Panel Furniture Machinery Manufacturing Base, Sales Area and Its Competitors
Table 191. JIABANG CNC Panel Furniture Machinery Product Portfolios and Specifications
Table 192. JIABANG CNC Panel Furniture Machinery Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 193. JIABANG CNC Main Business
Table 194. JIABANG CNC Latest Developments
Table 195. XIANG DIAO SHU KONG Basic Information, Panel Furniture Machinery Manufacturing Base, Sales Area and Its Competitors
Table 196. XIANG DIAO SHU KONG Panel Furniture Machinery Product Portfolios and

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Specifications
Table 197. XIANG DIAO SHU KONG Panel Furniture Machinery Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 198. XIANG DIAO SHU KONG Main Business
Table 199. XIANG DIAO SHU KONG Latest Developments

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List Of Figures

LIST OF FIGURES

Figure 1. Picture of Panel Furniture Machinery
Figure 2. Panel Furniture Machinery Report Years Considered
Figure 3. Research Objectives
Figure 4. Research Methodology
Figure 5. Research Process and Data Source
Figure 6. Global Panel Furniture Machinery Sales Growth Rate 2021-2032 (Units)
Figure 7. Global Panel Furniture Machinery Revenue Growth Rate 2021-2032 ($ millions)
Figure 8. Panel Furniture Machinery Sales by Geographic Region (2021, 2025 & 2032) & ($ millions)
Figure 9. Panel Furniture Machinery Sales Market Share by Country/Region (2025)
Figure 10. Panel Furniture Machinery Sales Market Share by Country/Region (2021, 2025 & 2032)
Figure 11. Product Picture of Cutting Machine
Figure 12. Product Picture of Drilling Machine
Figure 13. Product Picture of Edge Banding Machine
Figure 14. Product Picture of Others
Figure 15. Global Panel Furniture Machinery Sales Market Share by Type in 2026
Figure 16. Global Panel Furniture Machinery Revenue Market Share by Type (2021-2026)
Figure 17. Product Picture of Semi-Automatic
Figure 18. Product Picture of Fully Automatic
Figure 19. Global Panel Furniture Machinery Sales Market Share by Automation Level in 2026
Figure 20. Global Panel Furniture Machinery Revenue Market Share by Automation Level (2021-2026)
Figure 21. Product Picture of ?18000 rpm
Figure 22. Product Picture of 18000–24000 rpm
Figure 23. Product Picture of ?24000 rpm
Figure 24. Product Picture of Others
Figure 25. Global Panel Furniture Machinery Sales Market Share by Spindle Speed in 2026
Figure 26. Global Panel Furniture Machinery Revenue Market Share by Spindle Speed (2021-2026)
Figure 27. Panel Furniture Machinery Consumed in Home Furniture

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Figure 28. Global Panel Furniture Machinery Market: Home Furniture (2021-2026) & (Units)
Figure 29. Panel Furniture Machinery Consumed in Office Furniture
Figure 30. Global Panel Furniture Machinery Market: Office Furniture (2021-2026) & (Units)
Figure 31. Panel Furniture Machinery Consumed in Others
Figure 32. Global Panel Furniture Machinery Market: Others (2021-2026) & (Units)
Figure 33. Global Panel Furniture Machinery Sale Market Share by Application (2025)
Figure 34. Global Panel Furniture Machinery Revenue Market Share by Application in 2025
Figure 35. Panel Furniture Machinery Sales by Company in 2025 (Units)
Figure 36. Global Panel Furniture Machinery Sales Market Share by Company in 2025
Figure 37. Panel Furniture Machinery Revenue by Company in 2025 ($ millions)
Figure 38. Global Panel Furniture Machinery Revenue Market Share by Company in 2025
Figure 39. Global Panel Furniture Machinery Sales Market Share by Geographic Region (2021-2026)
Figure 40. Global Panel Furniture Machinery Revenue Market Share by Geographic Region in 2025
Figure 41. Americas Panel Furniture Machinery Sales 2021-2026 (Units)
Figure 42. Americas Panel Furniture Machinery Revenue 2021-2026 ($ millions)
Figure 43. APAC Panel Furniture Machinery Sales 2021-2026 (Units)
Figure 44. APAC Panel Furniture Machinery Revenue 2021-2026 ($ millions)
Figure 45. Europe Panel Furniture Machinery Sales 2021-2026 (Units)
Figure 46. Europe Panel Furniture Machinery Revenue 2021-2026 ($ millions)
Figure 47. Middle East & Africa Panel Furniture Machinery Sales 2021-2026 (Units)
Figure 48. Middle East & Africa Panel Furniture Machinery Revenue 2021-2026 ($ millions)
Figure 49. Americas Panel Furniture Machinery Sales Market Share by Country in 2025
Figure 50. Americas Panel Furniture Machinery Revenue Market Share by Country (2021-2026)
Figure 51. Americas Panel Furniture Machinery Sales Market Share by Type (2021-2026)
Figure 52. Americas Panel Furniture Machinery Sales Market Share by Application (2021-2026)
Figure 53. United States Panel Furniture Machinery Revenue Growth 2021-2026 ($ millions)
Figure 54. Canada Panel Furniture Machinery Revenue Growth 2021-2026 ($ millions)
Figure 55. Mexico Panel Furniture Machinery Revenue Growth 2021-2026 ($ millions)

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Figure 56. Brazil Panel Furniture Machinery Revenue Growth 2021-2026 ($ millions)
Figure 57. APAC Panel Furniture Machinery Sales Market Share by Region in 2025
Figure 58. APAC Panel Furniture Machinery Revenue Market Share by Region (2021-2026)
Figure 59. APAC Panel Furniture Machinery Sales Market Share by Type (2021-2026)
Figure 60. APAC Panel Furniture Machinery Sales Market Share by Application (2021-2026)
Figure 61. China Panel Furniture Machinery Revenue Growth 2021-2026 ($ millions)
Figure 62. Japan Panel Furniture Machinery Revenue Growth 2021-2026 ($ millions)
Figure 63. South Korea Panel Furniture Machinery Revenue Growth 2021-2026 ($ millions)
Figure 64. Southeast Asia Panel Furniture Machinery Revenue Growth 2021-2026 ($ millions)
Figure 65. India Panel Furniture Machinery Revenue Growth 2021-2026 ($ millions)
Figure 66. Australia Panel Furniture Machinery Revenue Growth 2021-2026 ($ millions)
Figure 67. China Taiwan Panel Furniture Machinery Revenue Growth 2021-2026 ($ millions)
Figure 68. Europe Panel Furniture Machinery Sales Market Share by Country in 2025
Figure 69. Europe Panel Furniture Machinery Revenue Market Share by Country (2021-2026)
Figure 70. Europe Panel Furniture Machinery Sales Market Share by Type (2021-2026)
Figure 71. Europe Panel Furniture Machinery Sales Market Share by Application (2021-2026)
Figure 72. Germany Panel Furniture Machinery Revenue Growth 2021-2026 ($ millions)
Figure 73. France Panel Furniture Machinery Revenue Growth 2021-2026 ($ millions)
Figure 74. UK Panel Furniture Machinery Revenue Growth 2021-2026 ($ millions)
Figure 75. Italy Panel Furniture Machinery Revenue Growth 2021-2026 ($ millions)
Figure 76. Russia Panel Furniture Machinery Revenue Growth 2021-2026 ($ millions)
Figure 77. Middle East & Africa Panel Furniture Machinery Sales Market Share by Country (2021-2026)
Figure 78. Middle East & Africa Panel Furniture Machinery Sales Market Share by Type (2021-2026)
Figure 79. Middle East & Africa Panel Furniture Machinery Sales Market Share by Application (2021-2026)
Figure 80. Egypt Panel Furniture Machinery Revenue Growth 2021-2026 ($ millions)
Figure 81. South Africa Panel Furniture Machinery Revenue Growth 2021-2026 ($ millions)
Figure 82. Israel Panel Furniture Machinery Revenue Growth 2021-2026 ($ millions)
Figure 83. Turkey Panel Furniture Machinery Revenue Growth 2021-2026 ($ millions)

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Figure 84. GCC Countries Panel Furniture Machinery Revenue Growth 2021-2026 ($ millions)
Figure 85. Manufacturing Cost Structure Analysis of Panel Furniture Machinery in 2026
Figure 86. Manufacturing Process Analysis of Panel Furniture Machinery
Figure 87. Industry Chain Structure of Panel Furniture Machinery
Figure 88. Channels of Distribution
Figure 89. Global Panel Furniture Machinery Sales Market Forecast by Region (2027-2032)
Figure 90. Global Panel Furniture Machinery Revenue Market Share Forecast by Region (2027-2032)
Figure 91. Global Panel Furniture Machinery Sales Market Share Forecast by Type (2027-2032)
Figure 92. Global Panel Furniture Machinery Revenue Market Share Forecast by Type (2027-2032)
Figure 93. Global Panel Furniture Machinery Sales Market Share Forecast by Application (2027-2032)
Figure 94. Global Panel Furniture Machinery Revenue Market Share Forecast by Application (2027-2032)

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