

# Wood-Based Panel Industry: An Analysis

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## Abstracts

The wood-based panel industry has failed to continue its growth momentum in the wake of the events on financial markets in 2008 that had a severe impact on the global economy. As the demand for wood-based panel products correlates to a significant degree to the level of residential construction activity, it is expected that there will be no near-term relief for the panel makers, both in North America and Europe from housing market pressures.

The North American wood panel market has seen stagnation since 2007 and this is evident from shrinking profitability of the panel makers. Also prices of panels have gone down recently. The demand for wood panels mainly comes from housing starts and so this industry is highly dependent on the construction sector. The North American market remains extremely challenging still driven by the US housing and credit crises.

In the United States, OSB and plywood are the dominant panels being utilized and the large capacity increase in OSB has resulted in declining prices for the panels, which in turn is impacting the margins of the panel makers.

One of the challenges that both the North American and European panel makers are facing is the increasing imports from China.

The European panel makers had generated huge profitability and strong growth in the last few years on the back of the growing construction industry and growth of the furniture sector. However, the challenges that European panel makers have been facing is the increasing costs of various inputs like wood, resin and energy. Also, the European panel makers are competing with the biomass industry for the procurement of wood.

The turnaround in the housing market in North America is not expected to be met until 2010 and experts believe that 2009 will be a transition year with tough conditions similar

to 2008. In the year 2009, downward pressure is likely to continue but from 2010 onwards, demand is likely to catch up. Also the demand for wood-based panels in Europe is expected to decline significantly in 2009 but it would start reviving from 2010 onwards.

The report titled “Wood-Based Panel Industry: An Analysis” studies the overall wood panel industry with specific focus on the North American and European markets. The report analyzes the major segments of the wood-based panels –Particleboard (PB), Medium Density Fiber board (MDF), Oriented Strand Board (OSB) and Plywood for both the European and North American markets. It studies the major global trends in the demand for structural panels and also highlights the challenges faced by panel makers. Further, the report analyzes the competitive landscape of the industry and features three major panel makers – Sonae Industria, Pflleiderer and Louisiana Pacific. Moreover, the report analyzes the future of the industry for 2009 and 2010 in the context of global economic slowdown, slump in the housing and construction industry and prices of input products.

We have predicted the future growth of the wood-based panel industry by combining SPSS Inc.’s data integration and analysis capabilities with our relevant findings,. We employed various significant variables that have an impact on this industry and created regression models with SPSS Base to determine the future direction of the industry. Before deploying the regression model, the relationship between several independent or predictor variables and the dependent variable was analyzed using standard SPSS output, including charts, tables and tests.

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