

Wood-based Panels

- Timber Committee forecasts by Mr. **Jeff Serveau**, Manager, Canada Wood
- Expert presentation by Mr. **Laszlò Döry**, President, European Panel Federation, Belgium



Highlights of Forest Products Market Review, 2004-2005 (1-3)

- The particle board industry in Europe recorded a major upswing in 2004, but faces a difficult start in 2005.
- MDF consumption in Europe accelerated by nearly 10% during 2004, with the laminate flooring industry as the key driving force.
- OSB production in Europe continues to expand and benefits from strong North American demand.



Highlights of Forest Products Market Review, 2004-2005 (4-6)

- The European plywood industry faces fierce competition from China despite anti-dumping duties of up to 67% on imports of okoumé plywood
- The Russian particle board and MDF industries are developing rapidly and will be characterized by major restructuring over the next few years.
- Prices in Europe rose steadily and prices in North America spiked several times in 2004 before declining to levels that were still well above previous years.



Highlights of Forest Products Market Review, 2004-2005 (7-9)

- A strong housing market allowed the North American plywood industry to post a 100% capacity utilization rate.
- Increased imports of cabinets and furniture reduced demand for particle board in the United States.
- OSB production in North America increased by 3% in 2004 and reached a record volume of 23.1 million m³.

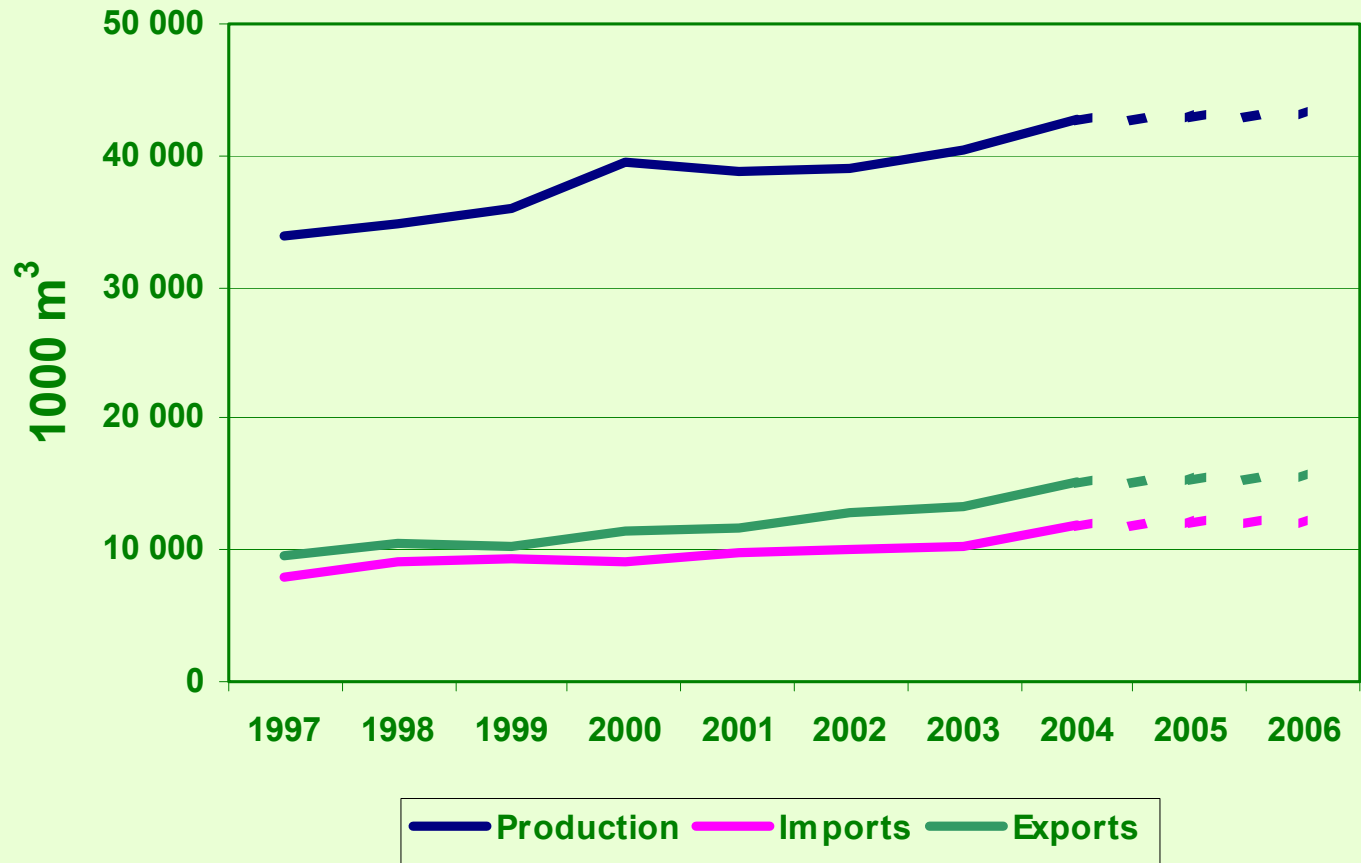


Highlights of Forest Products Market Review, 2004-2005 (10-12)

- Strong demand for OSB has resulted in plans to build 10 new mills in North America by 2008.
- Rapid growth of plywood imports from Brazil resulted in the rescission of its duty-free status in the United States and the imposition of an 8% duty in mid-2005.
- Several Chinese plywood manufacturers are expected to receive approval to grade stamp structural plywood by late 2005 or early 2006 and begin exporting to the US.



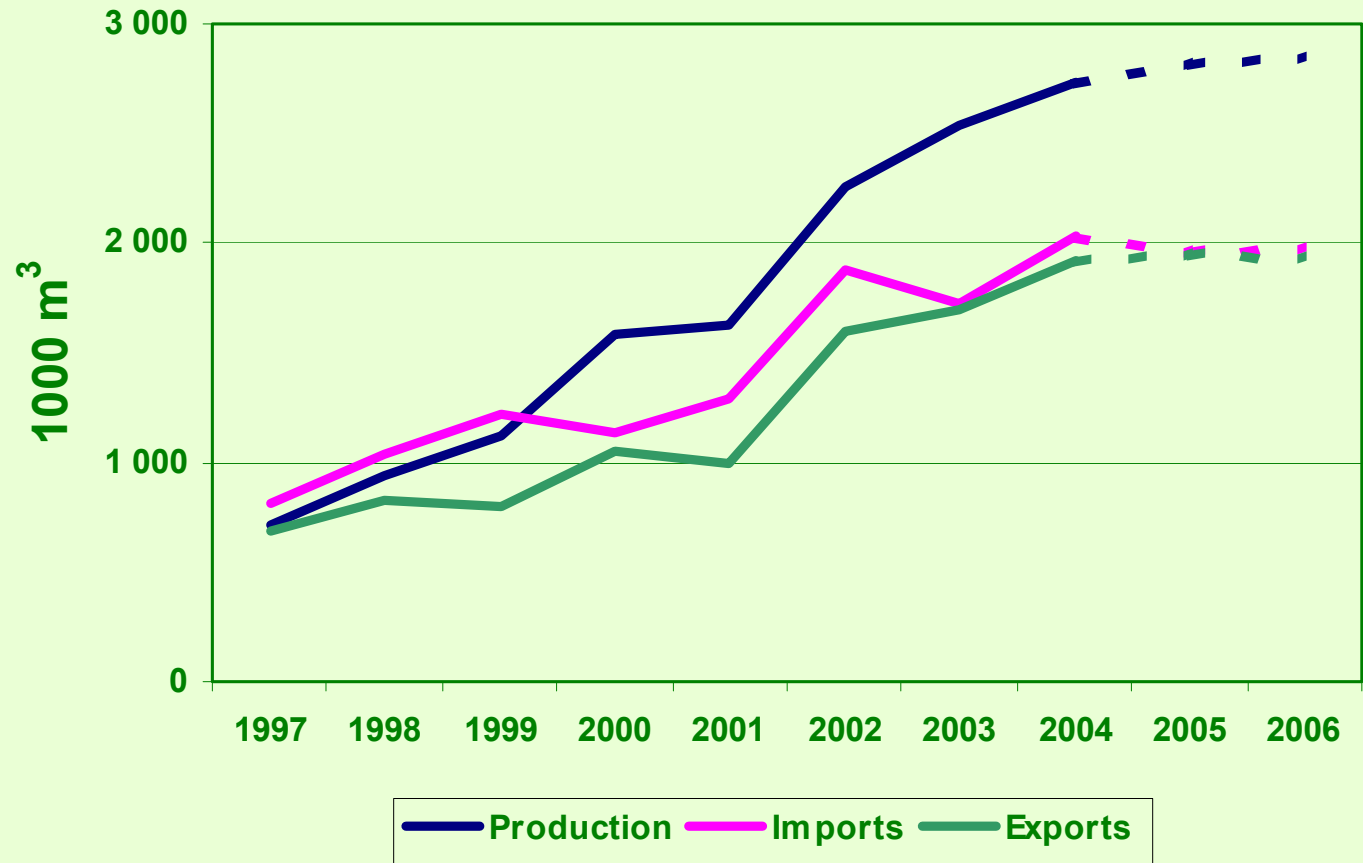
Particle Board - Europe



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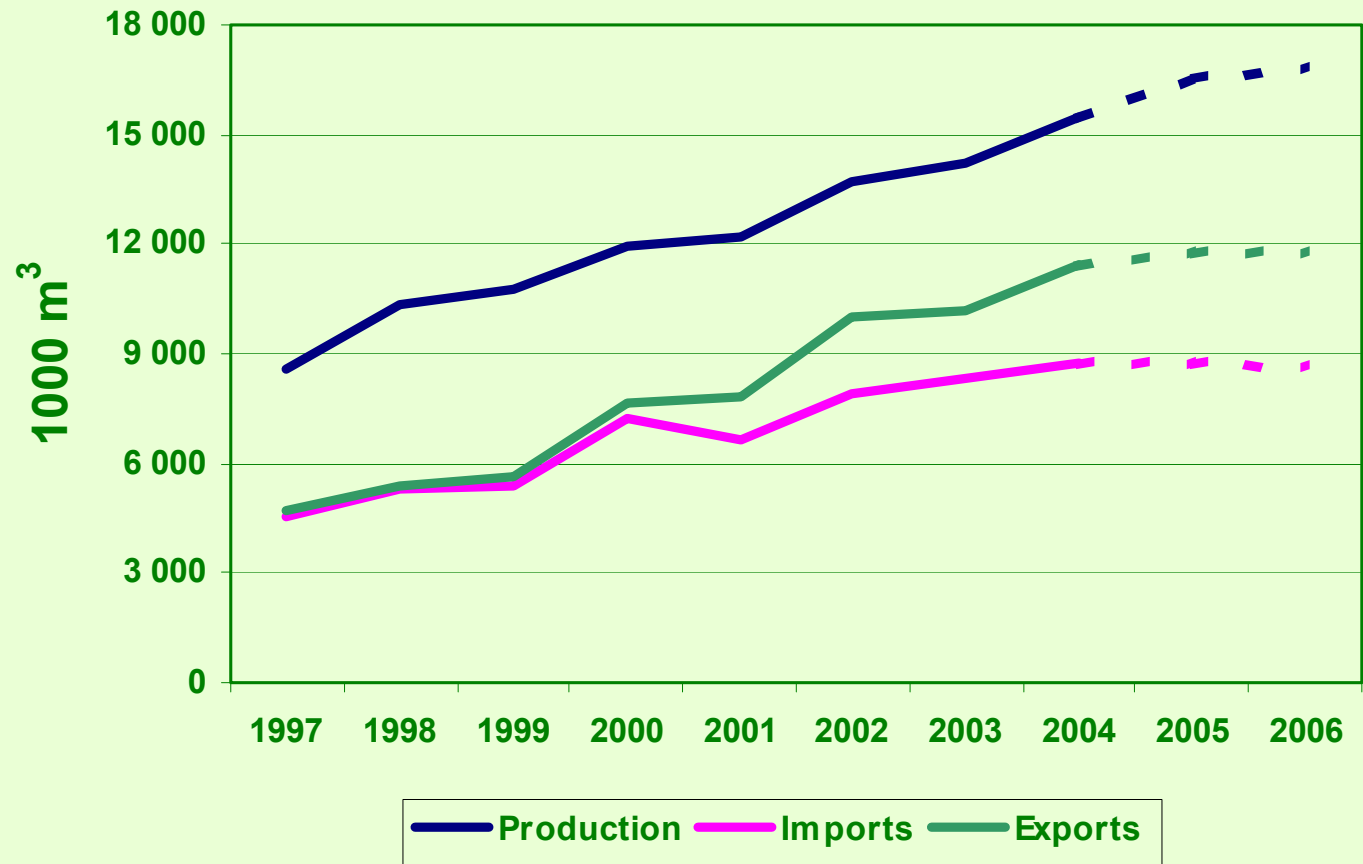
OSB - Europe



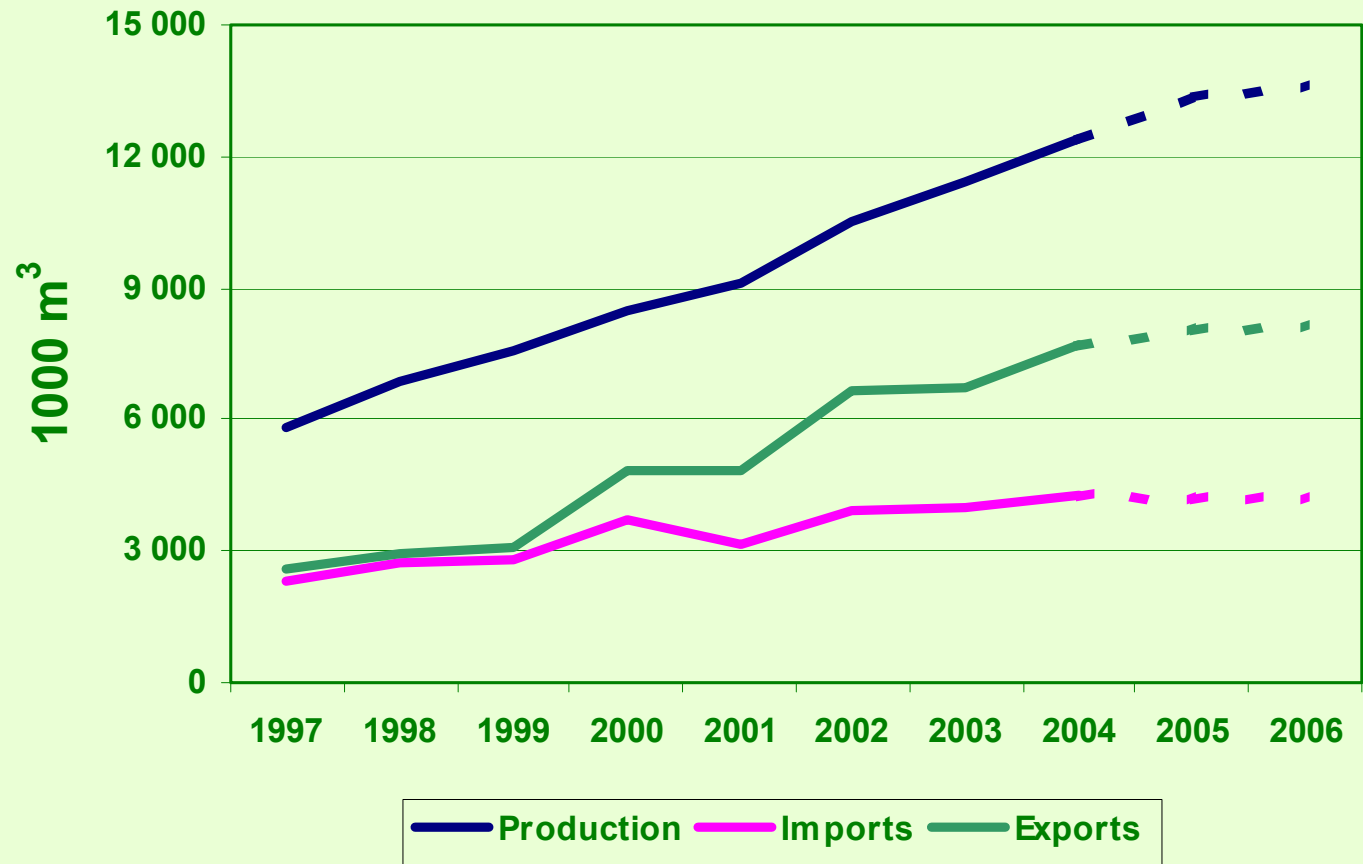
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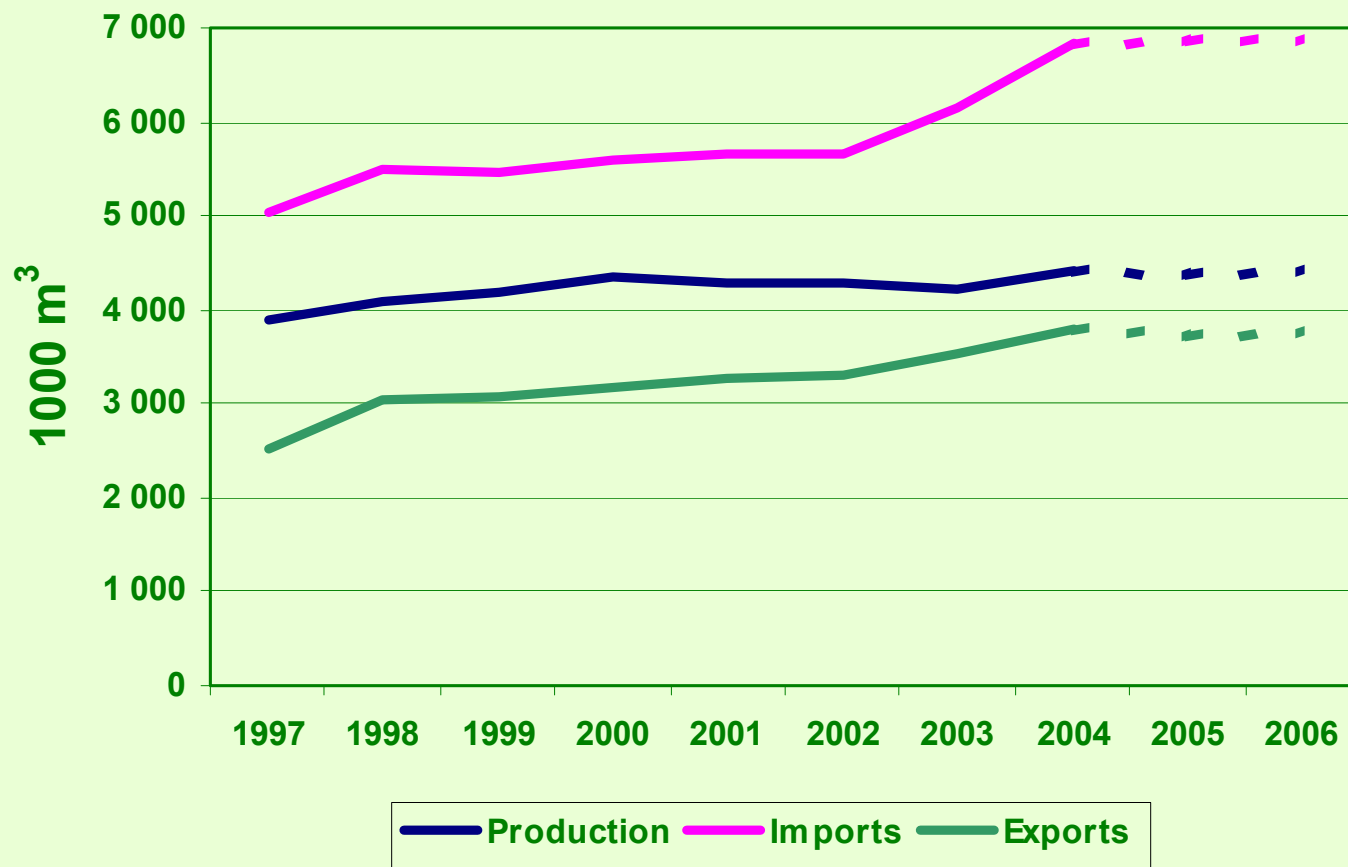
Fibreboard total - Europe



MDF - Europe



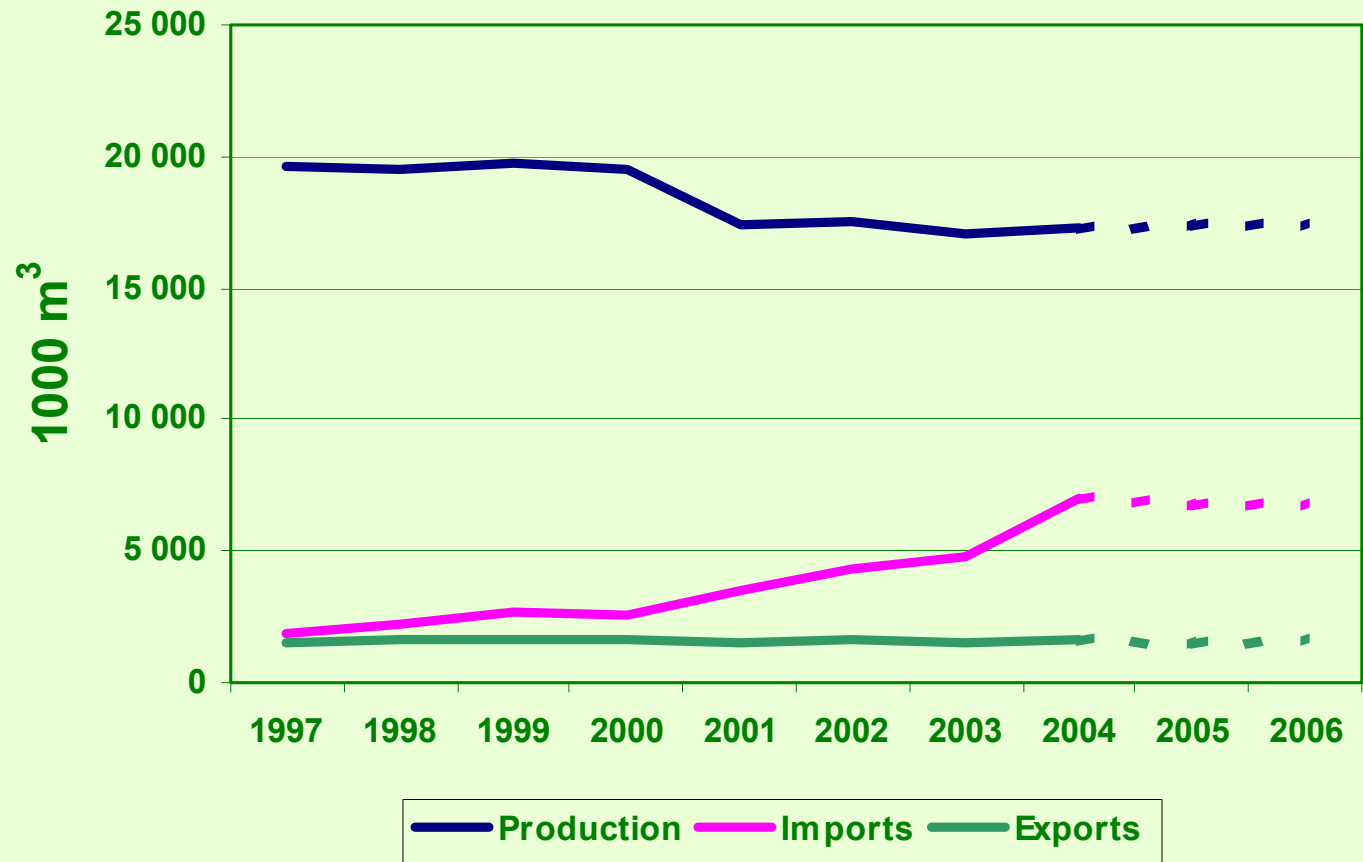
Plywood - Europe



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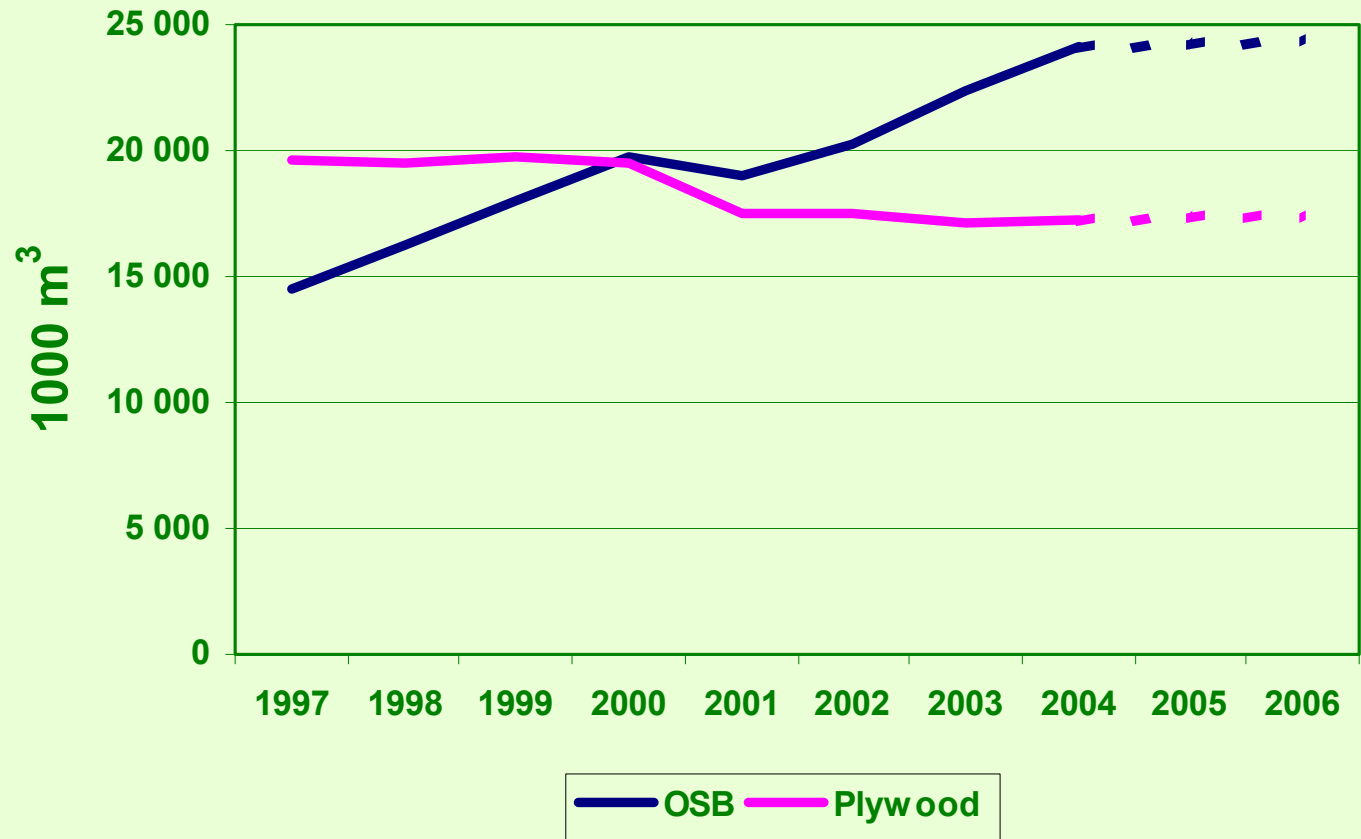
Plywood – North America



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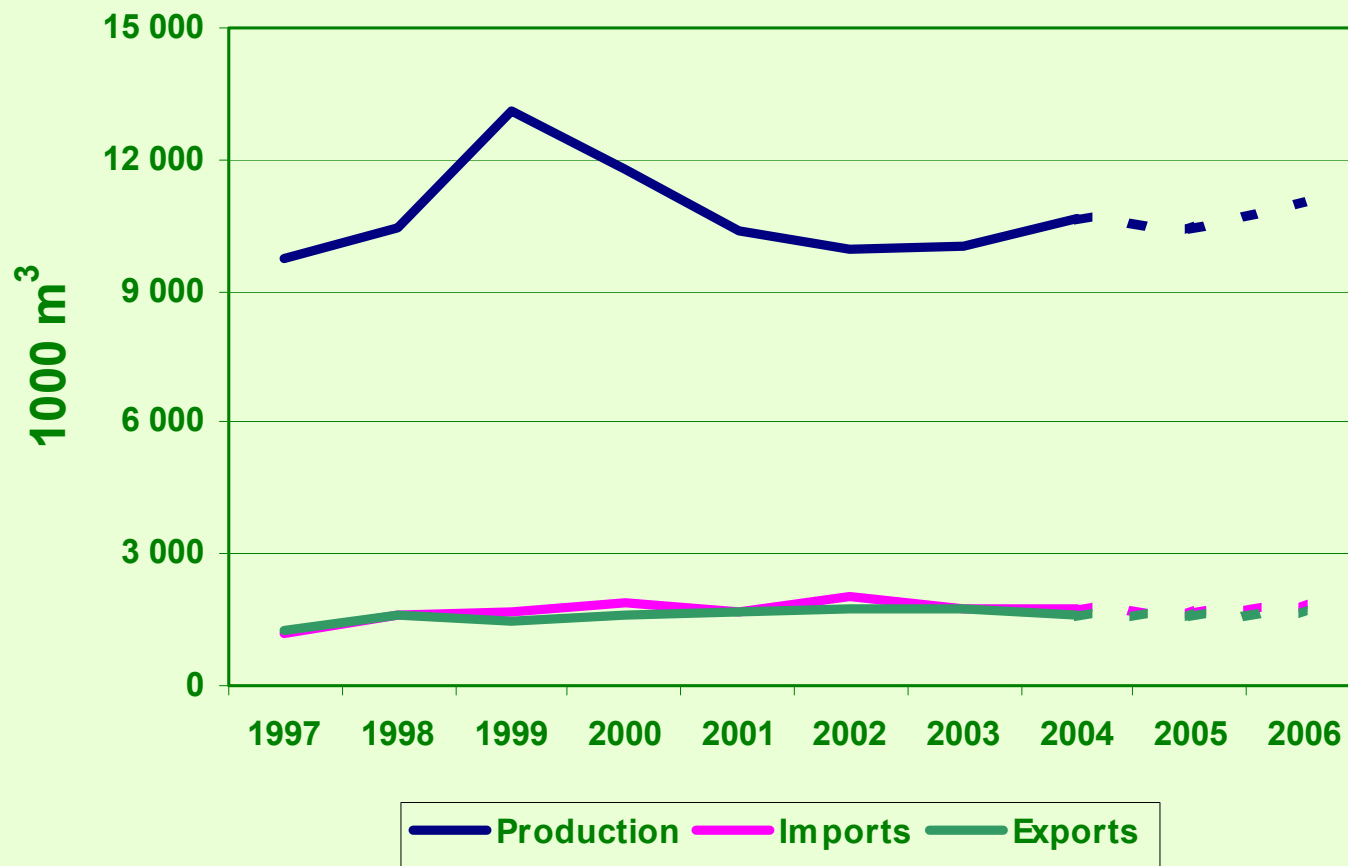
Production of Structural Panels – North America



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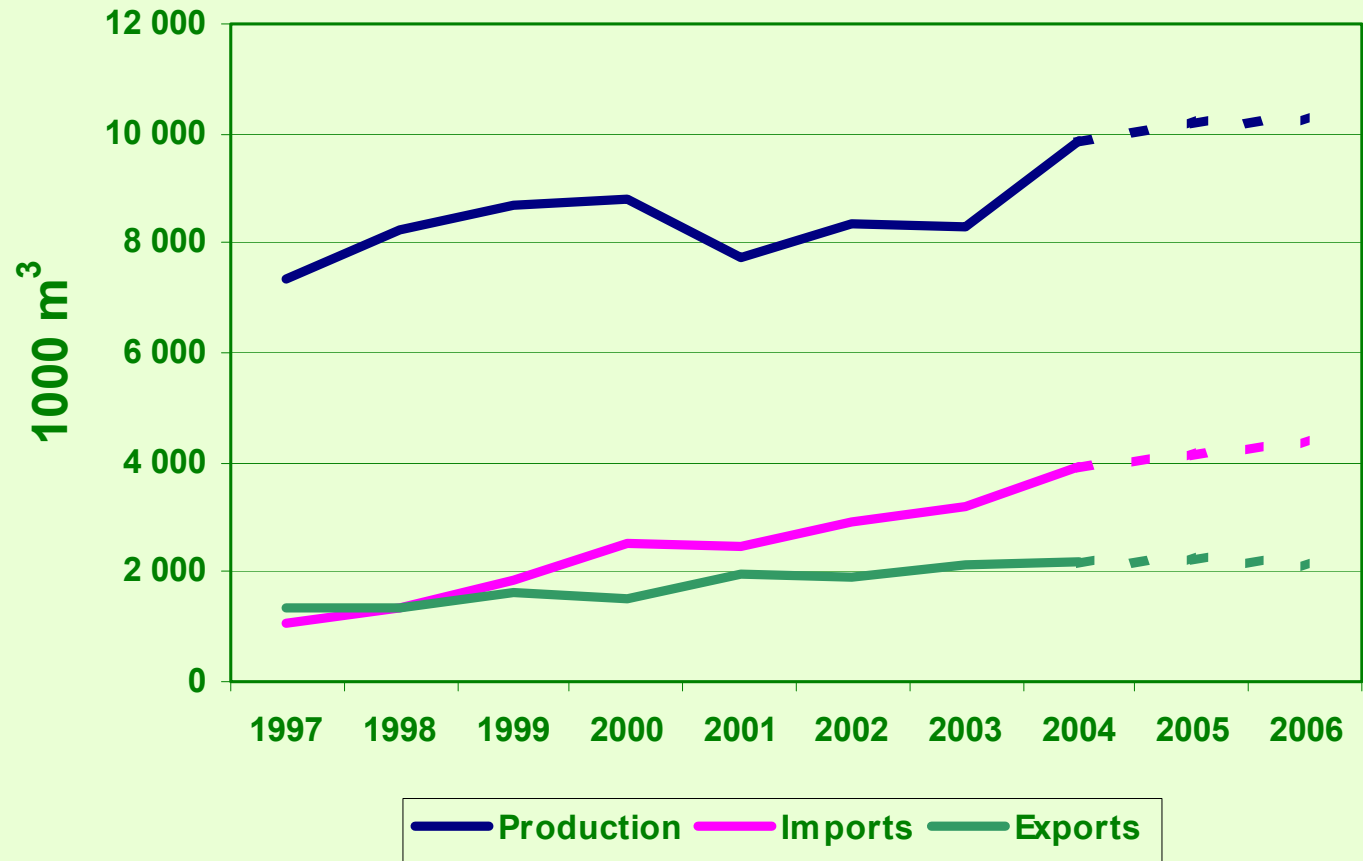
Particle Board (excluding OSB) – North America



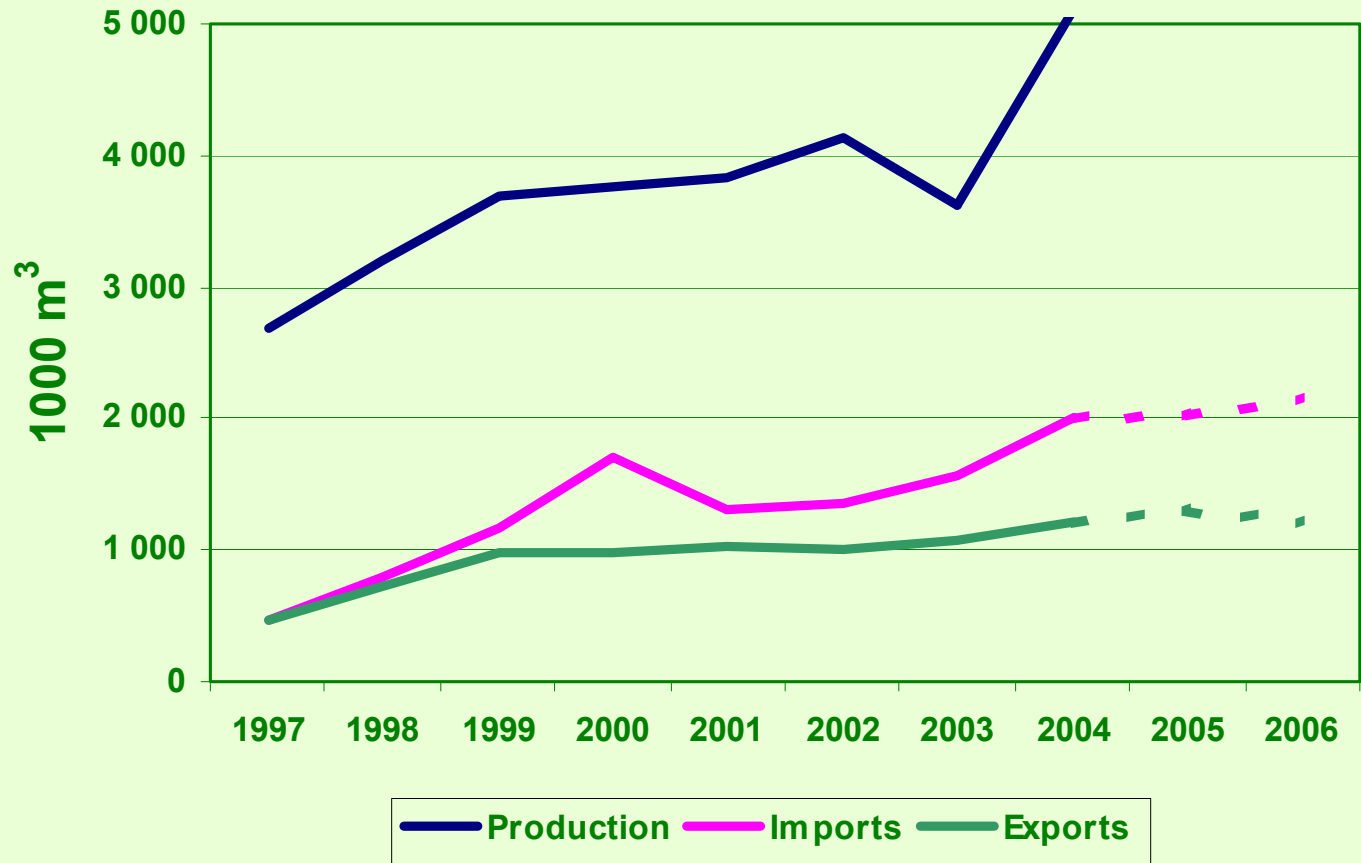
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Fibreboard total – North America



MDF – North America



Next Presentation

- Panel Markets by Mr. **Laszlò Döry**,
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Belgium



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