Analysis of the North American and European Engineered Wood Market

Description: This research service analyses the European and the North American market for engineered wood products. The main product segments covered are Oriental Strand Board (OSB), Plywood, Laminated Veneer Lumber (LVL), Glued Laminated Timber (glulam), I-joists, Particleboard, Medium-density Fibreboard (MDF), and High-density Fibreboard (HDF). Major industry drivers and restraints, manufacturing and regulatory standards, and product trends affecting the European and the North American market are also discussed. Unit shipment and revenue forecasts have been provided at the regional level for each segment from 2012 to 2022. At the sub-segment level, the analysis focuses on the dynamics of both the regions and the major applications for which these segments are used. Competitive structure and market share data have been provided for each segment at the regional level. The base year is 2015 and the forecast period ends at 2022.

Key Findings

- The European and North American market for engineered wood (EW) products began to show signs of recovery since 2014, post the global economic recession in 2009. However, this recovery has been slower than the recovery of the construction and the furniture industries.

- The demand for structural panels in North America and Europe recorded moderately healthy growth rates of X% and X% (2015), respectively, and is expected to grow further in line with the rise in the new residential housing construction market.

- Markets for all types of wood-based panels are showing signs of growth, except for hardboard, and expectations for the near term are cautiously optimistic.

- In terms of industrial applications, Europe has the highest penetration for EW products. Particleboard is the most widely consumed EW product, followed by medium-density fibreboard (MDF). However, the market share of the latter is expected to increase due to the high demand for furniture applications.

- Manufacturers are increasing investment in the research and development (R&D) of EW products that comply with stringent regulations and independent certification programs. They are also customizing products based on evolving customer needs.

- Over production beyond the demand of structural panels, such as oriented strand board (OSB), has been a major concern affecting price and revenue in the North American EW market. However, products like plywood and MDF, which have niche applications in transportation and packaging, have been able to gain stability due to increased consumption.

- With steady recovery expected in the European construction market, the focus of the wood-based panel industry will gradually shift from furniture to the overall building industry. This will help to further improve labor employability and will boost productivity.

Key Questions Answered

- At what growth stage is the EW market? What is the potential for future growth and at what rate will the market grow?

- What are the key factors driving and restraining growth in this market?

- What are the regulatory trends affecting the EW market in North America and Europe?

- Which EW segments are poised to grow during the forecast period?

- Which regions must manufacturers focus on during the forecast period?

- What is the competitive scenario in the market? Is the market ripe for acquisitions?
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- Percent Unit Shipment Forecast by Application
- Market Share Analysis

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