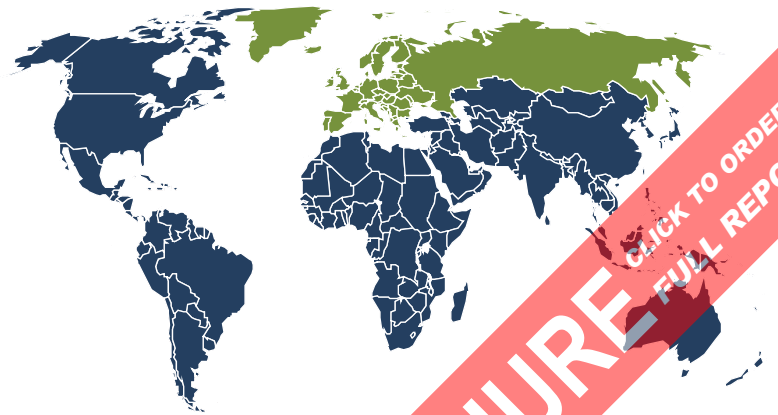




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Decorative Laminates: Europe

March 2021



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About This Report

Scope

This report forecasts to 2024 decorative laminate demand and production in square meters in Europe. Total demand is segmented by product in terms of:

- low-pressure laminates
- high-pressure laminates

Total demand is also segmented by market as follows:

- furniture
- cabinets
- flooring
- retail fixtures
- wall panels
- countertops
- other markets such as ceilings, signage, and window sills

To illustrate historical trends, total demand is provided in annual series from 2009 to 2019; production and the various segments are reported at five-year intervals for 2009, 2014, and 2019.

Edgebanding, as well as electrical, electronic, and other industrial laminates, is not included in this report.

Several assumptions have been made in order to ease understanding or to facilitate comparisons. For example, many decorative laminates are produced and sold in roll form to furniture producers or manufacturers, who then bond the laminate to a rigid substrate as part of the manufacturing process. This is frequently done with decorative foils and vinyl films. However, in the case of some decorative laminates, such as saturated papers, the laminates may be bonded to a substrate by the laminates producer and not by the customer due to the expense inherent in purchasing and operating the necessary machinery. So as not to skew the results (since some laminates are sold already bonded to a substrate and are therefore more expensive), all data treat laminates as unmounted.

Key macroeconomic indicators are also provided with quantified trends. Other various topics, including profiles of pertinent leading suppliers, are covered in this report. A full outline of report items by page is available in the Table of Contents.

For the purposes of this report, Europe encompasses the following countries:

About This Report

Table 6 | Countries in Western Europe

Andorra	Germany*	Italy*	Portugal
Austria*	Gibraltar	Jersey	Saint Pierre and Miquelon
Belgium	Greece	Liechtenstein	San Marino
Channel Islands	Greenland	Luxembourg	Spain*
Denmark	Guernsey	Malta	Sweden*
Faeroe Islands	Iceland	Monaco	Switzerland
Finland	Ireland	Netherlands*	United Kingdom*
France*	Isle of Man	Norway	Vatican City

Note: *Major decorative laminate markets.

Source: The Freedonia Group

Table 7 | Countries in Eastern Europe

Albania	Hungary	Romania
Belarus	Latvia	Russia*
Bosnia and Herzegovina	Lithuania	Serbia
Bulgaria	Macedonia	Slovakia
Croatia	Moldova	Slovenia
Czech Republic	Montenegro	Ukraine
Estonia	Poland*	

Note: * Major decorative laminate markets.

Source: The Freedonia Group

Sources

Decorative Laminates: Europe (FE60027) is based on *Global Decorative Laminates*, a comprehensive industry study published by The Freedonia Group. Reported findings represent the synthesis and analysis of data from various primary, secondary, macroeconomic, and demographic sources, such as:

- firms participating in the industry, and their suppliers and customers
- government/public agencies
- intergovernmental and non-governmental organizations
- trade associations and their publications
- the business and trade press
- indicator forecasts by The Freedonia Group
- the findings of other reports and studies by The Freedonia Group

About This Report

Specific sources and additional resources are listed in the Resources section of this publication for reference and to facilitate further research.

Industry Codes

Table 8 | HS/HTS Codes Related to Decorative Laminates

HS/HTS Codes	Definition
3920	Plastics; plates, sheets, film, foil and strip (not self-adhesive); non-cellular and not reinforced, laminated, supported or similarly combined with other materials, n.e.c.
4408	Sheets for veneering (including those obtained by slicing laminated wood), for plywood or for similar laminated wood and other wood, sawn lengthwise, sliced or peeled, planed or not, sanded, spliced or end-jointed, of a thickness not exceeding 6 mm
4412	Plywood, veneered panels and similar laminated wood

Source: United Nations Statistics Division

Table 9 | NACE Codes Related to Decorative Laminates

NACE Code	Definition
16.21	Manufacture of veneer sheets and wood-based panels
17.12	Manufacture of paper and paperboard

Source: European Commission

Freedonia Methodology

The Freedonia Group, a subsidiary of MarketResearch.com, has been in business for more than 30 years and in that time has developed a comprehensive approach to data analysis that takes into account the variety of industries covered and the evolving needs of our customers.

Every industry presents different challenges in market sizing and forecasting, and this requires flexibility in methodology and approach. Freedonia methodology integrates a variety of quantitative and qualitative techniques to present the best overall picture of a market's current position as well as its future outlook: When published data are available, we make sure they are correct and representative of reality. We understand that published data often have flaws either in scope or quality, and adjustments are made accordingly. Where no data are available, we use various methodologies to develop market sizing (both top-down and bottom-up) and then triangulate those results to come up with the most accurate data series possible. Regardless of approach, we also talk to industry participants to verify both historical perspective and future growth opportunities.

About This Report

Methods used in the preparation of Freedonia market research include, but are not limited to, the following activities: comprehensive data mining and evaluation, primary research, consensus forecasting and analysis, ratio analysis using key indicators, regression analysis, end use growth indices and intensity factors, purchase power parity adjustments for global data, consumer and end user surveys, market share and corporate sales analysis, product lifespan analysis, product or market life cycle analysis, graphical data modeling, long-term historical trend analysis, bottom-up and top-down demand modeling, and comparative market size ranking.

Freedonia quantifies trends in various measures of growth and volatility. Growth (or decline) expressed as an average annual growth rate (AAGR) is the least squares growth rate, which takes into account all available datapoints over a period. The volatility of datapoints around a least squares growth trend over time is expressed via the coefficient of determination, or r^2 . The most stable data series relative to the trend carries an r^2 value of 1.0; the most volatile – 0.0. Growth calculated as a compound annual growth rate (CAGR) employs, by definition, only the first and last datapoints over a period. The CAGR is used to describe forecast growth, defined as the expected trend beginning in the base year and ending in the forecast year. Readers are encouraged to consider historical volatility when assessing particular annual values along the forecast trend, including in the forecast year.

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Resources

The Freedonia Group

Global Decorative Laminates

Freedonia Industry Studies

Cabinets

Countertops

Flooring

Global Countertops

Global Drywall & Building Plaster

Global Flooring

Global Housing

Global Paint & Coatings

Global Prefabricated Housing

Moulding & Trim

Outdoor Furniture & Grills

Prefabricated Housing

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Adhesives & Sealants: United Kingdom

Cement: Europe

Construction: United States

Countertops: Canada

COVID-19 Market Impact Analysis

Furniture & Furnishings: United States

Global Demographics

Global Macroeconomy

Hard Surface Flooring: United States

Industrial Fasteners: Europe

Motor Vehicles: Europe

Paint & Coatings: Europe

Plumbing Fixtures & Fittings: Europe

Siding: Europe

Wood Flooring: United States

Wood Millwork: United States

Freedonia Custom Research

Trade Publications

CabinetMaker+FDM

Floor Covering News

About This Report

Kitchen & Bath Business

Kitchen & Bath Design News

National Floor Trends

Wood Based Panels International

Wood Products Magazine

WoodIQ

Woodworking Network

Agencies & Associations

APA – The Engineered Wood Association

British Laminate Fabricators Association

Composite Panel Association

Eurostat

International Committee of the Decorative Laminates Industry

International Monetary Fund

International Organization for Standardization

Organisation for Economic Co-operation and Development

United Nations Comtrade

World Bank

World Floor Covering Association