

Positioning in the market

Our strategy to convince customers worldwide as a complete supplier established itself in 2011. Increasingly more often plant operators will inquire about our complete range of products including front-end machinery, energy plants, dryers, forming and press lines, as well as finishing line equipment.

A complete particleboard plant underwent acceptance testing in 2011 at Metro Particle /Thailand: next to the centerpiece, the ContiRoll® press, the scope of supply included the planning and engineering, the energy plant, the wood preparation technology, the dryer, the resin application and blending system, the cooling and stacking line, the storage system, and the finishing line including sanding line and two-pass-saw system.

According to our "all from one source" principle, we received an order for a wood-fiber insulation board plant in 2011: The Pavatex Group ordered a complete plant for its location Golbey Cedex / France. Here we have distinguished ourselves as the only manufacturer for 8.5' wide plants. The order volume for Pavatex starts with the engineering by Siempelkamp and also includes the complete process technology ranging from the refiner to the packaging, the complete installation and the steel structure, the flexible blending system units, the pre-heater system ContiTherm®, a stacking line, the finishing line and the process control system Prod-IQ®.

The increasingly stronger integration of our Italian subsidiary CMC Texpan as well as Hombak plays a role in closing Siempelkamp's service chain: Both companies have been even more integrated into the technology, production and innovation pool of the Group and provide products for closing the service chain in the area of front-end technology. Our customers benefit from a complete range of products from the areas of debarking, milling and crushing, storing, dosing, cleaning, screening, particle separating, and resin application and blending of strands, chips, and fibers.

The constant expansion of our service chain is also documented in the orders of our subsidiaries: Siempelkamp Energy Systems GmbH received six orders for energy systems, Büttner Gesellschaft für Trocknungs- und Umwelttechnik GmbH sold ten dryer systems. With the start-up of a pellet plant for Enviva, USA, Büttner also documents an important positioning in a market with a promising future.

Outlook

After the boost in investment in 2010, the wood-based materials industry has reached calmer waters again in 2011. Due to the economic stagnation in Europe as well as the slight decline in the economic output, we expect a worldwide decrease in new investments for 2012. Replacement investments and investments in certain niche areas will play a bigger role.

After investments were made in the areas of MDF and OSB production, we now see an increase of investments in the particleboard market in Eastern Europe, Russia, and the former CIS countries. Great importance is still attached to the politically supported financing concepts which are important for the implementation of the projects.



The production area of Siempelkamp Maschinenfabrik



Separator



Energy plant

In South America Brazil will continue to be the locomotive in the western hemisphere in 2012 and establish additional capacities for MDF and particleboard production. However, a consolidation in the sector can be expected.

For Turkey we predict moderate growth despite the start-up of additional capacity during the year.

Western Europe will be characterized by investments in niche products.

The government-subsidized investment activities in China are decreasing. After an immense expansion in MDF production we are now recording an increase in particleboard capacities. We expect no new investments for North America in 2012.



Complete plants for the
wood-based panel industry