



International Committee of the Decorative Laminates Industry

## EUROPEAN HPL SUMMIT 2024

### From societal trends to new material properties: knowledge exchange in the HPL industry at the highest level

**Frankfurt am Main, 29/10/2024.** The European high-pressure laminates (HPL) industry is at a crucial moment. While the HPL market is back on a clear growth trajectory, recording an 8.1% increase in production in the core HPL board business last year<sup>i</sup>, the industry is facing greater challenges than ever before, with the weakness of the European economy clouding the future prospects of the HPL industry due to high dependence on the EU single market. This is shown by the market figures published by the ICDLI on the occasion of the EUROPEAN HPL SUMMIT in Porto.

After a significant decline in 2022 (-13.6% compared to 2021), the production output of HPL manufactures in Europe recovered significantly last year. In 2023, the companies included in the ICDLI survey produced a total of 293 million sqm of decorative laminates, which corresponds to a strong increase of 6.9% compared to 2022. The core business with HPL panels in particular grew above average by +8.1% compared to the previous year. “The prospects for market growth depend heavily on economic developments of the EU market and the resulting price pressure, which has the potential to reduce consumer demand for HPL. With a market share of over 80 percent, the EU single market is and remains by far the most important sales market for European HPL manufacturers”, says Miguel Nogueira (SURFORMA), President of the ICDLI.

#### Variety of topics, intensively discussed

The EUROPEAN HPL SUMMIT is the most important industry meeting bringing together HPL manufacturers, representatives of the supply chain and industry experts from all over Europe. With over 80 participants, the ICDLI underlines the importance of the three-day event as a central event for exchange, knowledge transfer and networking. In addition to the presentation of current market figures and an outlook on market developments, the two-day lecture program focused on the topics of sustainability, employer branding, design and technical developments. **Dr. Oliver Balch**, a British author and freelance writer at Reuters, The Guardian and Financial Times who specializes in business and international affairs, began by focusing on the

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sustainability challenges for the European economy and its impact on the HPL industry as well as general societal risks – on global and European level – for business and social cohesion. The two human resources experts from Porto **Joana Castro Pereira** (Peppermint) and **Elvira Cardoso** (Soul Temple) have looked at the opportunities and challenges of cross-generational workforces. Success in modern workplaces is the ability to integrate diverse generational perspectives, unlock collective strengths, and create a culture where every contribution is recognized and valued. Design trends in the hotel industry and the requirements of hotel furnishings for HPL were the focus of the presentation by **Pilar Paiva de Sousa**, managing director of the architectural firm PPS. Following on perfectly from this, **Patrick Ostheimer** from P-O-I.Design presents the requirements for the interior design of cruise vessels and shows the innovative use of HPL in shipping, calling for a strong cooperation between HPL manufacturers and designers. The first day of lectures ended with two presentations of new technical developments. Firstly, **Philip Haller** and **Florian von Kuczkowski** from Upco Srl - German Branch presented a new coating process for HPL, an innovative approach for new versatile product properties. Then **Fernando Cunha**, Executive Director of Fibrenamics, closed the first day of lectures with some insights about a process for producing fibers from waste biofibers made from natural polymers.

The second day of lectures began with a presentation by **Rui Henrique Alves** from the School of Economics and Management from University of Porto and former Head of the ECOFIN Unit (“Núcleo de Economia e Finanças”) at the Permanent Representation of Portugal to the European Union. He looked at the development and challenges of the Southern European economy, took a critical view of the focus on tourism as a growth driver and was quite sceptical with regard to the future prospects of the overall European economy. **Markus Höchli**, spokesman for the ICDLI Market Research Group, presented the current data for the European HPL market, traditionally collected and published by the ICDLI. **Alexander Kubo**, Managing Partner at MP Corporate Finance in Vienna, then addressed market drivers and the increasing consolidation of the HPL market in Europe. His conclusion: The HPL industry will experience accelerated consolidation in the coming years. BASF approach to sustainable amino resins and thus a greener HPL supply chain was the focus of the lecture by **Dr. Ralph Lunkwitz** from BASF. The company aims to achieve net-zero CO<sub>2</sub> emissions worldwide by 2050. To this end, BASF has taken far-reaching measures that will reduce absolute CO<sub>2</sub> emissions by around 50 percent by 2030 compared to 2018 levels,

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before reaching their final goal in 2050. Last but not least, two innovative products made of HPL were in the spotlight of the summit. **Dano Waldburger** from Timbaer presented the skis made of HPL – extravagant and high-quality – that he helped develop, while **Claudia Costa** from SURFORMA demonstrated the use of intelligent laminates – such as thin heaters embedded in the HPL or integrated lighting systems.

ICDLI President Miguel Nogueira was highly satisfied at the end of the three-day summit in his hometown: “The EUROPEAN HPL SUMMIT 2024 was not only the most well-attended summit ever, but also showed the challenges facing our industry precise and to the point. The HPL industry must be enabled to achieve climate targets while remaining competitive. Excessive rules and requirements hinder European companies in global competition. Europe must therefore focus on better implementing existing laws instead of continually expanding the regulatory framework”.

The next EUROPEAN HPL SUMMIT will take place on 22-24 October 2025 in Marseille, France.

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Group photo European HPL Summit 2024 in Porto at river Douro

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### **About the ICDLI**

*The ICDLI International Committee of the Decorative Laminates Industry is the association of European HPL manufacturers and their suppliers. It is the European voice of the HPL industry and an important interface to the media, politics, society and science.*

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<sup>i</sup> according to the information provided by ICDLI member companies plus further sources

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