MDF AND PARTICLEBOARD MANUFACTURERS ASSOCIATION (YOMSAD)

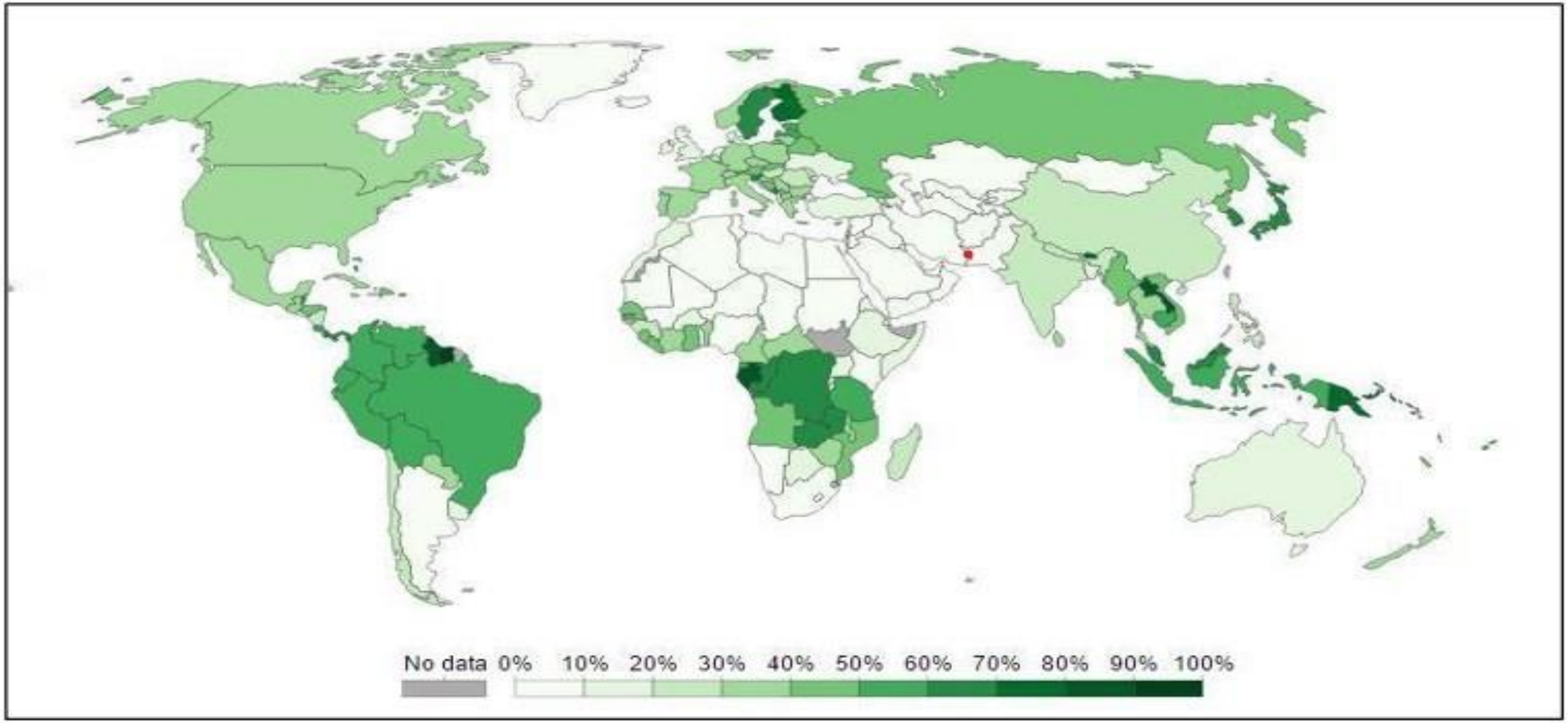
The Future of the Forest Products Industry / 2026

TEVFİK DEDEBAŞ

17 September 2026

MDF ve YONGA LEVHA SANAYİCİLERİ DERNEĞİ

Distribution of Forest Area as a Share of Total Land Area Worldwide



Kaynak: The World Bank-WDI, 2015.

There are 4 Billion ha of Forest Area Worldwide. (FAO-2024)

More than half of the total area is located in the top 5 countries. (Forest Areas)		
1	Russian Federation	815 Million ha
2	Brazil	497 Million ha
3	Canada	347 Million ha
4	USA	310 Million ha
5	China	220 Million ha
42	Türkiye	**23.6 Million ha**

MDF ve YONGA LEVHA SANAYİCİLERİ DERNEĞİ

World Roundwood Production: 1.96 Billion m³ (FAO-2024)

	Regional Distribution of Roundwood Production	
1	Europe (Including Russia)	591 Million m³
2	Asia-Pacific	545 Million m³
3	North America–Canada	434 Million m³
4	Latin America–Caribbean	307 Million m³
5	Africa	79 Million m³
	TOTAL	**1.960.000.000 m³**

MDF ve YONGA LEVHA SANAYİCİLERİ DERNEĞİ

World Roundwood Production (FAO-2024)

	Top 5 Countries with Combined Global Production Exceeding 1 Billion m^3	
1	USA	319 Million m^3
2	Russian Federation	210 Million m^3
3	Brazil	190 Million m^3
4	China	202 Million m^3
5	Canada	110 Million m^3
	TOTAL	**1 Billion m^3**

MDF ve YONGA LEVHA SANAYİCİLERİ DERNEĞİ

Global Forest Products Industry Exports Amount to USD 486 Billion. (FAO-2024)

	İhracatta Ürün Dağılım	
A-	190 Milyar USD (%39)	Kağıt Ürünleri
B-	156 Milyar USD (%32)	Ağaç Ürünleri
C-	95 Milyar USD (%19)	Masif Mobilya
D-	45 Milyar USD (%10)	Diğer

Top 5 Exporting Countries	
1-	China
2-	Brazil
3-	Sweden
4-	Vietnam
5-	Poland

* More than 50% of total exports are made by the top 5 countries.

MDF ve YONGA LEVHA SANAYİCİLERİ DERNEĞİ

General Directorate of Forestry: Program / Actual

		ORMAN GENEL MÜDÜRLÜĞÜ	
		2024	2025
Dikili	Program	32.000.000 m³	34.000.000 m³
	Gerçekleşme	30.200.000 m³	33.000.000 m³
Yapacak Odun	Program	16.585.000 m³	17.588.000 m³
	Gerçekleşme	13.970.000 m³	15.011.000 m³
Lif Yonga Odunu	Program	9.000.000 m³	9.600.000 m³
	Gerçekleşme	9.053.000 m³	10.139.000 m³
Endüstriyel Odun	Program	25.600.000 m³	27.300.000 m³
	Gerçekleşme	23.000.000 m³	25.150.000 m³
Dikili Satış	Program	10.000.000 m³	12.000.000 m³
	Gerçekleşme	6.850.000 m³	8.000.000 m³

Satış Geliri (OGM)	Program	60 Milyar TL.	80 Milyar TL.
	Gerçekleşme	55,6 Milyar TL.	75 Milyar TL.

Forest Products Industry Installed Capacity Wood Raw Material Requirements (2025)

	RAW MATERIAL REQUIREMENTS BY SECTOR	
1-	Wood-Based Panel Industry	17.500.000 m^3
2-	Pallet and Packaging Industry	8.000.000 m^3
3-	Mine Prop Industry	500.000 m^3
4-	Plywood Industry	500.000 m^3
5-	Paper Industry (OYKA)	750.000 m^3
6-	Construction Industry	5.000.000 m^3
	TOTAL	**32.500.000 m^3**

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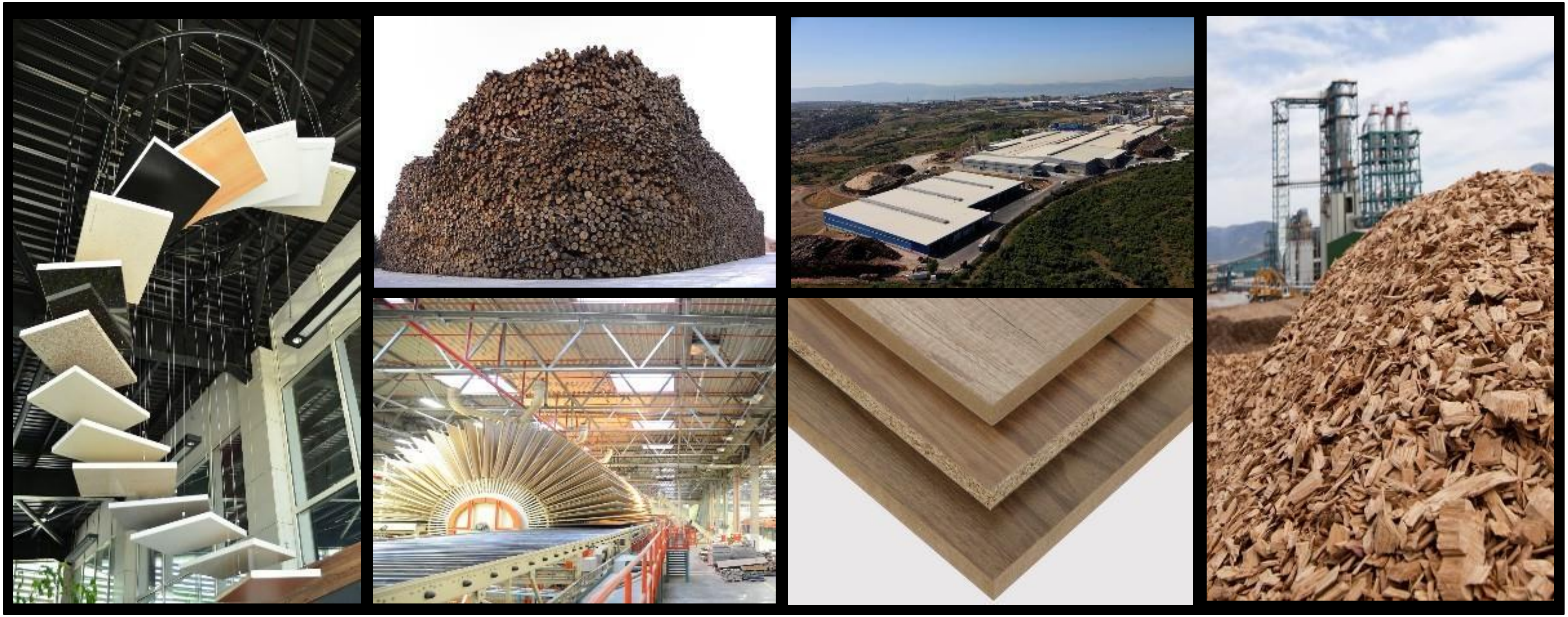
6-	Construction Industry	5.000.000 m^3
	TOTAL	**32.500.000 m^3**

	RAW MATERIAL SOURCES BY SECTOR	
1-	OGM Industrial Wood Production	25.150.000 m^3
2-	Industrial Waste-Private Poplar Wood-Imports-*	4.650.000 m^3
3-	Capacity Utilization GAP (deficit)	2.700.000 m^3
	TOTAL	**32.500.000 m^3**

* Industrial Waste (2,200,000 TONNES) - Imports (1,000,000 TONNES) - Poplar Wood (700,000 TONNES)

YONGA LEVHA
İLERİ DERNEĞİ

Türkiye Wood-Based Panel Industry



2025

MDF and Particleboard Manufacturers Association

MDF ve YONGA LEVHA
SANAYİCİLERİ DERNEĞİ

INDUSTRY SIZE

Türkiye Wood-Based Panel Industry

As the Türkiye Wood-Based Panel Industry, we produce particleboard, melamine-faced particleboard, MDF, melamine-faced MDF, laminate flooring, OSB and other value-added products required by the furniture, decoration and construction industries.

* 75% of production is consumed by the furniture industry, 12% by construction and 13% by the decoration industry.

MDF and Particleboard Manufacturers Association

- ✓ **Established: 1985**
Number of Member Companies: 20
Production Locations: 31

- ✓ **Total Installed Capacity in 2025: 15.5 million m³/year**
Wood Raw Material Requirement in 2025: 18 million tonnes/year*
Actual Production in 2024: 11.2 million m³/year
Wood Raw Material Consumption in 2024: 13.4 million tonnes/year

* If operating at full capacity

MDF ve YONGA LEVHA SANAYİCİLERİ DERNEĞİ

Türkiye Furniture, Wood and Wooden Products Industry

USD 21.3 billion industry size (2023)

500,000 Direct Employment

1,000,000 Indirect + Direct Employment

USD 6.2 billion exports (2024)

Global Ranking in Wood-Based Panel Production

Global particleboard and MDF production is 215 million m³.

Türkiye accounts for 5% of global production, while Turkish producers account for 6.3%.

Türkiye accounts for 13% of global laminate flooring production, while Turkish producers account for 17%.

Rank	PB+MDF PANELS million m³ / year	PARTICLEBOARD (PB) million m³ / year	MDF million m³ / year	LAMINATE FLOORING million m² / year
1	CHINA 92.4	CHINA 43.9	CHINA 48.5	CHINA 200
2	TÜRKİYE 11.6	RUSSIA 7.4	TÜRKİYE 7	GERMANY 195
3	RUSSIA 11.3	GERMANY 5.1	BRAZIL 5.3	TÜRKİYE 115
4	THAILAND 9.4	THAILAND 4.9	THAILAND 4.5	RUSSIA 90
5	BRAZIL 8.5	TÜRKİYE 4.6	RUSSIA 3.8	USA 90

Source: EPF 2023, MUNKSJÖ 2022

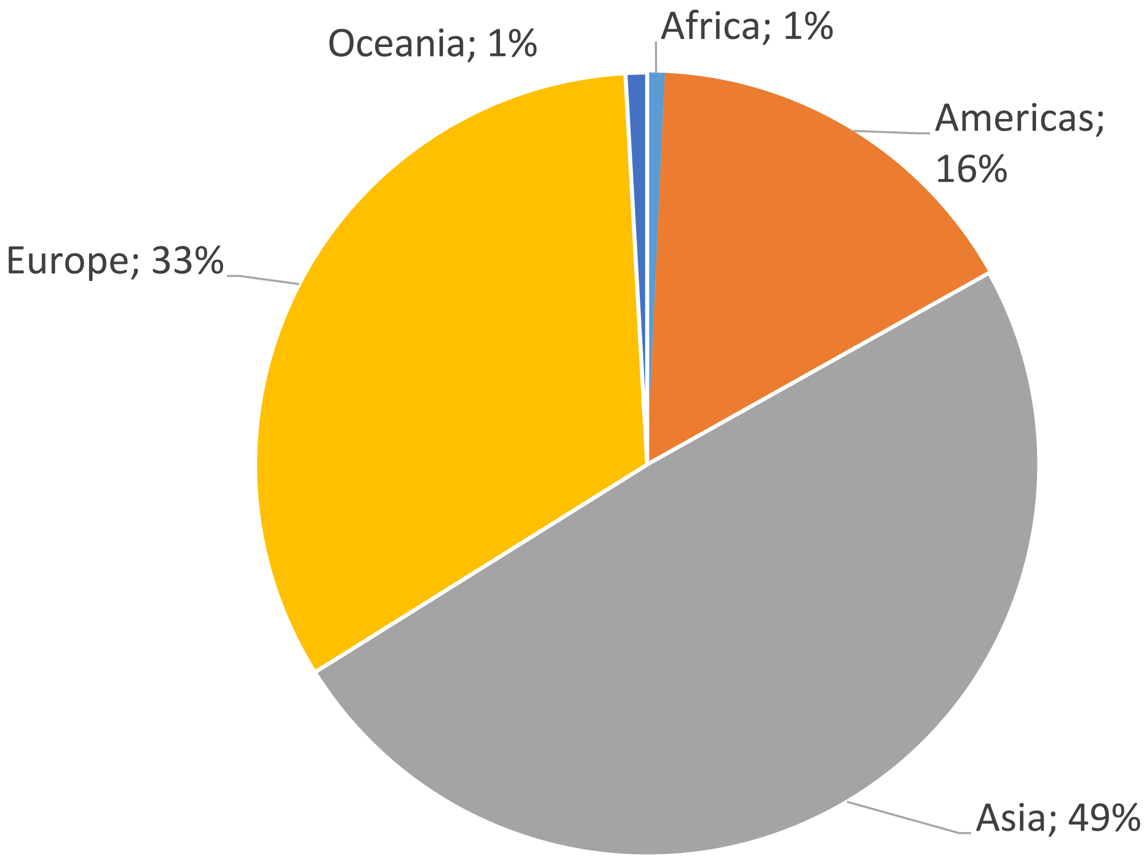
MDF ve YONGA LEVHA SANAYİCİLERİ DERNEĞİ

Distribution of Global MDF and Particleboard Production (2023)

TOTAL PRODUCTION
215 Million m³

TÜRKİYE*
5%

TURKISH PRODUCERS**
6.3%



Source: FAOSTAT, 2023

*Türkiye's share of the global economy was 1% in 2023.
** Includes the share of Turkish companies producing abroad.

MDF ve YONGA LEVHA SANAYİCİLERİ DERNEĞİ

Distribution of Global Laminate Flooring Production (2022)

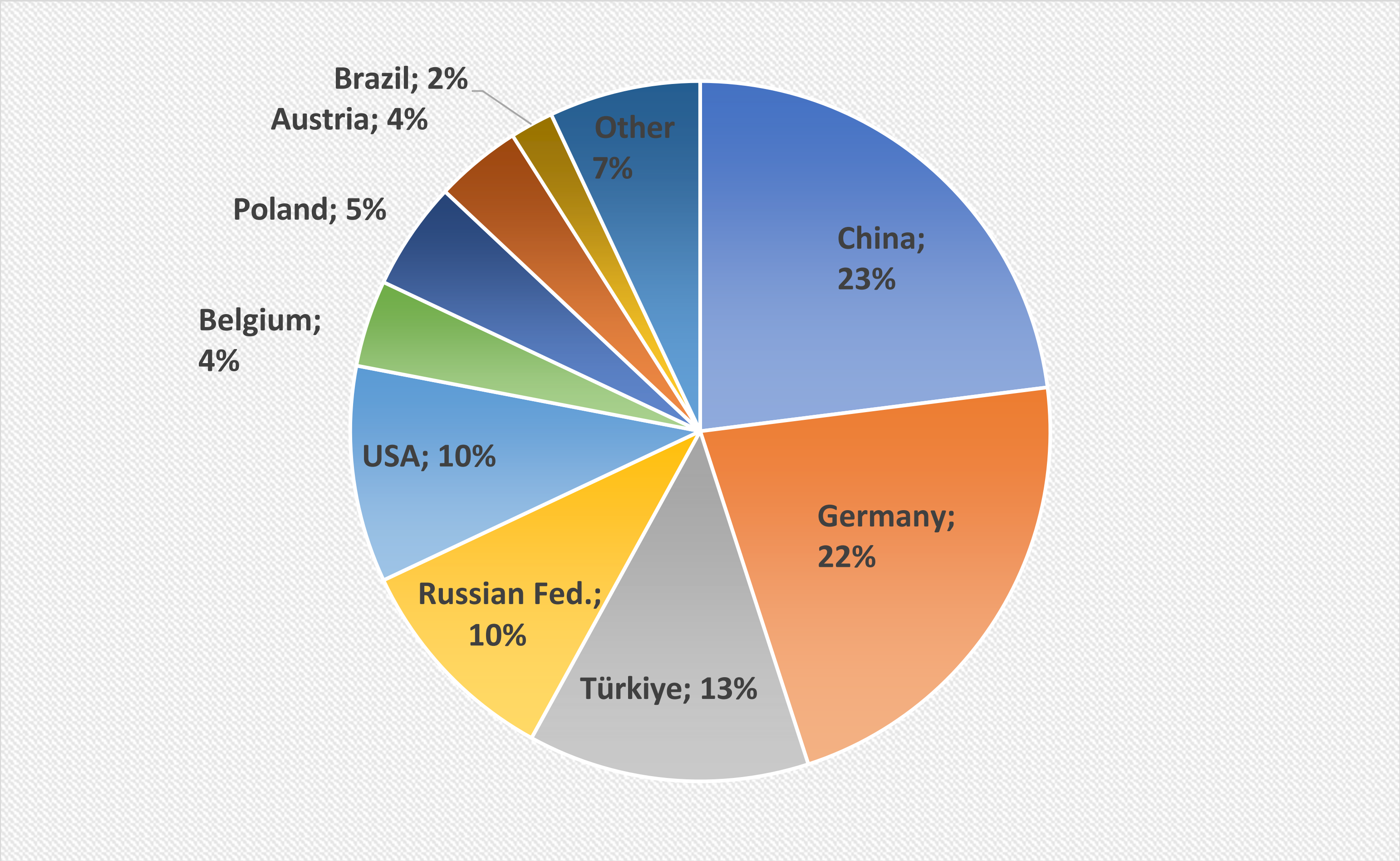
TOTAL PRODUCTION

880 Million m²

TÜRKİYE 13%

TURKISH PRODUCERS* 17%

Source: Munksjö 2022



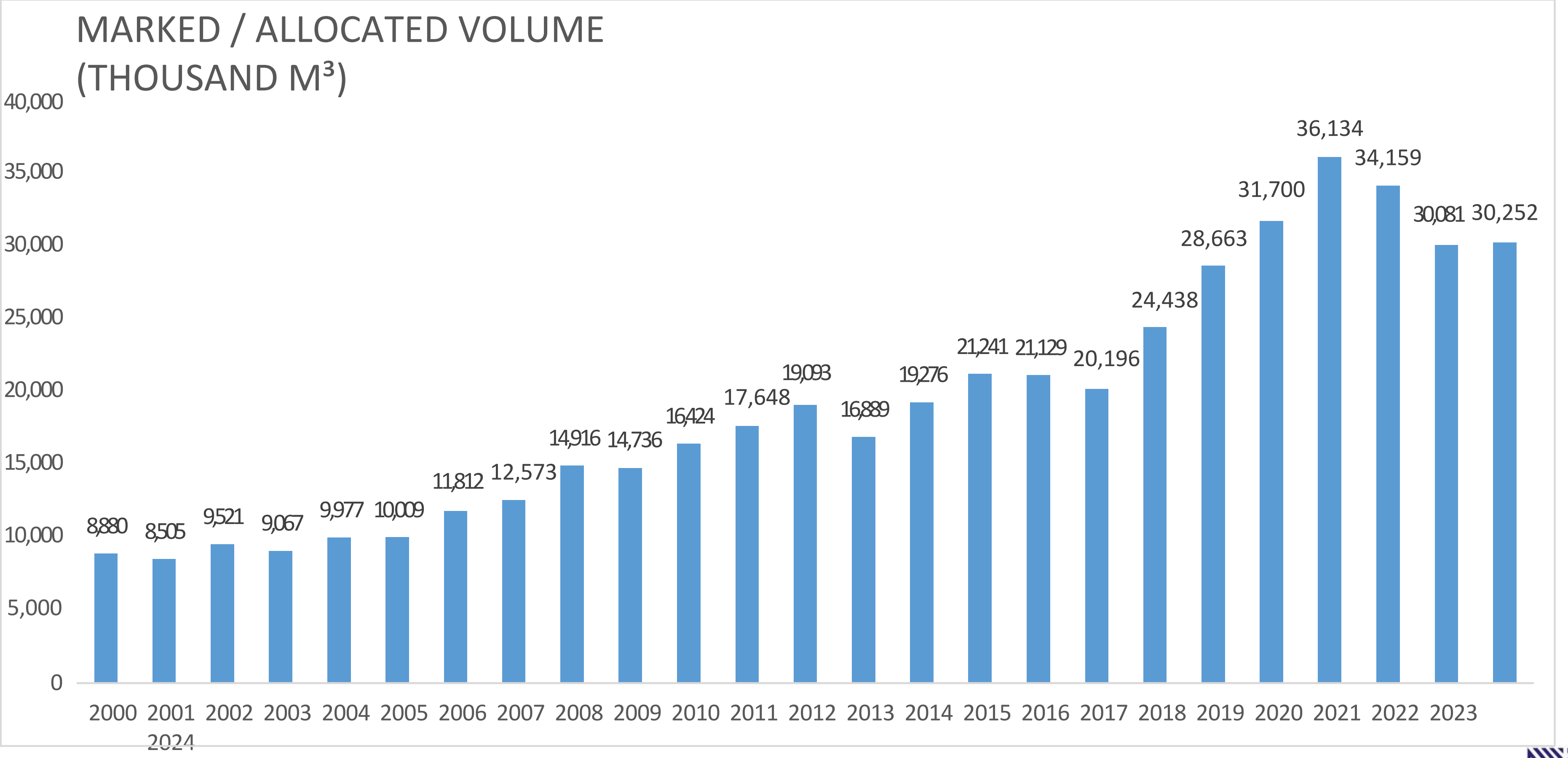
* Production share includes our global producers operating abroad.

MDF ve YONGA LEVHA SANAYİCİLERİ DERNEĞİ

THE INDUSTRY’S GROWTH JOURNEY 2003-2024

OGM’s Contribution to Industry Growth

The increase in OGM production has been the biggest driving force behind the growth of the furniture and wood industries.



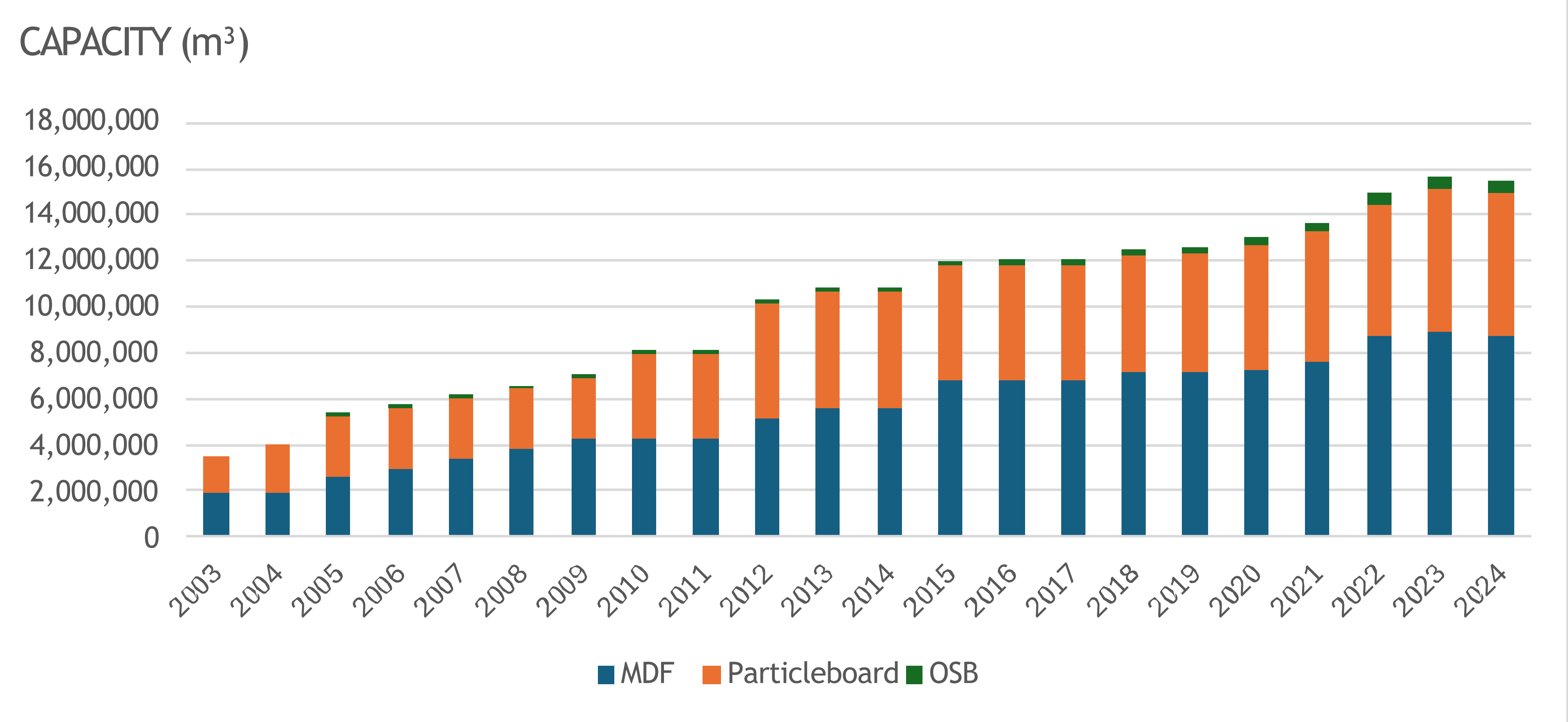
Source: OGM

MDF ve YONGA LEVHA SANAYİCİLERİ DERNEĞİ

Especially after 2001, the spread of natural gas in cities also enabled fuelwood to be redirected as a resource for the industry.

Increase in Panel Industry Capacity

Total production capacity in our industry has increased by approximately 7 times compared with 2000, exceeding 15 million m³.

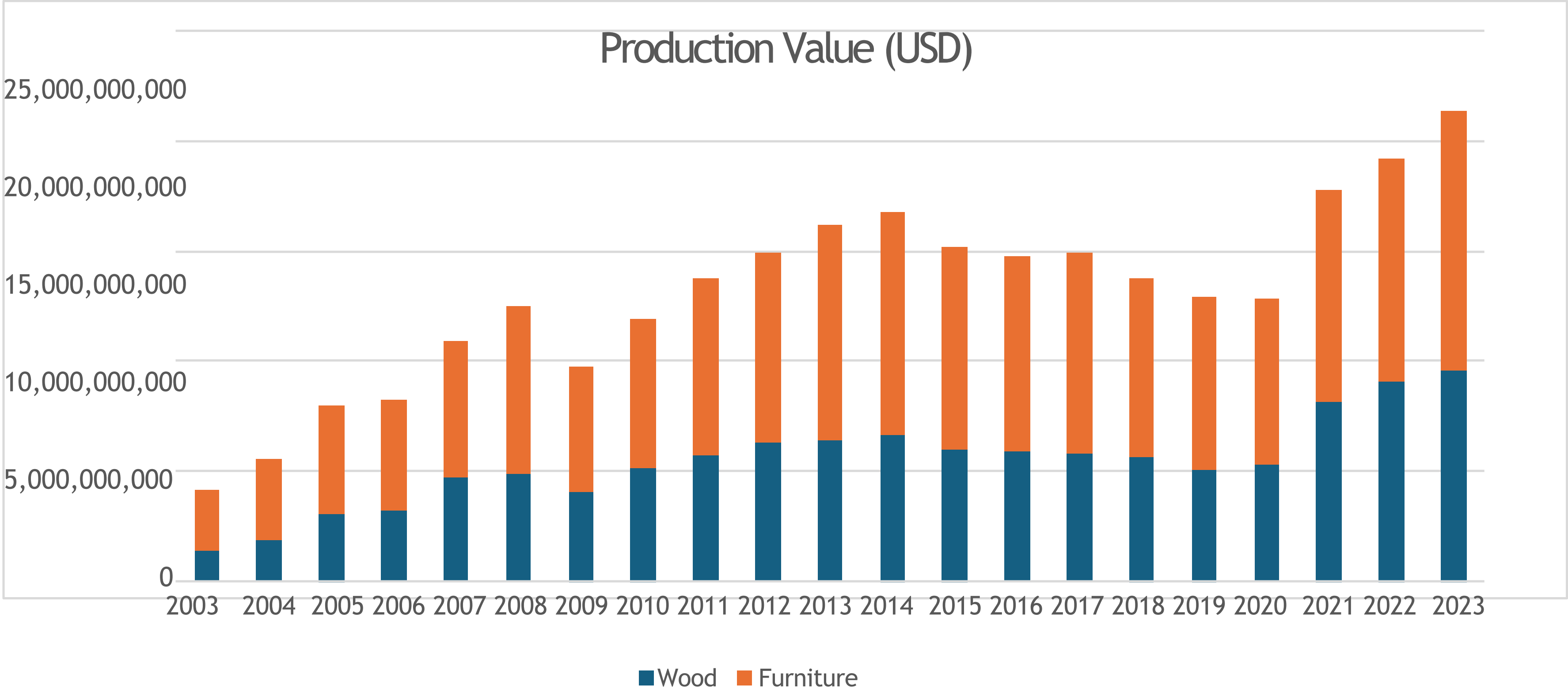


MDF ve YONGA LEVHA SANAYİCİLERİ DERNEĞİ

Source: YOMSAD

Rising Production in the Furniture and Wood Industry

Production value, which was approximately USD 4 billion in 2003, increased more than fivefold to USD 21 billion by 2023.

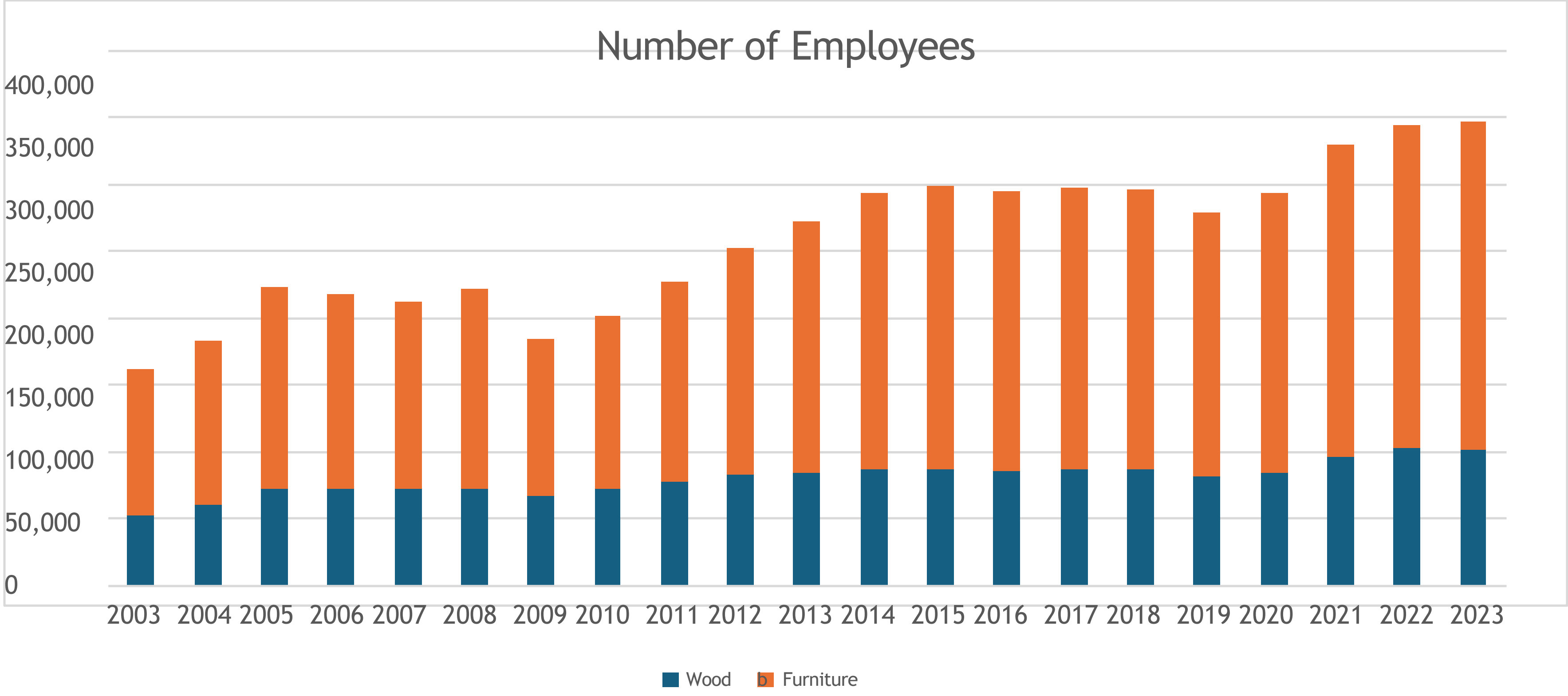


MDF ve YONGA LEVHA SANAYİCİLERİ DERNEĞİ

Source: TURKSTAT, Annual Industry and Service Statistics

Employment Growth in Parallel with Capacity Growth

Following the growth of our industry and the increase in the number of workplaces, employment has risen by approximately 2.3 times compared with 2003.



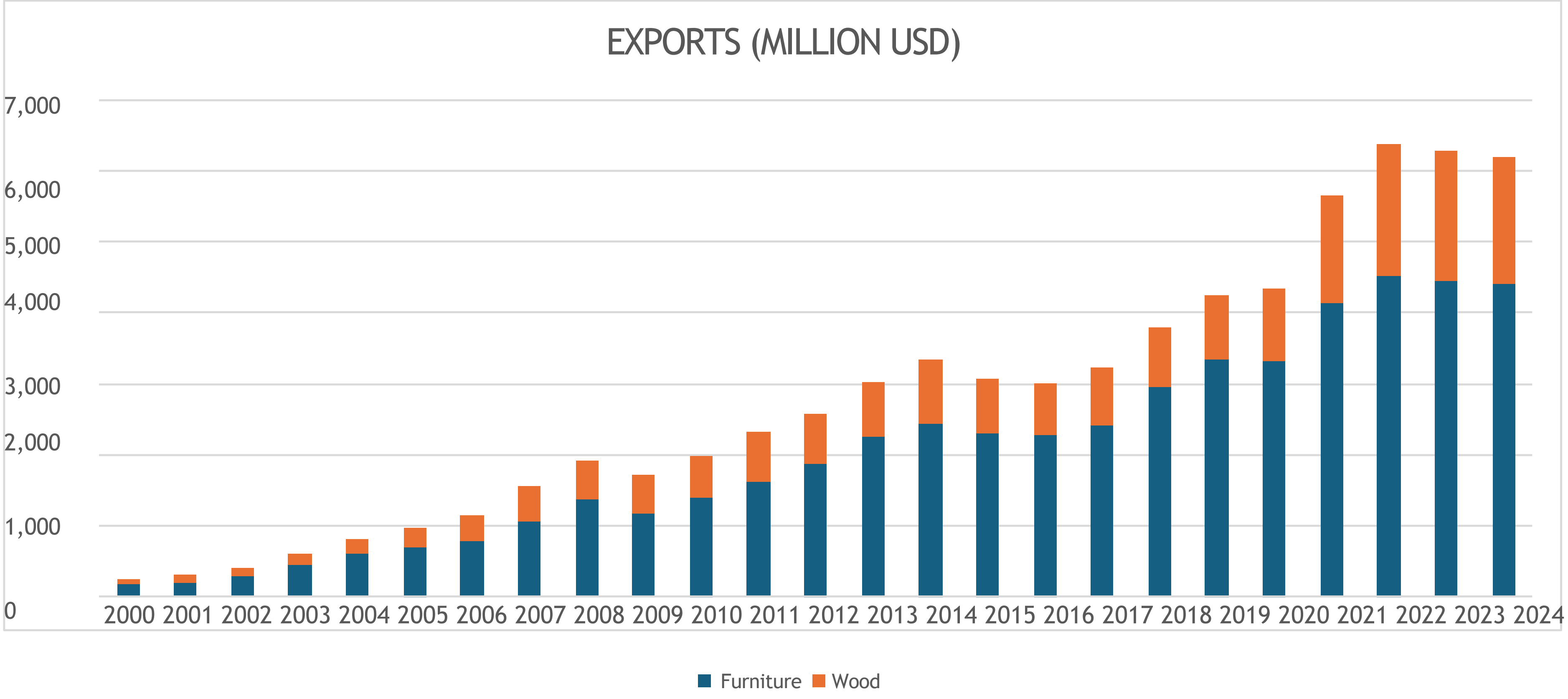
Source: TURKSTAT, Annual Industry and Service Statistics

MDF ve YONGA LEVHA SANAYİCİLERİ DERNEĞİ

When timber harvesting, logistics, and furniture and panel sales/retail organizations are included, total employment is estimated to reach 1 million

Rising Exports of the Furniture and Wood Industry

Our exports increased twelvefold from approximately USD 0.5 billion in 2003 to more than USD 6 billion.

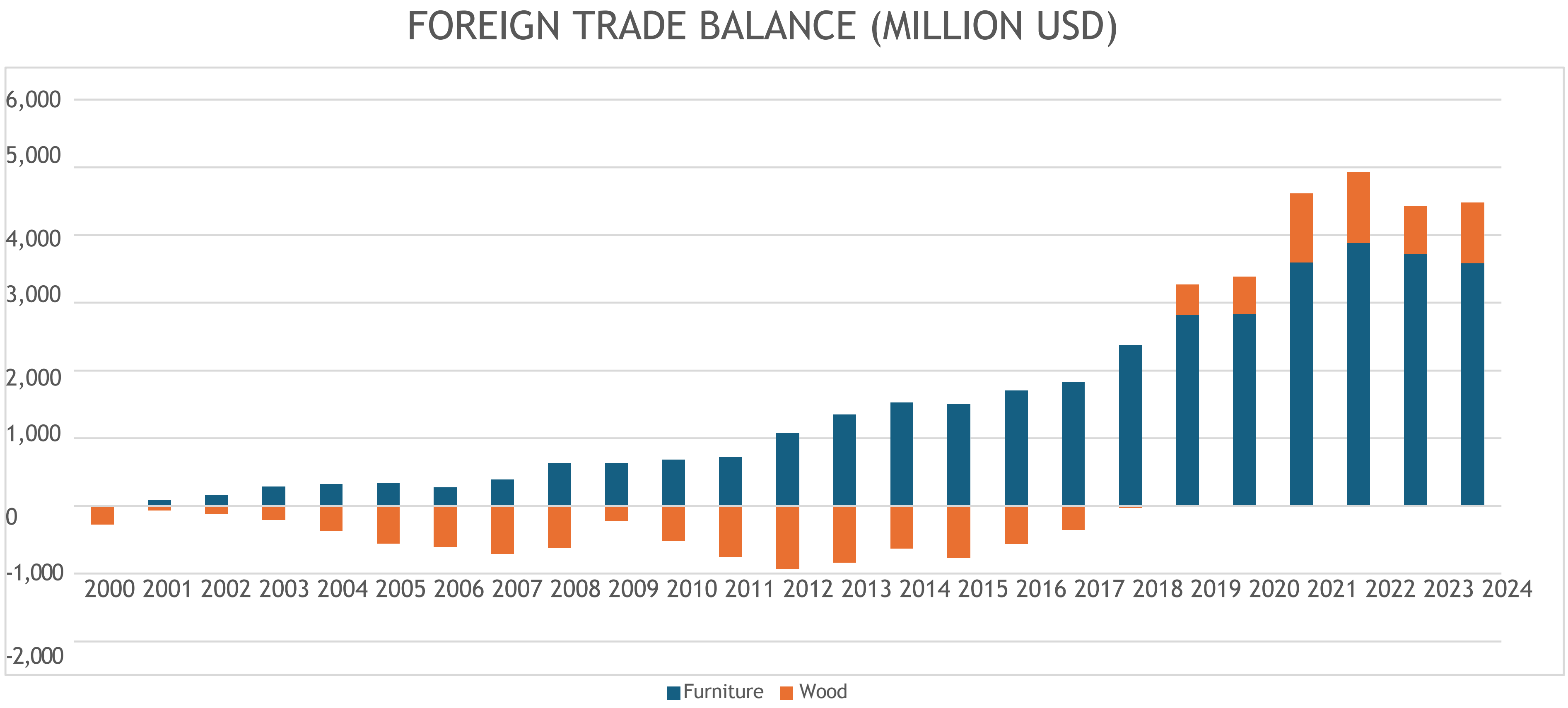


MDF ve YONGA LEVHA SANAYİCİLERİ DERNEĞİ

Source: TURKSTAT

From a Foreign Trade Deficit to a USD 5 Billion Surplus

Our industry, which previously ran a deficit, now generates a USD 5 billion surplus thanks to rising exports, contributing to Türkiye's efforts to reduce the foreign trade deficit.



MDF ve YONGA LEVHA SANAYİCİLERİ DERNEĞİ

Source: TURKSTAT

MEMBERS OF THE MDF AND PARTICLEBOARD MANUFACTURERS ASSOCIATION (YOMSAD)

Members of the MDF and Particleboard Manufacturers Association

AGT

Balkanlar A.Ş.

www.balkanlarparke.com

beypan entegre

Çamsan entegre

MDF Çamsan Ordu Ağaç Sanayi ve Tic. A.Ş.

KOLÇAM

Divapan

GENTAŞ

İLKER ENTEGRE

KASTAMONU

koyuncuoğlu ŞİRKETLER TOPLULUĞU

kronospan

kupeliler

ORMA 1970

selolit

SUMAŞ SUNİ TAHTA ve MOBİLYA SANAYİ A.Ş.

STARWOOD ORMAN ÜRÜNLERİ SANAYİ A.Ş.

TEVERPAN AĞAÇ SANAYİİ A.Ş.

VEZİRKÖPRÜ ORMAN ÜRÜNLERİ VE KAĞIT SAN. A.Ş.

YILDIZ ENTEGRE

Türkiye Wood-Based Panel Industry Installed Capacity Data (2024)

Companies	PARTICLEBOARD	OSB	MDF	Grand Total
Kastamonu Entegre Ağaç San.ve Tic. A.Ş.	2,053,262		1,768,243	3,821,505
Yıldız Entegre Ağaç Sanayi ve Ticaret A.Ş.	1,461,995		2,212,605	3,674,600
Starwood Orman Ürünleri Sanayi ve Ticaret A.Ş.	1,263,380		1,400,136	2,663,516
AGT Ağaç Sanayi ve Ticaret A.Ş.			824,373	824,373
Orma Orman Mahsülleri İntegre Sanayi ve Ticaret A.Ş.	710,111			710,111
Kronospan Entegre Orman Ürünleri Sanayi ve Ticaret A.Ş.	61,257	169,849	464,188	695,294
Çamsan Entegre Ağaç Sanayi ve Ticaret A.Ş.			568,920	568,920
Çamsan Ordu Ağaç San. ve Tic. A.Ş.			564,563	564,563
Küpeliler Otomotiv Ambalaj İnşaat Malzemeleri Ticaret ve Sanayi A.Ş.	322,588	232,000		554,588
Teverpan MDF Levha Sanayii ve Ticaret A.Ş.	139,554		386,668	526,222
Vezirköprü Orman Ürünleri ve Kağıt Sanayi A.Ş.	104,665		198,589	303,254
Divapan Entegre Ağaç Panel Sanayi ve Ticaret A.Ş.			193,072	193,072
Beypan Entegre Orman Ürünleri Sanayi ve Ticaret A.ª.			95,847	95,847
Sumaş Sun-i Tahta ve Mobilya Sanayi ve Ticaret A.Ş.		71,690		71,690
Balkanlar Ağaç Sanayi ve Ticaret A.Ş.			64,128	64,128
Koyuncuoğlu San. ve Tic. A.Ş.		63,997		63,997
İlker Entegre Ağaç Sanayi Tekstil İnşaat ve Ticaret A.Ş.	61,257			61,257
Gentaş Genel Metal Sanayi ve Ticaret A.Ş.	40,036			40,036
Selolit Lif Levha Sanayi ve Ticaret A.Ş.			20,525	20,525
Grand Total	**6,218,105**	**537,536**	**8,761,857**	**15,517,498**

Source: YOMSAD

Türkiye Particleboard/OSB and MDF Producers

MDF ve YONGA LEVHA
SANAYİCİLERİ DERNEĞİ

Panel and Furniture Producers in the ISO Top 500 Ranking

Panel Producers

KASTAMONU

YILDIZ ENTEGRE

STARWOOD ORMAN ÜRÜNLERİ SANAYİ A.Ş.

AGT

kronospan

Çamsan entegre

ÇAMSAN ORDU AĞAÇ SANAYİ VE TİC. A.Ş.

Furniture Producers

BELLONA

DOĞTAŞ

yataş GRUP

istikbal

The 2024 ISO Top 500 includes
7 panel and 4 furniture producers.

Panel and Furniture Producers in the ISO Second 500 Ranking

Panel Producers

ASD LAMİNAT

ORMA 1970

GENTAŞ a touch to life

VEZİRKÖPRÜ ORMAN ÜRÜNLERİ VE KAĞIT SAN. A.Ş.

TEVERPAN AĞAÇ SANAYİİ A.Ş.

Furniture Producers

İNCİ MOBİLYA

bambi YATAK SANATI

GÜRKAN

mondi

Together with 5 panel and 4 furniture producers in the 2024 ISO Second 500, Türkiye's 1,000 largest industrial enterprises include 12 panel producers and 8 furniture producers.

*Alphabetical order

Contributions of the Wood-Based Panel and Furniture Industries to the Turkish Economy

- Investments made over the last 20 years have brought some of the world's newest and most modern facilities to our country, making Türkiye a global production hub.

The wood-based panel and furniture industries provide direct and indirect employment for 1 million people.

In previous years, Türkiye met 15–20% of its panel demand through imports. As a result of these investments, panel imports have now fallen to almost zero, while approximately 25–30% of production is exported.

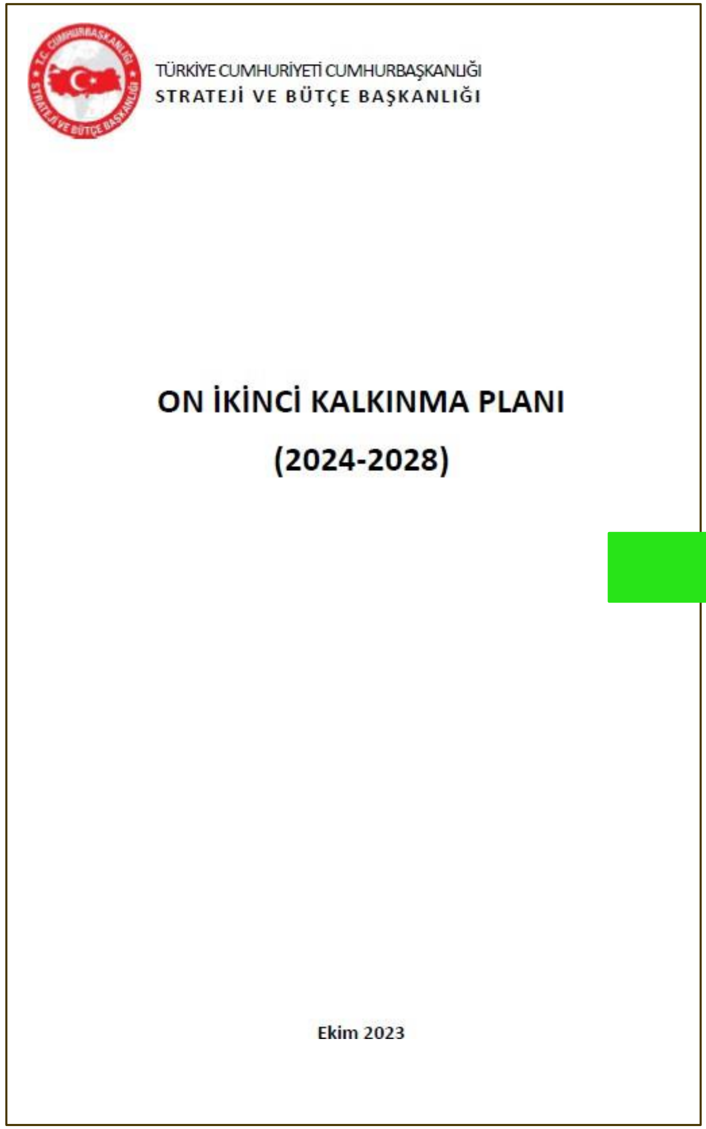
The General Directorate of Forestry's efforts to increase production across all regions, carry out regeneration and especially silvicultural maintenance within the framework of sustainable forestry principles have contributed positively to the industry's development in recent years.

Together, OGM, the Wood-Based Panel Industry and the Furniture Industry have generated a significant net current-account surplus since 2013. In 2022, our industry contributed positively to Türkiye's current account with a net surplus of USD 5 billion.

Our industry makes an important contribution to reducing the current-account deficit, one of the main objectives of the Medium-Term Program (2024–2026), and this contribution can be increased.

Keeping the cost of wood raw material, our industry's main input, at levels comparable with Europe and the USA will strengthen our competitiveness.

Targets in the 12th Development Plan


TÜRKİYE CUMHURİYETİ CUMHURBAŞKANLIĞI
STRATEJİ VE BÜTÇE BAŞKANLIĞI

ON İKİNCİ KALKINMA PLANI
(2024-2028)

Ekim 2023

Companies operating in our industry have begun to become influential global players. The 12th Development Plan aims to strengthen and continue this progress.

500.6. The international activities of our country's companies in the forestry sector will be supported.

501. Forest-based products and services will be diversified with an export focus within the framework of sustainable forest management principles, and the sector's share in the economy will be increased.

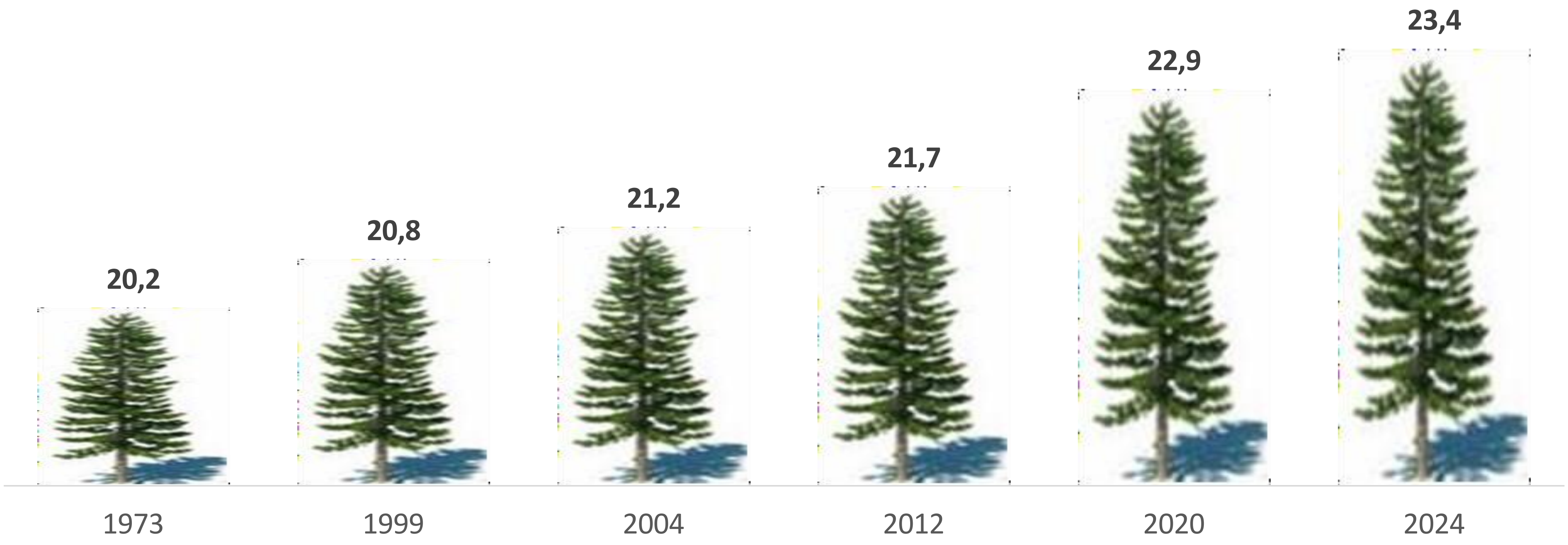
501.7. The use of forest products in sectors that generate greater employment and added value will be increased.

OUR FOREST RESOURCES AND THE INDUSTRY’S WOOD REQUIREMENT

Türkiye's Forest Resources

Wood raw material is the industry's most important input.

Türkiye’s Forest Area (Million ha)



Source: OGM

MDF ve YONGA LEVHA SANAYİCİLERİ DERNEĞİ

Map of Türkiye's Forest Resources

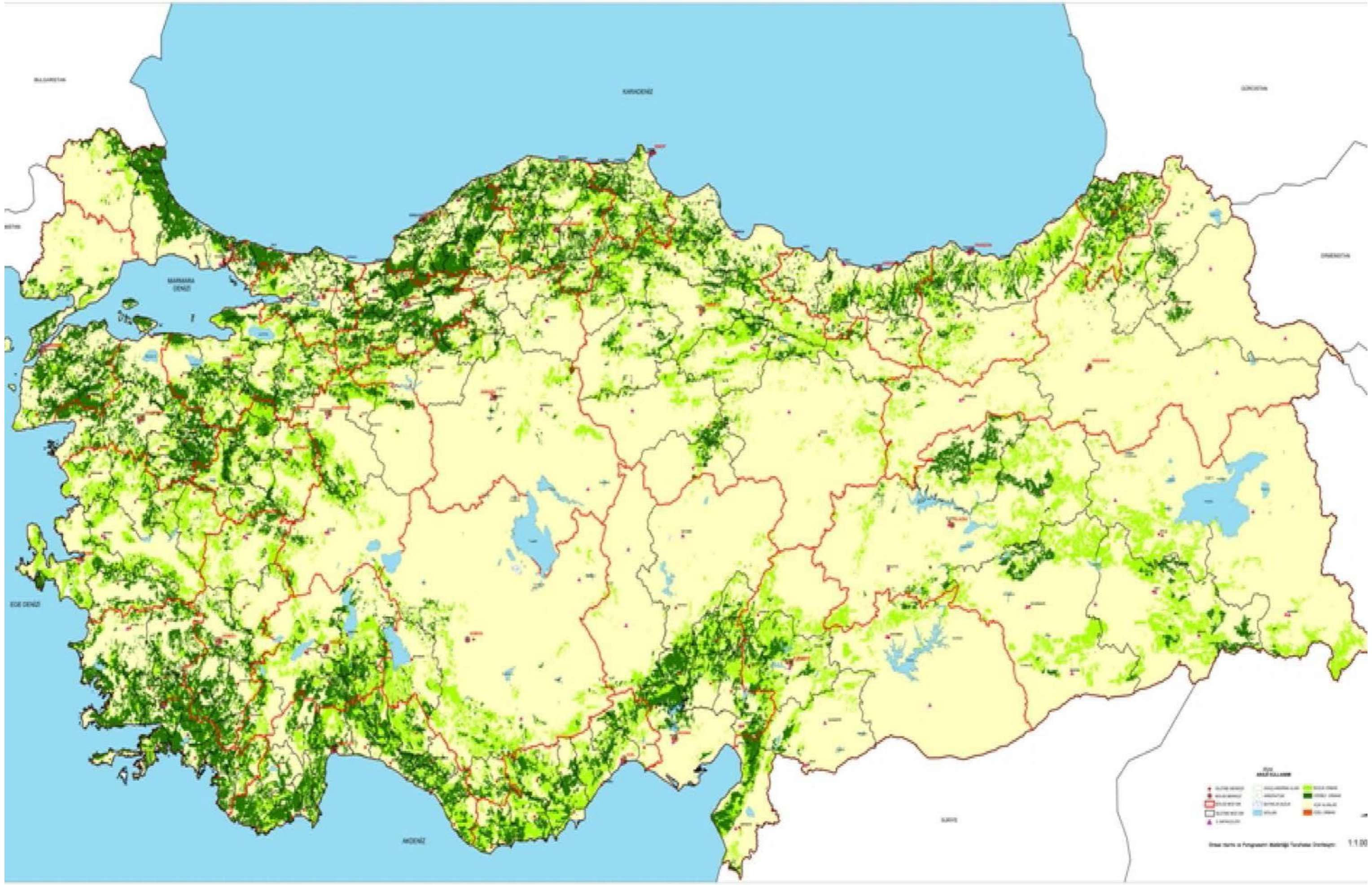
- Our total forest growing stock is 1.8 billion m³, with an annual increment of around 3%.

Türkiye's forest area is 23.4 million ha, corresponding to 29% of the country's land area.

The productive forest area in Türkiye is 13.8 million ha.

Our FSC-certified forest area is 9.5 million ha.

Global forest area is 4 billion ha, corresponding to 31% of the world's land area.



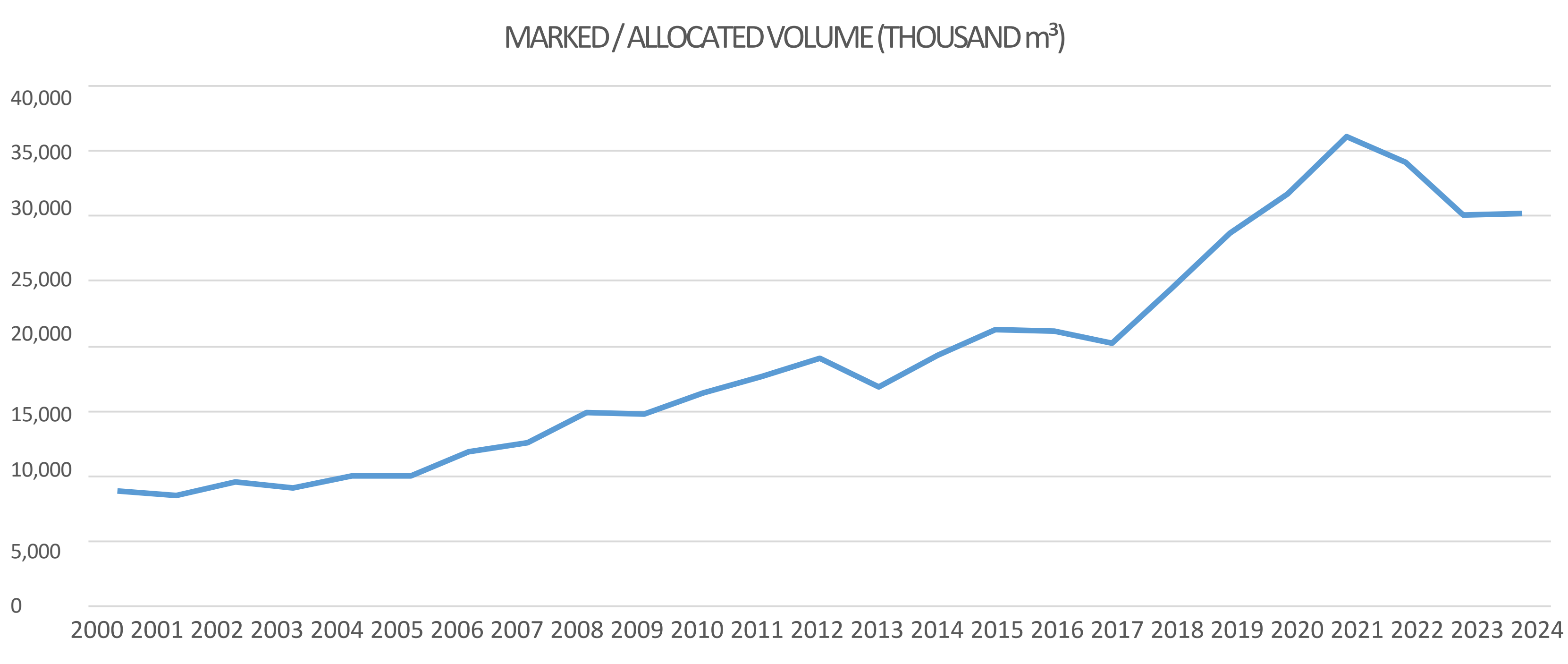
Source: OGM

MDF ve YONGA LEVHA SANAYİCİLERİ DERNEĞİ

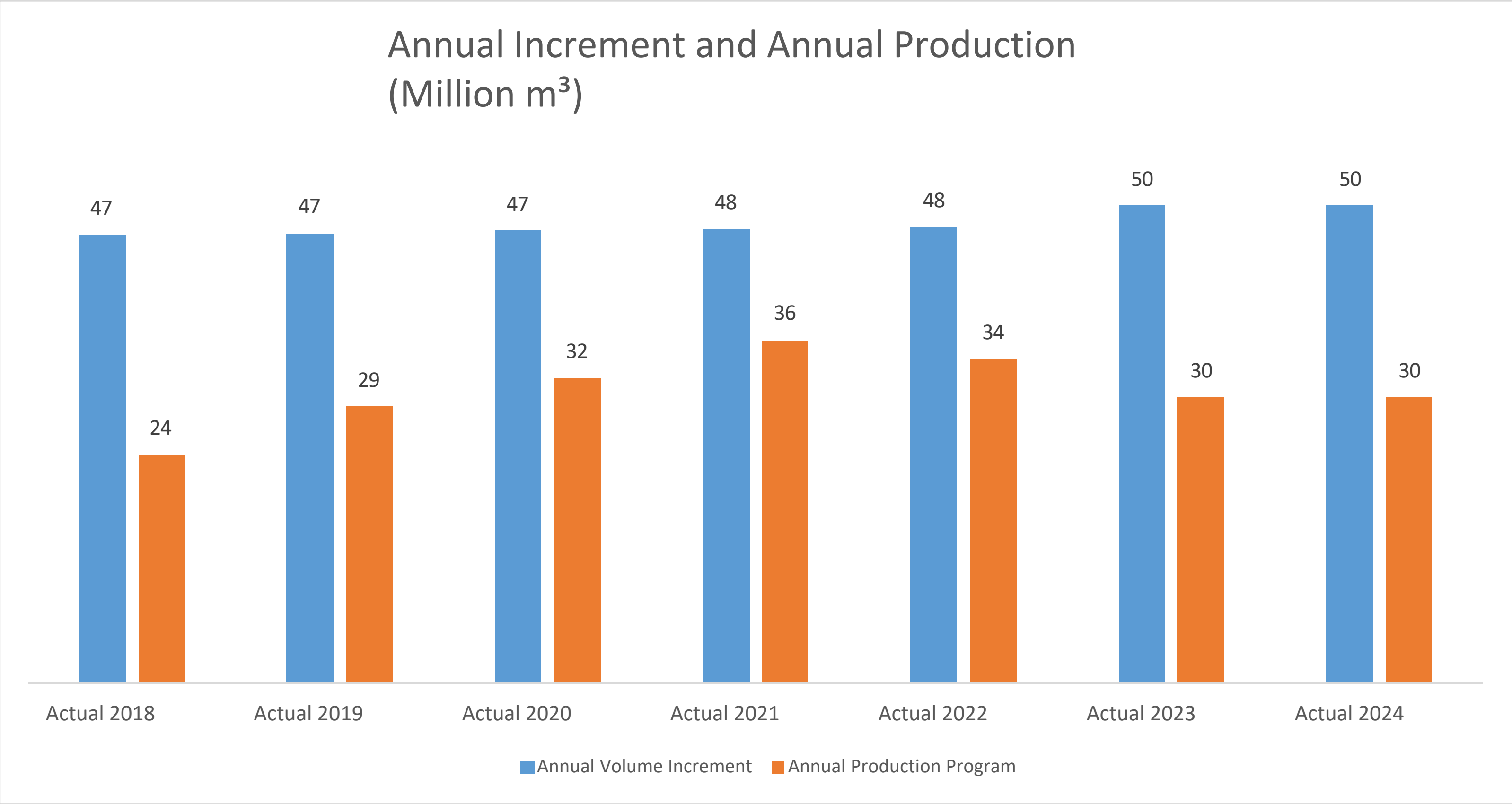
OGM Wood Production

000 m³	Marking (Allocation)	Industrial Wood Total	Fiber & Particle Wood	Industrial Wood Total	Fuelwood
Year	A	B	C	D=B+C	E
2000	8,880	5,939	1,371	7,329	7,861
2001	8,505	6,128	1,362	7,529	7,576
2002	9,521	6,168	1,821	8,005	7,587
2003	9,067	5,235	2,073	7,320	7,816
2004	9,977	5,908	2,330	8,253	8,120
2005	10,009	5,672	2,409	8,100	7,667
2006	11,812	6,308	2,965	9,299	7,004
2007	12,573	6,768	3,265	10,053	6,834
2008	14,916	7,705	3,817	11,541	7,304
2009	14,736	7,417	4,033	11,463	7,428
2010	16,424	7,940	4,608	12,569	7,194
2011	17,648	8,853	4,663	13,532	6,778
2012	19,093	8,989	5,425	14,424	6,433
2013	16,889	8,102	5,551	13,668	5,982
2014	19,276	8,305	6,608	14,923	5,258
2015	21,241	9,761	6,866	16,638	5,023
2016	21,129	9,798	7,201	17,010	4,877
2017	20,196	9,018	6,494	15,522	4,360
2018	24,438	11,706	7,362	19,080	4,890
2019	28,663	13,686	8,417	22,113	5,590
2020	31,700	15,632	9,105	24,751	5,397
2021	36,134	17,330	10,388	27,735	5,487
2022	34,159	16,059	9,411	25,481	6,129
2023	30,081	13,561	8,966	22,535	4,936
2024	30,252	13,970	9,053	23,033	4,609

Source: OGM



Annual Increment and Annual Production



- Annual AAC: 32 million m^3

Increment per ha: 2.1* m^3
Production per ha: 1.5 m^3

- Carbon sequestration: 1.9 billion tonnes

Oxygen production: 42 million tonnes

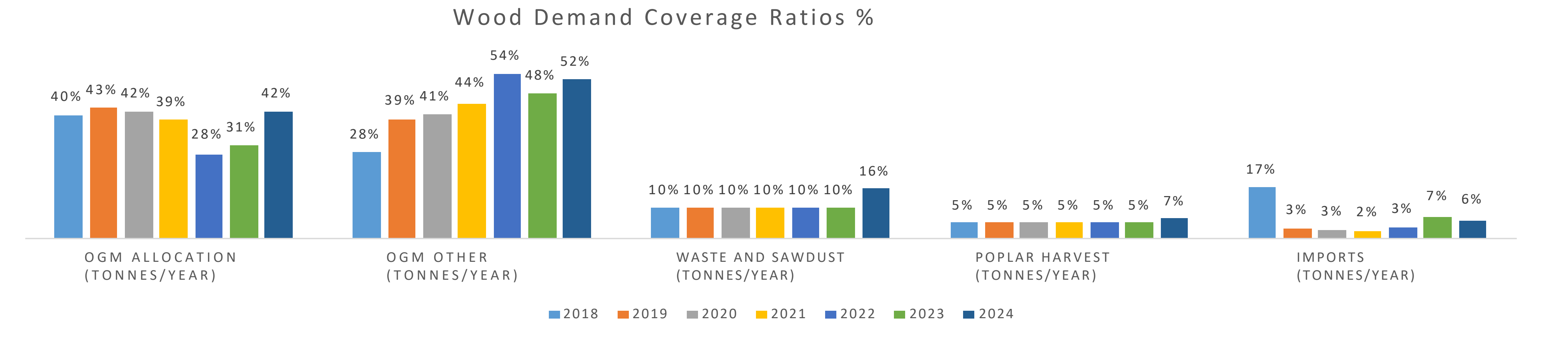
* In successful industrial plantation practices in Chile and Brazil, this figure reaches 50 m^3/ha for eucalyptus and 20 m^3/ha for pine.

Source: OGM

MDF ve YONGA LEVHA SANAYİCİLERİ DERNEĞİ

Wood Demand and Sources of the Wood-Based Panel Industry

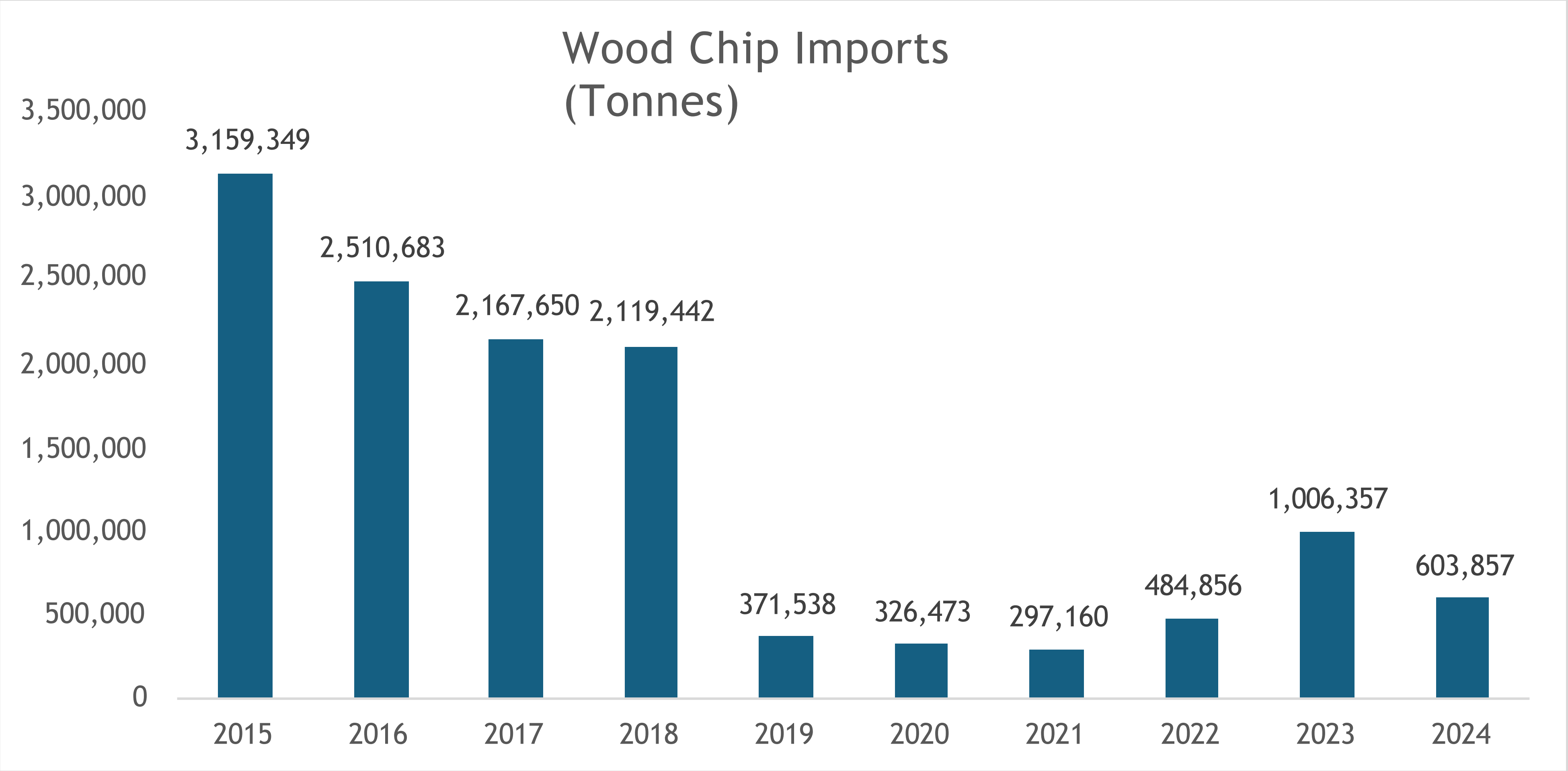
	2019	2020	2021	2022	2023	2024	2025
OGM ALLOCATION (TONNES/YEAR)	5.000.000	5.200.000	5.350.000	3.800.000	4.400.000	4.500.000	5000000
OGM OTHER (TONNES/YEAR)	4.575.000	5.103.500	6.080.000	7.450.000	6.840.000	5.630.000	5.500.000
WASTE AND SAWDUST (TONNES/YEAR)	1.170.000	1.251.000	1.380.000	1.380.000	1.440.000	1.750.000	2.000.000
POPLAR HARVEST (TONNES/YEAR)	585.000	625.500	690.000	690.000	720.000	720.000	700.000
IMPORTS (TONNES/YEAR)	370.000	330.000	300.000	480.000	1.000.000	600.000	1.000.000
	11.700.000	**12.510.000**	**13.800.000**	**13.800.000**	**14.400.000**	**13.200.000**	**14.200.000**



The industry operated at 60–70% capacity in 2025.
At full capacity, 18 million tonnes of wood raw material would be required.

MDF ve YONGA LEVHA SANAYİCİLERİ DERNEĞİ

Türkiye Wood Chip Imports



YEAR 2025: 1,000,000 Tonnes

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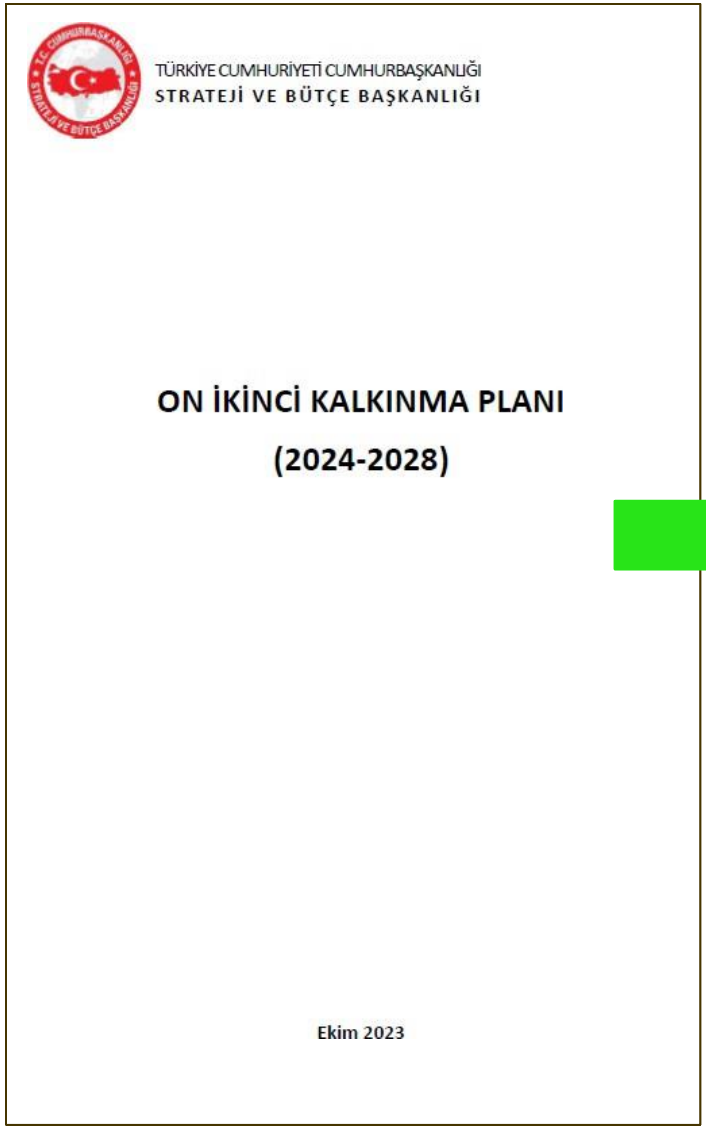
Targets in the 12th Development Plan


TÜRKİYE CUMHURİYETİ CUMHURBAŞKANLIĞI
STRATEJİ VE BÜTÇE BAŞKANLIĞI

ON İKİNCİ KALKINMA PLANI

(2024-2028)

Ekim 2023

The importance of forest maintenance is also recognized in the 12th Development Plan.

502.1. Priority will be given to all silvicultural maintenance interventions, especially in young stands, to effectively combat forest fires, enhance biodiversity and ensure carbon storage.

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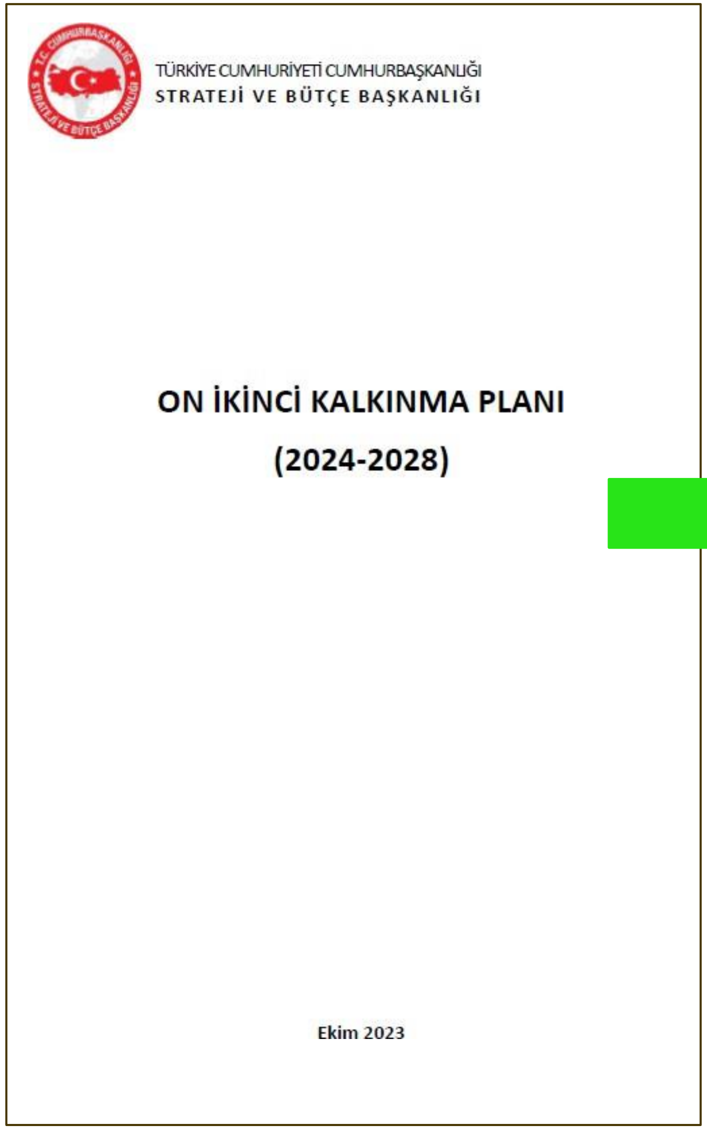
Plantation Forestry Worldwide

	Country	Forest Land (ha)	Naturally Regenerating Forest (ha)	Planted Forest* (ha)
1	China	219.978.180	135.281.880	84.696.300
2	USA	309.795.000	282.274.000	27.521.000
3	Russian Fed.	815.311.600	796.431.500	18.880.100
4	Canada	346.928.100	328.764.710	18.163.390
5	Sweden	27.980.000	14.068.000	13.912.000
6	India	72.160.000	58.891.000	13.269.000
7	Brazil	496.619.600	485.396.000	11.223.600
8	Japan	24.935.000	14.751.000	10.184.000
9	Finland	22.409.000	15.040.920	7.368.080
10	Poland	9.483.000	2.054.000	7.366.000
11	Germany	11.419.000	5.709.500	5.709.500
12	Ukraine	9.690.000	4.842.000	4.848.000
13	Indonesia	92.133.200	87.607.500	4.525.700
14	Viet Nam	14.643.090	10.293.720	4.349.370
15	Thailand	19.873.000	16.336.000	3.537.000
43	**Türkiye**	22.220.360	21.503.020	717.340

* Planted Forest: Forest area established through planting and/or deliberate seeding. 45% of the world’s planted forests are industrial plantations in nature.

SOURCE: FAO 2020

Targets in the 12th Development Plan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STRATEJİ VE BÜTÇE BAŞKANLIĞI

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(2024-2028)

Ekim 2023

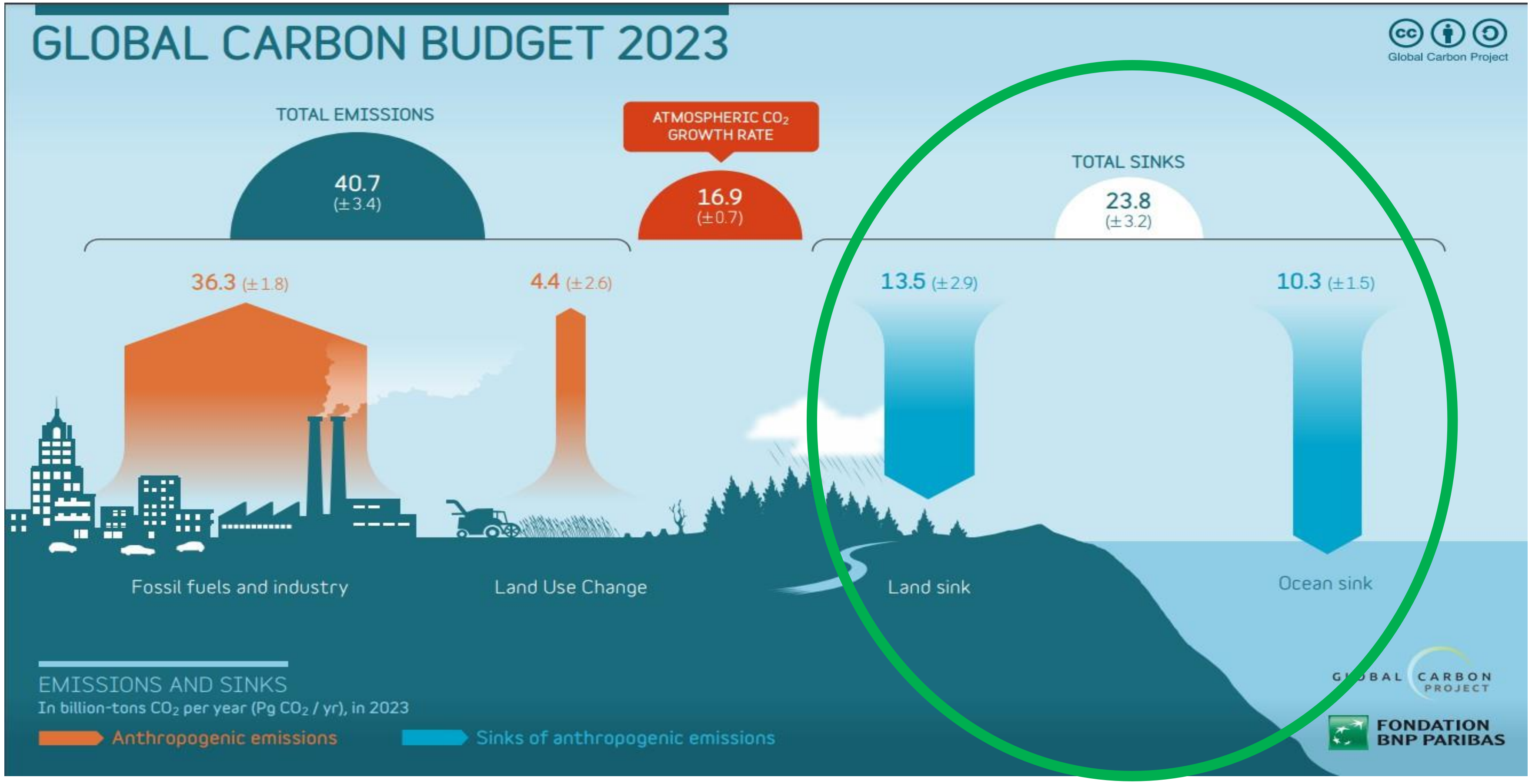
Plantation forestry is also encouraged by the 12th Development Plan.

501.4. Industrial afforestation practices carried out by the private sector using genetically improved and fast-growing species will be supported.

THE ROLE OF WOOD IN COMBATING CLIMATE CHANGE

Forests and Soil Account for 60% of Carbon Sequestration

Total carbon uptake in 2023 was 23.8 billion tonnes. Of this, 13.5 billion tonnes, nearly 60%, was absorbed by forests and soil, while 10.3 billion tonnes, about 40%, was absorbed by oceans.



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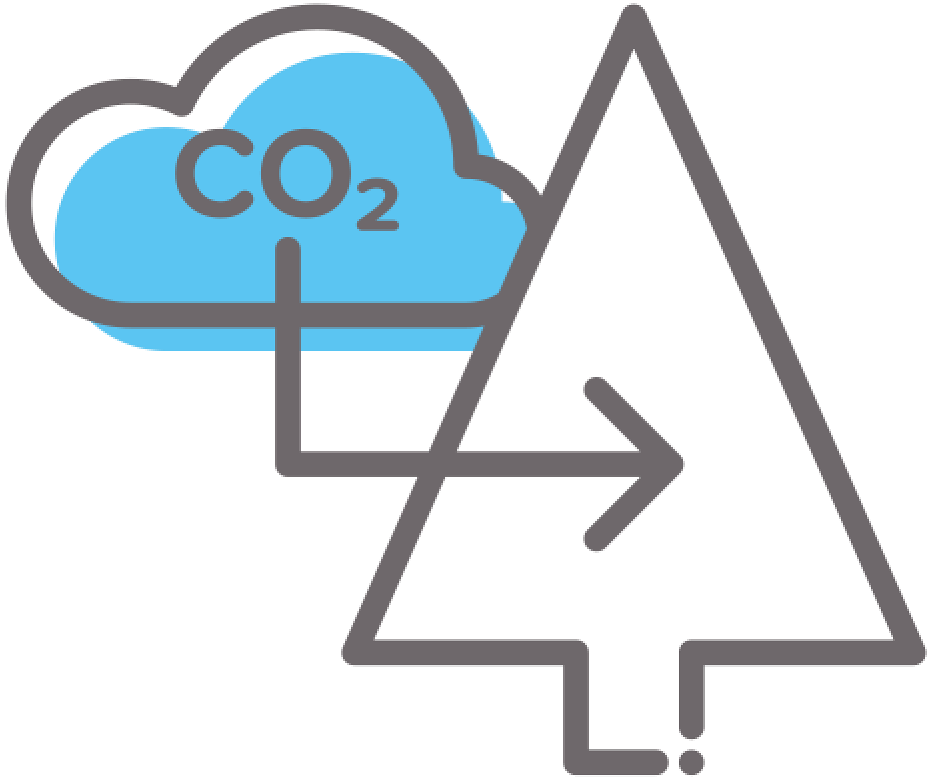
Climate Change and Wood Use: The EU Promotes the Use of Wood Products Under Green Deal Targets



“1 m³ of wood stores 0.9 tonnes of CO_2”

Source: CEI-Bois. Wood – Building the Bio-economy, (p9), 2019

Climate Change and Wood Use: The EU Promotes the Use of Wood Products Under Green Deal Targets

“Research shows that replacing 1 tonne of concrete with 1 tonne of wood in construction can reduce carbon dioxide emissions by 2.1 tonnes.”

[Source: European Commission. A sustainable Bioeconomy for Europe: strengthening the connection between economy, society and the environment (p45), 2018]

CO_2 Emissions per m^3 of Materials Used in Construction

| GWP [kg $CO_{2\,eq}$ / m3]
| module A1-A3

↓ scroll down to
"CALCULATOR"

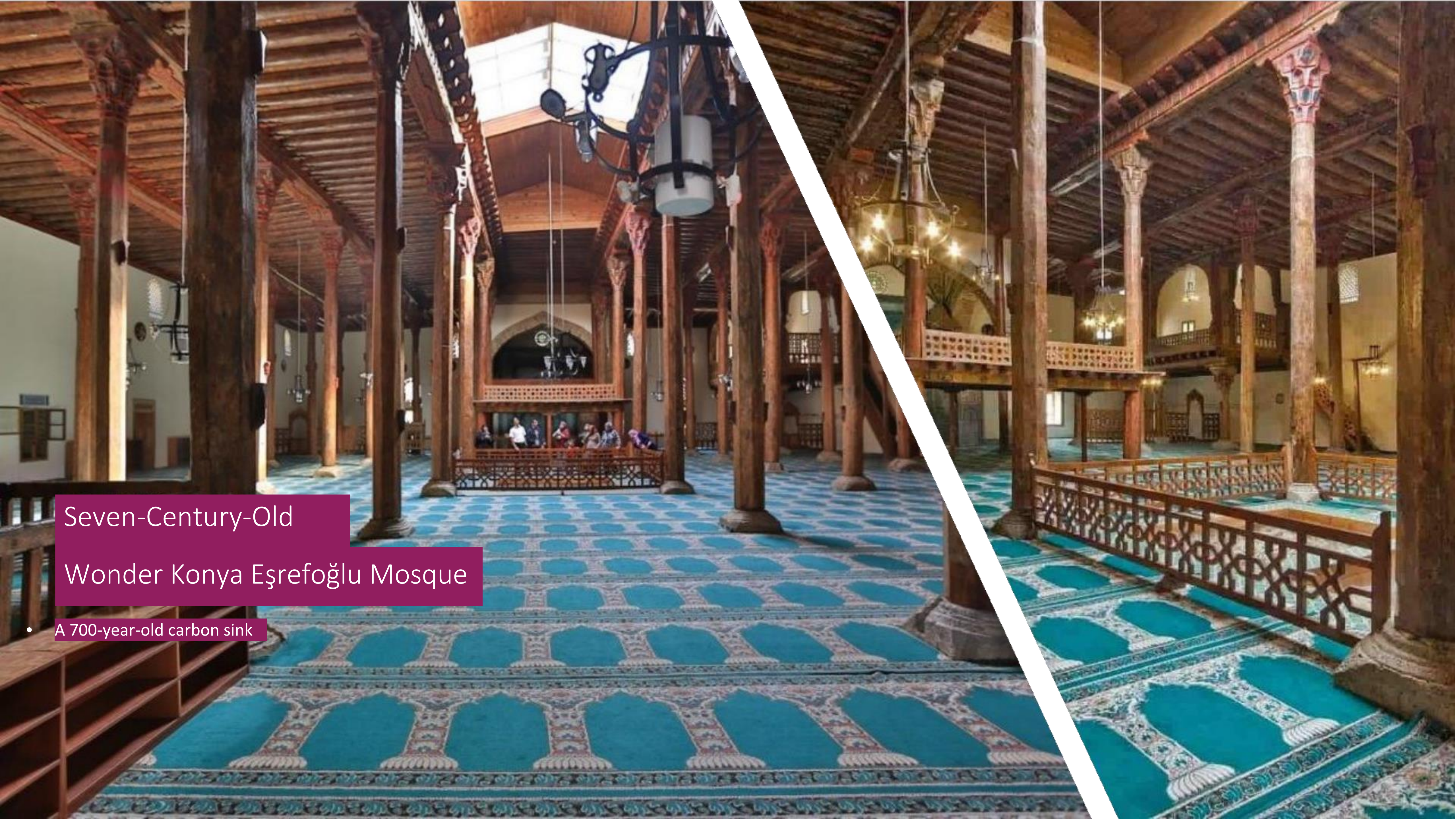
select materials in the pyramid (click)
to include them in the calculator.
See the data used for the materials
by double-clicking on the material.

CO_2 Emissions per m³ of Materials Used in Construction

Seven-Century-Old

Wonder Konya Eşrefoğlu Mosque

- A 700-year-old carbon sink



Targets in the 12th Development Plan

TÜRKİYE CUMHURİYETİ CUMHURBAŞKANLIĞI
STRATEJİ VE BÜTÇE BAŞKANLIĞI

ON İKİNCİ KALKINMA PLANI
(2024-2028)

Ekim 2023

In line with Green Transformation objectives, increasing the use of wood is also encouraged by the 12th Development Plan.

501.3. The use of wood in homes and workplaces will be expanded.

634. The use of climate-sensitive, energy-efficient and sustainable wooden buildings will be expanded in our country.

Through its forest policies and by increasing the use of wood, the European Union stores 20% of total carbon emissions in forests and wood-based products.

Today - the Forest-Based Industries of Europe make a positive 20% climate contribution......

-447 Mt CO_2e/yr	-410 Mt CO_2e/yr	+51 Mt CO_2e/yr
Forest sink & carbon storage in products remove CO_2	**Material substitution** prevents CO_2 emissions	**Fossil emissions**

- 3S Framework
- Sequestration, Storage, Substitution
- **Positive climate contribution today of -806 Mt CO2e/yr**
- **= 20% of EU fossil emissions with the potential for a lot more!**

role model industry

EUROPEAN PANEL FEDERATION
WOOD-BASED PANELS

MDF ve YONGA LEVHA SANAYİCİLERİ DERNEĞİ

Our Products and the Fight Against Climate Change

1 m³ of spruce wood stores 825 kg CO_2
1 m³ of raw particleboard stores 958 kg CO_2*
1 m³ of raw MDF stores 724 kg CO_2*

According to OGM records, in 2021:

Türkiye's forest growing stock was 1.7 billion m³.
1.5 billion tonnes of CO_2 were stored.

Annual forest increment was 47 million m³/year.
42 million tonnes of CO_2 were stored.

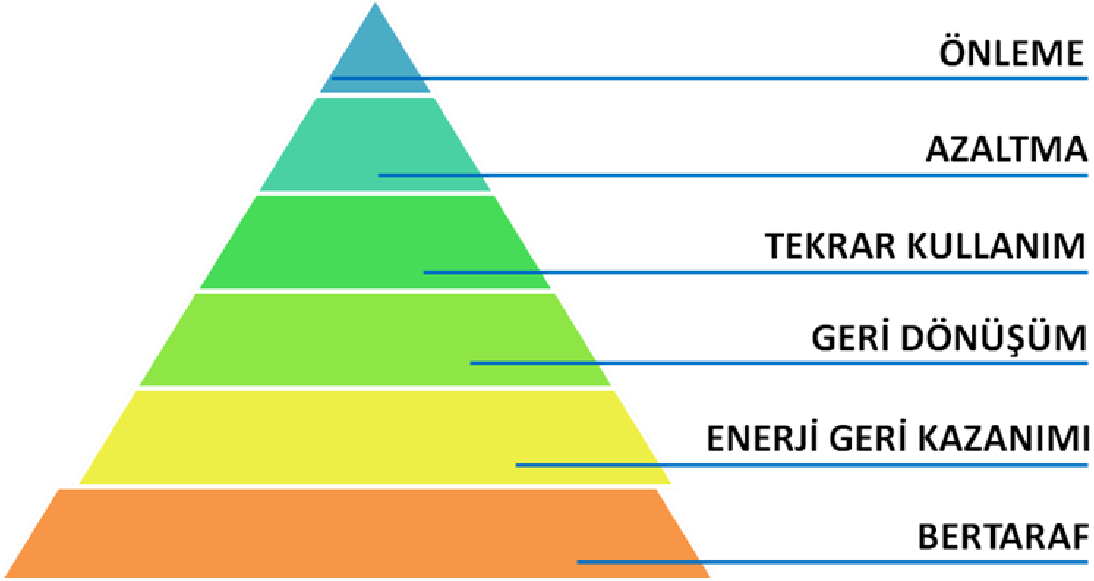
25 million m³ were used in production.
20 million tonnes of CO_2 were stored.

*This amount is equivalent to the annual emissions of approximately 7 million people in Türkiye**.*

* According to our EPD documents, this is the amount of CO_2 stored in the production of 1 m³ of panel from raw material through the end of the manufacturing stage.
** Greenhouse Gas Emission Statistics, 1990–2020. (Total greenhouse gas emissions per capita were 4 tonnes CO_2-eq in 1990 and 6.3 tonnes CO_2-eq in 2020.)

Renewable Energy Directive (RED III)

Through this directive, the EU encourages certain restrictions on the use of wood raw material for energy production and promotes its use in high-value-added, long-life products.



According to the directive published in 2018, when designing incentives:

The waste hierarchy should be taken into account

Circularity and recycling should be taken into account

The raw material markets of other industries should not be harmed

With the amendment proposal published by the European Commission on 21 July 2021, provisions were added to encourage the long-term and repeated use of wood raw material.

With the latest update dated 30 March 2023, while retaining the previous amendments, the minimum threshold for sustainability monitoring of biomass plants in Europe was set at 7.5 MW. In the first version of the directive, this figure was 20 MW.

European Union Forest Strategy for 2030

EUROPEAN
COMMISSION

Brussels, 16.7.2021
COM(2021) 572 final

COMMUNICATION FROM THE COMMISSION TO THE EUROPEAN PARLIAMENT, THE COUNCIL, THE EUROPEAN ECONOMIC AND SOCIAL COMMITTEE AND THE COMMITTEE OF THE REGIONS

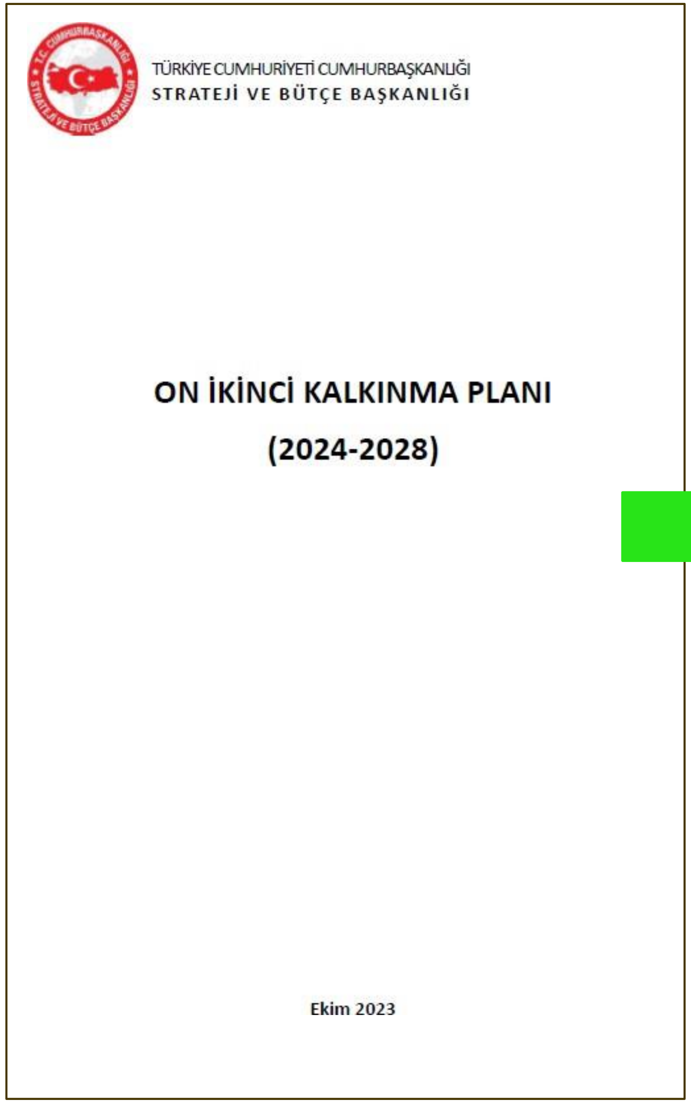
New EU Forest Strategy for 2030

{SWD(2021) 651 final} - {SWD(2021) 652 final}

Key points:

Promoting the use of forest wood resources in long-life products: furniture and construction
Adhering to the principle that biomass plants should not consume raw materials used by other industries
Sustainable forest management
Planting 3 billion new trees by 2030
Providing financial incentives to private forest owners

Targets in the 12th Development Plan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STRATEJİ VE BÜTÇE BAŞKANLIĞI

ON İKİNCİ KALKINMA PLANI
(2024-2028)

Ekim 2023

As in the EU’s RED III, Forest Strategy and Carbon Certification regulations, the 12th Development Plan also encourages the use of wood in long-life products such as furniture.

500.4. The use of forest products for the longest possible period within the circular economy framework will be encouraged, and reuse and recycling will be increased.

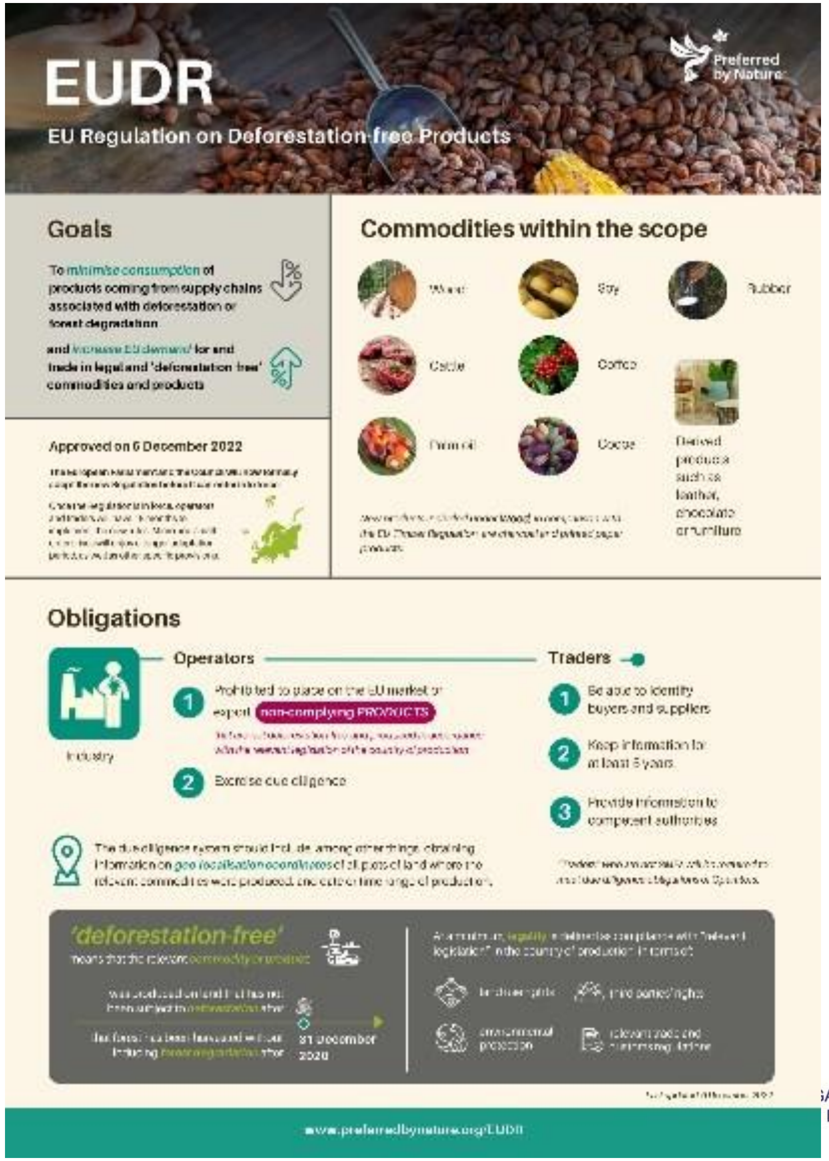
EU Deforestation Regulation (EUDR)

- **Countries exporting products to Europe will have to prove that their products have not caused deforestation.**

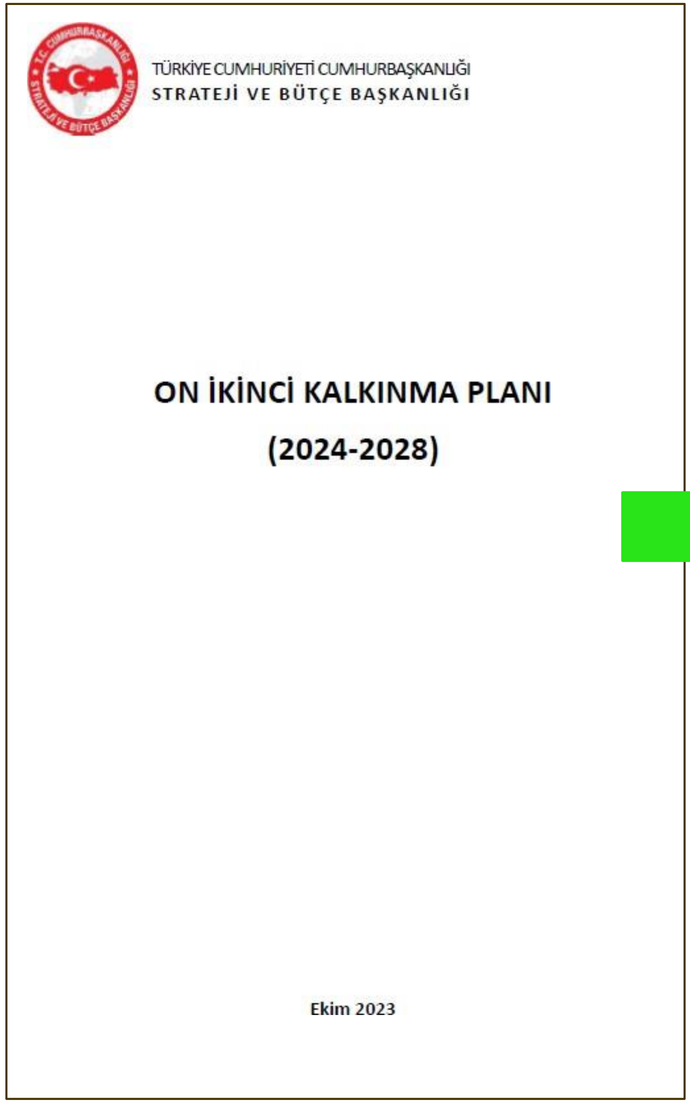
Implementation will begin in December 2025.

Matters such as the exact coordinates of the harvesting location and the harvesting date of wood used in exported products will be subject to strict monitoring and reporting.

Trade in wood and wooden products, palm oil, cattle, coffee, cocoa, rubber and soy will be directly affected by this regulation.



Targets in the 12th Development Plan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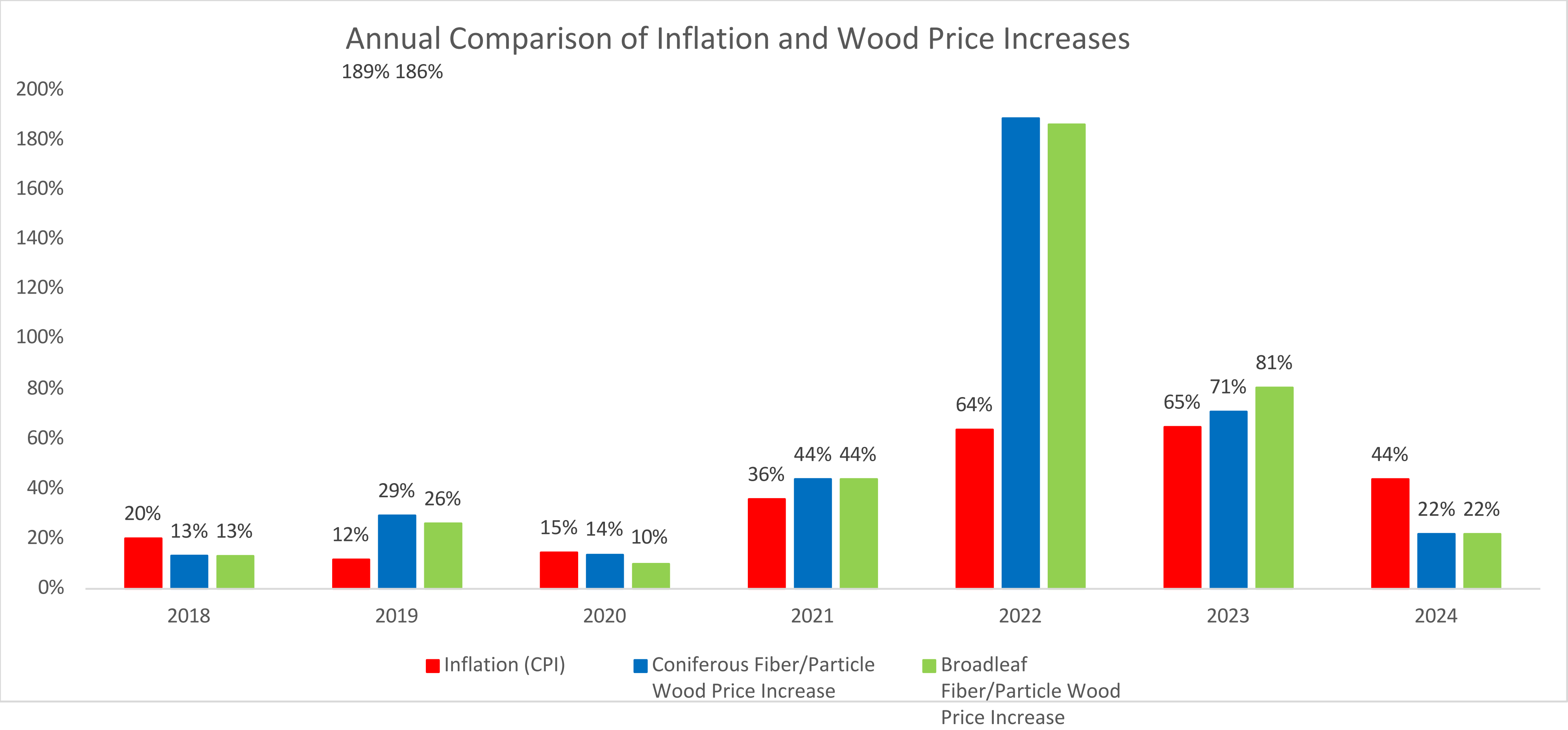
Ekim 2023

Removing certification-related barriers to forest products trade is also among the objectives of the 12th Development Plan.

501.2. Certification practices will be expanded to facilitate trade in forest products.

MDF ve YONGA LEVHA SANAYİCİLERİ DERNEĞİ

Wood Price Increases Above Inflation



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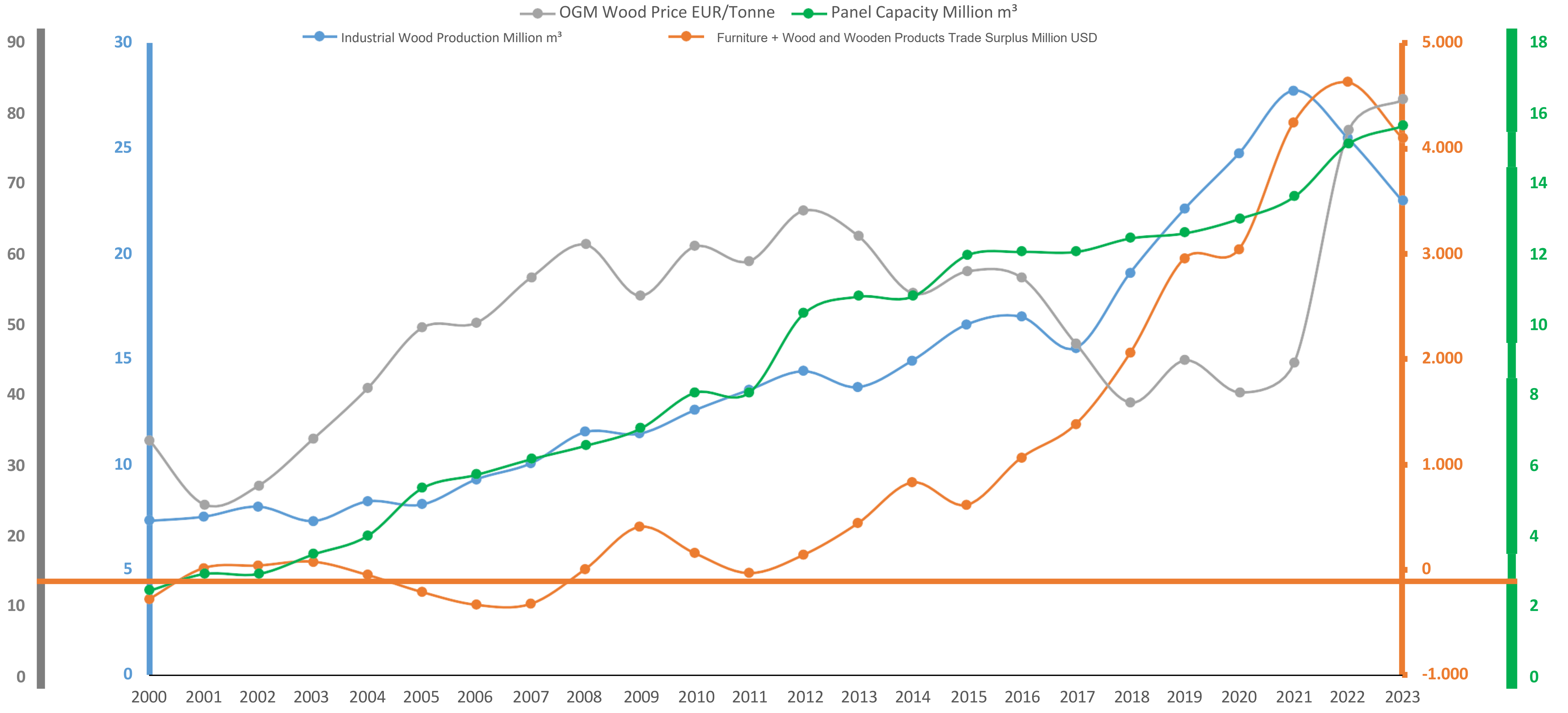
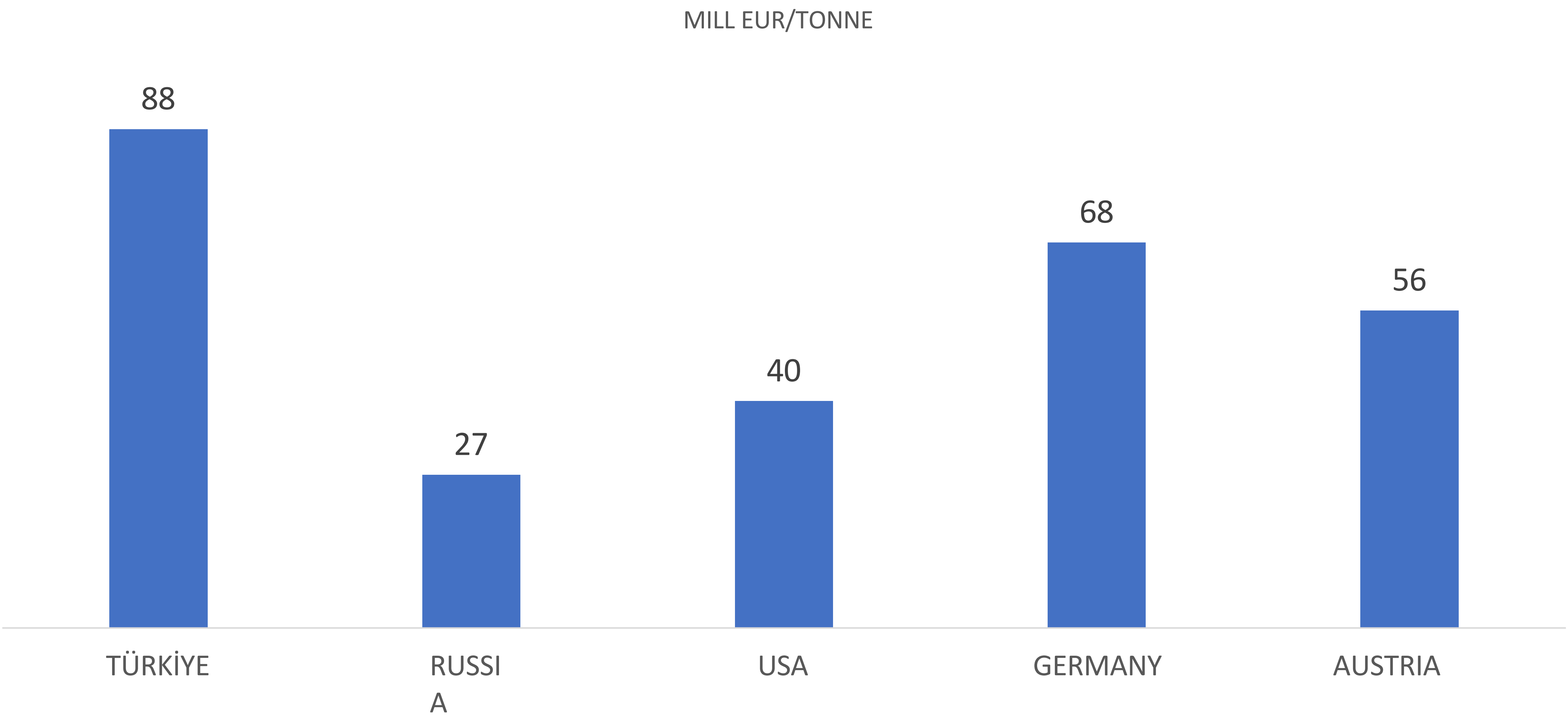
Relationship Between Wood Prices, Wood Production, Panel Capacity Investments and Current-Account Surplus, 2000–2023



Sources: OGM, TURKSTAT, YOMSAD

Delivered-to-Mill Wood Cost by Country (EUR/TONNE)



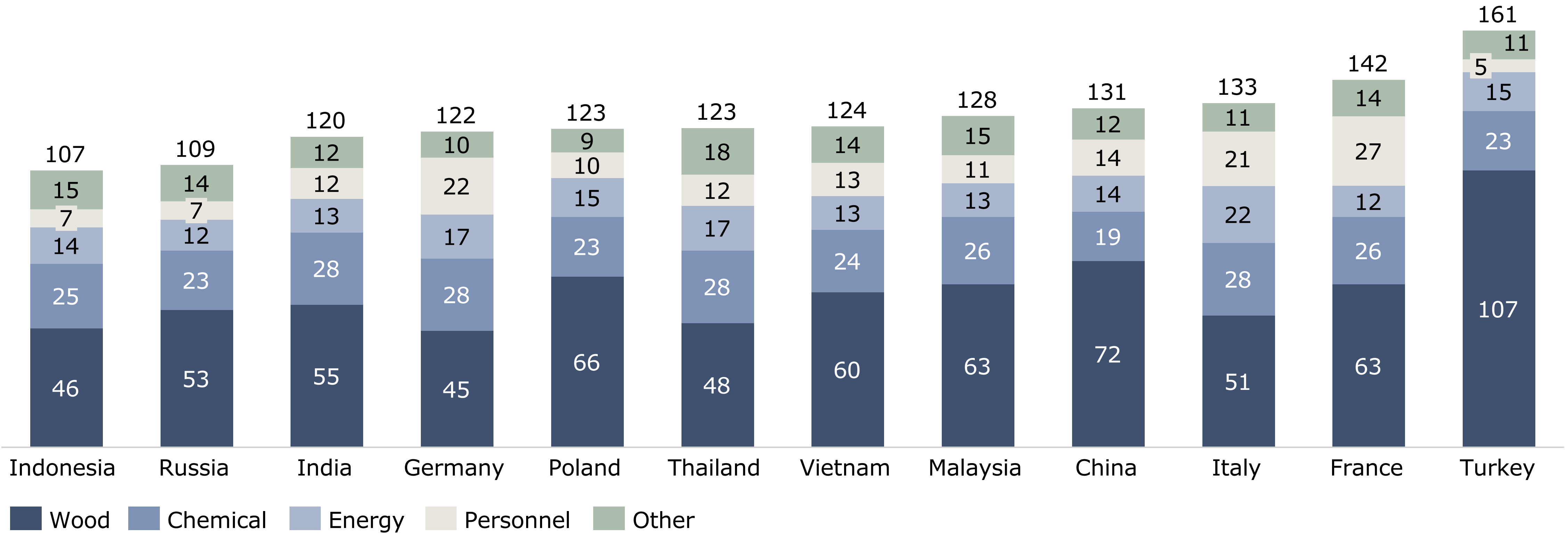
MDF ve YONGA LEVHA SANAYİCİLERİ DERNEĞİ

DÜNYA YONGA LEVHA ÜRETİM MALİYET MUKAYESESİ – ODUNUN ROLÜ

PB PRODUCTION COST COMPARISON Q3 2023 – AVERAGE BY COUNTRY

Average production cost vary significantly by country. Lowest wood costs are in Germany and Indonesia, highest in China and Turkey

Q3 2023, EUR/M³



 15.09.2026 | MULTI-CLIENT REPORT Q1 2024

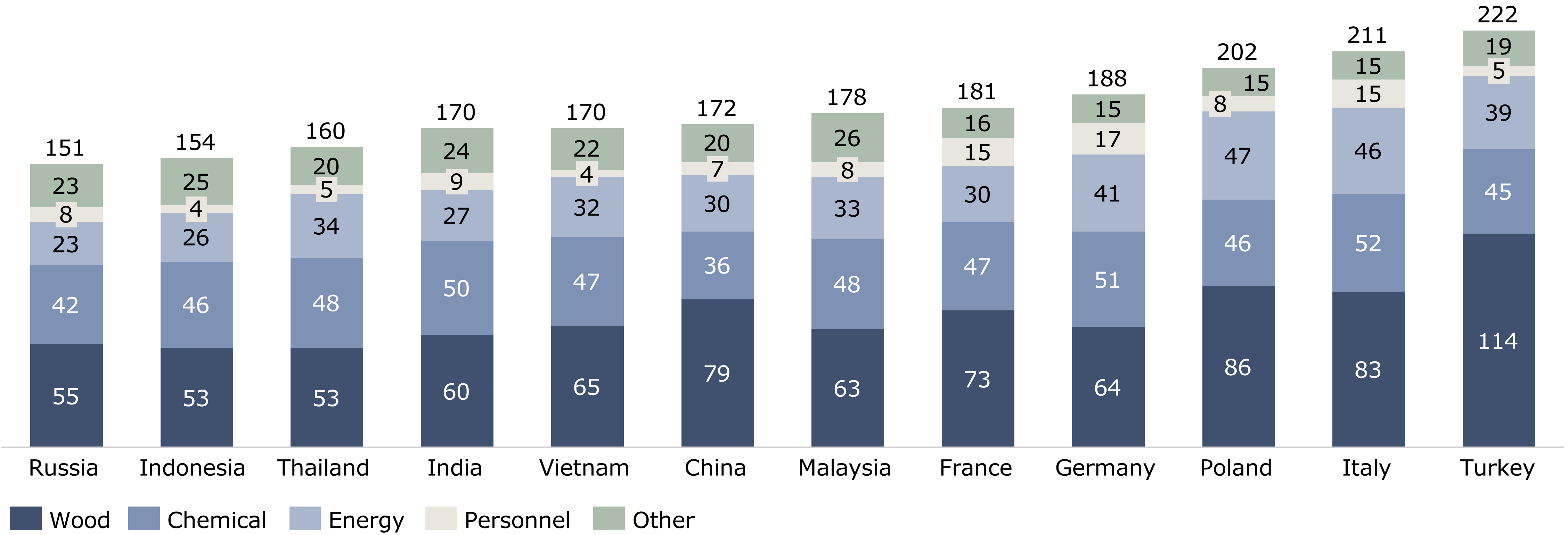
AFRY

DÜNYA MDF ÜRETİM MALİYET MUKAYESESİ – ODUNUN ROLÜ

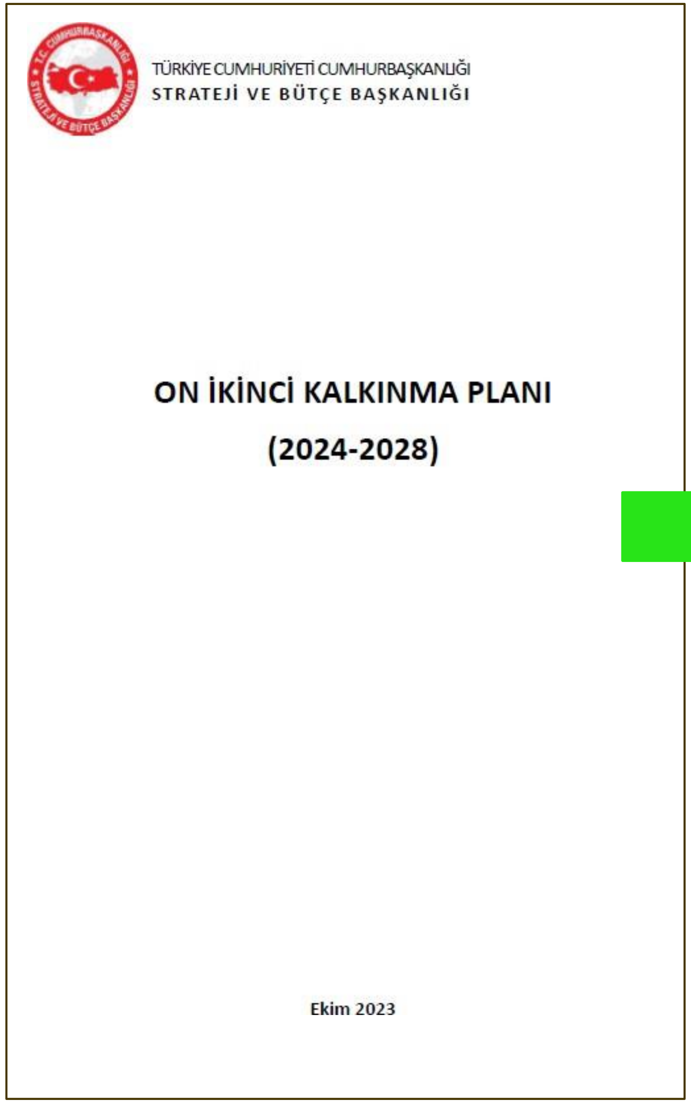
MDF PRODUCTION COST COMPARISON Q3 2023 – AVERAGE BY COUNTRY

MDF average production cost vary significantly by country. Lowest wood costs are in Russia and Thailand, highest in Poland and Turkey

Q3 2023, EUR/M³



Targets in the 12th Development Plan



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STRATEJİ VE BÜTÇE BAŞKANLIĞI

ON İKİNCİ KALKINMA PLANI
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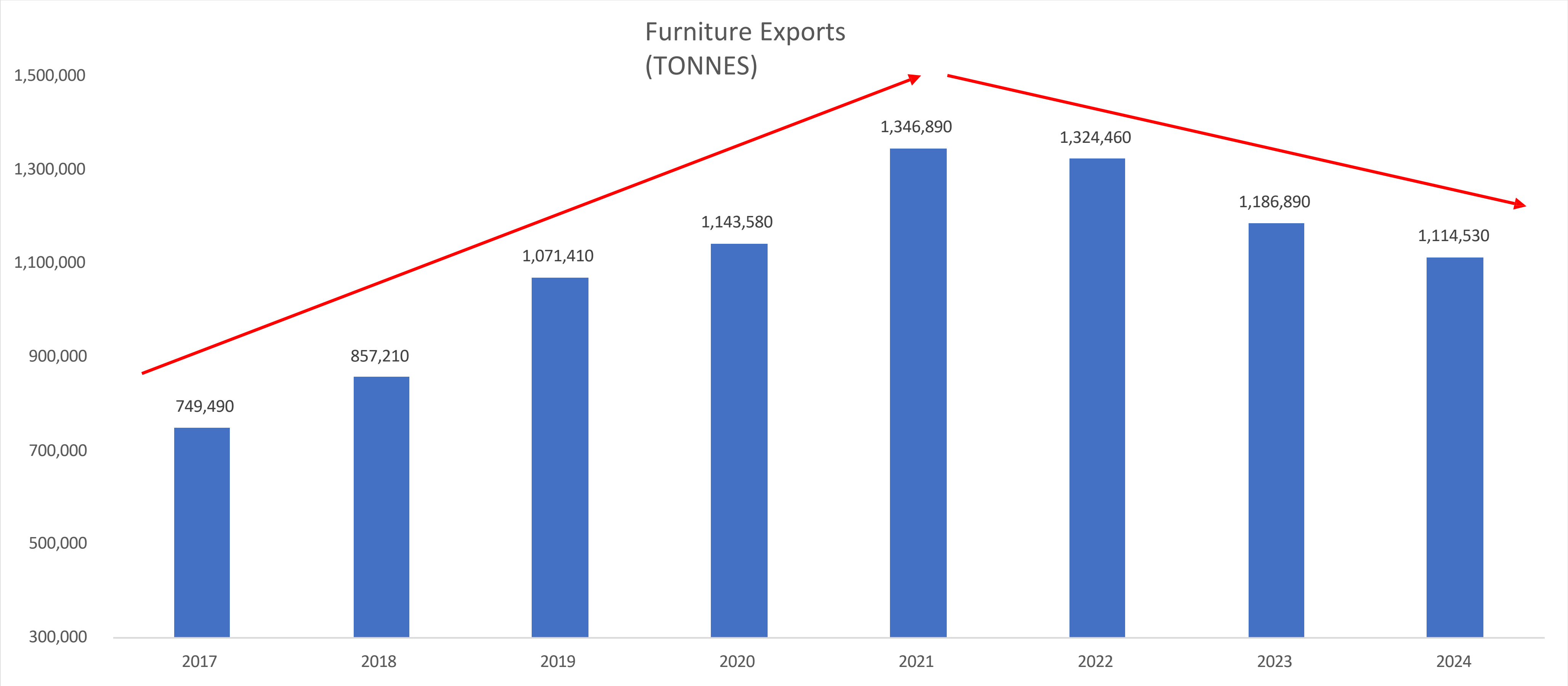
Ekim 2023

As producers, we seek a level playing field with our global competitors. Price stability, also targeted by the 12th Development Plan, is our most important agenda item.

501.6. Price stability in forest products will be ensured through the necessary regulations, particularly those addressing input costs.

Downward Trend in Furniture Exports

Our furniture exports, which had increased every year for a long period, have been on a downward trend for the last three years.



Source: OAIB

MDF ve YONGA LEVHA SANAYİCİLERİ DERNEĞİ

Problems in Raw Material Supply

Instability in wood raw material prices and excessive increases in tender prices

Wood raw material demand exceeding supply

Demand from biomass energy plants for raw material needed by the industry (including making fuelwood available for industrial use)

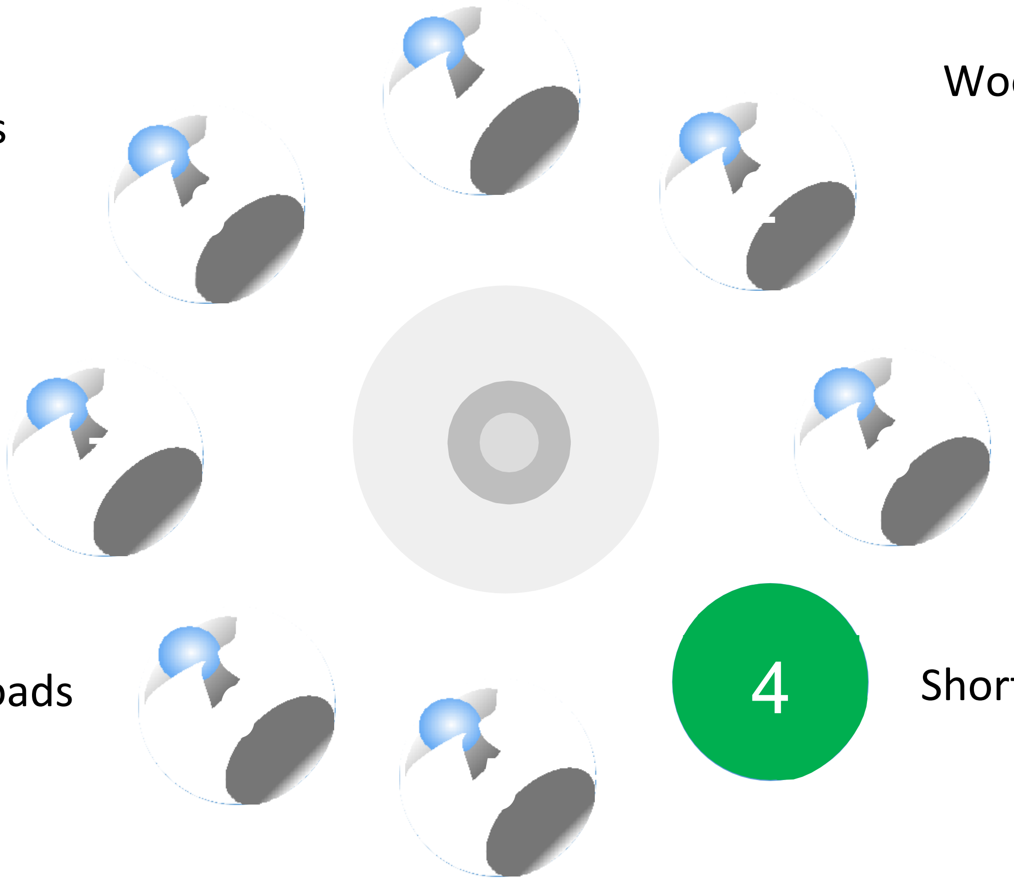
Shortage of forest operations chiefs and forest rangers

Practices and legislation concerning standing timber sales need to be improved

Need to improve forest roads and infrastructure

Underdevelopment of industrial plantation forestry

Need for revisions to forestry legislation



MDF ve YONGA LEVHA SANAYİCİLERİ DERNEĞİ

THANK YOU