

# **Quality Inside – Made in Europe**

## **Surface specialists are repositioning themselves**

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*The European suppliers of surface materials are repositioning themselves. In recent months, various companies in the industry have changed hands. Clear signs were also set in sales, where investments were made in new product segments and in strengthening the company's presence in global growth markets.*

The Japanese surface specialist Toppan Printing plans to strengthen its position on the German market with the purchase of the decor printer Interprint (Germany). The takeover of Interprint is currently under review by the antitrust authorities, so the purchase is not expected to be completed until the end of the year. The German decor printer is not the first Japanese company acquisition in Europe. In 2017, they had already acquired the decor printer Decotec Printing (Spain) and thus their first printing location in Europe. With Interprint, they now receive a much larger slice of the cake, as the company achieved sales of around EUR 355 million in 2018. In addition to the production site in Germany, Interprint has printing sites and finish foil production facilities in Poland, the USA, Brazil, Malaysia and China.

The surface specialist Surteco (Germany) concentrates on its core competences. In July, the company announced the sale of its US impregnation site in East Longmeadow. The new owner is the US chemical group Arclin. Surteco originally had two impregnation sites in North America. In 2015, the plant in Biscoe/USA had already been sold to the engineered wood manufacturer Arauco North America and activities concentrated at the East Longmeadow site.

### **Prospects seen in China**

Schattdecor (Germany) is not only the world market leader in decor printing but also wants to position itself as a free impregnator on the surface market worldwide. For this reason, the company has not only greatly expanded its European impregnation capacities, but has also invested in new locations abroad. Among other things, the Malaysian impregnator Vasatech was acquired. At the same time, the international decor printing and finish foil activities are being further expanded. In the USA, the finish foil producer US Coating was taken over.

Another important focus market is China, where the second printing facility in Quzhou went into operation in May 2019. The construction of the plant is Schattdecor's response to the capacity bottlenecks at the Shanghai plant. The second location offers space for ten narrow 4-foot and six wide 8-foot printing machines on a production and office area of 25,000 sqm. At present, however, only two 4-foot wide presses have been installed, and two more are scheduled to go into operation at the end of 2019. In addition to the two printing sites, the Thansau-based company also has an impregnation plant in Huanggang and, as part of the Kingdecor joint venture, operates a decor paper production facility, which is also located in Quzhou.

### **Investment in digital printing**

Schattdecor also wants to grow in digital printing. After Interprint (Germany) recently announced its investment in a second digital printing system from printing press manufacturer Koenig & Bauer (Germany), Schattdecor also plans to purchase a second digital printing system. Like the first "Palis 2250"

system installed in 2016, this will produce industrially at a speed of up to 162 metres per minute with a width of 2.25 metres. Interprint commissioned its first digital printing system with a width of 1.68 metres in 2014. But digital printing is also increasingly making its way into the wood-based products industry: Swiss Krono (Switzerland) is also investing in its second digital printing system from Koenig & Bauer, which is to be installed in Heiligengrabe, Germany.

The independent impregnators and smaller decor printers, on the other hand, intend to strengthen their competitive position through cooperation agreements. By cooperating with the BMK Group (Germany), which has impregnation facilities in Germany, the USA and Russia, the decor printer Lamigraf (Spain) intends to offer customers more surface solutions and expand their range of services in future.

The suppliers of thermoplastic furniture films see growth potential in the Asian markets. Renolit (Germany) has founded a joint venture called Guangdong Renolit Citiking with its Chinese trading partner Citiking and the previous owner Dongtang. With 60 employees and three printing and embossing machines, 2D and 3D foils in high gloss and supermatt are produced, which extend the portfolio of the already existing location in Guangdong.

## **Decor paper producers invest overseas**

After the suppliers of decor paper had already concentrated in recent years, the focus is now on expanding worldwide decor paper capacities, particularly in China. The Felix-Schoeller Group (Germany) was able to strengthen its position in the Chinese market by acquiring a majority interest in the decor paper producer Grandrich. The takeover took place via Winbon Schoeller New Materials, the Chinese joint venture of the German paper producer. As another major player in decor papers, Ahlstrom-Munksjö had already expanded its market position on the American continent in 2018 with the takeover of the two specialty paper producers Expera (Kaukauna/USA) and Caieiras (Caieiras/Brazil).

With the capacity expansions, the surface specialists are reacting not least to the growing concentration on the customer side. In recent months, a new global player has emerged on the laminate market, Broadview Holding (part of HAL Investments). It completed the acquisition of the Formica Group in the summer of this year. With the acquisition of Formica, the holding now also includes the laminate manufacturer Homapal (Germany). As early as 2018, the holding company acquired a majority stake in the wood-based products producer Westag & Getalit (Germany). Previously, the holding included the laminate producers Trespa International (Netherlands) and Arpa Industries (Italy).

Change of ownership also for laminate supplier Decolan (Switzerland): The distributor was taken over by the Indian laminate manufacturer Greenlam and now operates on the market under the name Greenlam Decolan S.A.

The laminate manufacturer Dekodur (Germany), which filed for insolvency at the end of 2018, can continue to operate with the help of a private investor and a holding company. At the newly founded DI-Dekodur International, all 65 employees have been given a new job. *Richard Barth*

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