Think tank n°5 de l'ATIBT

Explorer les nouveaux marchés des bois tropicaux: nouvelles réglementations, nouveaux équilibres, nouvelles opportunités

→ Opportunités pour le bois tropical dans le secteur du parquet en Europe

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What’s FEP

- European Parquet Federation
- Created in 1956
- Main body representing and defending the interests of the European parquet industry at all relevant levels
  - To strengthen and improve the position of wood flooring
  - To enhance growth, prosperity and stature of European parquet manufacturers
- The activities of FEP are situated in the areas of raw material supply, production, market and internal affairs
What’s FEP

• 82 members
  • 51 manufacturers
  • 8 national federations
  • 23 suppliers
• In 22 countries
What’s FEP

- Relevant EU & international initiatives and policies regarding parquet and its raw materials
  - Green Deal, Circular Economy, Sustainable Products Package, Sustainable Carbon Cycles, Renovation Wave, Forest Strategy, Biodiversity Strategy, LULUCF, EUTR, Deforestation-free value chains, trade issues (*Free, but Fair Trade*)…

- Relevant EU & international standards and other technical topics
  - CEN/TC 175, ISO/TC 218, ISO/TC 287, Construction Products Regulation (CPR), Single Market…

- Development of market data
  - FEP Annual Statistics, Q-Stats, PRs, Marketing studies…

- Communication towards the end-consumers
  - Real Wood initiative

- Communication towards our members and the Press
  - PRs, contributions, Annual GA & Parquet Congress

- Enlarge the membership
Use of tropical wood - Evolution

• European parquet market

Production 2021 → level not seen since the start of the financial crisis
- FEP 82,624,000 m² (+6.9%)
- *Non-FEP countries in Europe* 15,300,000 m²
- Total 97,924,000 m² (+7.9%)

Consumption 2021 → level not seen for 10 years
- FEP 88,155,000 m² (+6.2%)
Results 2021
Results 2021
First trends 2022 & beyond
Use of tropical wood – Evolution (top-layer)
Use of tropical wood - Evolution

• Top-layer
  • Tropical wood from 15%, 15 years ago, to 2-5% in 2021
  • Oak, oak, oak both for producers & end-consumers
• Presence in some layers…
• Wengé, rubber wood, iroko, afrormosia, teak, doussié, (American walnut)…
• Difference between large (mass production) & small (tailor-made projects) producers
• Difference between North & South of Europe
Use of tropical wood – Opportunities

• Current challenges for the parquet sector
  • Availability & affordability of wood raw material, especially oak and birch plywood
    • Exports of (oak) logs out of Europe
    • Ban of imports of wood & wood products from Russia & Belarus
    • Difficulties to import from Ukraine
    • Some EU Member States & Western Balkans (Serbia, Bosnia & Herzegovina, North Macedonia, Kosovo) limit wood exports
Use of tropical wood – Opportunities

• Potential solutions for the parquet sector
  • Request for EU export authorization/ban relating to (oak) logs with other Woodworking Industries associations, but need for positive evidences of critical shortages
  • Temporary EU safeguarding, mitigation and support measures to the sector
  • Reinforcing EUTR implementation and forthcoming Deforestation-free value-chains Regulation to avoid circumvention
  • Coherent EU policies allowing higher mobilization/harvesting of European wood resources (Forestry Strategy, Biodiversity Strategy…) as long as principles of Sustainable Forest Management are applied
  • A longer-term perspective to explore/test sustainable (and recyclable) substitutes and alternatives (to oak) + circularity & cascading use
  • Diversify supplies incl. with under-appreciated domestic and tropical species
Use of tropical wood – Barriers

- Image
  - Avoid any potential risk regarding legality (Press, NGOs, EUTR, forthcoming Deforestation-free value chains Regulation…)
- History
- Sustainability
  - Incl. “Local” supplies → conclusive Environmental Product Declarations (EPD)?
- Technical requirements (machineries, properties…) → education
- Demand
  - Currently declining
  - Cf. image (to be tested further in FEP next Marketing Study)
  - Look, habits
Use of tropical wood – Extra opportunities

• Everybody wants wood flooring
  • End-consumers & EU authorities
  • But competition from wood-look, species-look products
  • Promote “the Original”
    ➢ Real Wood initiative (logo, license, website, calculator, movie, SoMe) to sensitize European consumers to opt for parquet as THE flooring solution (current focus on carbon storage)
    ➢ Link with Fair & Precious
      • Storytelling
      • Local development (production, transformation…)
    ➢ EC Sustainable Products Package

• Waterproof?
Q&A
Thank you for your attention!

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