



European
Parquet
Federation



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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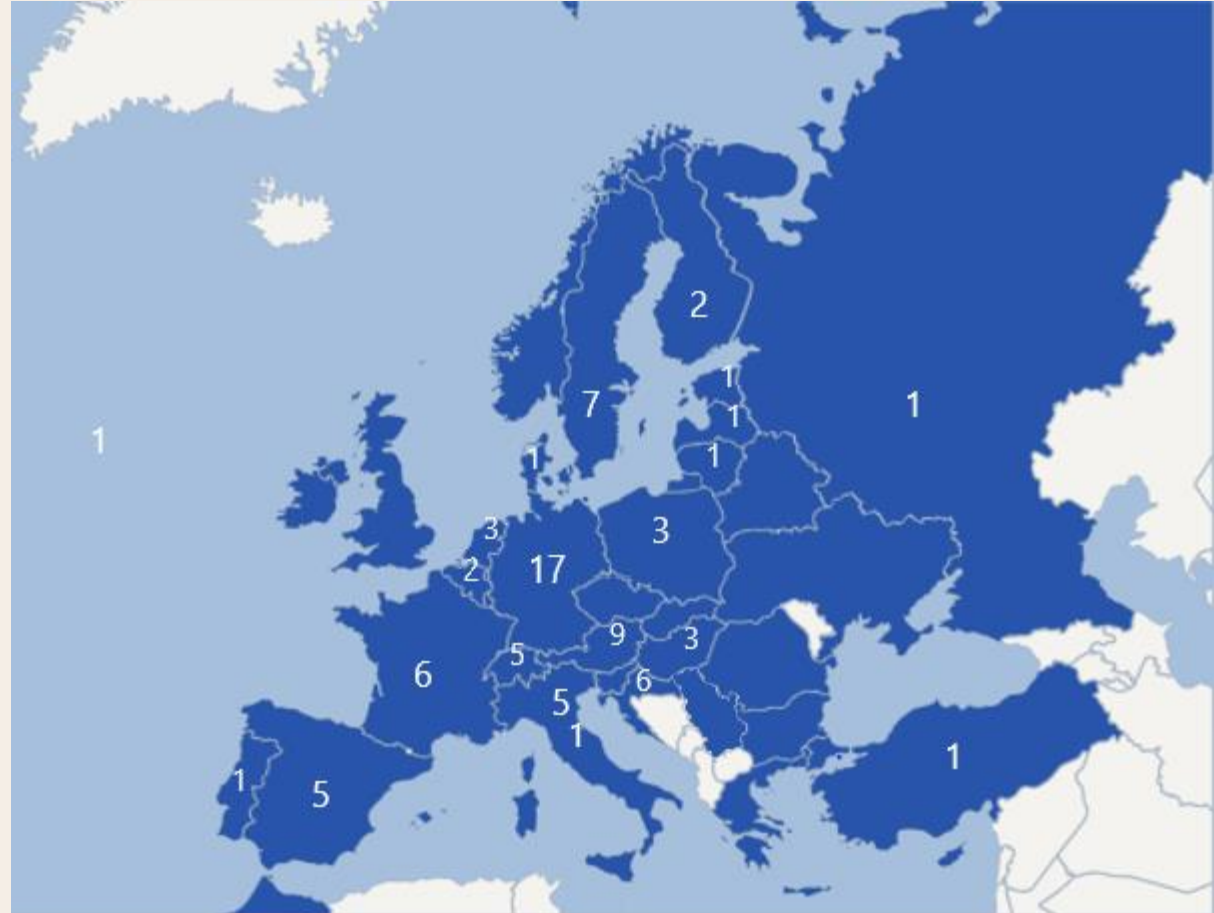
What's FEP

- 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**

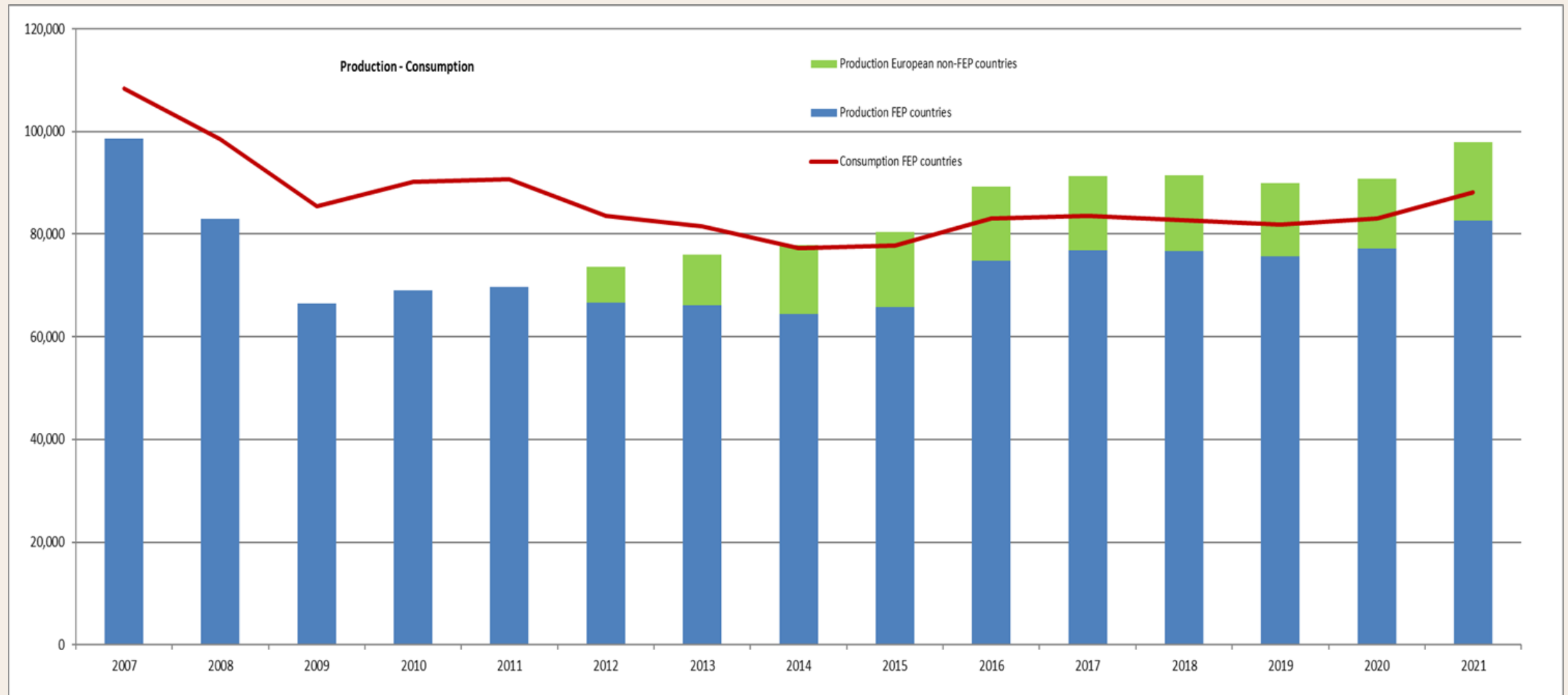
Production 2021 → level not seen since the start of the financial crisis

- 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

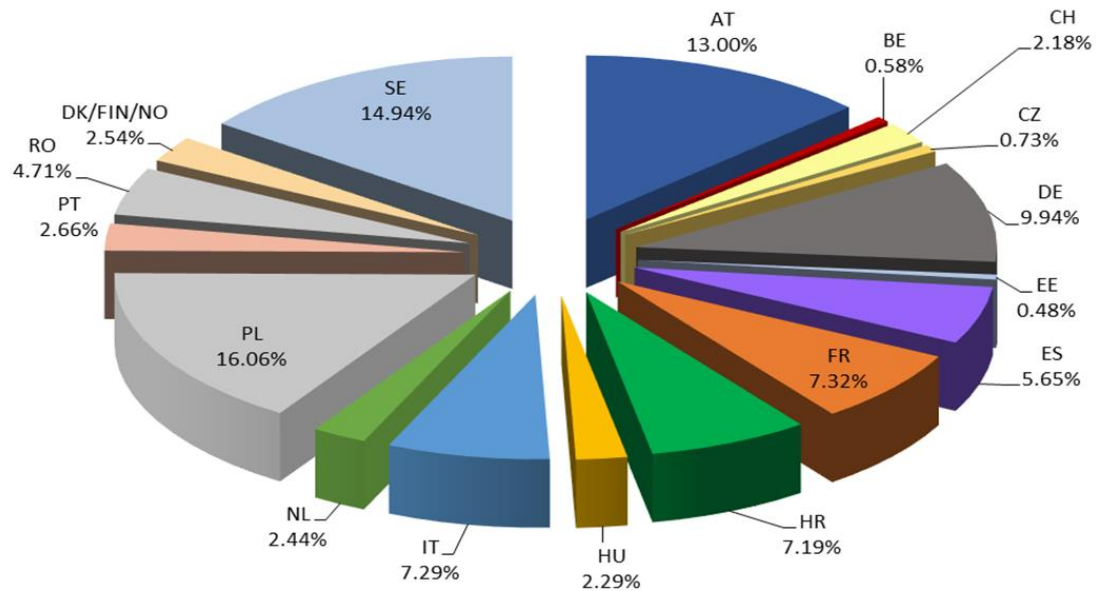
- FEP 88.155.000 m² (+6.2%)

Results 2021

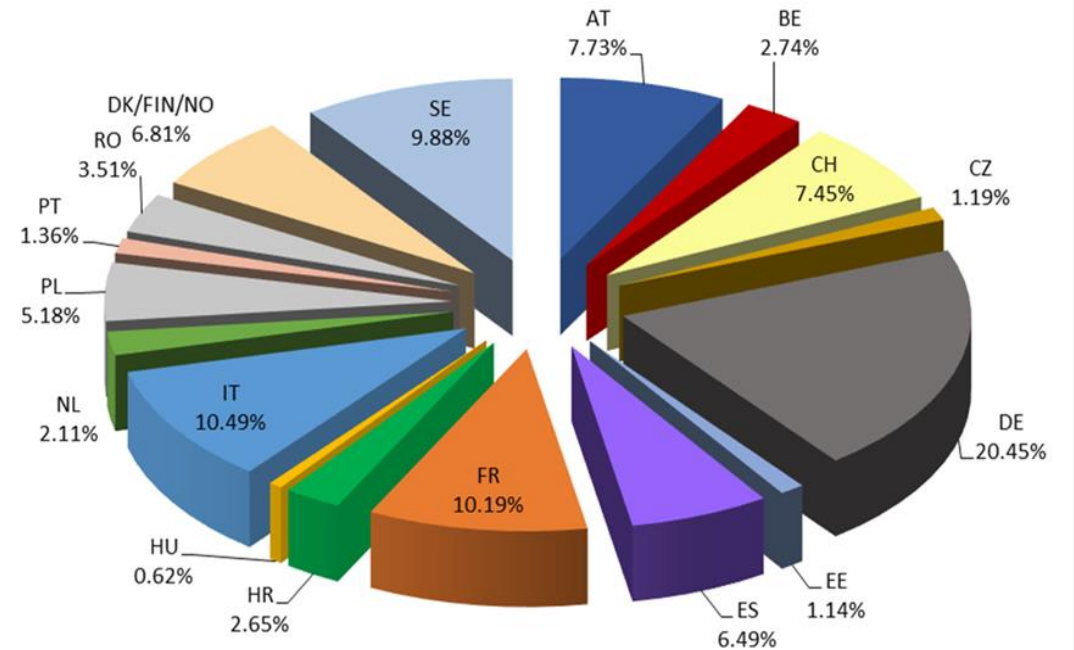


Results 2021

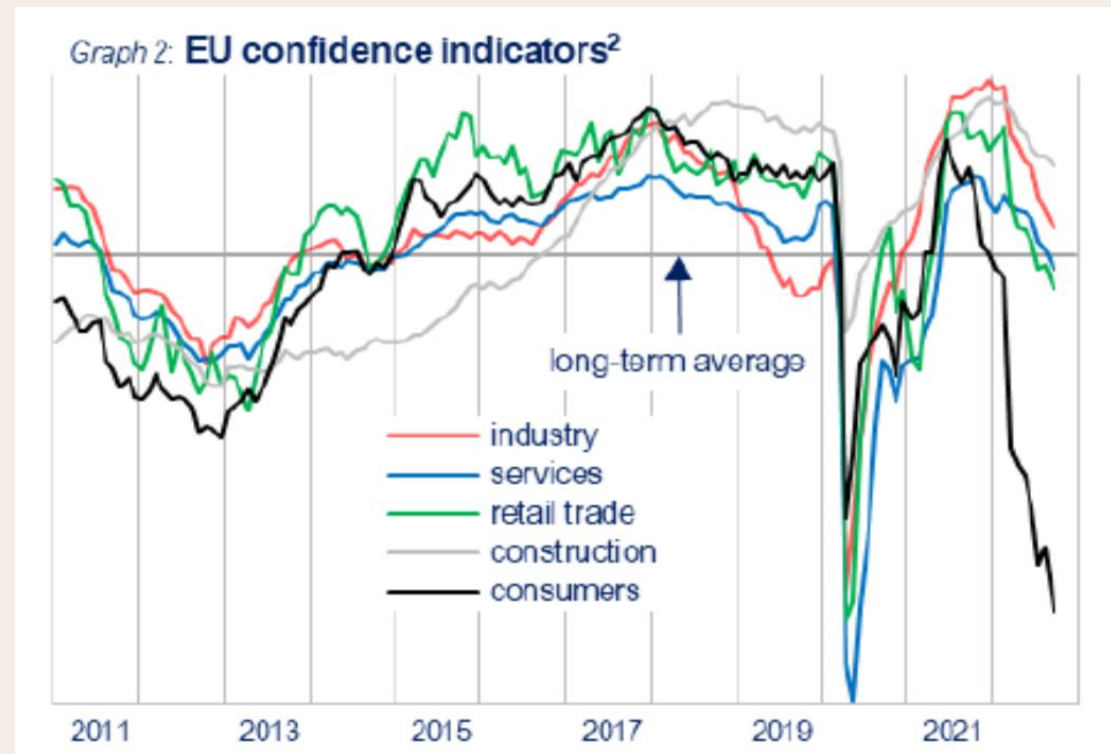
**Total FEP Production
Percentages for 2021**



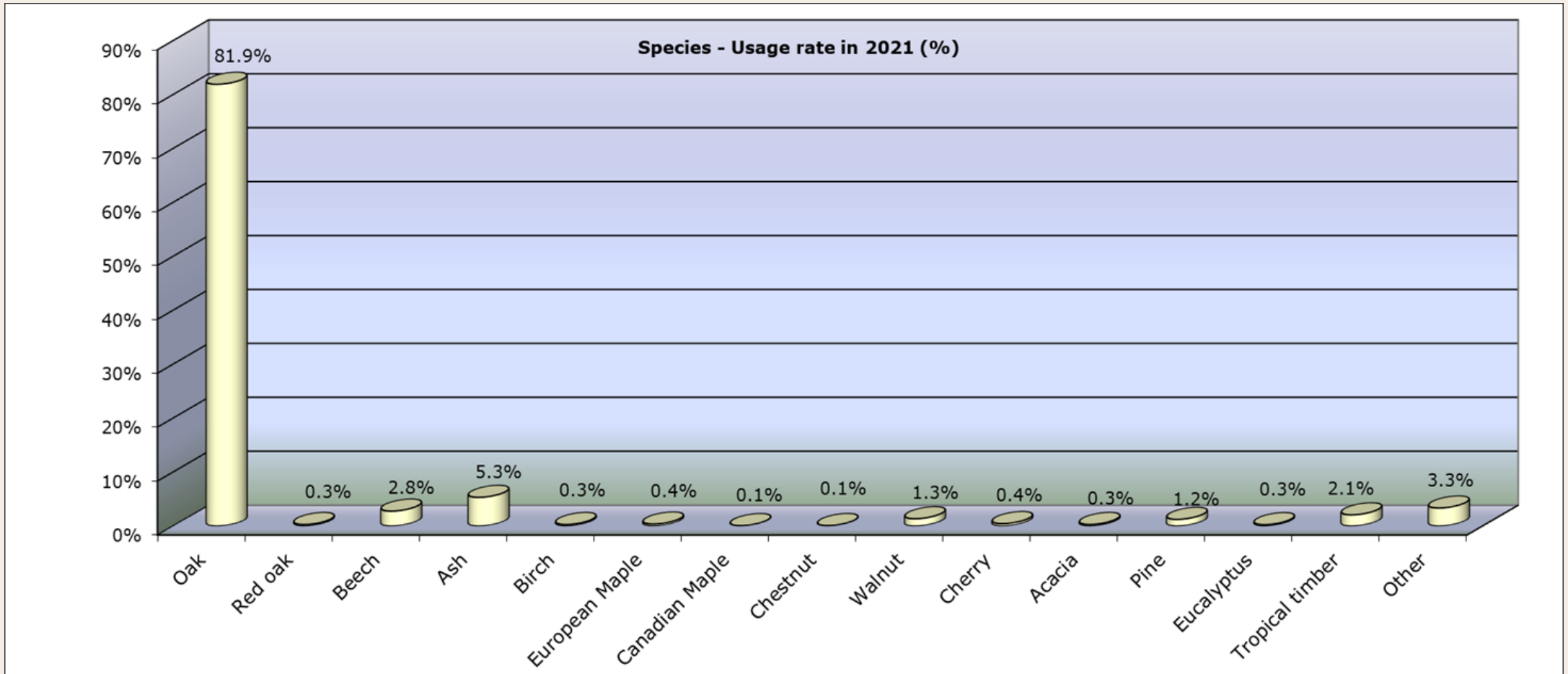
**Total FEP Consumption
Percentages for 2021**



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

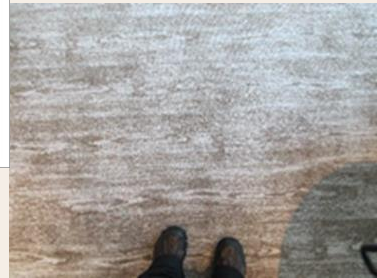
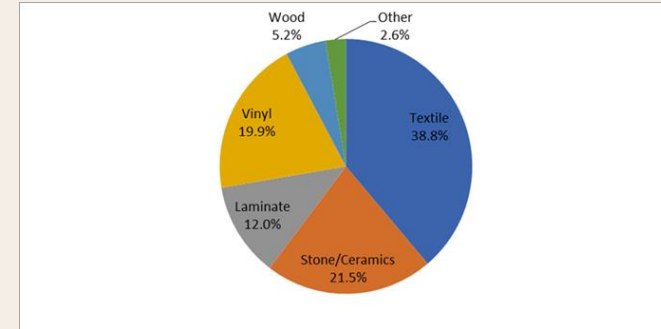
- Image
 - Avoid any potential risk regarding legality (Press, NGOs, EUTR, forthcoming Deforestation-free value chains Regulation...)
 - History
 - Sustainability
 - Incl. “Local” supplies → conclusive Environmental Product Declarations (EPD)?
- Technical requirements (machineries, properties...) → education
- 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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