



WOOD FLOORING THE EUROPEAN MARKET

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FLOORING CONFERENCE - CTWPDA



SUMMARY



1. Institutional environment (European and French)
2. Macro-economic data: France, Europe, China
- 3. The European market**
4. The parquet sector in France



I. Institutional environment (European and French)



! Geographical Europe is not a political Europe (28 countries) and even less Europe of trade unions

The European trade union landscape:

Europe :

CEI (wood industry)

ETTF (import & trade)

EOS (sawmill)

FEP (parquet industry), 21 member countries



France :

Union des Industriels de la Construction Bois - UICB (wood industries)

LCB – Le Commerce du Bois (import & trade)

FNB - Fédération Nationale du Bois (sawmill)

ParquetFrançais.org (parquet industry), 17 manufacturers



Note: the data collected and presented come mainly from the FEP and ParquetFrançais.org



2. Macroeconomic data 2018: China, Europe, France



	 France	 EU 28	 China
Area (million km ²)	0,550	4,5	9,6 (*17 ; * 2)
Population (millions)	67	513	1 386 (*20 ; *2,7)
Capital city President	Paris Emmanuel MACRON	Bruxelles Donald TUSK (PL)	Pékin Xi JINPING
Unemployment rate	9 %	6 %	4 %
Currency versus dollar	Euro (90)	Euro (90)	Yuan (700)
GDP (USD billion)	2,7	15,5 (13 sans la GB)	14,2
Minimum monthly salary (USD)	1700	320 in Bulgaria 2300 in Luxembourg	305 in Beijing 350 in Shanghai
Number of billionaires	70	500	700

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3. Le marché européen des parquets



1. What is a wood flooring (parquet) ?
2. Regulations (laws, standards, labels...)
3. The production
4. The consumption
5. Wood species
6. The forecasts



3.1 What is a wood flooring (parquet) ?



- ✓ A floor covering
- ✓ Wood-based
- ✓ Siding over 2.5 mm
- ✓ Allowing for several renovations

- ✓ With or without chamfers
- ✓ With or without finitions
- ✓ Species: hardwood, softwood, exotic
- ✓ There are different types of wood flooring (parquet) :
 - ✓ Massifs with thickness from 12 to 23 mm
 - ✓ Laminated (solid facing over 2.5 mm)



3.2 Regulations (laws, standards, labels...)



✓ Regulations: mandatory information, under the responsibility of the manufacturer

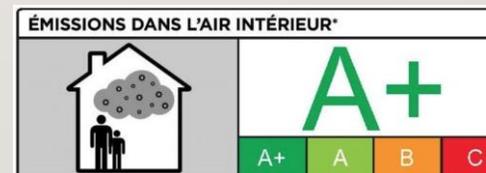
✓ CE marking (EN 14 342)

- ✓ Mechanical resistance
- ✓ Safety in case of fire
- ✓ Safety of use

✓ Declaration of performance (DOP)

- ✓ Reaction to fire
- ✓ Emissions of pollutants (formaldehyde, pentachlorophenol...)
- ✓ Breaking strength
- ✓ Slippage
- ✓ Thermal conductivity
- ✓ Biological sustainability
- ✓ ...

<i>Norme EN 14915 pour bardages et lambris</i> <i>Norme EN 14342+A1 pour lames de parquet</i>
Code essence : PCAB
Réaction au feu bardages/lambris : D-s2,d0
Réaction au feu lames de parquet : Dfl-s1
Absorption acoustique : 0,1 / 0,3
Dégagement de formaldéhyde : E1
Teneur en PCP : < 5 ppm
Glissance : NPD
Durabilité naturelle (sans traitement) : 4
Masse volumique : 460 kg/m ³
Conductivité thermique : 0,12 (W/(m.K))
Perméabilité à la vapeur d'eau : 66
Résistance à la rupture (planchers) : NPD
Produit de traitement : TANALITH
Classe de pénétration : NP4
Rétention : 8,9 kg/m ³
Agents visés : champignons et insectes



! Importers must provide **proof of the legality of the wood** they place on the market, hence the importance of wood traceability throughout the value chain (EUTR)



3.2 Regulations (laws, standards, labels...)



✓ Certification marks, voluntary approach

- ✓ Third party audit
- ✓ Exceeding regulatory requirements



✓ Labels, voluntary approach

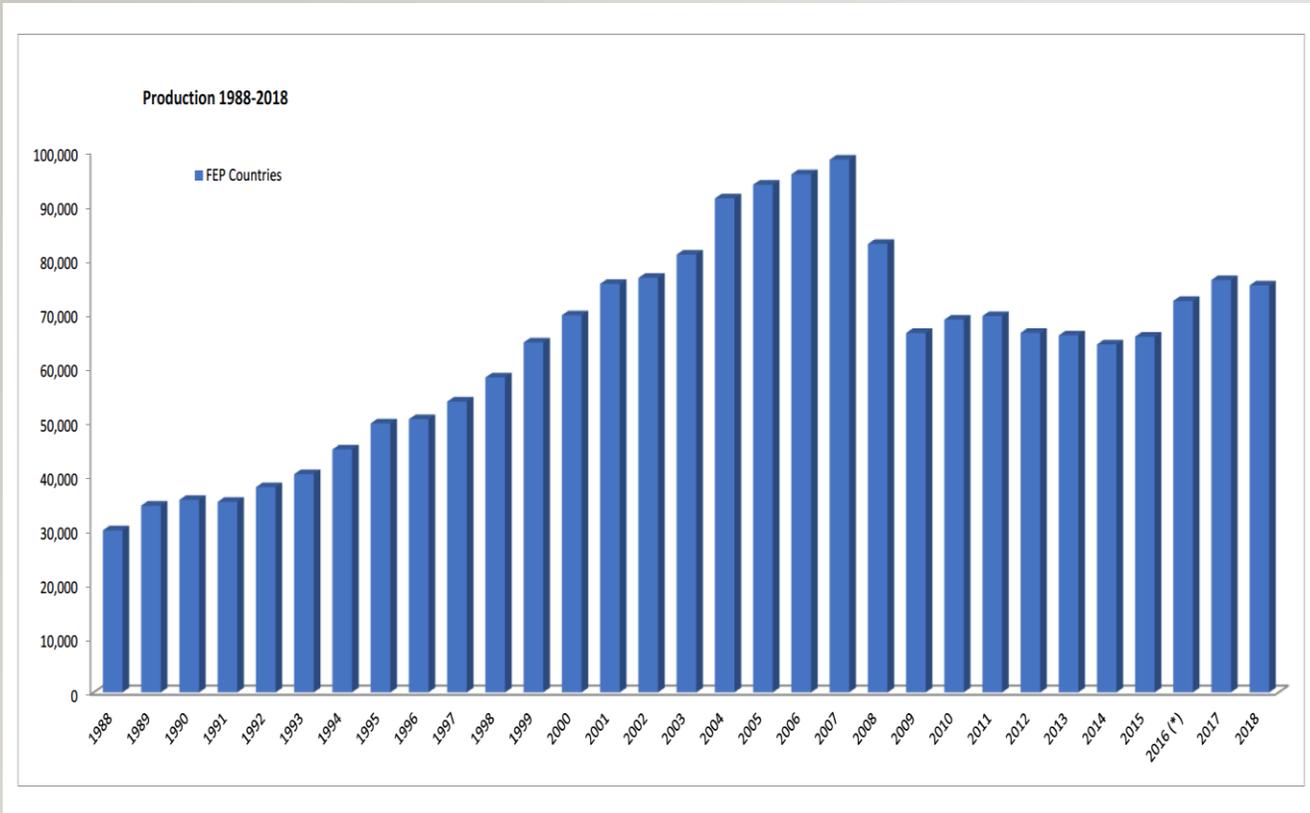
- ✓ Third party audit or not
- ✓ Compliance with specifications
- ✓ Promotion of a product, a territory....

Note: a label is generally more flexible in its application than a certification

! The installation of parquet floors complies with standards that correspond to good practices accepted by the profession. If these standards are voluntary, their respect will nevertheless be sought in the event of a claim.



3.3 Production 2018



➤ **FEP Countries :**
75 millions m2



➤ **UE 28 :**
90 millions de m2

- 83% laminated parquet flooring
- 17% solid parquet flooring

Methodological alert: the production of softwood floors is not recorded in France

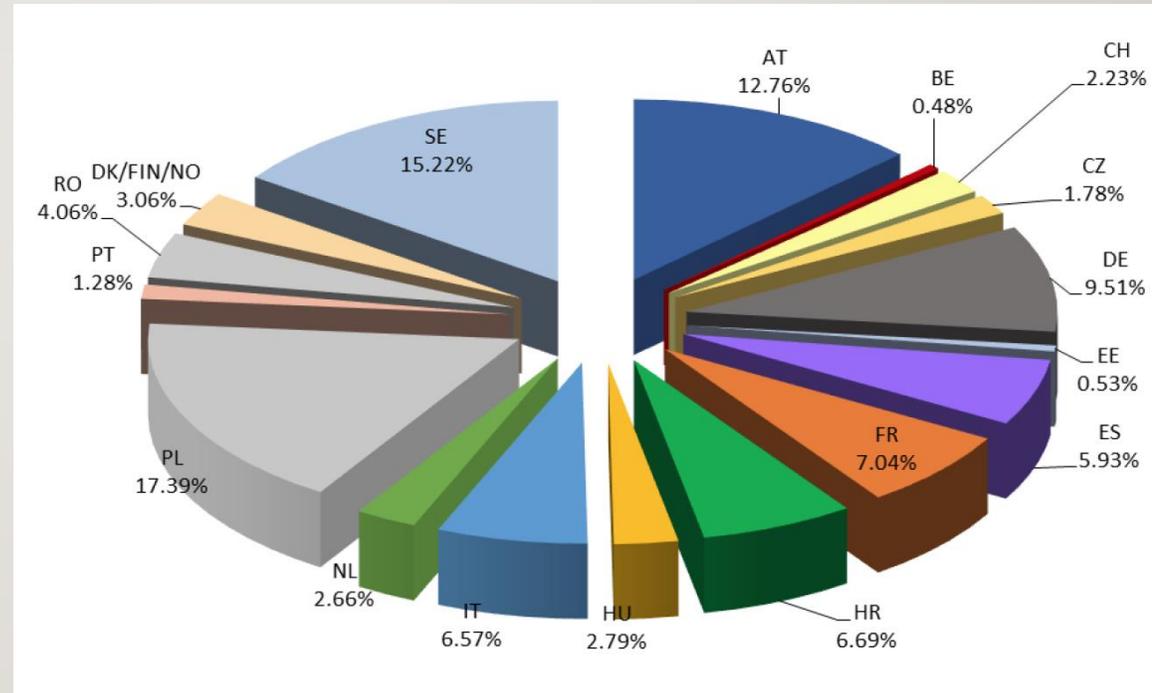


3.3 Production 2018

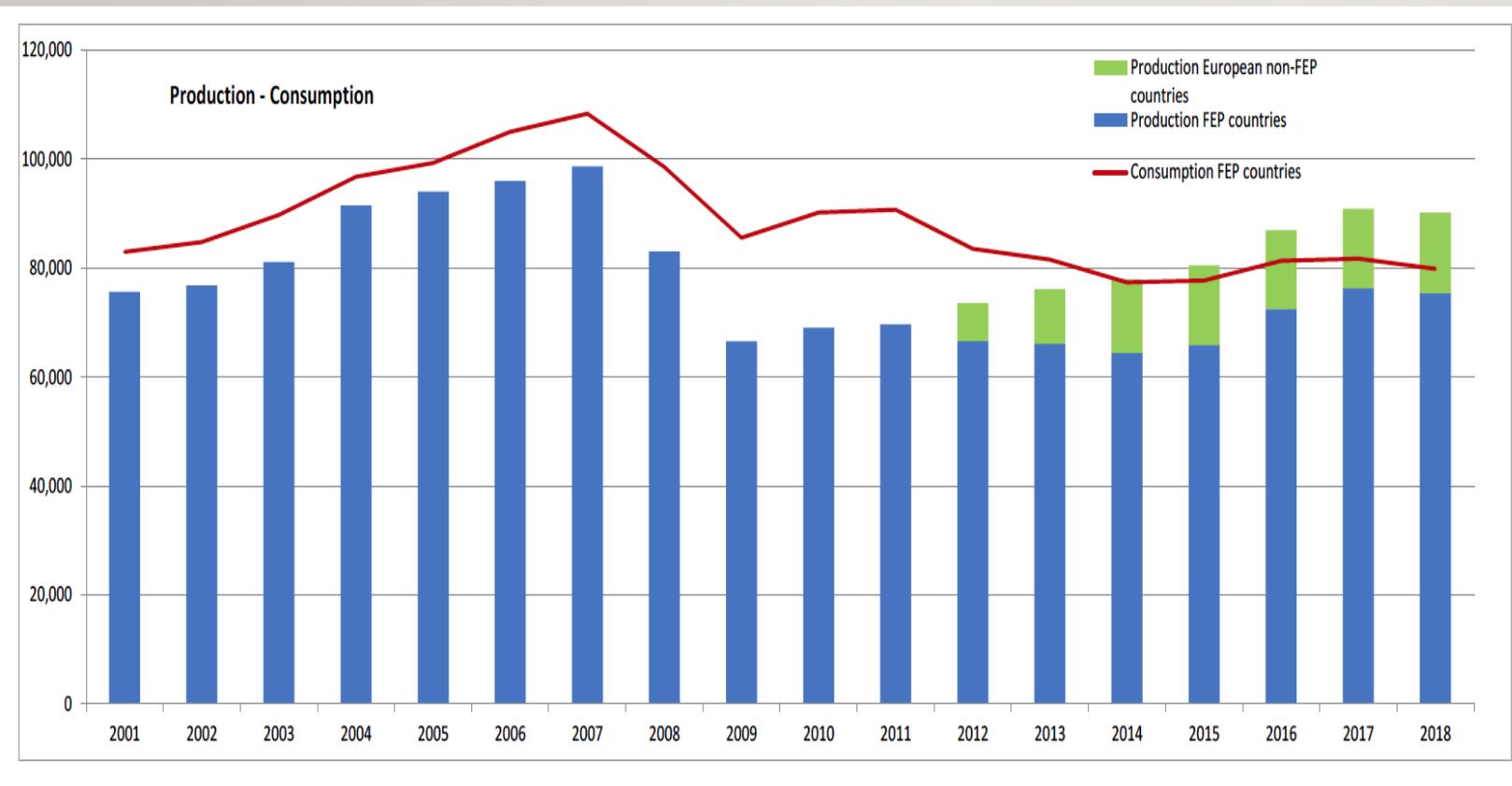


Ranking of the main European producers who are members of the FEP

- Rank 1: **Poland** with 17.4%
- Rank 2: **Sweden** with 15.2%
- Rank 3: **Austria** with 12.76%
- Rank 4: **Germany** with 9.5%
- Rank 5: **France** with 7%
- Rank 6: **Croatia** with 6.7%
- Rank 7: **Spain** with 5.9%



3.4 Consumption 2018



➤ FEP Countries

80 millions m² (-2,3 % / 2017)

Rank 1: Germany with 18.8%

Rank 2 : Italy with 11,5 %

Rank 3 : France with 10,6 %

Rank 4 : Sweden with 10,4 %

Rank 5 :Austria with 8 %

Rank 6 : DK/FIN/NO with 7,8 %

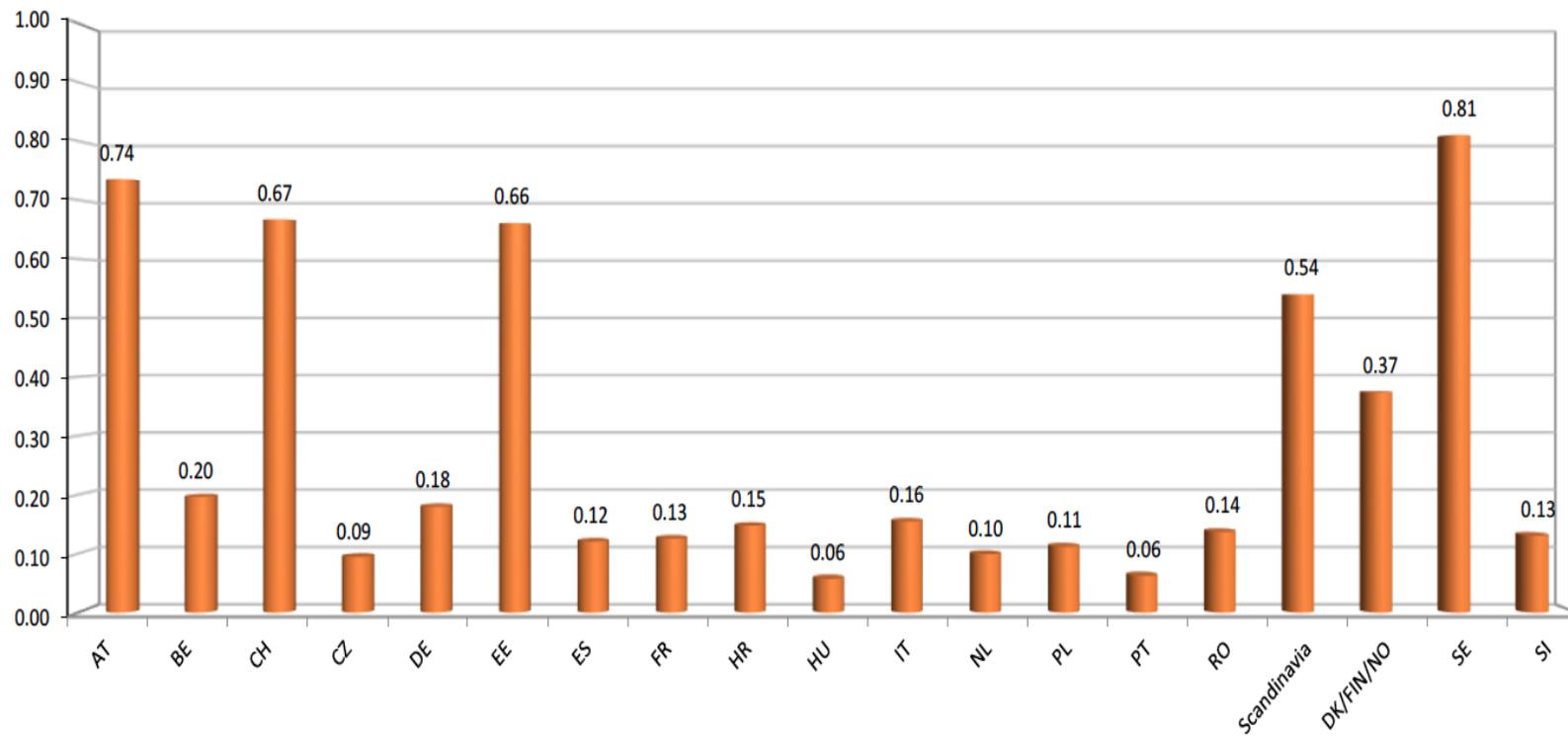
Rank 7 : Switzerland with 7,25 %



3.4 Consumption 2018 (m2 / capita)



Consumption per capita 2018



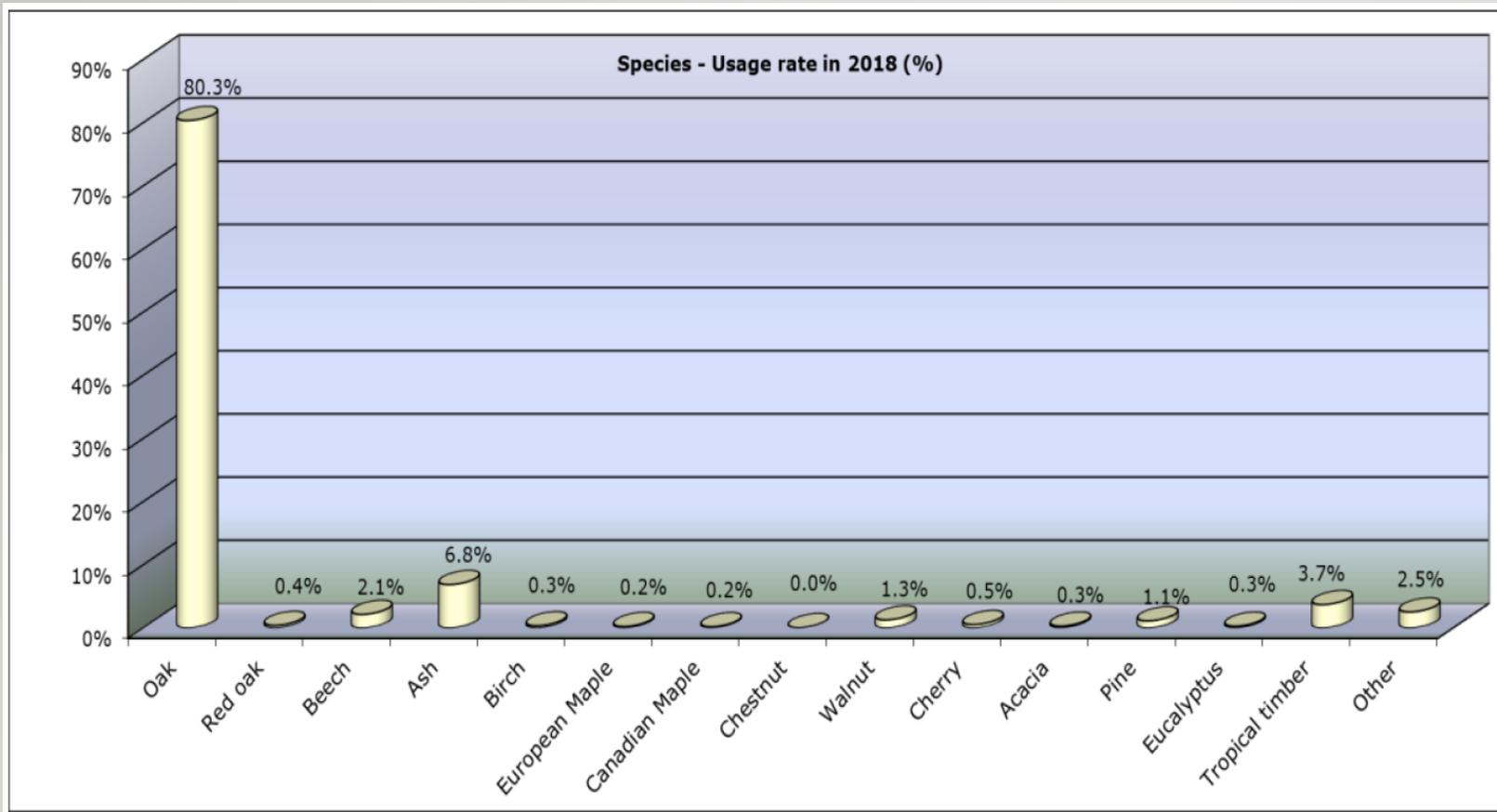
- Rank 1: Sweden with 0,81
- Rank 2: Austria with 0,74
- Rank 3: Switzerland with 0,67
- Rank 4: Estonia with 0,66
- Rank 5: Scandinavia with 0,54
- Rank 6: DK/FIN/NOR with 0,37



➤ FEP Countries : **0,19 m2 / capita** (idem 2017)



3.5 Wood species



- **Rang 1 : Oak with 80 %**
- **Rang 2 : Ash 6,8 %**
- **Rang 3 : Tropical timber 3,7 %**
- **Rang 4 : Beech 2,1 %**



3.6 The 2019 and 2020 forecast



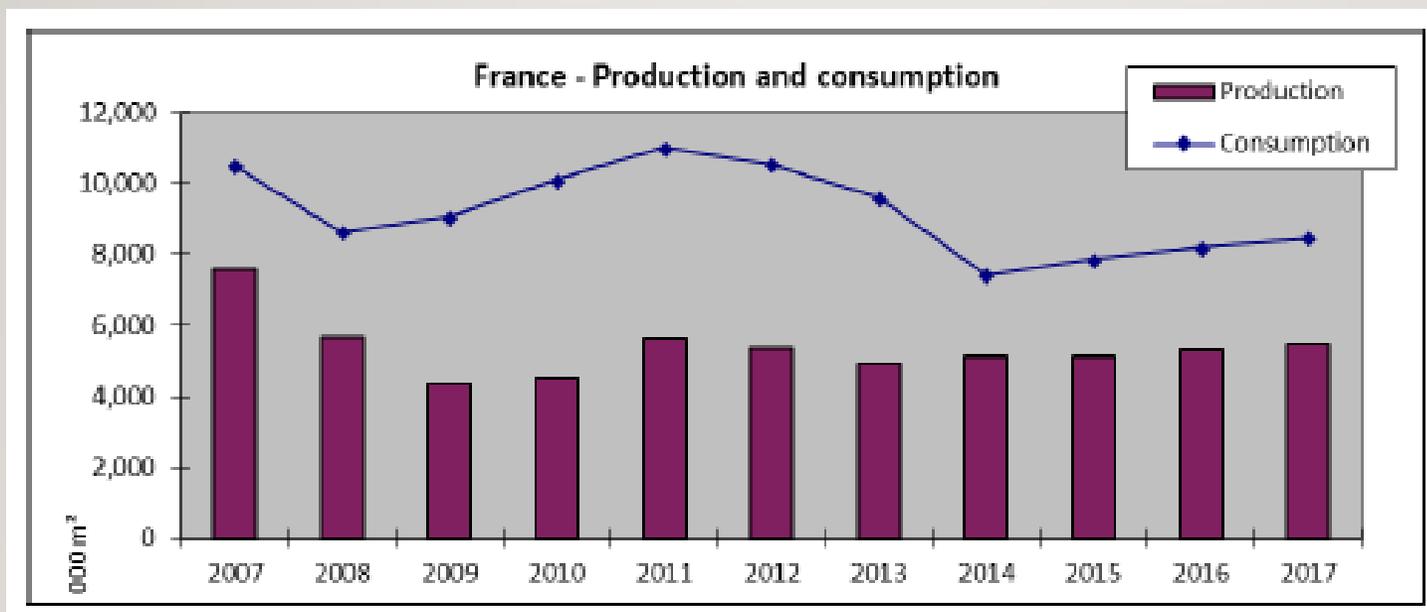
- **The market could start to rise again:**
 - Dynamism of Germany
 - Positive image of the wood flooring
 - Regain for interior decoration (loft, boudoir, organic, dandy...)
 - Friendly policies (environmental regulation)



4. Wood flooring sector in France



- A quality production and a recognized know-how
- High cost and significant competition
- French production continues to decline with -3% in 2018
- At the same time, consumption increased by 1.6% over the same period
- French manufacturers have mobilized to launch a label aimed at promoting French manufacturing : **the *Parquets de France* label**



4. Wood flooring sector in France



THE PARQUET FLOORING LABEL OF FRANCE:

- **100% French manufacturing**
- Use of local wood
- Use of wood from certified forests
- Traceability of the floor
- High quality approach (raw materials, environmental and health quality...)
- Compliance with these requirements shall be monitored by an independent organisation





Thank you for your attention!



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