European
Parquet
Federation

Developments in the Parquet sector

Lorenzo Onofri, FEP Chairman

6 November 2026, International Hardwood Conference, Antwerp

Agenda



- What is FEP?
- Challenges faced by the European Parquet sector
- FEP @ work
- FEP @ DOMOTEX 2026 & 2028
- Wood4Real coalition
- FEP Statistics 2025 & first elements for 2026
- Q&A

What is FEP?

European Parquet Federation

- ✓ **E**uropean **P**arquet **F**ederation
- ✓ Created in 1956
- ✓ Main body representing and defending the interests of the European parquet industry at all relevant levels

Membership

- ✓ 92 Members
  - 57 manufacturers
  - 8 National Associations
  - 27 suppliers
- ✓ In 23 countries
- ✓ All the main players

*As of 1 May 2026



What is FEP?

Organisation

- FEP Chairman – Lorenzo Onofri
- FEP Managing Director – Isabelle Brose
- Board of Directors
- General Assembly
- Annual European Parquet Congress
- FEP Technical Committee
    - Incl. Core Group & Task Force
- *ad hoc* Group ‘Communication’ whenever relevant

Activities

- Active follow-up of relevant EU initiatives regarding parquet and its raw materials, incl. trade issues
- Active follow-up of relevant EU & international standards, and other technical topics
- Development of market data (annual statistics, Q-Stats, market surveys)
- Communication towards the consumers: Real Wood & Refinishable Program
- Communication towards the Members and the Press
- Enlarging the membership

Challenges faced by the EU Parquet sector



- **Unfair competition** with imports from **China**, price absorption & circumvention practices to avoid Anti-Dumping (AD) definitive measures
- **Competition** from **wood-look** products
- **Wood** (raw material) **availability**, especially for oak & birch
  - Oak logs are massively exported, especially towards China, without any transformation/processing in Europe
  - A significant part of birch plywood supplies to EU parquet producers came from Russia before 2022 → challenging diversification & competition from products benefitting from trade hubs for illegal wood
- Other challenges
  - EUropean Deforestation Regulation (**EUDR**)
  - Barriers to **exports**: US (volatile duties), Canada (new inquiry), India (AD duties *vs*. Free Trade Agreement)…
  - Carbon accounting rules → Certification framework for Carbon Removals, flooring not in scope so far…

FEP @ work

- Current main areas of work for FEP on its own, and through coalitions, results and next steps
  - **EUDR** implementation postponed by 1 extra year → ongoing work on further simplification by & beyond end-2026
  - **AD** on Multilayer Wood Flooring (MWF) from China - Definitive measures → ongoing work on Anti-Absorption (AA)
  - EU Commission (EC) **Construction Products Regulation** (CPR) Acquis Process → ongoing work on Standardization Request
  - Better balance between **Green & Industrial** "Deals" (EU Industry Forum) → ongoing advocacy to go further, especially on Industrial Accelerator Act (IAA) and Biotech Act II, which are not focusing on "traditional" manufacturing & uses
  - **Simplification** through Omnibus Packages → to be applied further and wider



FEP @ work



- 70th FEP GA & 50th European Parquet Congress in 2026
- From a “club” to a recognised European Federation
- Presence & results
- But
  - Increasing number of initiatives to follow
  - Geopolitics and trade have changed
  - European parquet markets are subdued

➢ To work further on advocacy and trade, but also on communication

➢ Let’s look towards the future!

FEP @ DOMOTEX 2026 & 2028

- **2026** - High number of visitors on FEP Lounge
  - Long-standing or more recent Members
  - New fruitful contacts
  - Program of presentations
  - FEP visibility

- **2028** – An experience to repeat
  - Dedicated area & FEP Lounge
  - ➢ DOMOTEX as a hub to gather and show our sector's unity!



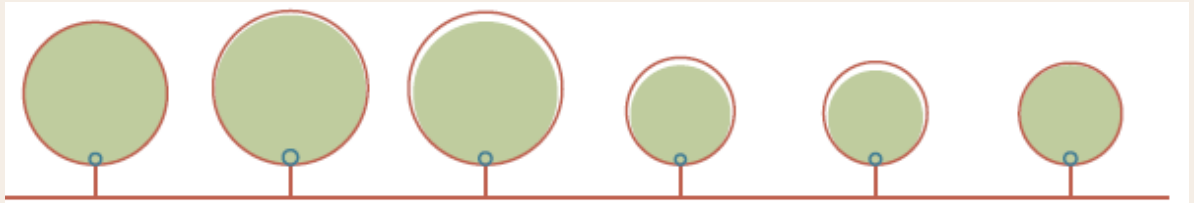
Wood4Real coalition



- Aim: avoiding misuse of the term “wood” or of wood species
- Steered by Danzer with FTI Consulting
- Consumer Campaign
  - Mobilizing consumers/employees that have been deceived, in particular by retailers (both online & offline), so that they raise their voices and file formal complaints (tool-kits) → EU Consumer Protection Cooperation Network: DE, FR, IT, ES, PL, NL & BE
  - Voluntary Commitment at company level
- Advocacy
  - Active monitoring of Empowering Consumers Directive (EmpCo) implementation, support complaints & enforcement actions, share best practices, and maintain public visibility
  - Activy monitoring of preparatory process of Ecodesign Sustainable Products Regulation (ESPR) - Furniture Delegated Act - requirements for furniture on durability, reparability, disassembly, recycled/bio-based content, substances of concern and Digital Product Passport (could be led in parallel with CPR for flooring)

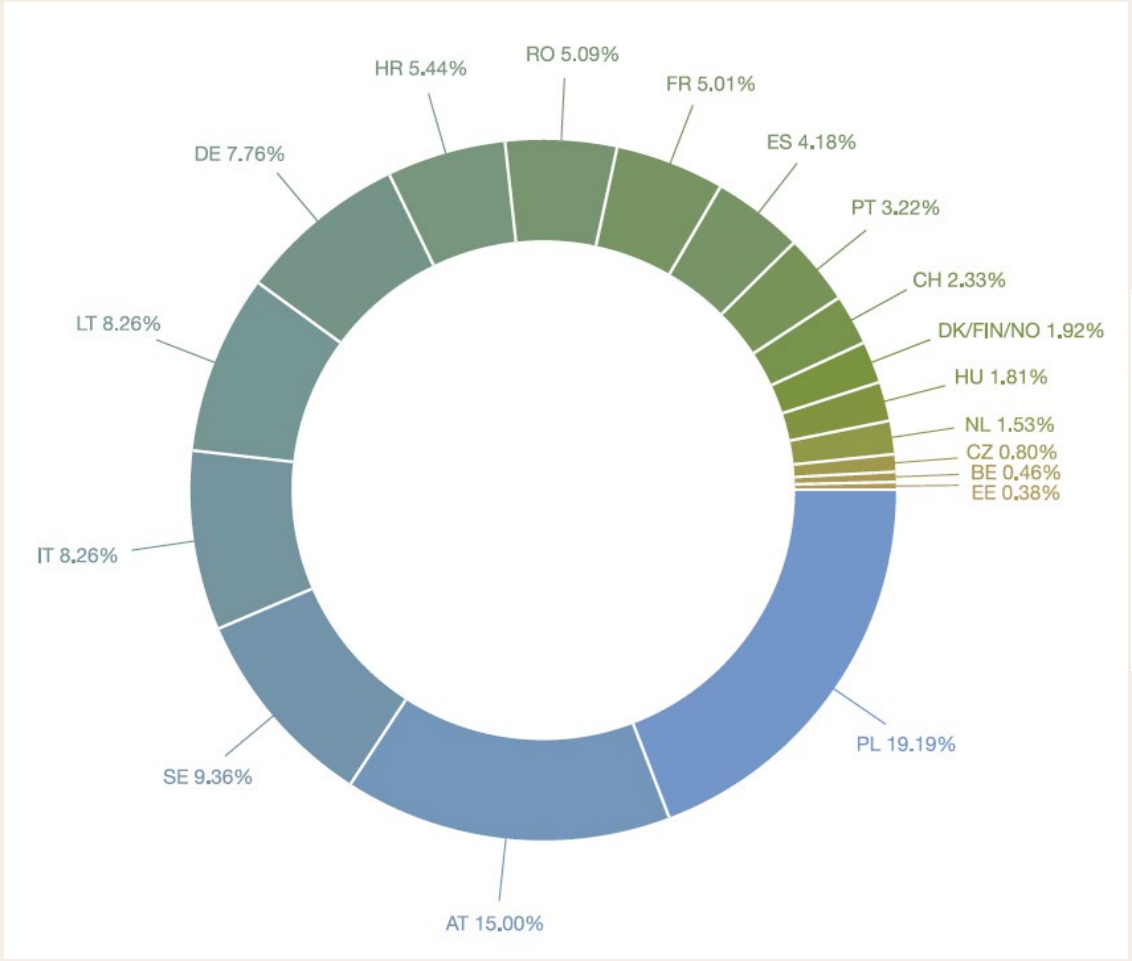
FEP Statistics 2025 - Key figures

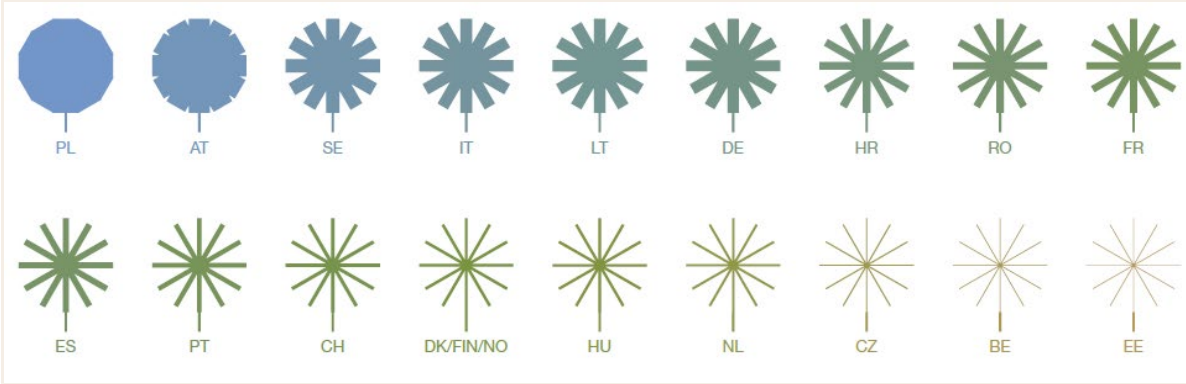
- Production 2025
  - FEP (LT incl.) 58.973.000 m² (+5.87%)
  - Non-FEP countries in Europe 7.200.000 m²
  - Total 66.173.000 m² (+6.21%)
- Consumption 2025
  - FEP 60.246.000 m² (-0.98%)



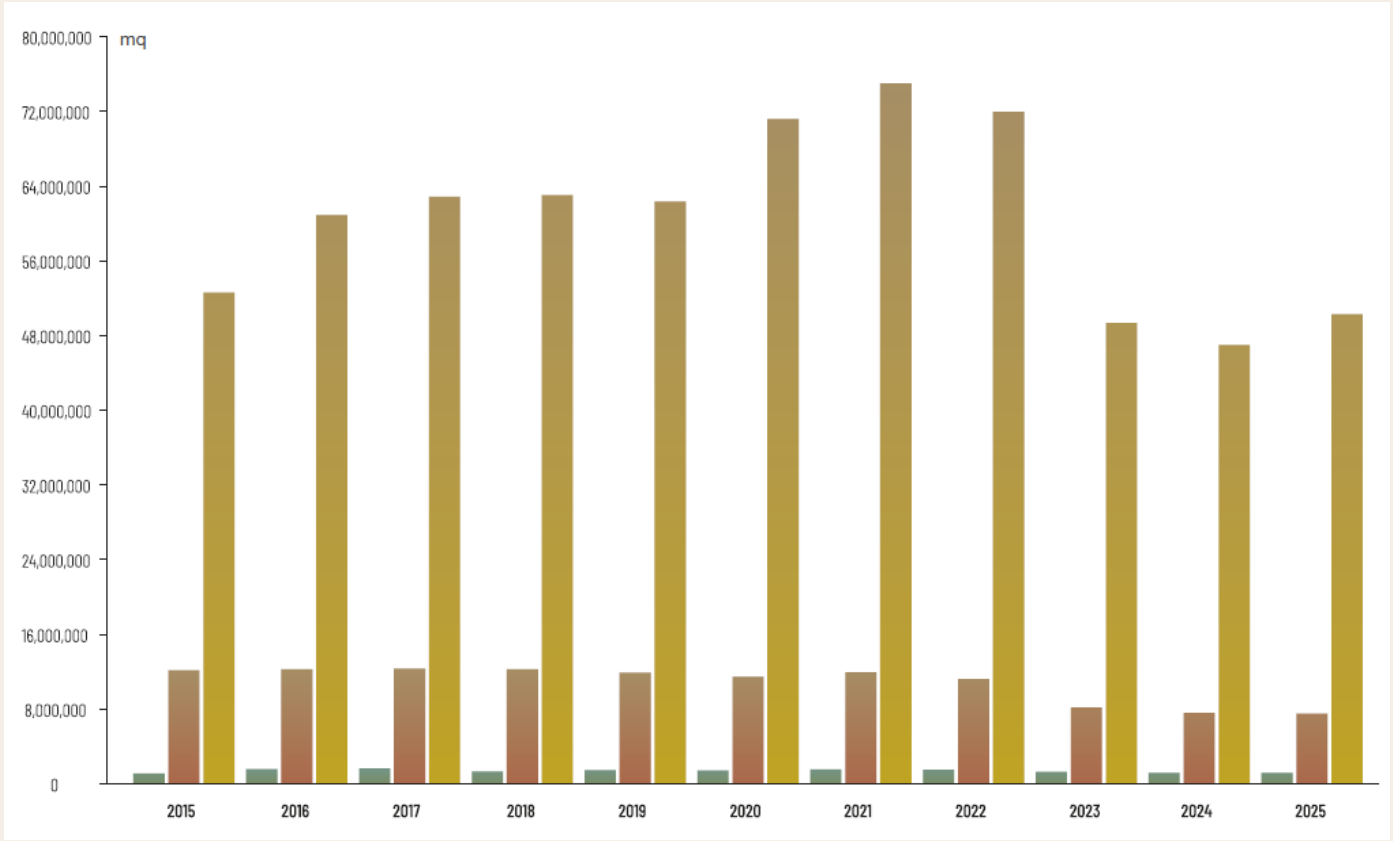
Million sqm	2020	2021	2022	2023	2024	2025
Production FEP countries	84,074	88,451	84,660	58,761	55,705	58,973
Production European non-FEP countries ***	6,700	8,700	7,200	6,000	6,600	7,200
Consumption FEP countries	84,372	90,975	90,323	63,394	60,842	60,246

FEP Statistics 2025 - Production

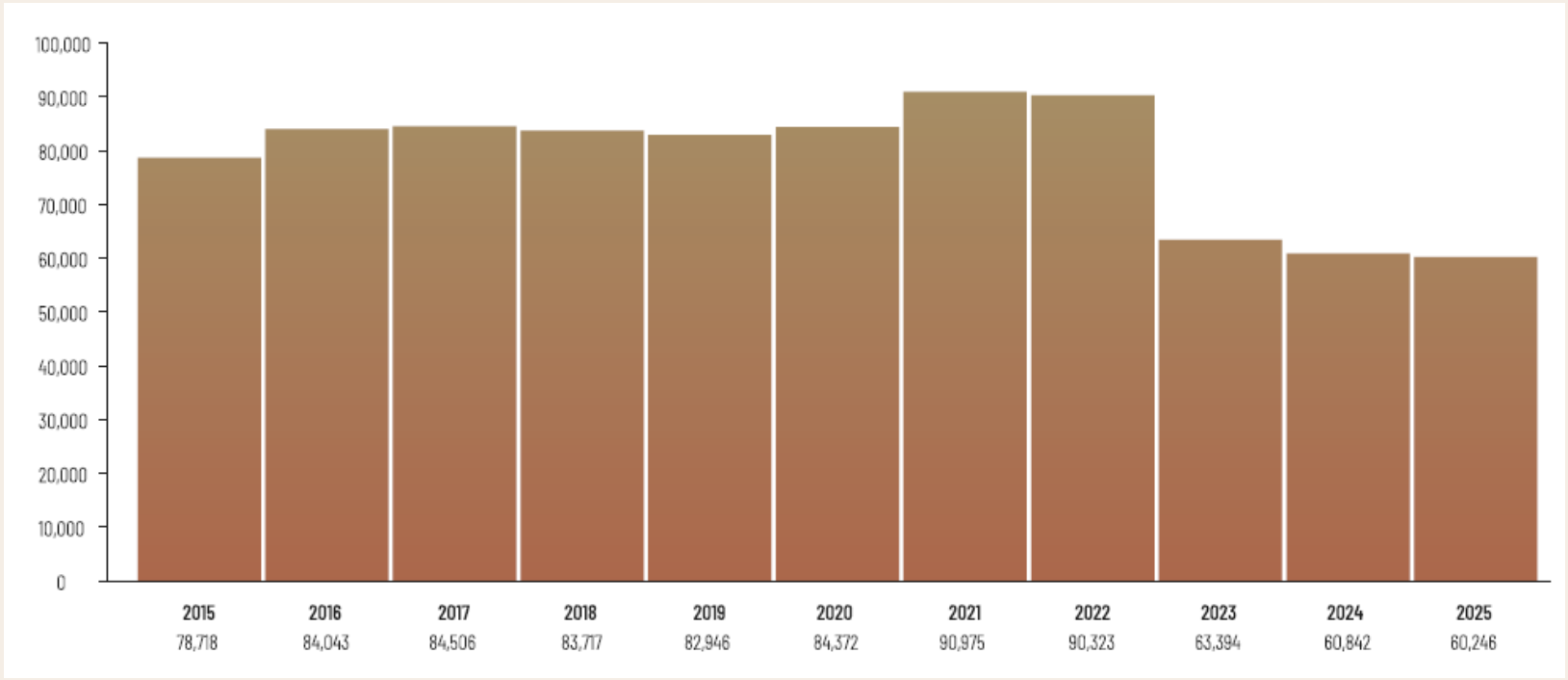




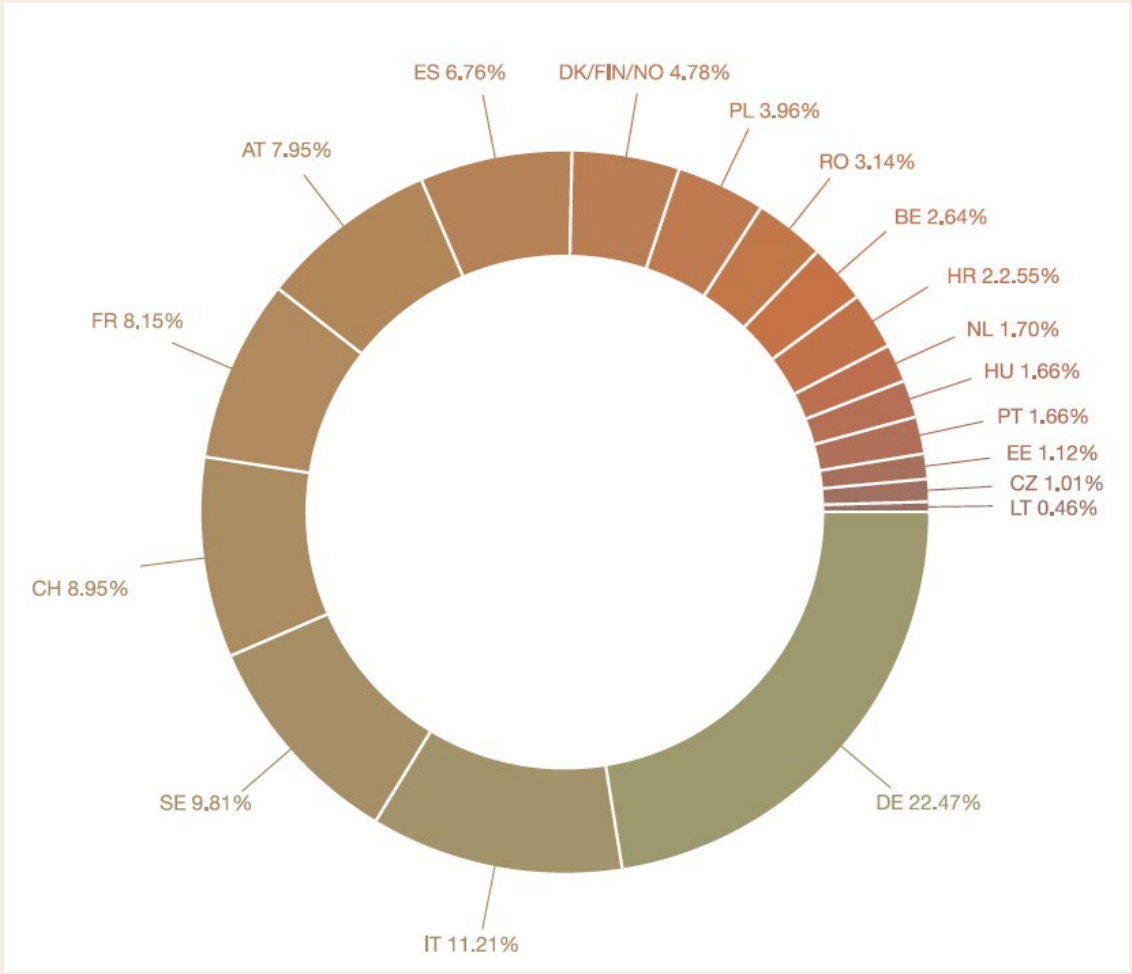
FEP Statistics 2025 – Production (mosaic/solid/multilayer)

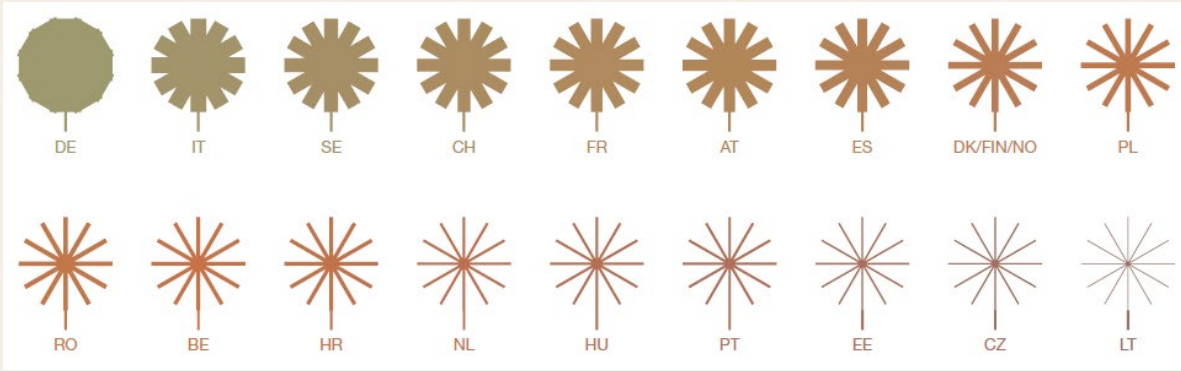


FEP Statistics 2025 - Consumption

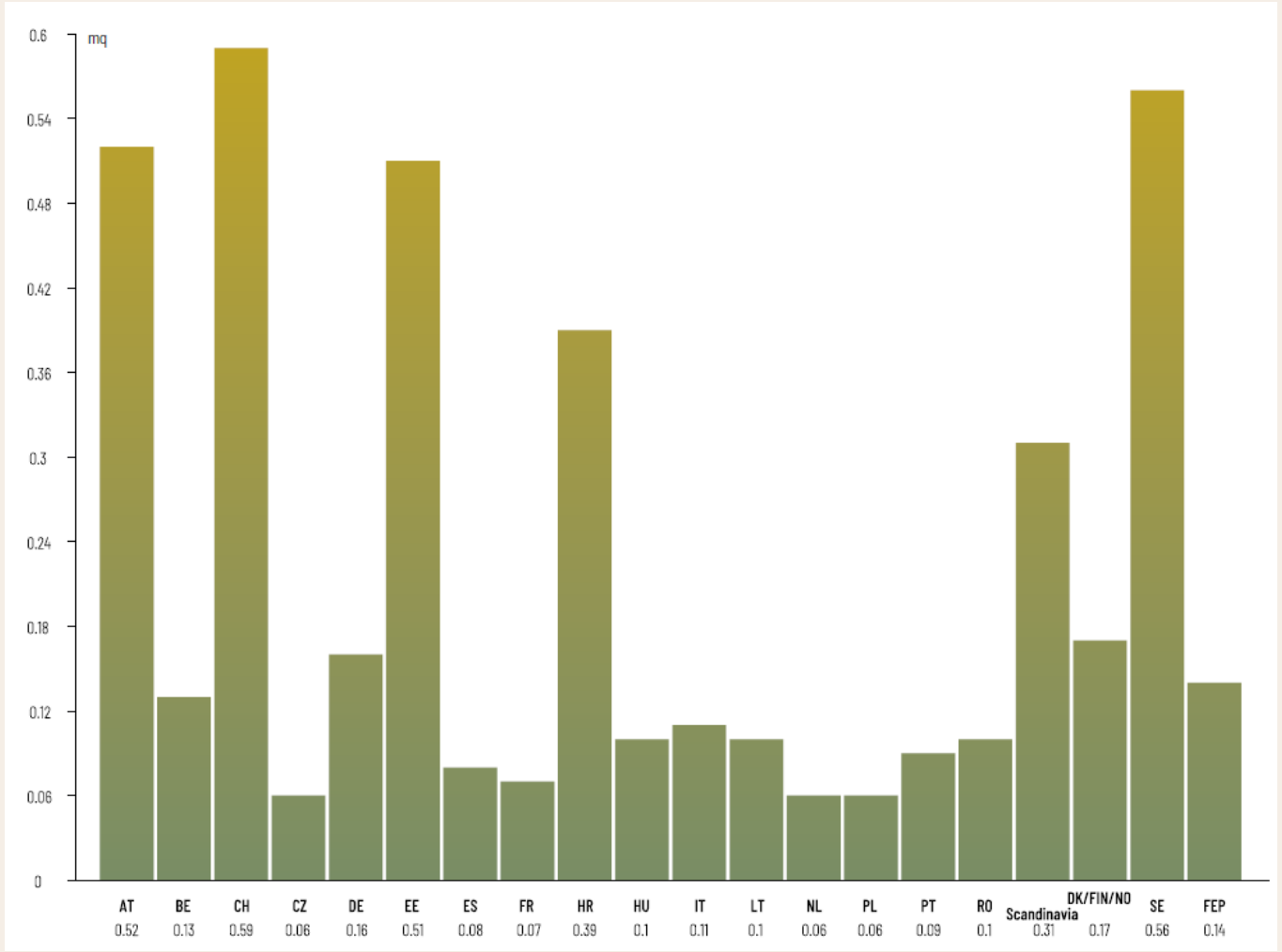


FEP Statistics 2025 – Consumption

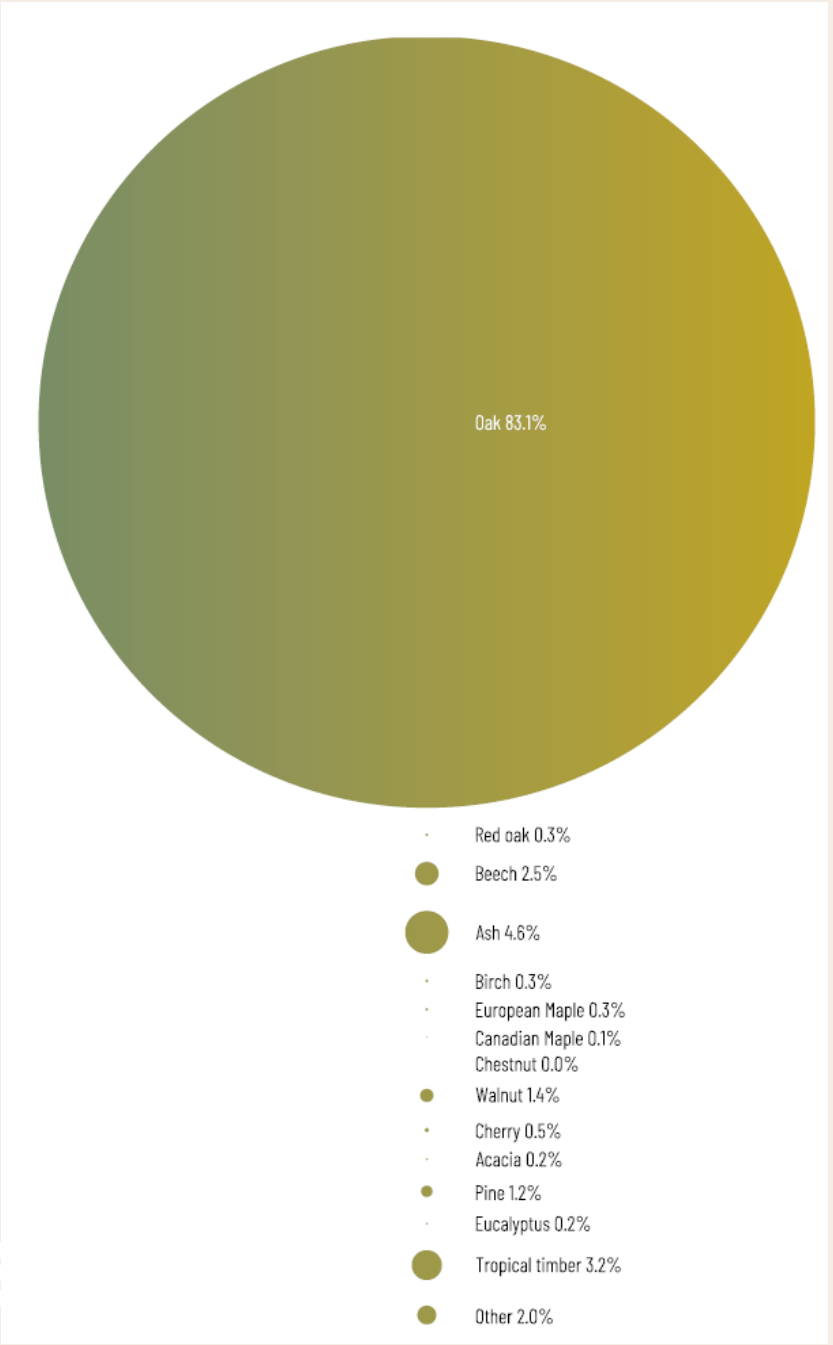




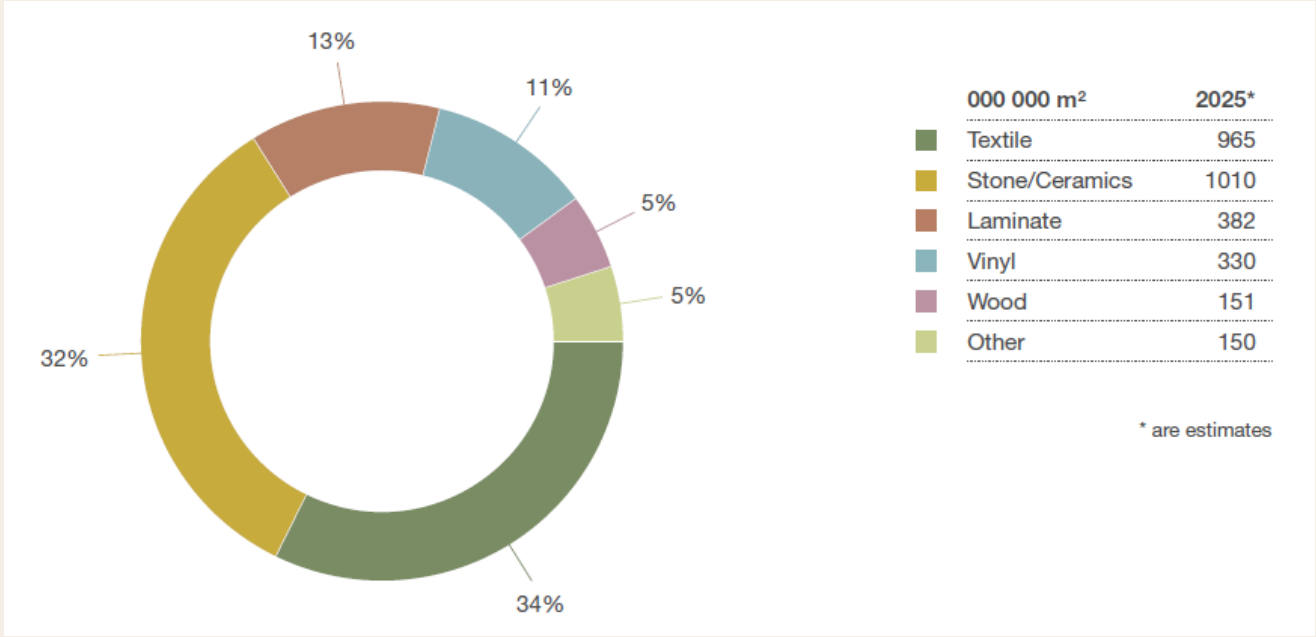
FEP Statistics 2025 – Consumption per capita



FEP Statistics 2025 - Wood



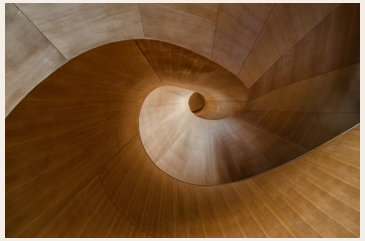
FEP Statistics 2025 - Floorings



000 000 m²	2025*
Textile	965
Stone/Ceramics	1010
Laminate	382
Vinyl	330
Wood	151
Other	150

* are estimates

2026



- European parquet market remains broadly stable to slightly positive, with modest growth reported in several markets during the 1st half of 2026
- Market sentiment has weakened since the summer, driven by geopolitical uncertainty, declining consumer confidence, higher interest rates, increasing energy costs and renewed inflationary pressures
- Consumers are becoming more cautious, with higher savings rates and postponed renovation investments
- Construction sector is showing early signs of stabilization, but a broad recovery has not yet materialised and activity levels remain below historical standards
- Manufacturers continue to face rising costs for labour, energy and raw materials, while price increases are difficult to pass on to customers, especially when considering competition from imported products from China and new countries of origin
- Supply of certain hardwood species remains challenging, adding further pressure to production costs and availability
- Market conditions are expected to remain challenging in the coming months, with geopolitical developments, inflationary pressures and subdued consumer confidence continuing to weigh on demand
- Nevertheless, the sector remains cautiously optimistic that a gradual recovery in construction and renovation activity, combined with parquet's sustainability, durability and natural appeal, will support future growth when confidence returns

Q&A



Thank you for your attention!

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