



European Federation of the Parquet Industry
 Fédération Européenne de l'Industrie du Parquet
 Föderation der Europäischen Parkett-Industrie

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Press release

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THE EUROPEAN PARQUET INDUSTRIES IN 2014

European Parquet business still looking for signs of stabilisation

Further amplifying the January forecast of the FEP (European Federation of the Parquet Industry) issued at the start of the DOMOTEX fair in Hannover, the consolidated data provided by member companies and affiliated national associations indicates that the market still follows a downward trend. The general picture is, as expected, not uniform with considerable variations from country to country.

Compared to 2013, the overall consumption figures in 2014 point to a decline of 6,4%. As far as production is concerned, the trend already witnessed in the previous years, namely the strategic choices made by several producing companies to relocate their production in European countries outside the FEP territory, was once again confirmed. The production in FEP territory went back by 6.62% to 62.6 millions square meters, while the European production outside FEP countries is at an estimated 13.5 millions square meters.

Parquet production in Europe

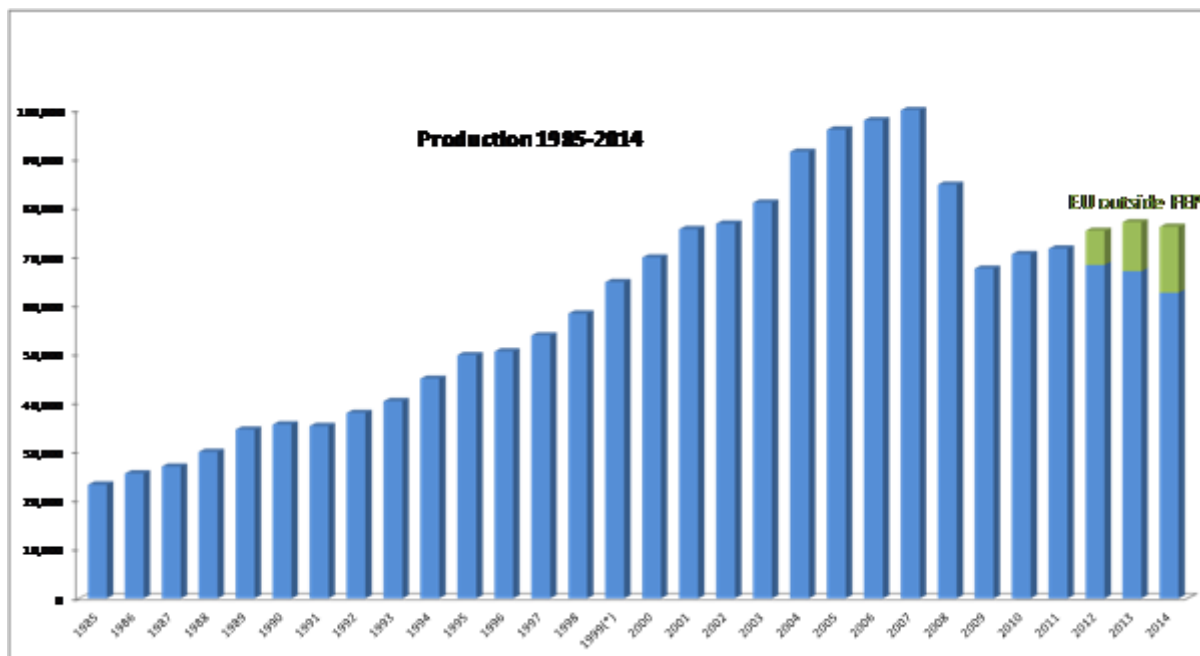
	FEP Countries		EU - outside FEP(**)	Total	
	000 m ²	+ / - %	000 m ²	Total	+ / - % Total
1985	23,300			23,300	
1986	25,580	9.79%		25,580	
1987	26,991	5.52%		26,991	
1988	29,997	11.14%		29,997	
1989	34,566	15.23%		34,566	
1990	35,634	3.09%		35,634	
1991	35,294	-0.95%		35,294	
1992	37,977	7.60%		37,977	
1993	40,396	6.37%		40,396	
1994	44,972	11.33%		44,972	
1995	49,798	10.73%		49,798	
1996	50,578	1.57%		50,578	
1997	53,836	6.44%		53,836	
1998	58,308	8.31%		58,308	
1999(*)	64,774	11.09%		64,774	
2000	69,812	7.78%		69,812	
2001	75,621	8.32%		75,621	
2002	76,741	1.48%		76,741	
2003	81,039	5.60%		81,039	
2004	91,453	12.85%		91,453	
2005	95,977	4.95%		95,977	
2006	97,911	2.02%		97,911	
2007	100,334	2.47%		100,334	
2008	84,725	-15.56%		84,725	
2009	67,523	-20.30%		67,523	
2010	70,500	4.41%		70,500	
2011	71,630	1.60%		71,630	
2012	68,266	-4.70%	7,000	75,266	
2013	67,027	-1.81%	10,000	77,027	2.34%
2014	62,587	-6.62%	13,500	76,087	-1.22%

(*) As of 1999, figures shown represent total market in FEP area.

No distinction is made between "traditional" and "new" member countries.

(**) Best estimates according to information received from FEP affiliates

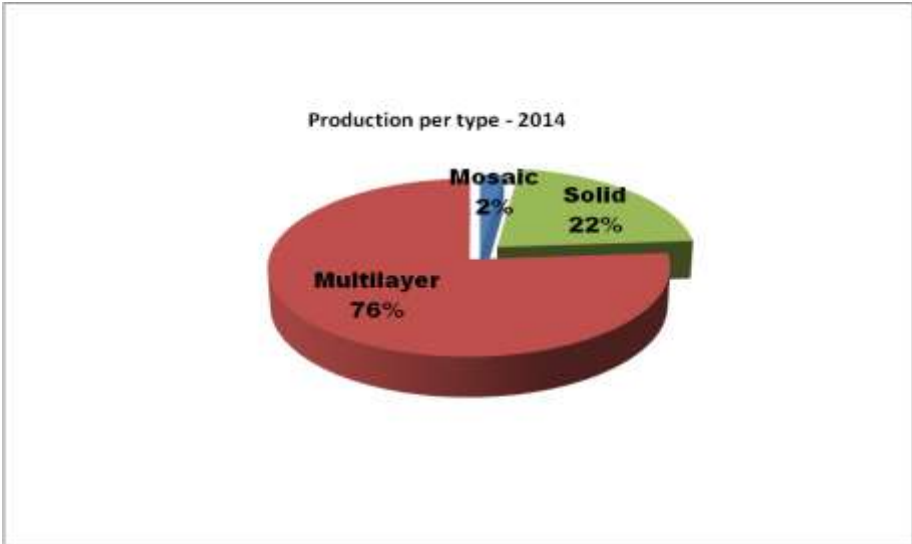
The total production in FEP territory went down by 6,62% to a volume of 62.587.383 m². Taking into account the total production in Europe (FEP countries + EU outside FEP) implies that production in 2014 fell by 1.22% only and exceeded 76 million m².



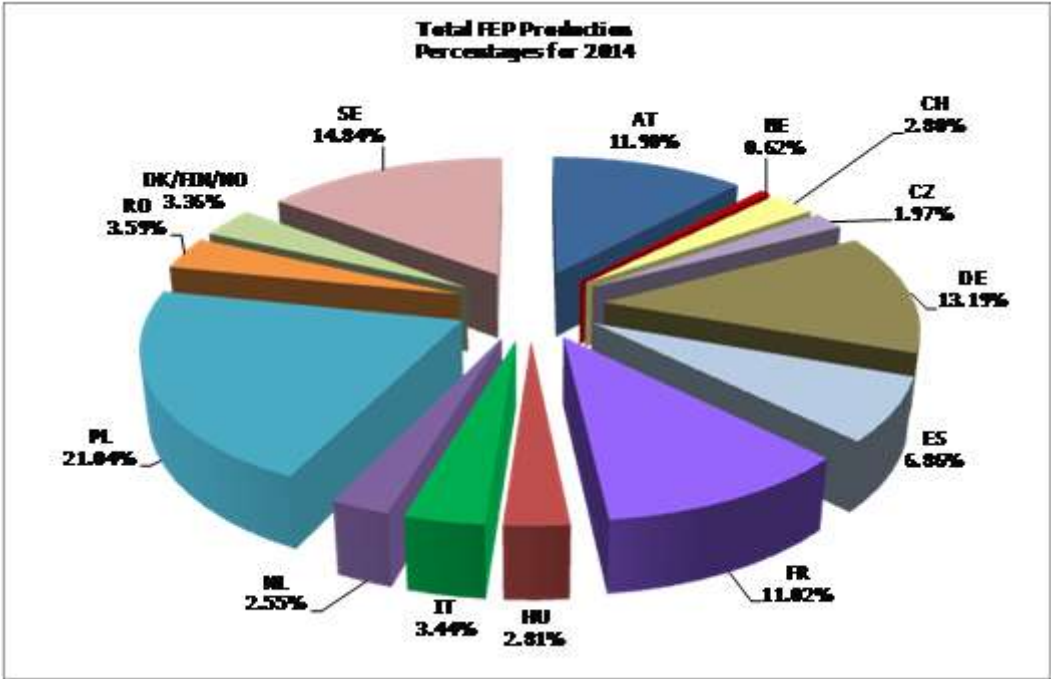
Consumption in the FEP area declined by 6,4%, to a level of 77.358.400 m². This somewhat lower result than initially forecast at the Domotex in January can be explained by the retroactive corrections provided by member national federations in the past months

	Production development 2014/2013	Consumption development 2014/2013
AT	-9,99%	-5,00%
BE	0,00%	-3,01%
CH	0,37%	-2,96%
CZ	-8,89%	-5,39%
DE	-20,45%	-8,65%
ES	-6,43%	-4,84%
FR	0,00%	-19,10%
HU	3,89%	1,11%
IT	-27,12%	-17,85%
NL	10,52%	91,11%
PL	-0,83%	-3,42%
RO	0,00%	0,00%
SK	-3,31%	0,92%
DK/FIN/NO	-30,00%	-0,17%
SE	5,81%	2,22%
FEP	-6,62%	-6,44%

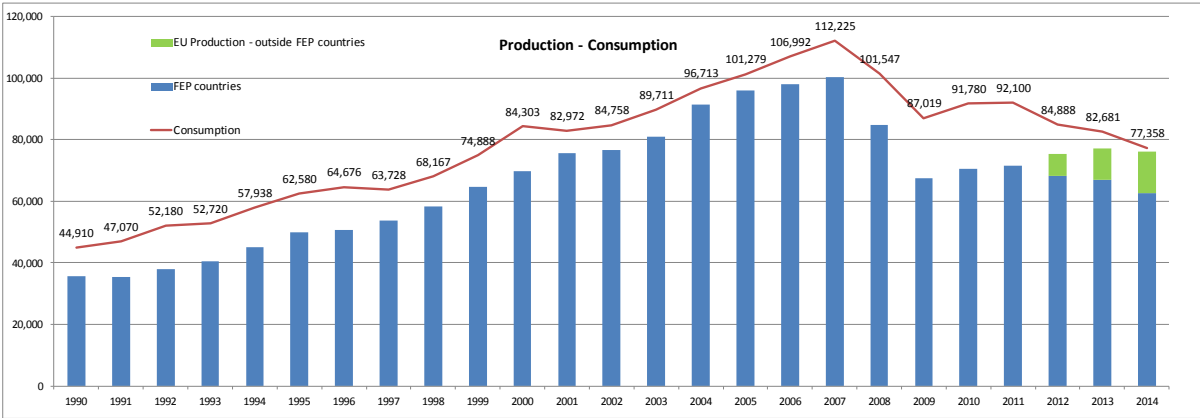
The 2014 total parquet production per type remains similar to the picture already presented from 2010 onwards, whereby multilayer comes in first with 76% (compared to 78% in 2013), being followed by solid (including lamparquet) with 22% (compared to 20%) and mosaic at 2% of the total cake.



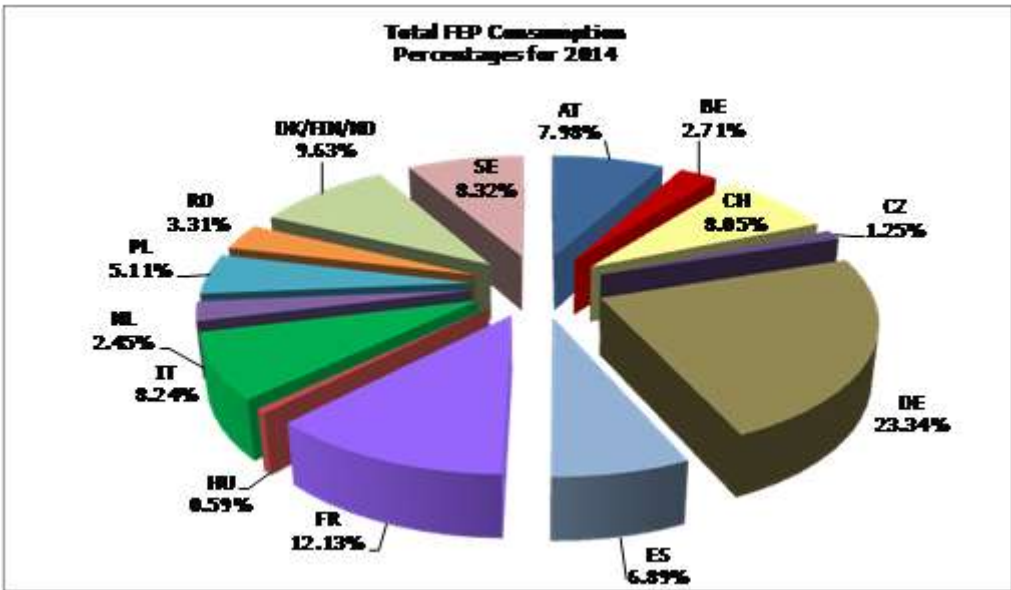
In absolute production figures by country, Poland is consolidating a bit its top position at 21,04%, Germany has lost its second position with a decreasing score at 13,19%. This position has been taken by Sweden which completes the usual podium with 14,84%.



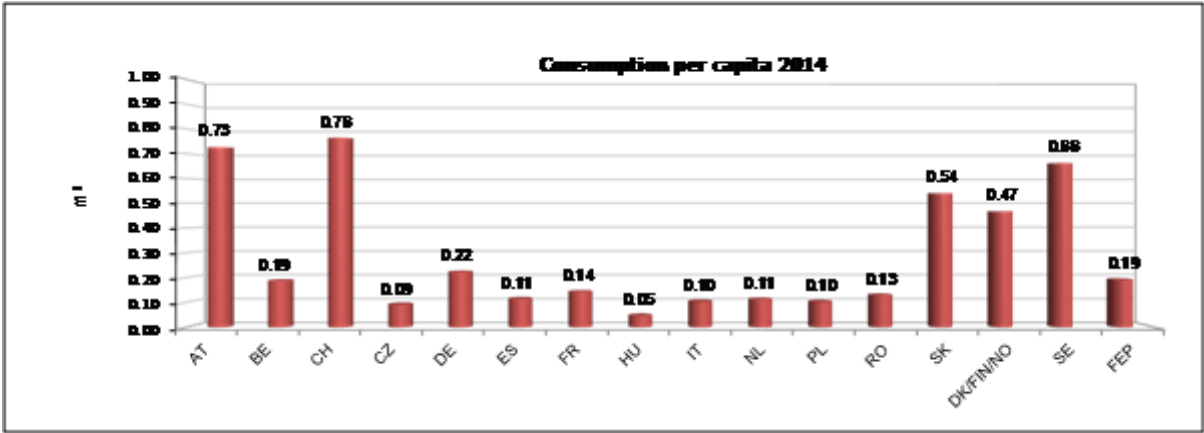
Consumption in the FEP area declined by 6,4% to reach 77.358.400 m² compared to 82.681.000 m² the year before.



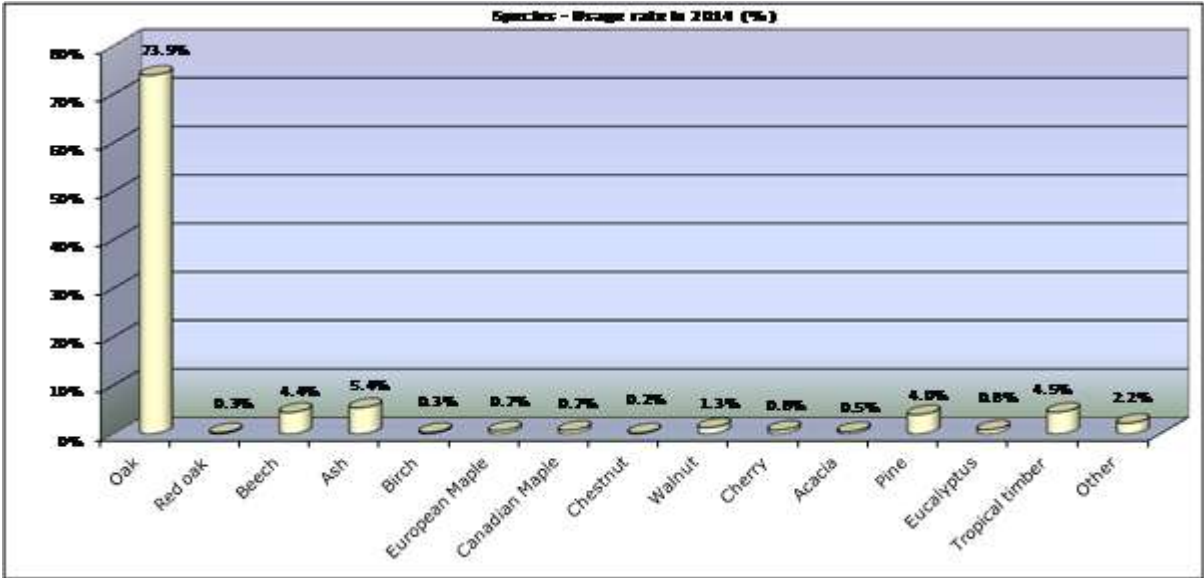
In terms of consumption per country, Germany maintains its first position with 23,34% and is still followed by France which is losing some more ground to 12,13%. Italy was not able to maintain its third position taken by the Nordic Cluster at 9,63% and is now in fifth position behind Sweden.



The per capita parquet consumption remains the highest in Switzerland (0,76 m²), followed by Austria (0,73) and Sweden at 0,66 m². In the total FEP area, the consumption per inhabitant lost two points at 0,19 m² in 2014.



Use of wood species



The usage of wood species in 2014 as shown on the above graph indicates that oak is advancing further and reaches 73,9%. Tropical wood species continue their downward trend and now show a mere 4,5%. Ash and beech remain the two other most common chosen species with 5,4% and 4,4% respectively.

More information on this issue is available from the FEP Secretariat in Brussels.
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