European Federation of the Parquet Industry
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Press release

19-06-2018

The European Parquet Market consolidates its positive trend

THE EUROPEAN PARQUET INDUSTRIES IN 2017

In general, parquet consumption continues to progress in the EU benefiting from the encouraging economic context, especially from the growth of the European consumption, and the positive trends shown by the construction sector. Regretfully, Germany, the biggest European market for parquet, has officially reported a significant decline in parquet consumption. The consolidated data provided by the FEP (European Federation of the Parquet Industry) member companies and affiliated national associations are at present pointing to a slight growth of the global European market of 0,3% in 2017 compared to 2016. As usual, the results show some variation from country to country. The production in FEP territory confirms its growth by 2,6% and exceeds significantly the 72 million square meter threshold.

It is important to note that, as of 2016, figures from Croatia, Estonia, Portugal and Slovenia are considered in the general FEP overview. The European production outside FEP countries is at an estimated 14,5 million square meters – 9 million square meters produced in EU countries and 5,5 million square meters in European non-EU countries.

Parquet production in Europe

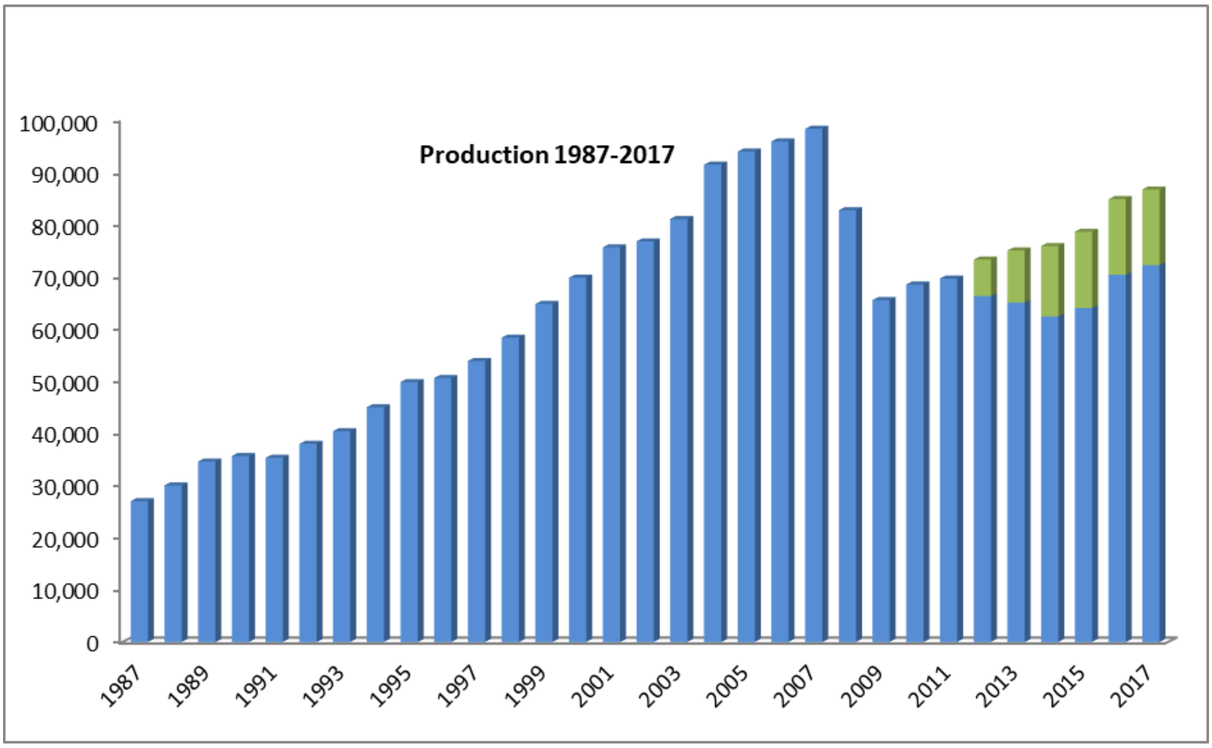
	FEP Countries		Non-FEP countries in Europe (**)	Total	
	000 m²	+ / - %	000 m²	Total	+ / - % Total
1985	23,300			23,300	
1986	25,580	9.79%		25,580	
1987	26,991	5.52%		26,991	
1988	29,997	11.14%		29,997	
1989	34,566	15.23%		34,566	
1990	35,634	3.09%		35,634	
1991	35,294	-0.95%		35,294	
1992	37,977	7.60%		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	93,977	*2.76%*		93,977	
2006	95,911	*2.06%*		95,911	
2007	98,334	*2.53%*		98,334	
2008	82,724	*-15.87%*		82,724	
2009	65,522	*-20.79%*		65,522	
2010	68,500	*4.54%*		68,500	
2011	69,630	*1.65%*		69,630	
2012	66,266	*-4.83%*	7,000	73,266	
2013	65,027	*-1.87%*	10,000	75,027	2.40%
2014	62,357	*-4.11%*	13,500	75,857	1.11%
2015	63,982	*2.61%*	14,600	78,582	3.59%
2016 (*)	70,358	*9.97%*	14,500	84,858	7.99%
2017	72,184	*2.60%*	14,500	86,684	2.15%

(*) As of 2016, figures are covering all European FEP countries – data for Croatia, Estonia, Portugal & Slovenia have been added.

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

The total production in FEP territory rose by 2,60% to a volume of 72.184.490 m². Taking into account the total production in Europe (FEP countries + non-FEP countries in Europe) implies that production in 2017 increased by 2,15% and exceeded 86,7 million m².

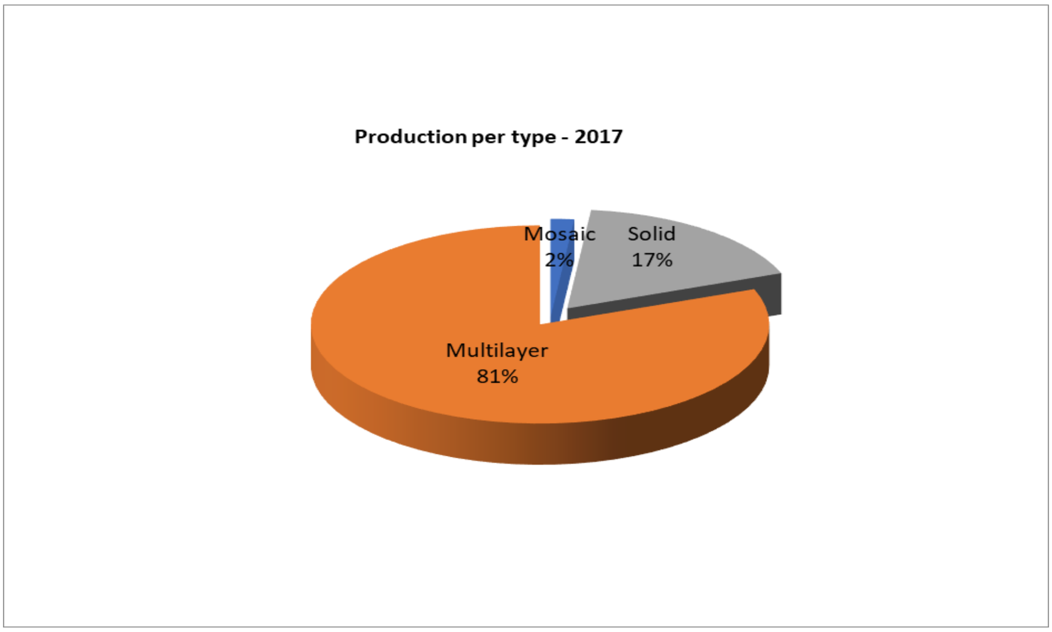


Consumption in the FEP area improved by 0,3%, to a level of 79.249.514 m².

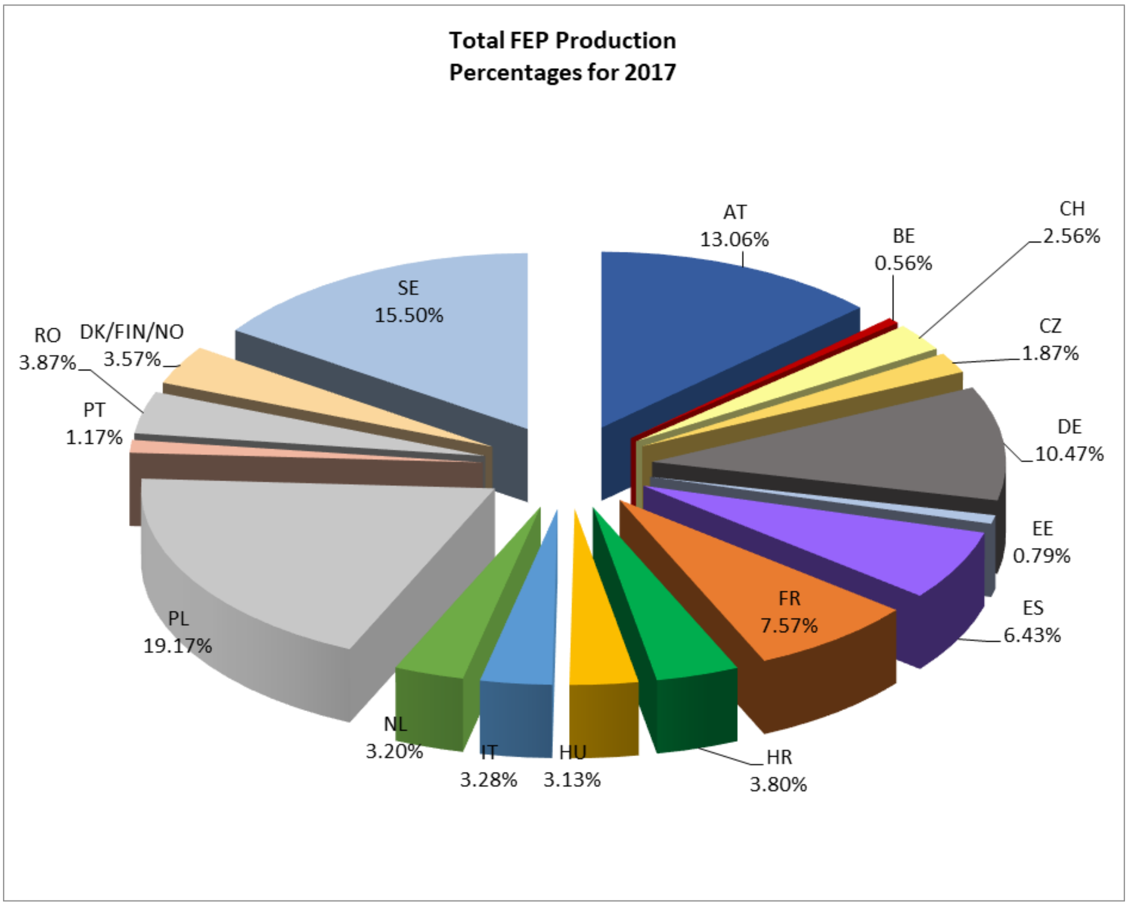
	Production development 2017/2016	**Consumption development 2017/2016**
AT	1,9%	2,0%
BE	-15,0%	4,0%
CH	12.,0%	0,2%

CZ	-0,4%	2,5%
DE	-4,2%	-8,0%
EE	28,8%	9,5%
ES	-3,4%	2,0%
FR	3,0%	3,2%
HR	-0,7%	2,0%
HU	2,2%	2,0%
IT	7,2%	0,5%
NL	9,9%	20,1%
PL	10,2%	5,0%
PT	9,8%	3,2%
RO	-7,3%	1,0%
Scandinavia	1,4%	2,3%
DK/FIN/NO	*8,0%*	*1,5%*
SE	*0,0%*	*3,0%*
SI	0,0%	1,2%
FEP	**2,6%**	**0,3%**

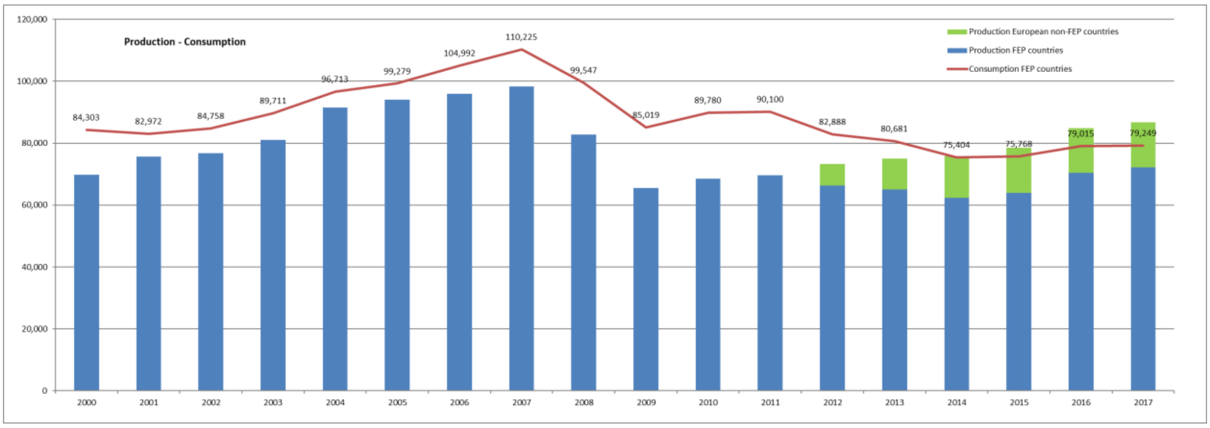
The 2017 total parquet production per type remains similar to the picture already presented from 2010 onwards, whereby multilayer comes in first with 81% (compared to 80% in 2016), being followed by solid (including lamparquet) with 17% (compared to 18%) and mosaic at 2% of the total cake.



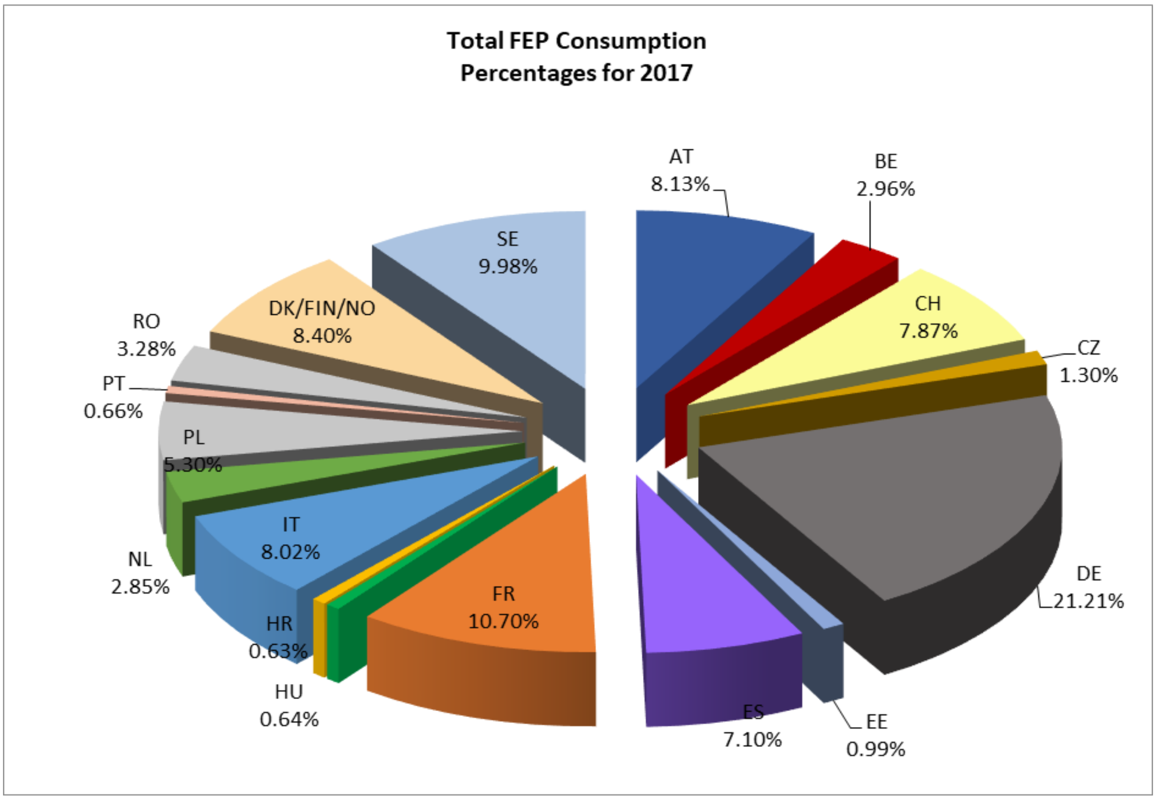
In absolute production figures by country, Poland maintains its top position at 19,17%. Sweden consolidates its second place on the podium with 15,50%. It is followed by Austria at 13,06%, while Germany comes in as fourth (10,47%).



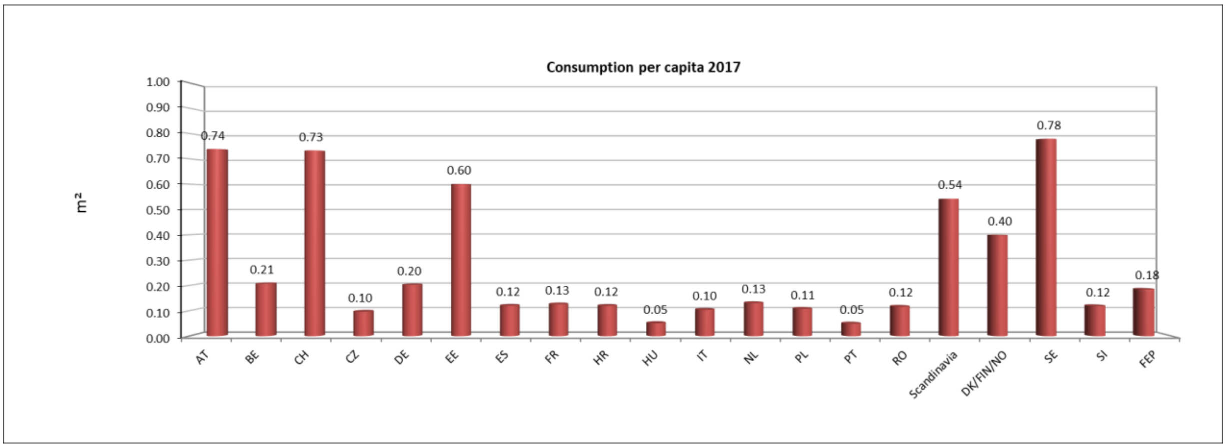
Consumption in the FEP area rose by 0.3% to reach 79.249.514 m² compared to 79.014.520 m² the year before.



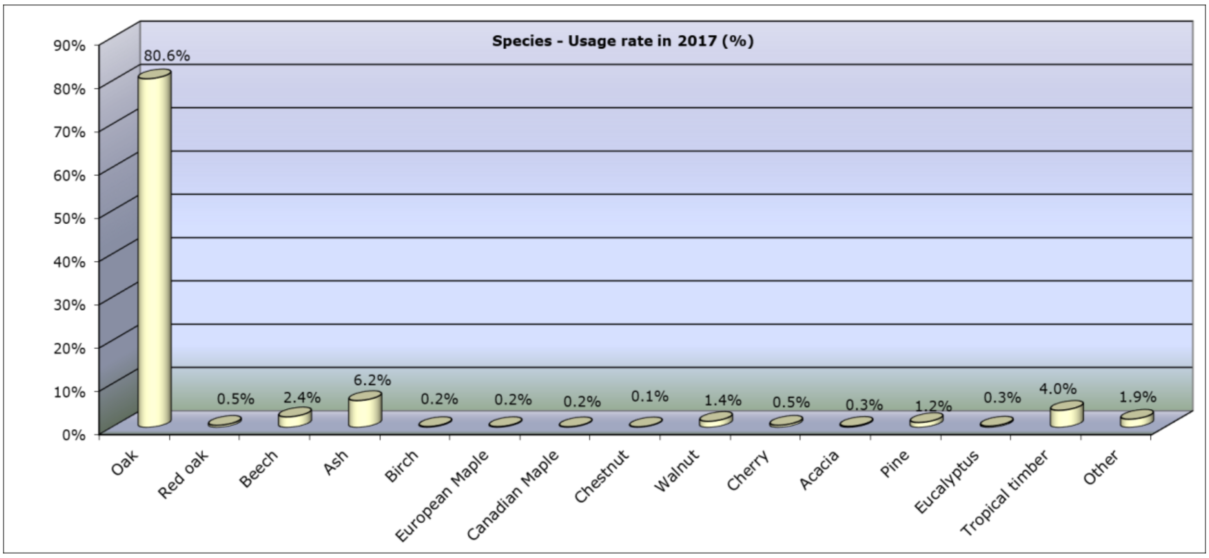
In terms of consumption per country, Germany remains in first position, despite its declining market, with 21,21% and is followed by France at 10,70%. Sweden completes the podium with 9,98%. The Nordic Cluster at 8,40% keeps the fourth seat. Austria with 8,13% takes back its fifth position from Italy (8,02%) while Switzerland (7,87%) comes in seventh position only.



As regards the per capita parquet consumption, Sweden keeps the first seat (0,78 m^2) before Austria (0,74 m^2) and Switzerland (0.73 m^2). In the total FEP area, the consumption per inhabitant remains stable at 0,18 m^2 in 2017.



Use of wood species



The usage of wood species in 2017 as shown on the above graph indicates that the share of oak remains stable and reaches 80,6% compared to 80,8% in 2016. Tropical wood species use continues to represent 4,0% of used wood. Ash and beech remain the two other most common chosen species with 6,2% and 2,4% (compared to 5,7% and 2,5% in 2016) respectively.

Outlook for 2018 & 2019

After several years of a challenging situation, the general trends on the parquet market eventually turned positive in 2016 and progressed further in 2017. The results after the first quarter of the current year point to a continuation of the moderately positive parquet consumption trends with the exception of Germany which is again reporting a significant decrease. All other European markets are generally in a positive mood and experience slight growth.

Projects are the main driver of the market although renovation should create additional activity. As the economic picture at European level, and for the construction sector in particular, continues to improve steadily, the captains of the parquet industry consider that parquet will benefit from these developments throughout the year 2018.

In general, and in spite of the long and wet winter, the availability of raw material is not a critical issue for the time being. Nevertheless, as long as oak represents more than 80% of the wood used to produce parquet, any variation in its availability can be problematic for the industry. Furthermore, as efficient harvesting has been demanded from forest-owners and sawmillers, small formats are now unfortunately lacking.

Although the competition from "wood look flooring substitutes" remains harsh and the widespread misuse of the PARQUET denomination causes a growing and unjust confusion at consumer level, parquet remains the genuine original, the only flooring solution made of sustainable and renewable raw material Real Wood, coming from sustainably managed and expanding forests!

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FEP, Brussels, June 2018

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