

EPLF

Annual Press Conference
13 March 2024



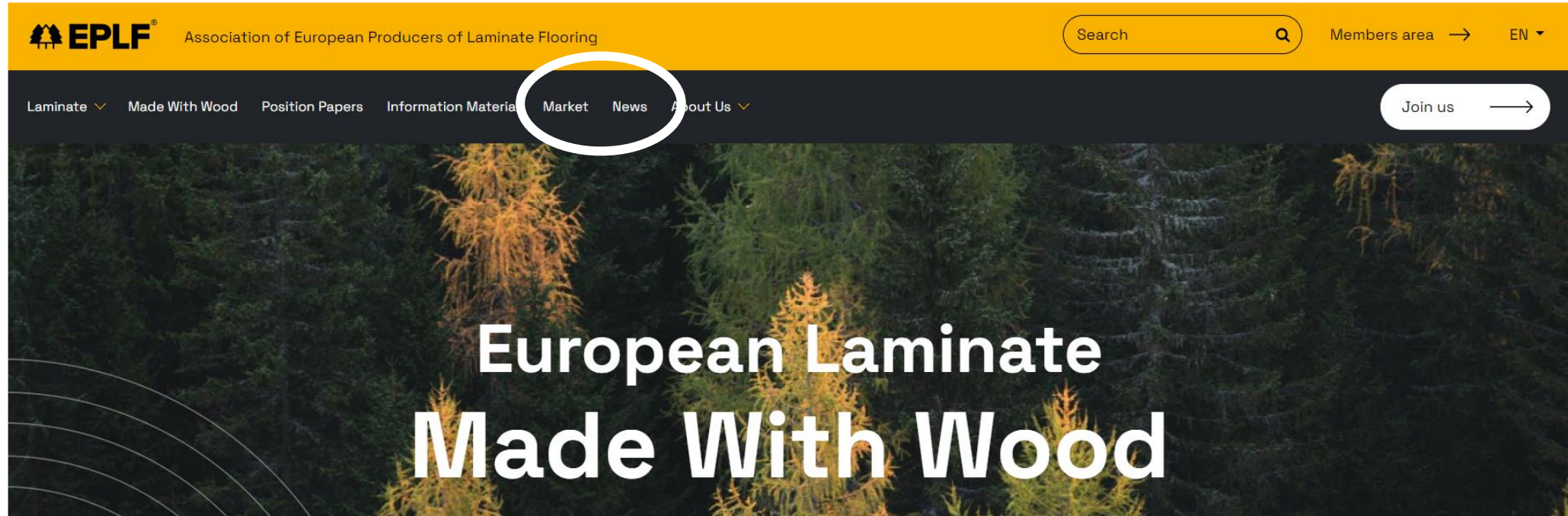
Meeting etiquette

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- Please mute when not speaking
- Participation is encouraged:
 - Use the chat box to ask questions
 - Raise hand to speak and come on screen
(activate your video/microphone when you have the floor)

Materials posted on website

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2023 overview

Max von Tippelskirch, SWISS KRONO
President

Reflecting on 2023...

Crisis of the construction sector (recession)

Increasing costs (raw materials, energy, logistics)

Growing interest rates

Competition (other products, Asia)

Volatile global political situation

Lack of skilled workers



Sustainability and recyclability

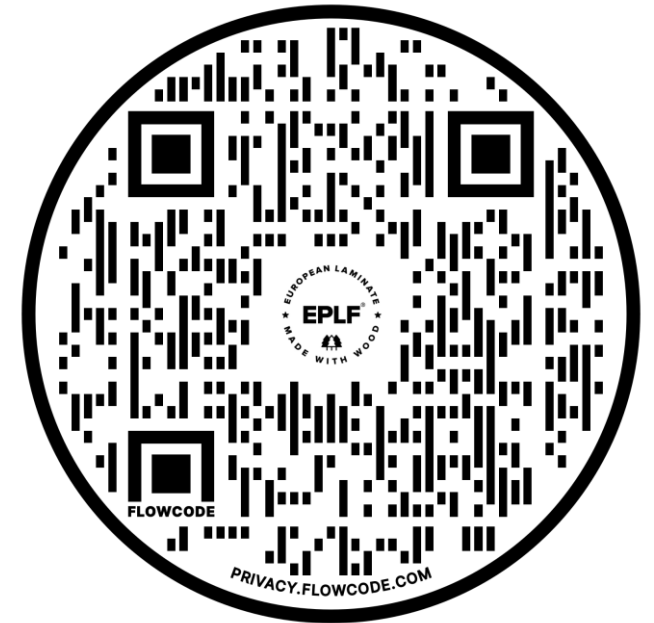
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Innovative technology to **recycle MDF/HDF boards into HDF**, allowing to save raw material and energy

Technology to **reduce production losses** in the profiling and milling processes thanks to special cutting method



Sustainability and recyclability



Monitoring trade issues

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- EPLF closely monitors trade issues affecting the laminate flooring market
- Taking actions, when appropriate



Laminate own customs code

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- Lack accurate data about laminate flooring trade volumes between the EU and third countries, and within the EU
- Now bundled with other products
- **EPLF is applying to have its own customs code**



Acting as the voice of the sector

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EUROPEAN PANEL FEDERATION
WOOD - BASED PANELS

- **Who?**
 - Voice of the EU wood-based panel industry
- **What?**
 - Contributed to case seeking the annulment of SVHC nomination for melamine (process expected to last up to 18 months)
 - Provided annual sales figures for the European market of laminate flooring



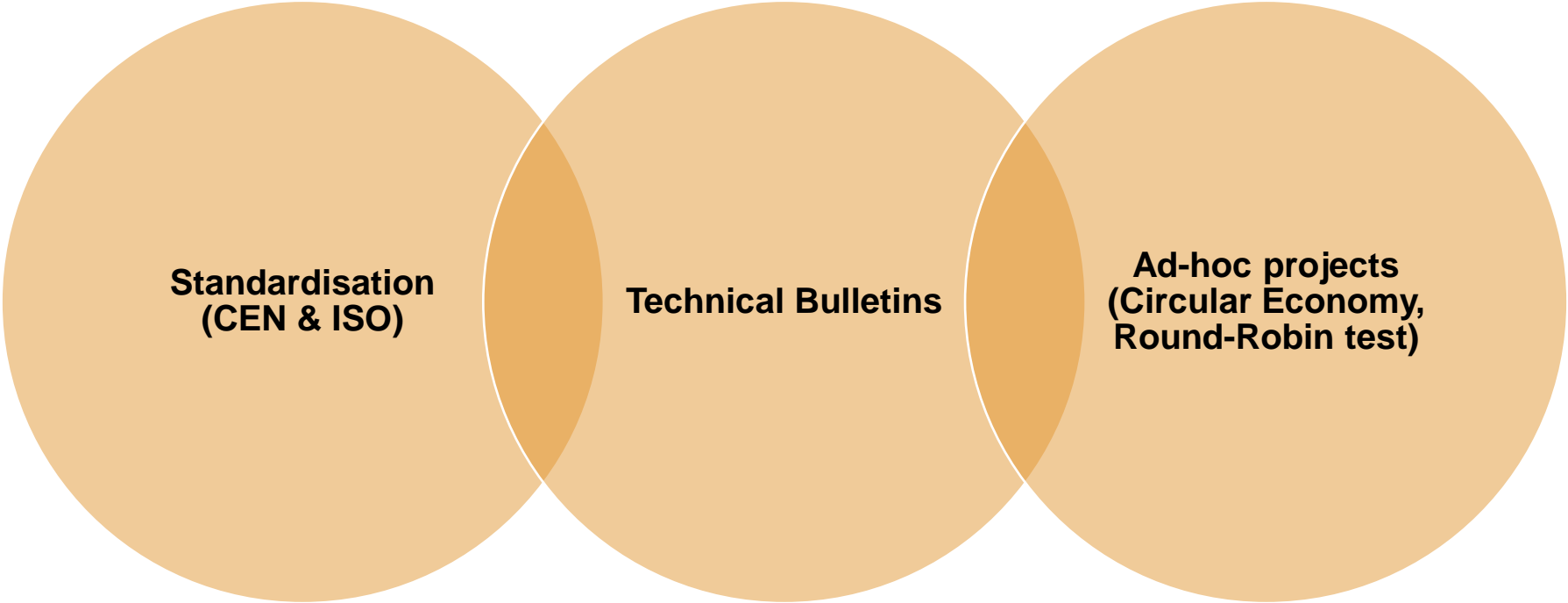
europen
SHAPING A SUSTAINABLE
FUTURE FOR PACKAGING

- **Who?**
 - Informal coalition on packaging
- **What?**
 - Endorsed PPWR (Packaging and Packaging Waste Regulation proposal) joint industry statements **fighting against the fragmentation** of the internal market. Position papers are available on EPLF website

Technical update

Eberhard Herrmann, CLASSEN
Convenor Technical Committee

Work of the Technical Committee



Working Group on Circular Economy¹³

- How to support the **recycling strategy of the laminate flooring sector?**
- Launch a **WG on Circular Economy**
- The WG is **looking into**:
 - **Legal and market requirements** for recycling and definition of recycled content in the Construction Products Regulation (CPR)
 - Content of a **Digital Product Passport (DPP) for laminate flooring**
 - **Collection and sorting**:
 - **CISUFLO white paper**: Strategy for implementing industry-wide collection schemes for the flooring industry
 - **Joint initiative** to start in 2024 across the whole flooring sector, together with MMFA
 - **Recycling technology solutions** (in close cooperation with the CISUFLO project)
 - **New Technical Bulletin on R-Strategies** (Repair, Refurbish, Remanufacture and Recycle):
 - Project confirmed in 2023; work will continue in 2024

CEN-related work

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EU standard for laminate floors

CEN TC 134 WG 09

- New merged **standard** prEN 13329:2023 was **approved / published**
- Includes optional **requirements for water resistance**

EU standard on Circular Economy

CEN TC 134 WG 10

- New **standard** prEN 17861:2023 was **approved / published**
- Includes **definitions on recycled content**
- Aim is to **avoid waste and pollution** through circular product design
- Discussion of **DPP content**:
 - **Unified code** (generic information)
 - **Use and end-of-life information** (product circularity)
- Liaison with EU stakeholders to **avoid divergences**

ISO-related work

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International standards for laminate floors

ISO TC 219 WG 3

- Revision of ISO 14486 for **definition of the substrate** containing at least 65% wood in mass **was approved**
- **Requirements on small ball impact** equivalent to EN 13329 **and water resistance were added**
- US experts do not want to exclude melamine surfaces on polymer cores
- Ongoing discussion on how to integrate **melamine surfaces** on polymer cores into a **standard**

Harmonised test methods

ISO TC 219 WG 4

- Revision of ISO 4918 for **Castor Chair test method** for textile, resilient, MMF and laminate floors **was approved**; comments will be discussed before CD vote
- Castor Chair test now includes **underlayment EN 14918**, specified in standard unless manufacturer has their own
- **Future topics:** revision of ISO 6356:2012 for textile and laminate floor coverings and discussion regarding an ISO MMF standard

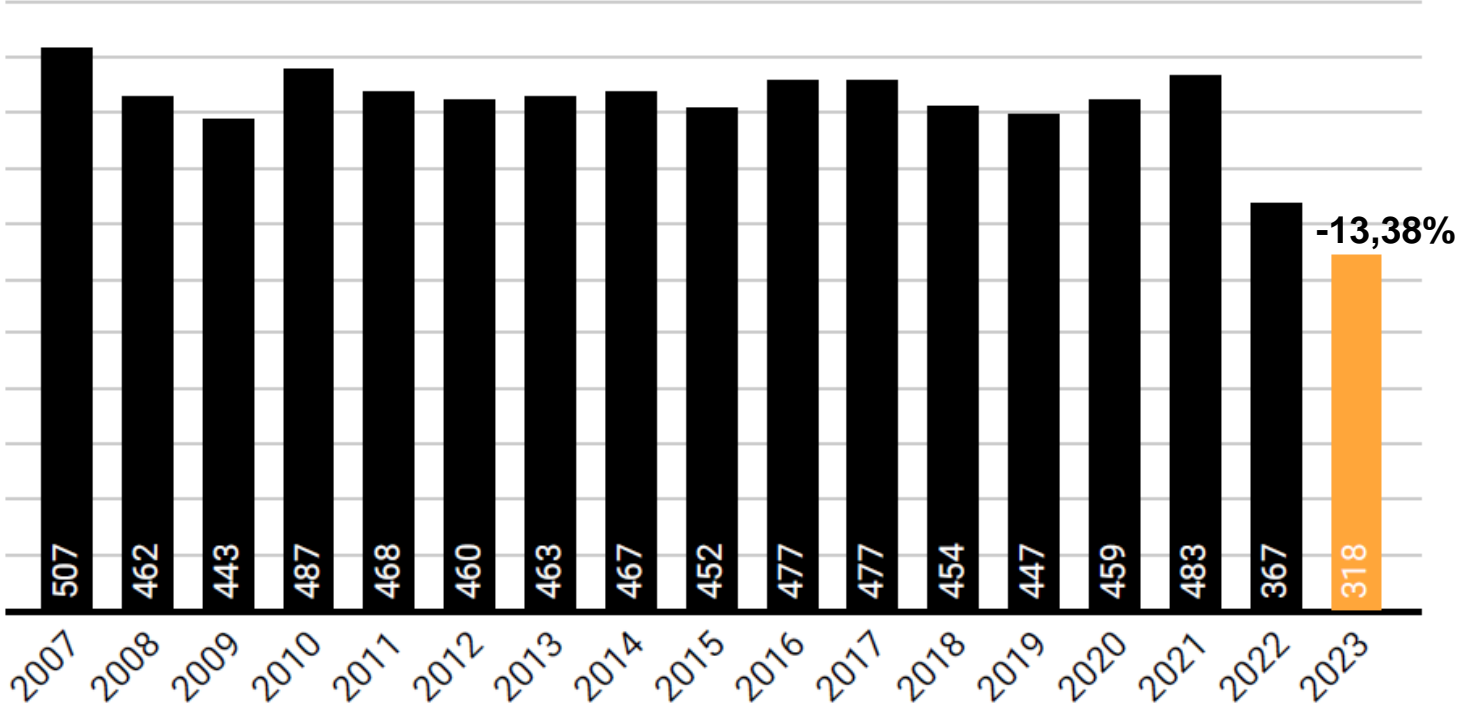
Sales figures 2023

Ruben Desmet, Unilin

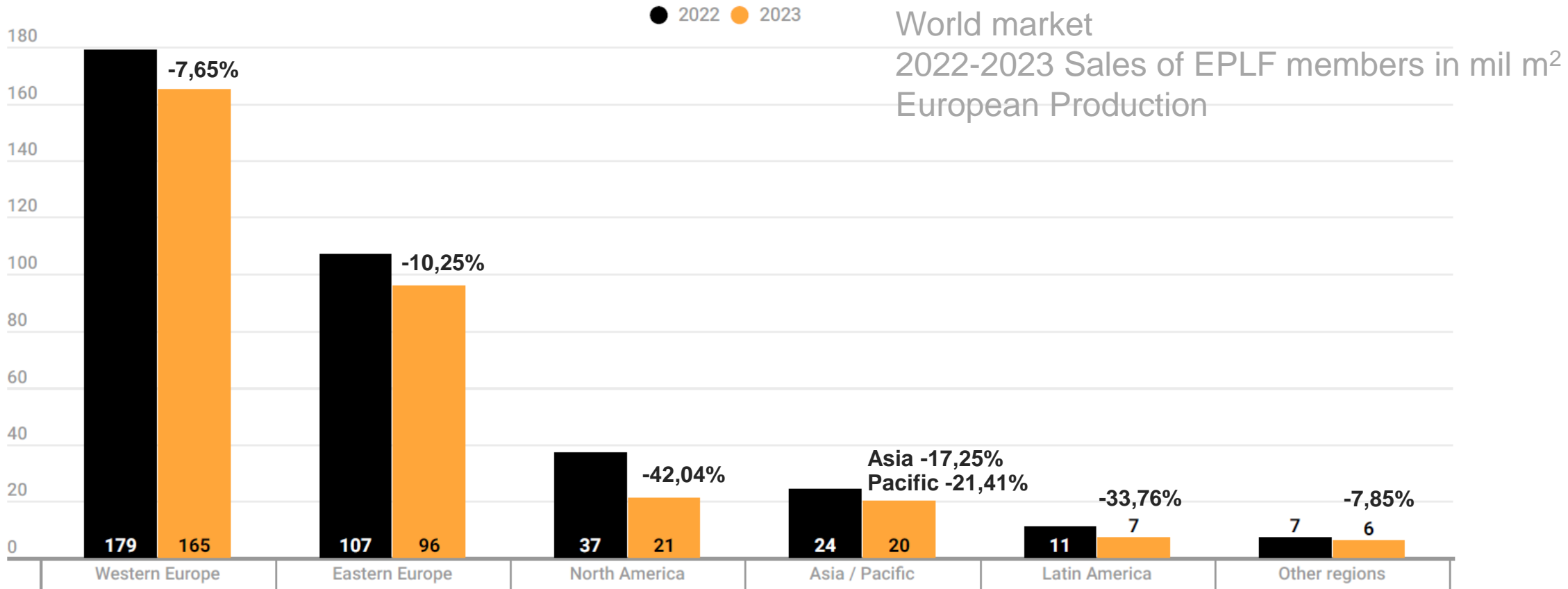
Vice President and Convenor Markets & Image Committee

The market is at an all-time low

World market
2007-2023 Sales of EPLF members in mil m²
European Production

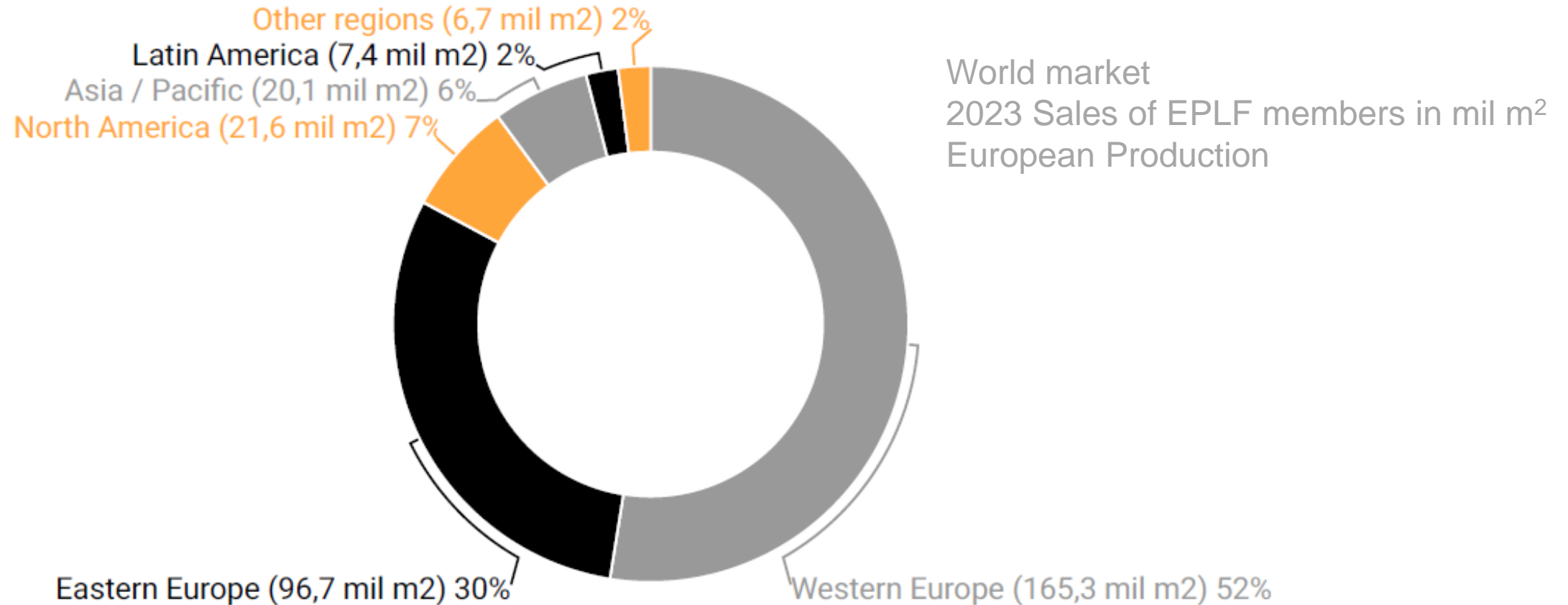


Western Europe reported smallest decline

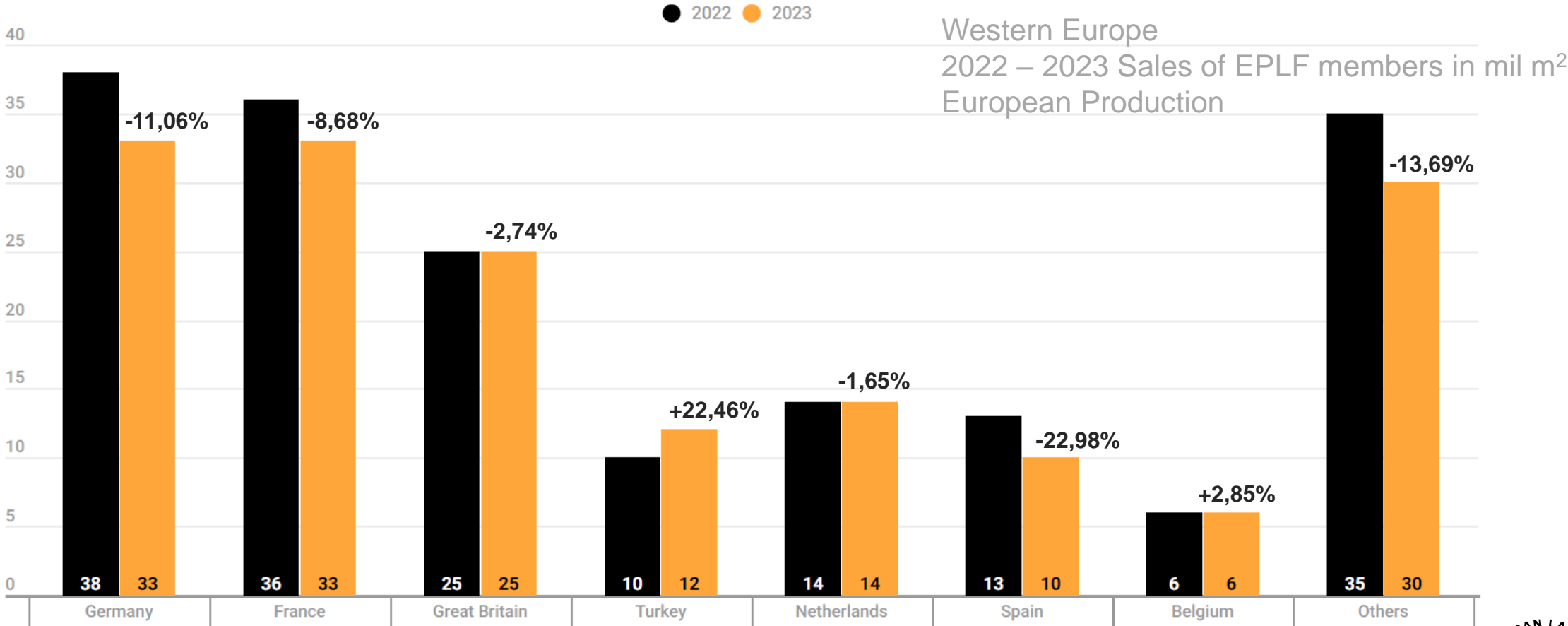


Western Europe remained largest market

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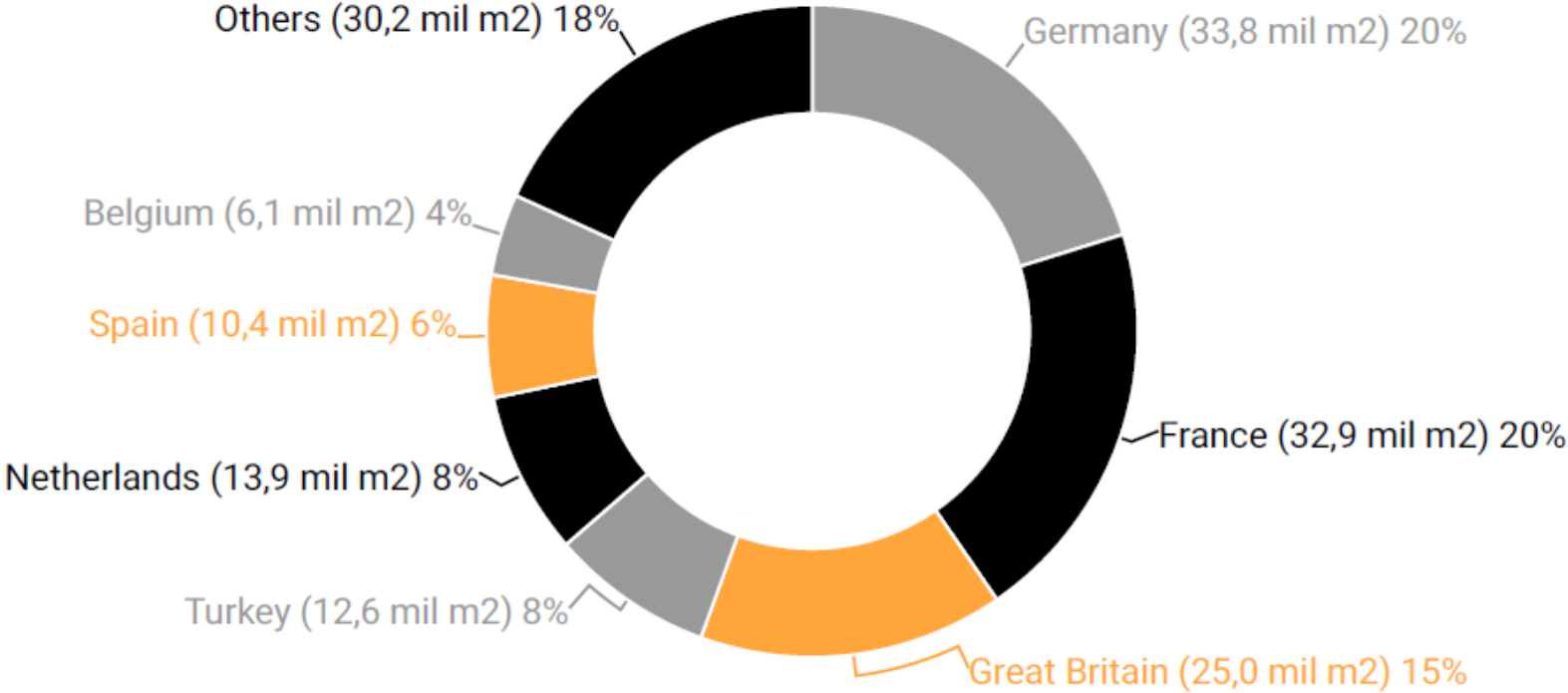


Sales increased in Belgium and Turkey

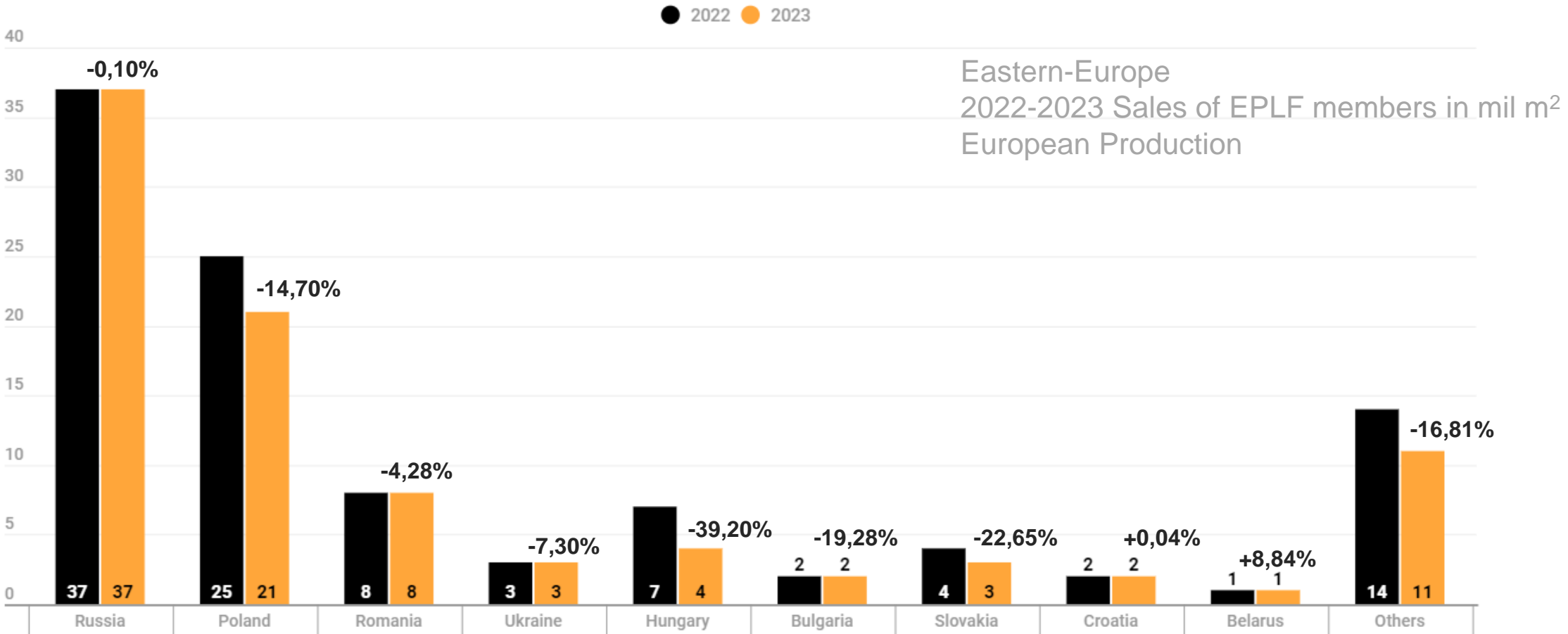


Germany took lion's share again

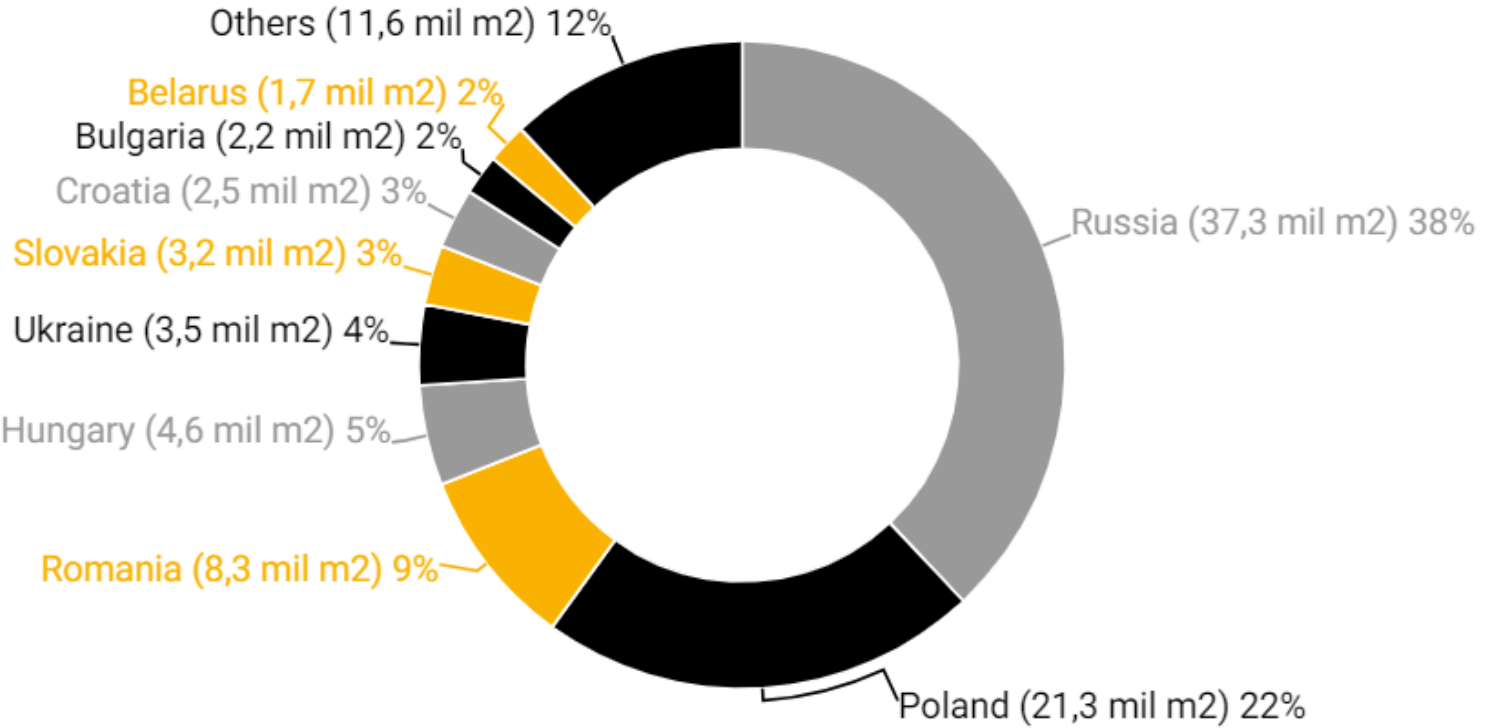
Western Europe
2023 Sales of EPLF members in mil m²
European Production



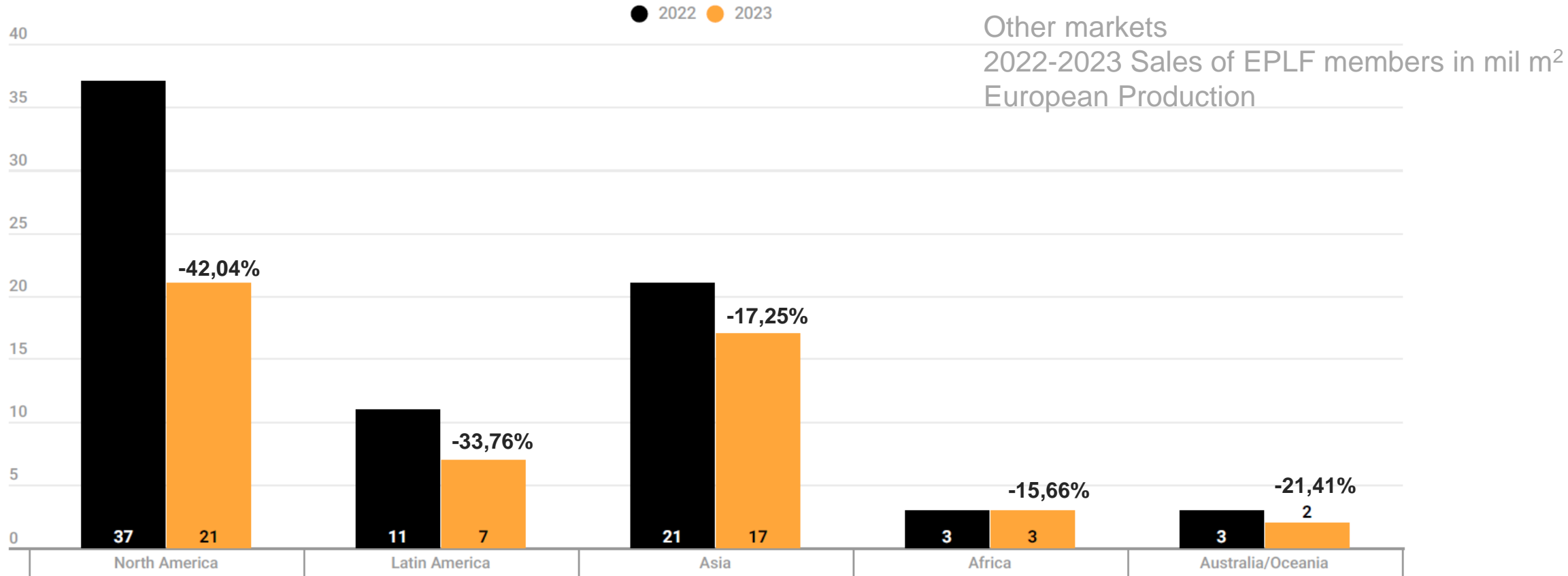
Mixed markets in Eastern Europe



Main two markets represented 60% and continue to grow



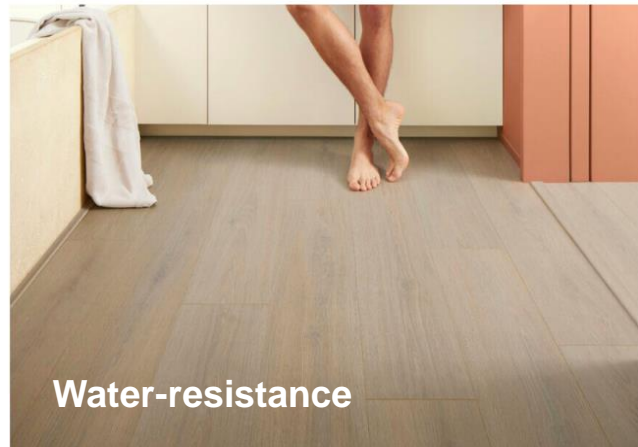
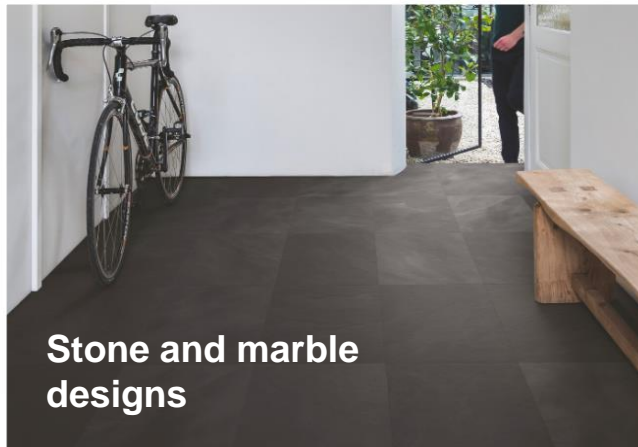
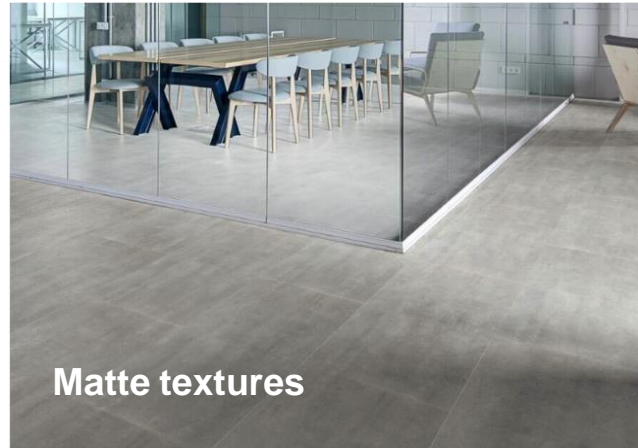
Largest sales decrease in North America ²⁴



Closing remarks

Max von Tippelskirch, Swiss Krono
President

Where style meets sustainability



Q&A



Thank you!

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