

EPLF

Annual Press Conference

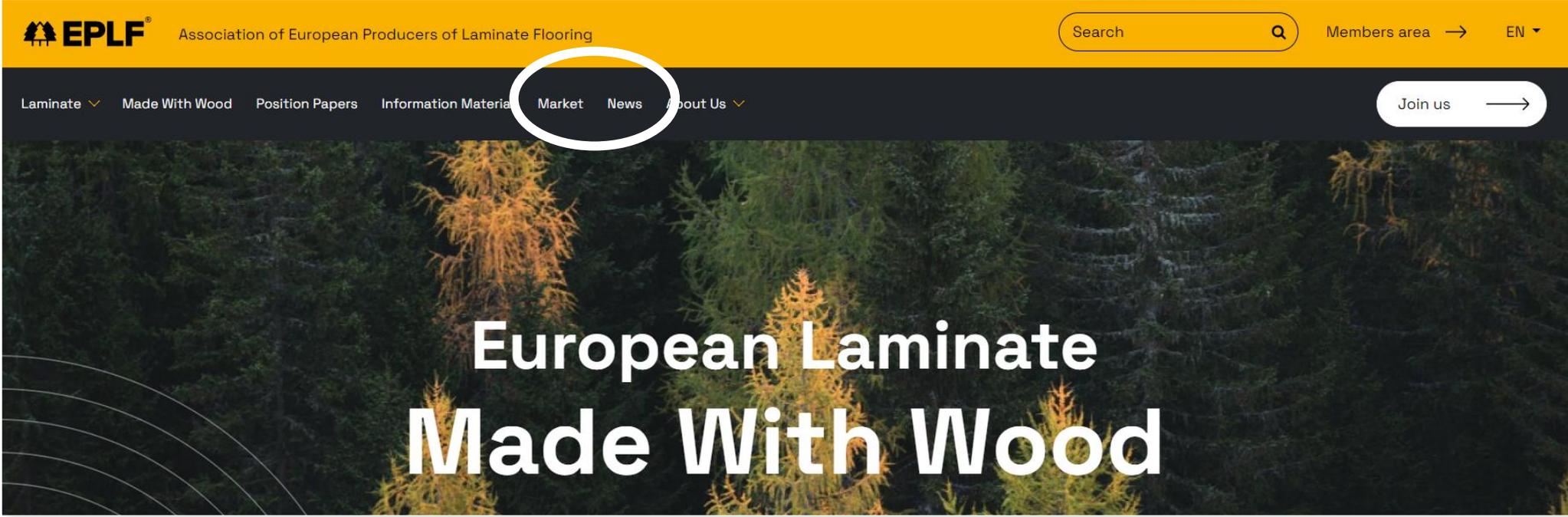
12 March 2026



Meeting Etiquette

- Please mute when not speaking
- Participation is encouraged:
 - Use the chat box to ask questions
 - Raise hand to speak and come on screen

Website Materials



EPLF Today

New Leadership



Growing membership



Veronique Hoflack
(Unilin)
President



Fabian Kölliker
(Swiss Krono)
Deputy



Philipp Sprockhoff
(Egger)
Director

2025 Overview

Veronique Hoflack

EPLF President | UNILIN

Philipp Sprockhoff

EPLF Board | Member EGGER

Reflecting on 2025

Market Challenges

- Ongoing **economic pressure** and construction-sector **bottlenecks** across EU
- **Slower permitting** and **rising costs** continue to weigh on housing and renovation activity



Sector Resilience & EPLF Action

- Laminate flooring remains **competitive, affordable, and sustainable**
- EPLF stepped up **engagement** at **EU** and **national** level

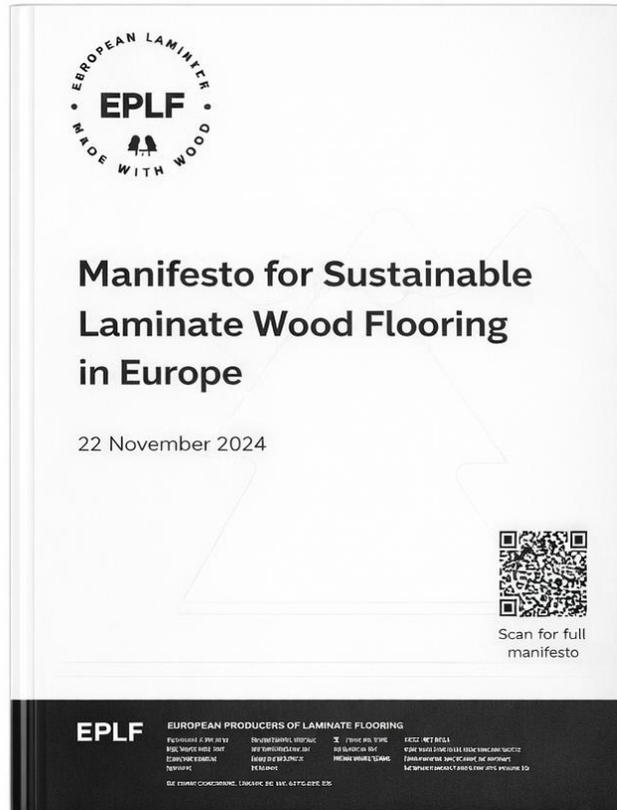
A Key Ally for Europe in 2025

Laminate flooring remains:



EPLF Manifesto

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- Launched at **last year's Annual Press Conference**
- Work steered by EPLF Sustainability Committee
- Includes:
 - The basis of our advocacy work
 - Shared commitment to:
 1. Sustainable and innovative production
 2. Stronger European manufacturing
 3. Support for affordable and sustainable housing

EU Advocacy: Our Collective Voice

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**EU
Deforestation
Regulation
(EUDR)**

**Sustainable and
Affordable
Housing
Initiative**

**New European
Bauhaus**

**Bioeconomy
Strategy**

**Circular
Economy Act**

**Packaging and
Packaging Waste
Regulation
(PPWR)**

**Digital Product
Passports
(DPPs)**

**Public
Procurement**

Representing on Trade Matters

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Morocco

- 2024: EPLF hearing clarified LF is **distinct** from **wood-based composite flooring (CFP)**.
- February 2025: LF **excluded** from safeguard duties on CFP.

United States of America

- March 2025: **US investigation** on security risks of timber, lumber & **derivative products** - LF included.
- February 2026: 10% global tariffs.
- EPLF continues monitoring.

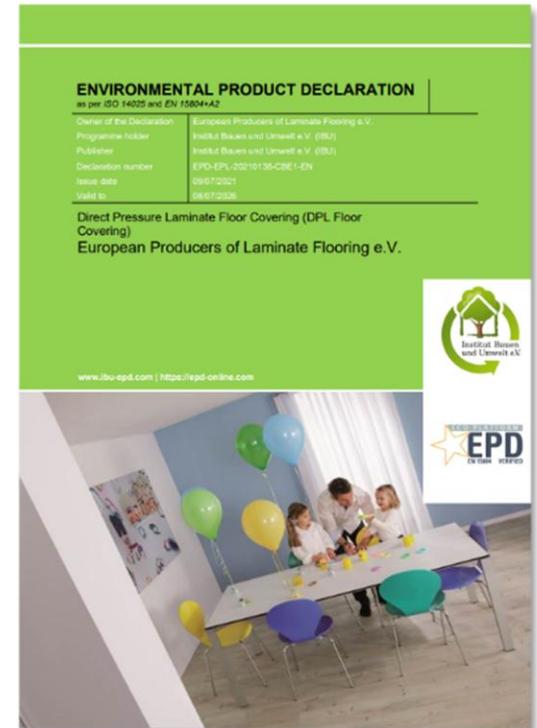
Technical Update

Thomas Dambeck

New convenor of the EPLF Technical Committee | EGGER

Clear on Environmental Performance

- Generic EPD to be updated in 2026
- Aligned with CPR & Digital Product Passport (DPPs) applicable as of 2029-2030
- Requested IBU **pre-verified** EPD software tool (co-developed with MMFA)
- Available to **all EPLF members**





Blue Angel Revision

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- Certified wood requirement adjusted from 100% to **85%**
- Stricter melamine **threshold $\leq 0.1\%$** (aligned with **REACH**)
- Formaldehyde compliance: either RAL UZ 76-certified HDF or EN 16516 test conditions for floor coverings, but carried out with HDF / raw board
- 3-year transition for EN 15804 EPDs; EPLF-EPD **accepted**
- **Recycled packaging** → recommendation

Construction Products Regulation (CPR)¹⁴

- **2025** = New CPR & CPR Acquis for floor coverings
- EU Commission's experts (Acquis); CPR flooring expert group application under review
- **Upcoming:**
 - DPP
 - EN 15804 environmental parameters
 - System 3+ validation
 - Lfespan disclosure
 - R-strategies
- **Timing:** CPR Acquis on flooring (early 2026) + New harmonised standard (2030)

EPLF asks:

1. **Clearer** product family **definitions**
2. **Slip resistance: tribometer** (EN 13893) over dry pendulum – realistic & universal

Formaldehyde & Melamine

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Formaldehyde

- **New EU limit** for emissions from wood-based products
 - Emission limit of 0.062 mg/m³ (0.05 ppm)
- Comes into effect **6 August 2026**
- Official EU test method **published in 2025**

Melamine

- Still **under EU review** as a “substance of concern”
- Uses in **resins** for laminate production **remain allowed**

Testing Innovation

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NALFA Stylus Scratch Method



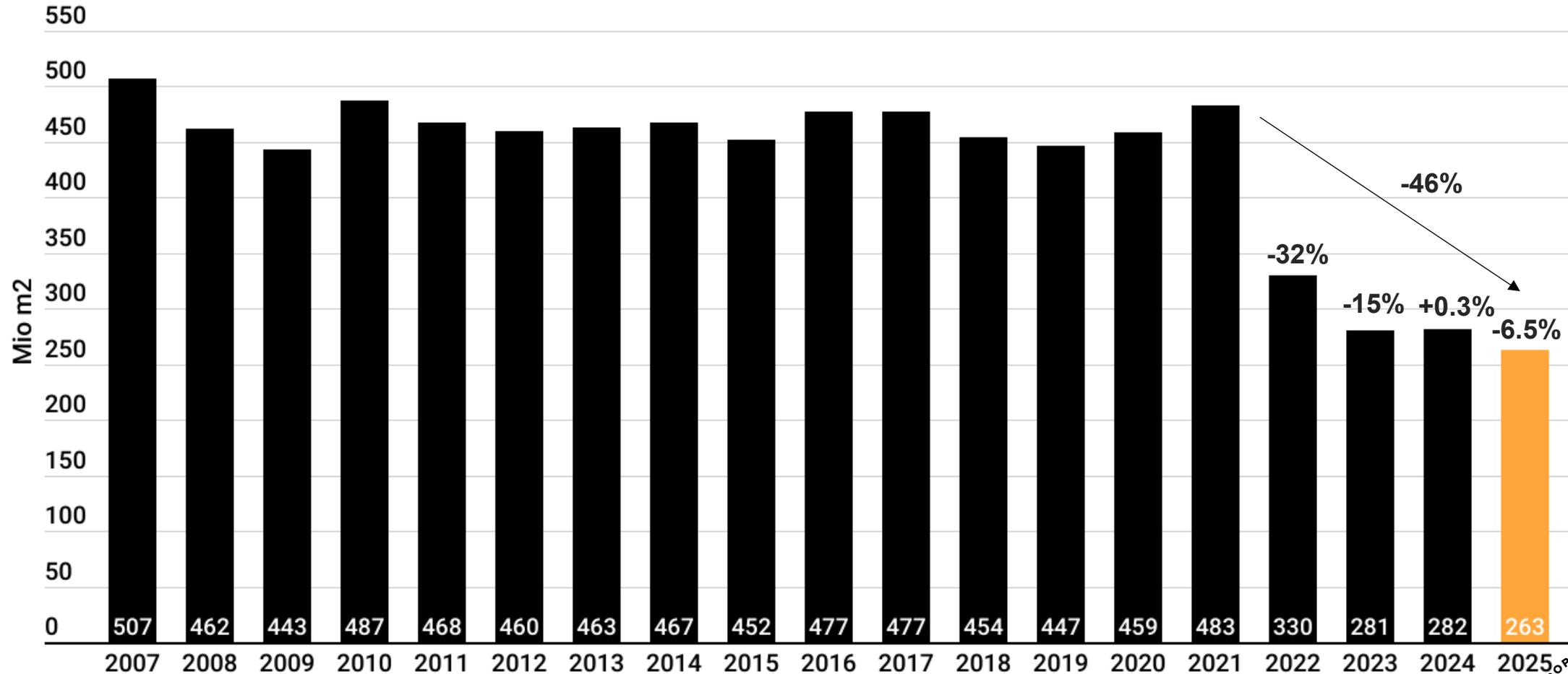
- EPLF **co-developing new scratch test method** with NALFA
- Taber 5900 Reciprocating Abraser installed at EPH (Dresden)
- Performance thresholds still being developed

Sales Figures 2025

Fabian Kölliker

EPLF Board member | SWISS KRONO

Market Resets Over the Past Four Years

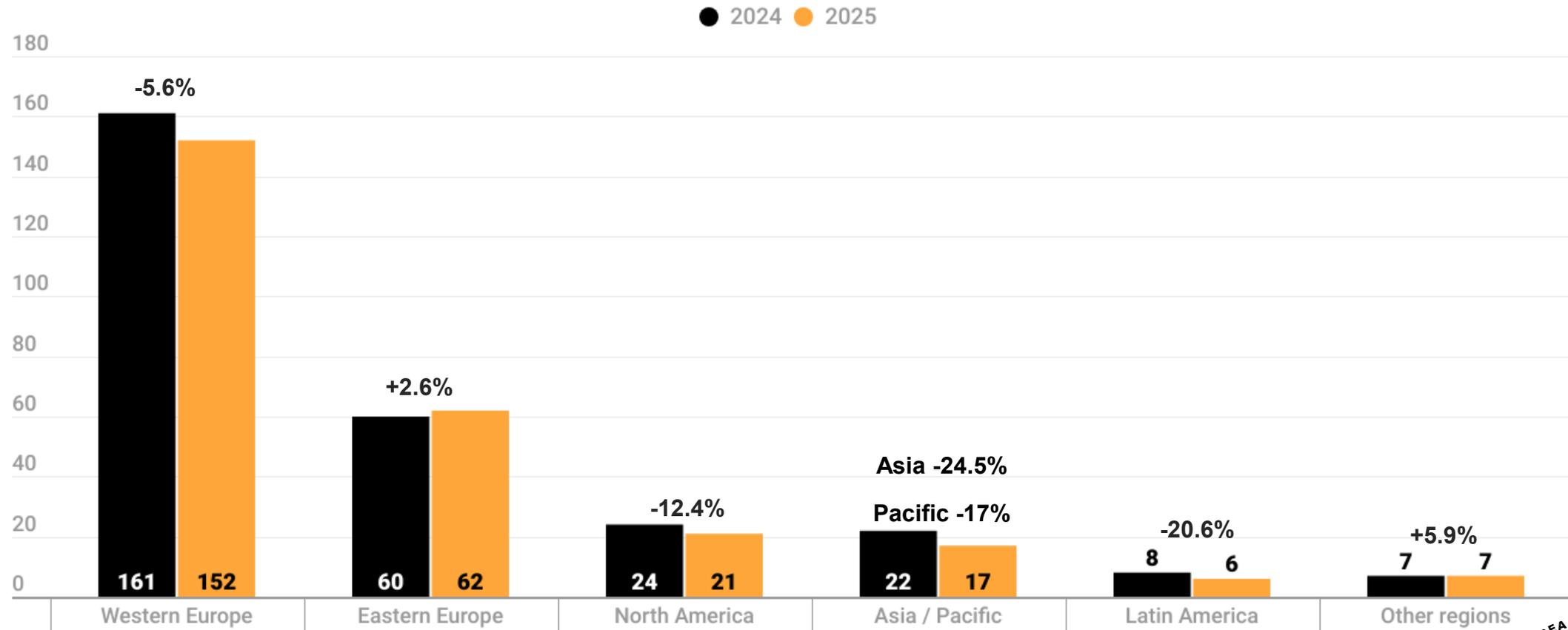


EPLF - EUROPEAN PRODUCERS OF LAMINATE FLOORING

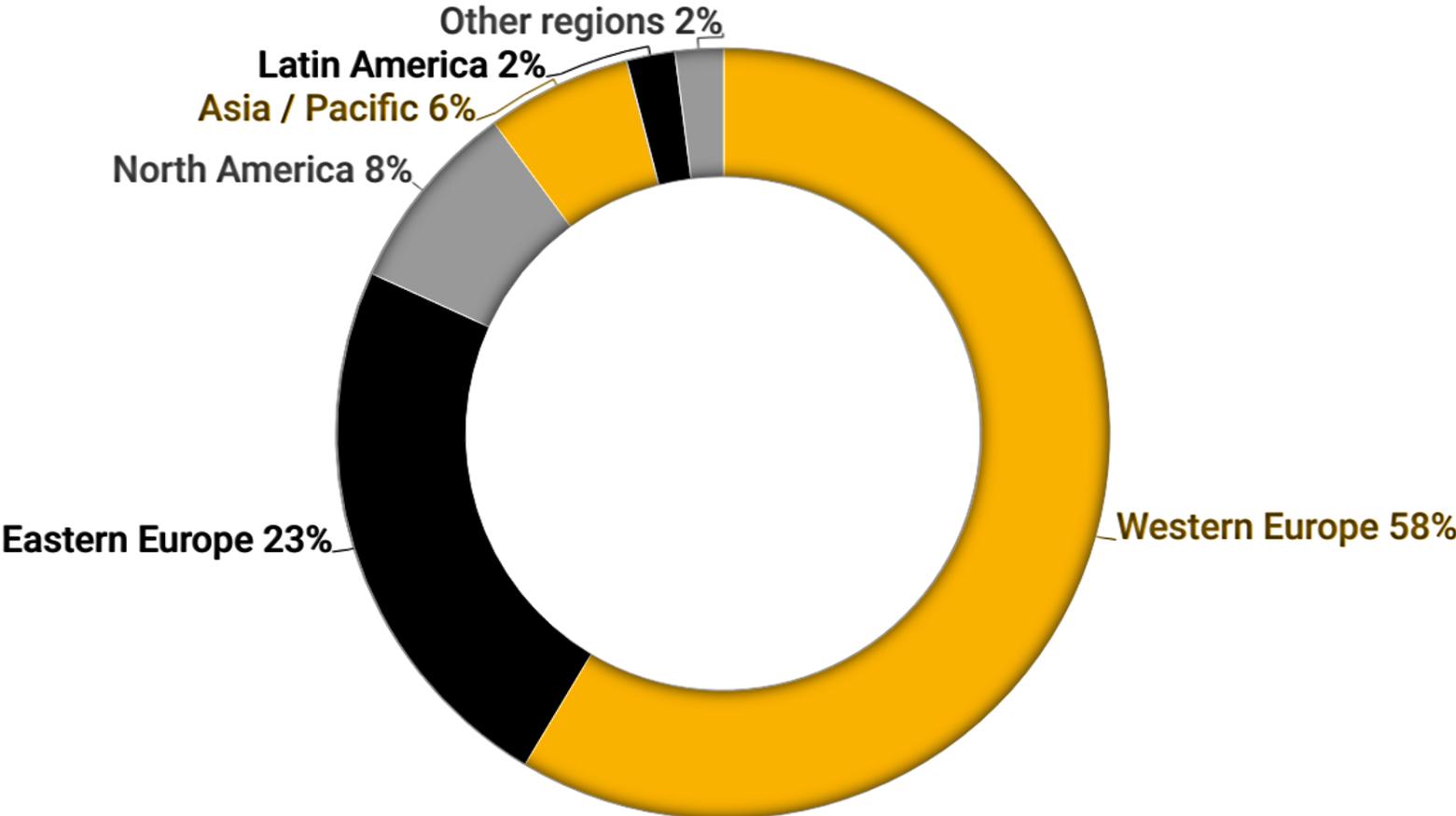
2007-2025 Sales of EPLF Members in Mio m² - European Production



An Uneven Contraction by Region



EU's Dominant Role in Global EPLF Sales

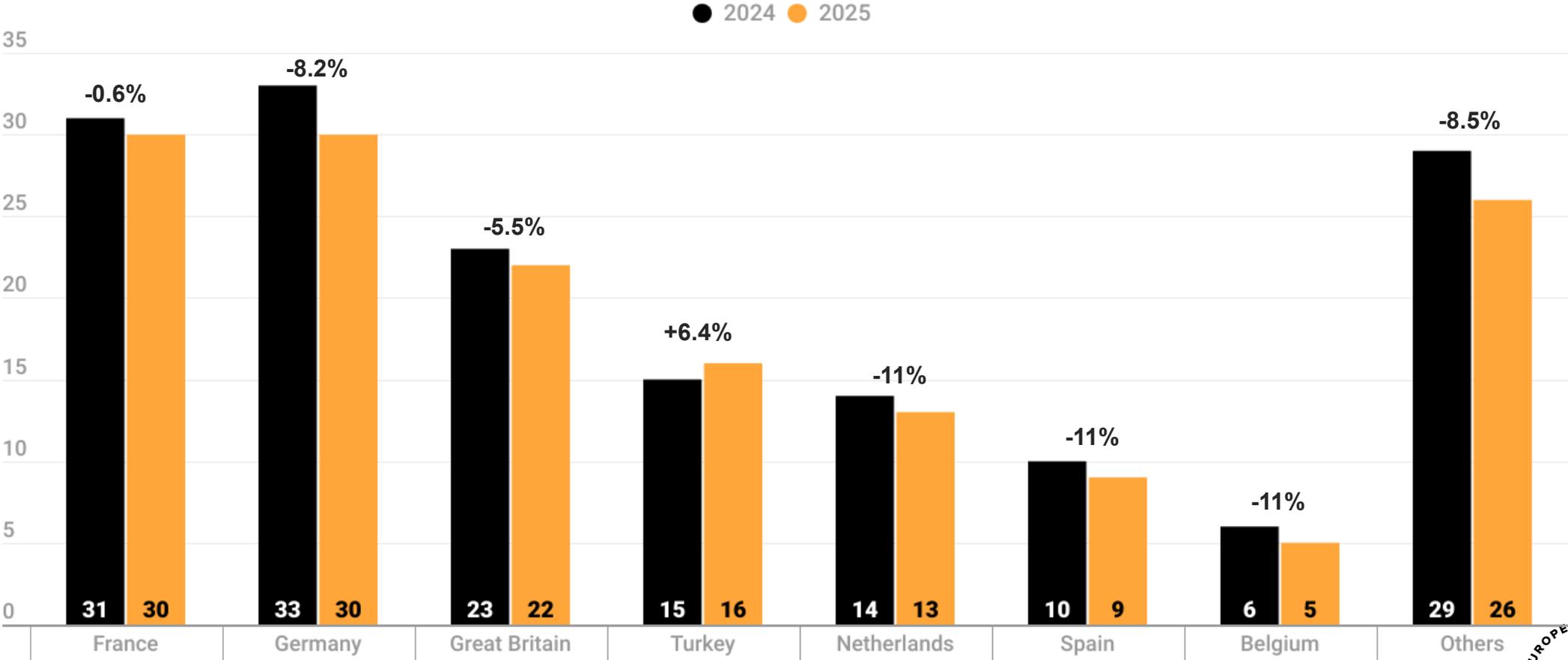


EPLF - EUROPEAN PRODUCERS OF LAMINATE FLOORING

2025 Sales of EPLF members in Mio m² - European Production



France and Great Britain holding, drop in Germany

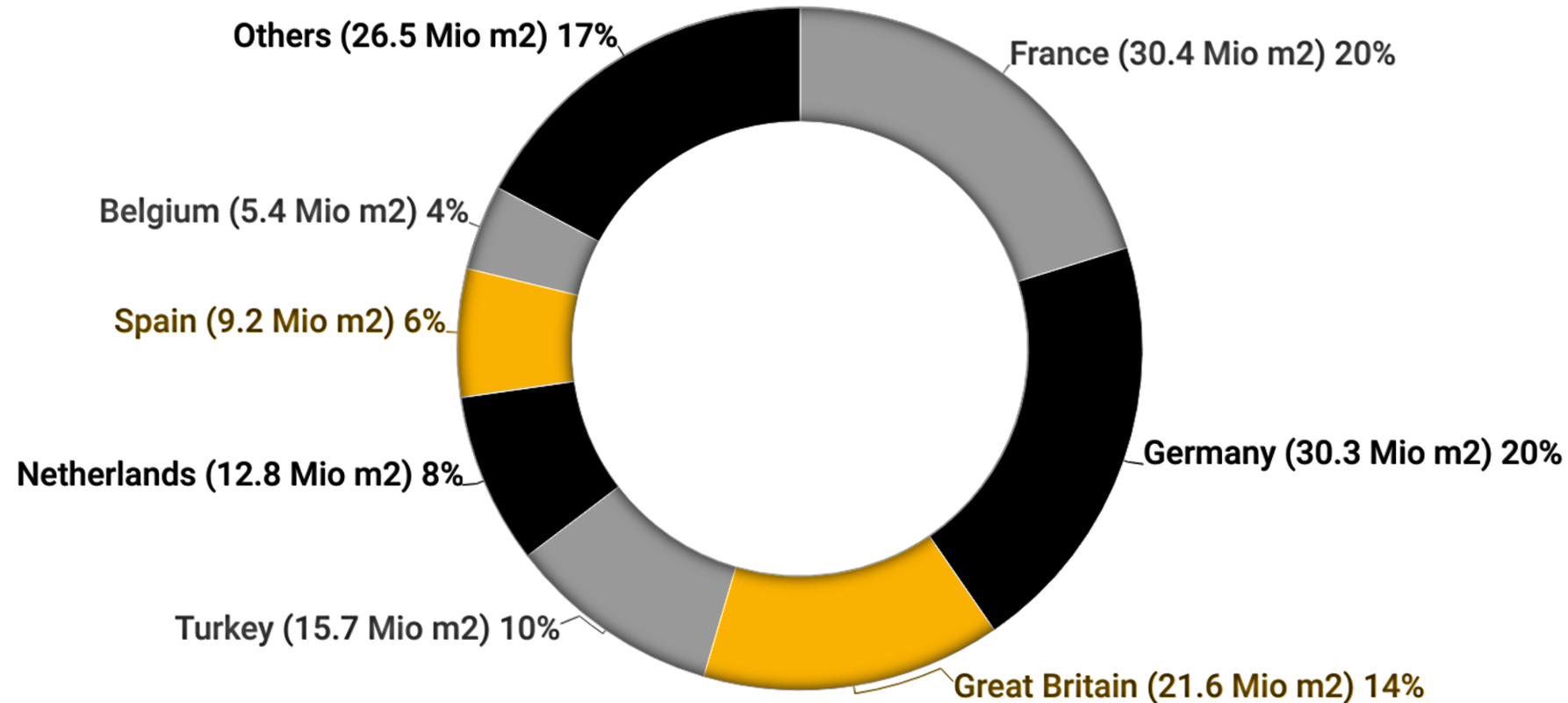


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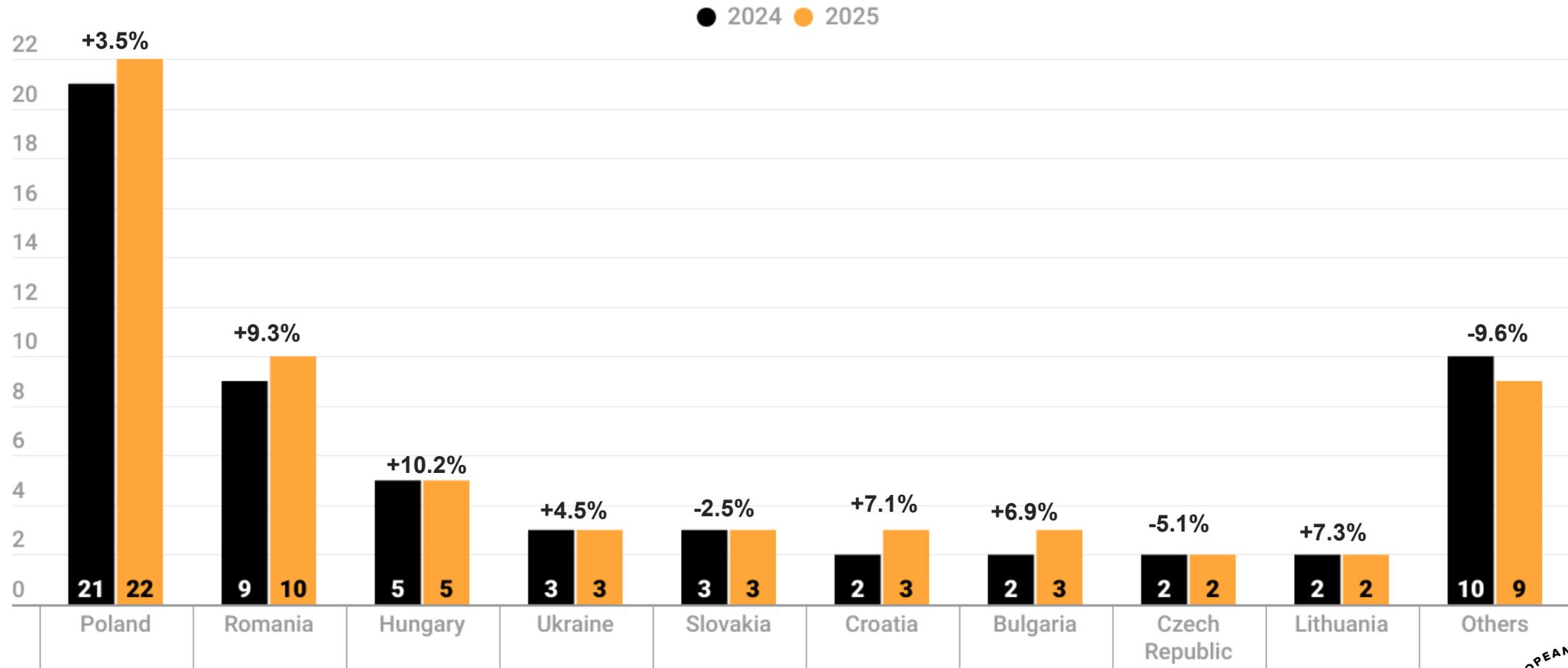
2024 vs. 2025 Sales of EPLF members in Western Europe in Mio m2 - European Production



Consistent Market in Western Europe



Pockets of Strong Growth in Eastern EU

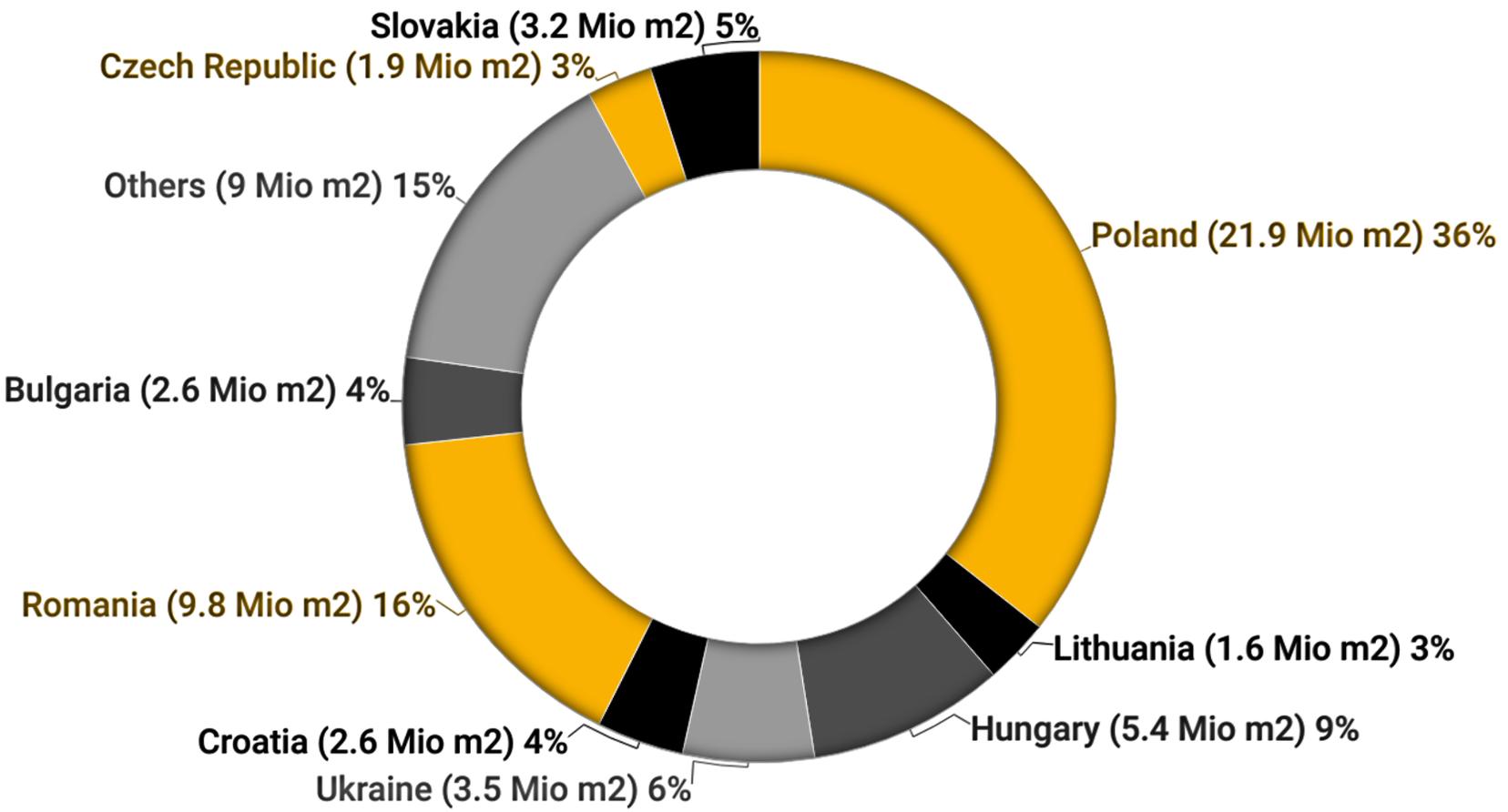


EPLF - EUROPEAN PRODUCERS OF LAMINATE FLOORING

2024 vs. 2025 Sales of EPLF members in Eastern Europe in Mio m² - European Production



Market Share Rebalancing in Eastern Europe



Main Trends for LF in 2026

Philipp Sprockhoff

EPLF Board Member | EGGER

Performance, Aesthetics & Sustainability

DURABILITY & EASE

Performance qualities such as water- and scratch-resistant surfaces combined with innovative locking systems provide peace of mind and straightforward installation to homeowners and installers alike.



© CLASSEN

EXTENDED FORMAT

Longer and wider planks give the floors an expansive and elegant look, with consumers favouring this contemporary format for its seamless, high-end aesthetic.



© MeisterWerke

GOOD FOR THE PLANET

Sustainable and eco-friendly materials remain a decisive factor. Consumers are seeking products with a reduced environmental impact without compromising on performance.



© Skema

STAND OUT INSTALLS

Herringbone continues to offer a unique but timeless style that sets interiors apart from the mainstream.



© Alsa flooring

Closing Remarks

Philipp Sprockhoff

EPLF Board Member | EGGER

Q&A



Thank you!

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