

EPLF

Annual Press Conference
12 March 2025



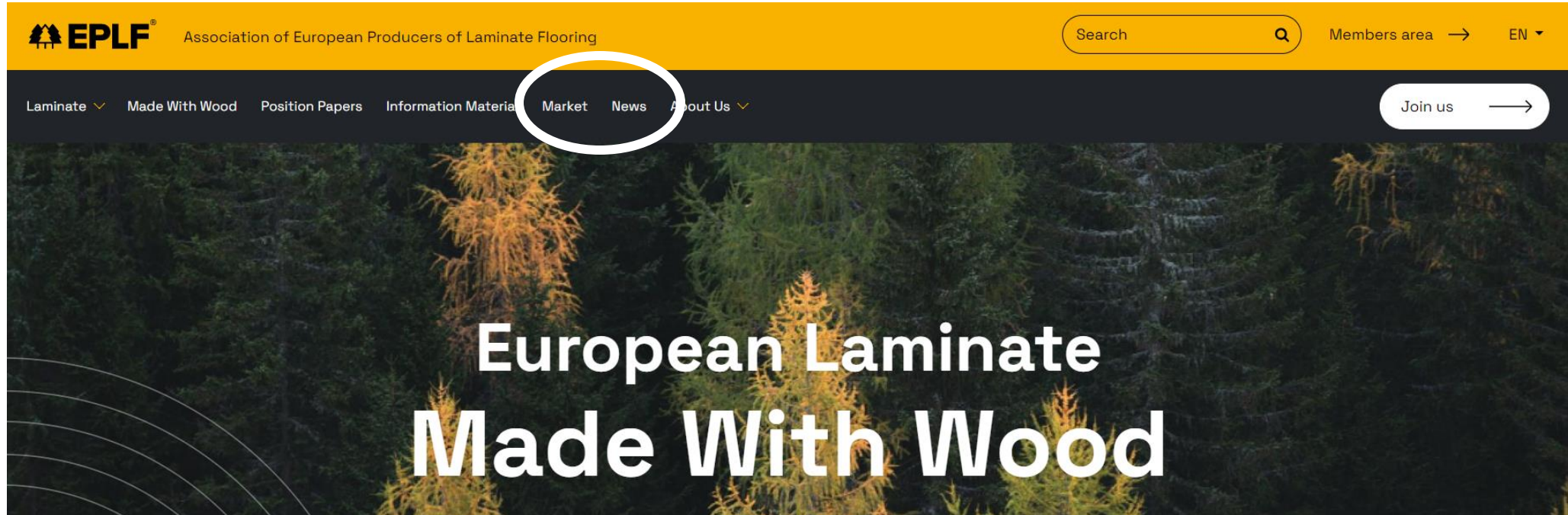
Meeting etiquette

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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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2024 overview

Ruben Desmet, UNILIN

President and Convenor Market & Image Committee

Reflecting on 2024



- Resilience of the laminate flooring sector, despite continued pressure on the construction market
 - Global economic shifts
 - Continued inflation
 - Rising material costs
- Sales of laminate stabilising
- Optimism for the future and how our industry can support the EU's Renovation Wave and Affordable Housing Initiative
 - Laminate flooring can play a key role in affordable and sustainable European housing

Durable

Low
maintenance

25 years
average
lifespan

Cascading
use of wood

Preserve EU
forests

Easy to
install and
uninstall

New EPLF Manifesto

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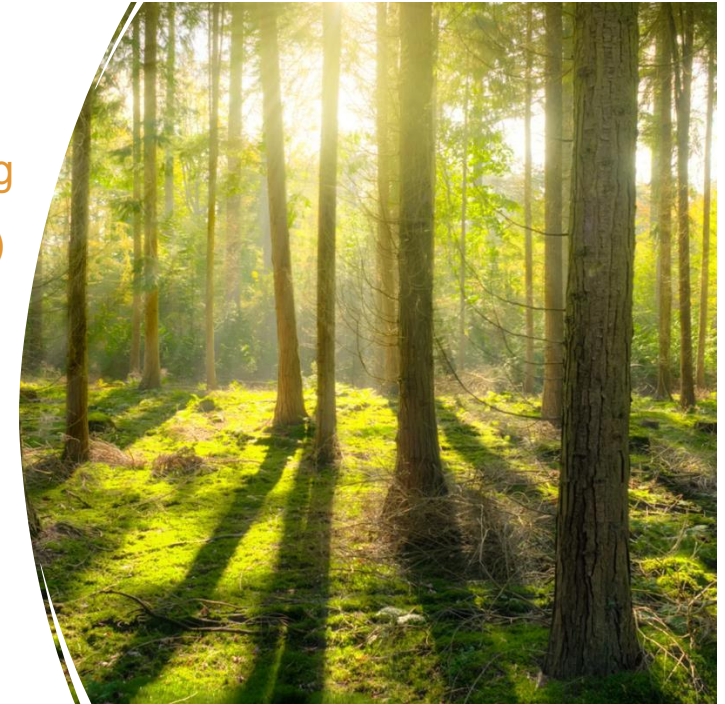


- Outlines our vision, priorities and commitments for the future of the laminate flooring industry
- Guiding framework to drive positive change in the sector
- Work together to:
 - Drive forward sustainability and innovative production methods for laminate flooring
 - Ensure laminate plays a key role in affordable and sustainable European housing
 - Invest in research and development, with a focus on durability, design and circular solutions
 - Strengthen European manufacturing, secure jobs and support local economies
- Available in the Position Papers section of the EPLF website

Celebrating our history and looking forward to the future

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- EPLF celebrated its 30th anniversary (1994-2024)
- Introduction of new Affiliate member category
 - Retain members who stopped producing but continue to sell laminate flooring
 - Bring the value chain closer to EPLF (distributors, customers, trade partners)
- Significant growth over the years: from 8 to 48 members
 - 12 Ordinary members
 - 23 Associate members
 - 11 Supporting members
 - 2 Affiliate members



Acting as the voice of the industry

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Sustainability and Circularity

- Work on **collection, sorting and recycling** of laminate flooring
- Cooperation with other flooring associations, incl. participation in sorting trials

Trade

- Successful application for **new Customs Codes** for laminate flooring:

4411 13 91 (thickness 5-9 mm)
4411 14 91 (thickness >9 mm)
- Codes applicable as of 1 January 2025. Will help better track and assess trade flows between EU-third countries, and within the EU

Competitiveness

- Endorsed joint industry statements about **avoiding market fragmentation and ensuring level playing field** under the PPWR (Packaging and Packaging Waste Regulation, and **relaunching European competitiveness and the EU single market**. Position papers are available on [EPLF website](#)
- Signed the **Antwerp Declaration** calling for a European Industrial Deal to complement the EU Green Deal and safeguard the quality of jobs in Europe

Technical update

Eberhard Herrmann, CLASSEN
Convenor Technical Committee

Sustainability and Circular Economy¹⁰

- Ad-hoc group on Circular Economy worked **on collection, sorting and recycling**:
 - Looking into available sorting and recycling technologies for laminate flooring
 - Partnering with ERFMI and MMFA to discuss what sorting systems would make sense on the market
 - Participating in two sorting tests with MMFA and TOMRA
- **New Technical Bulletin on R-Strategies and Lifespan of Laminate Floor Coverings** published in November 2024 (available in English and German on the Information Material section of EPLF website)
- EPLF's **Environmental Product Declaration (EPD)** is now available in French on EPLF website
- In 2025, the Technical Committee will carry out further research on technical solutions (for collection and sorting) and will continue cooperating with other associations

CEN-related work

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CEN TC 134 WG 09

EU standard for laminate floors

- Discussing an **amendment to EN 13329:2023-12**:
 - Herringbone installation (tests and requirements)
 - Calibration value for abrasion test
- Started **systematic review** of EN 16354 (**Underlays**)
 - Specifications, requirements and test methods

CEN TC 134 WG 10

EU standard on Circular Economy

- New **standard FprEN CEN/TS 18075 was approved**
 - Focuses on design throughout a product's lifetime
- prEN vote to be organised on version 9 of **Product Passport Document**
 - Adapted to all types of flooring covered by CEN TC 134
 - 2 levels of information: unified code (generic information); use and end-of-life (product circularity)

Harmonised test methods

- **Vote** on revision of prEN 1815 **was successful** – Several test parameters now described more in details
- **Vote** on revision of prEN 16810:2024 **is finished** – Underlays and MMF floor coverings were integrated

ISO-related work

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ISO TC 219 WG 3

International standards for laminate floors

- **Revised draft of ISO DIS 14486 will be sent to vote.**
 - To correct issues with definition of laminate floor covering as a substrate with 65% wood content
 - Locking strength requirements for herringbone installation was reduced

ISO TC 219 WG 4

Harmonised test methods

- **Vote on the revised ISO 4918 for Castor Chair test method for textile, resilient, MMF and laminate floors was successful**
 - The assessment parameters were improved
- Revision of ISO 6356:2012 for textile and laminate floor coverings has started. The laminate group has requested for the test parameter in EN 1815 and the future ISO 6356 to be equal

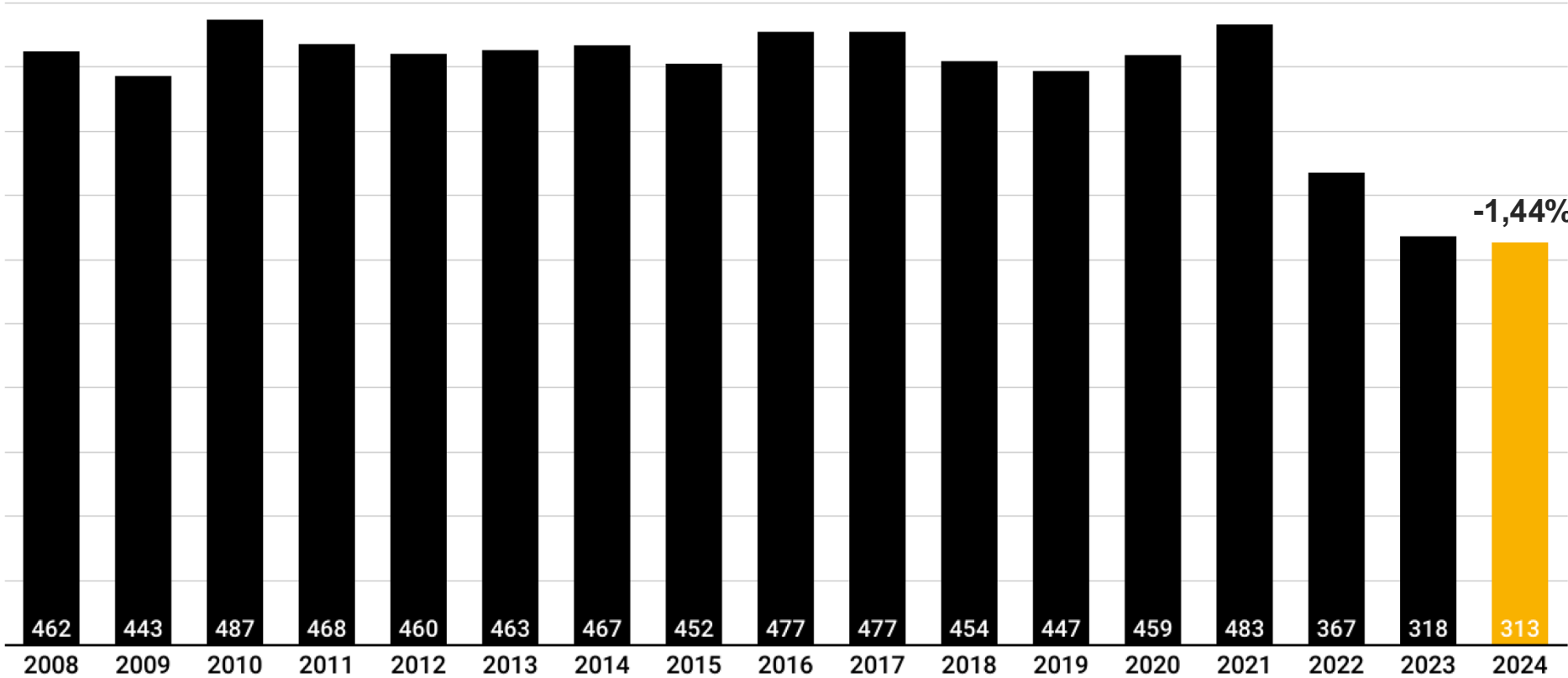
Sales figures 2024

Ruben Desmet, UNILIN

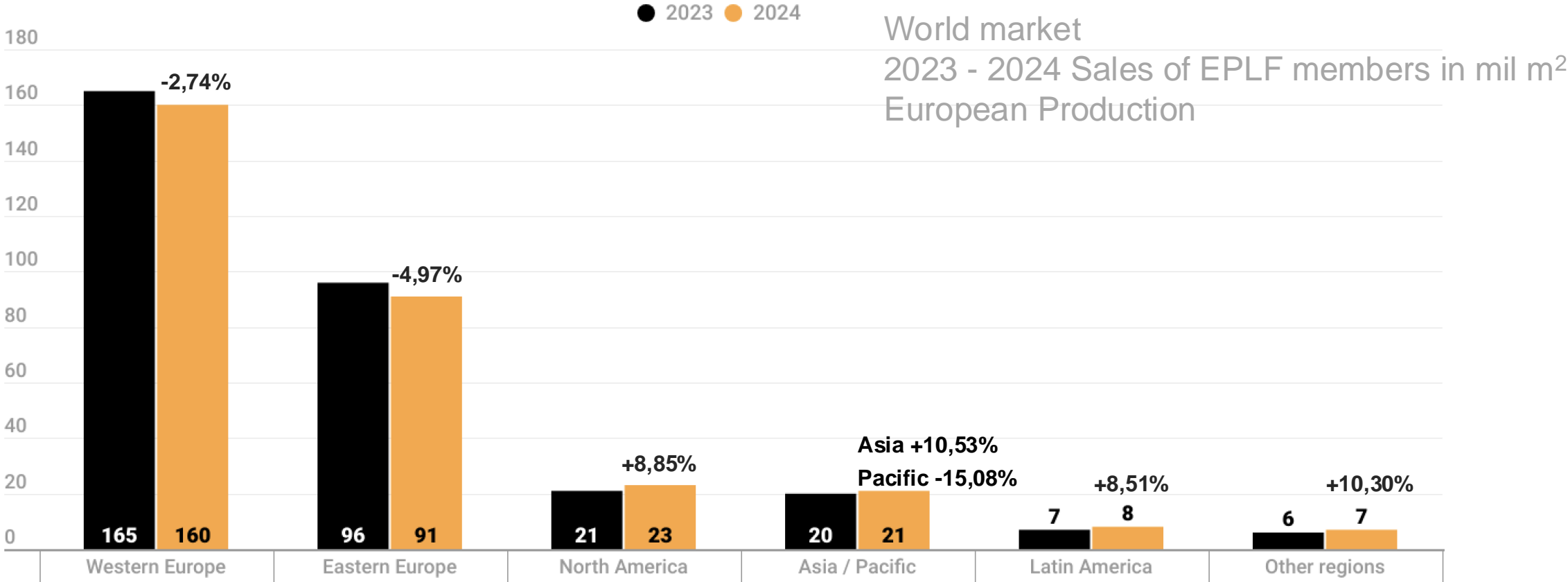
President and Convenor Markets & Image Committee

Sales of laminate stabilising

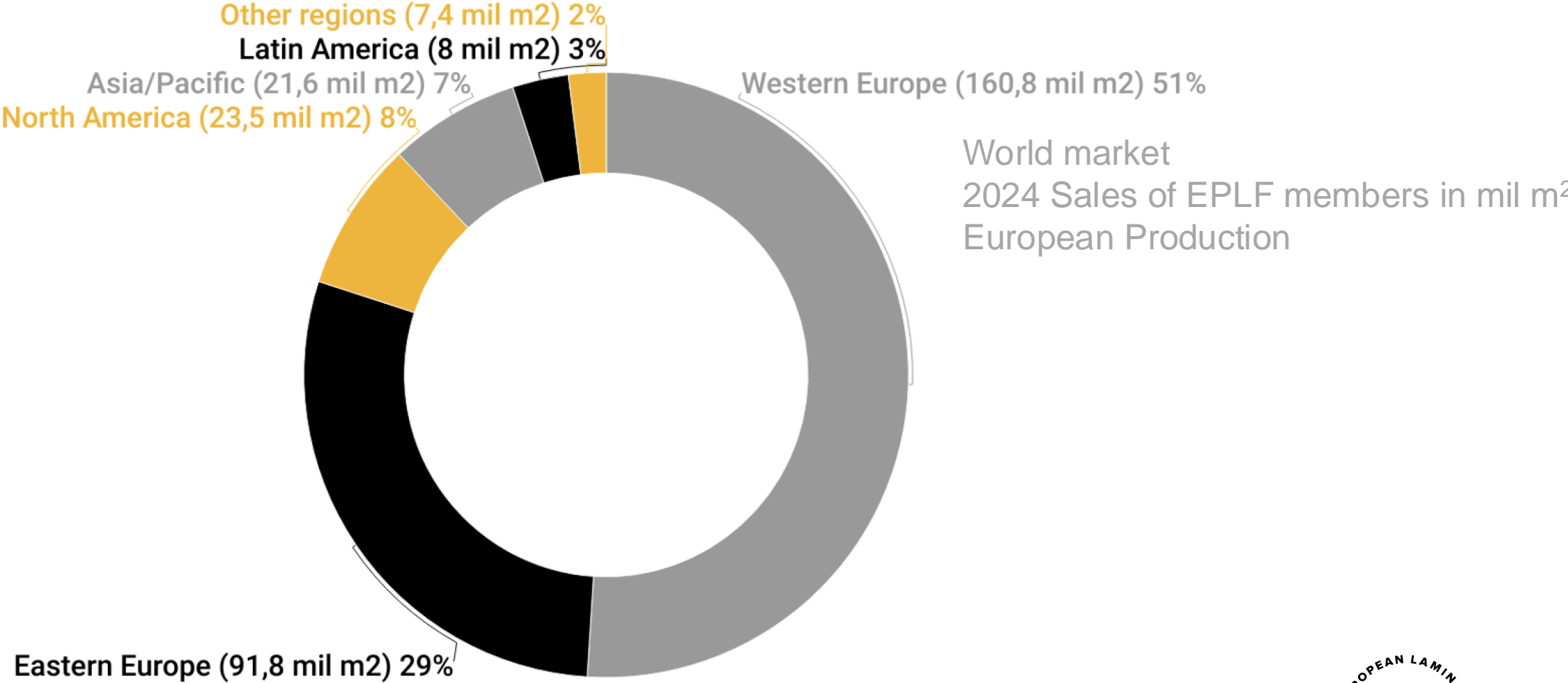
World market
2008 - 2024 Sales of EPLF members in mil m²
European Production



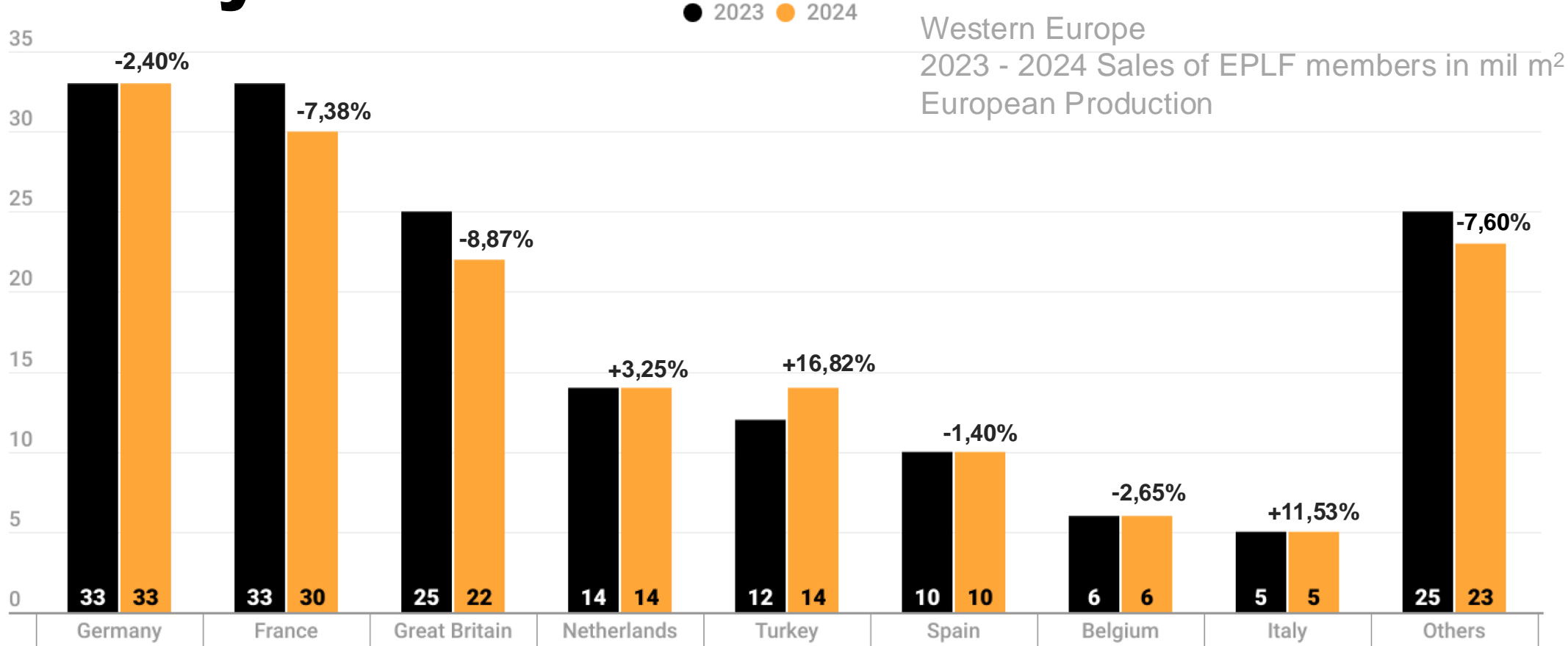
Slight decrease of sales in Europe



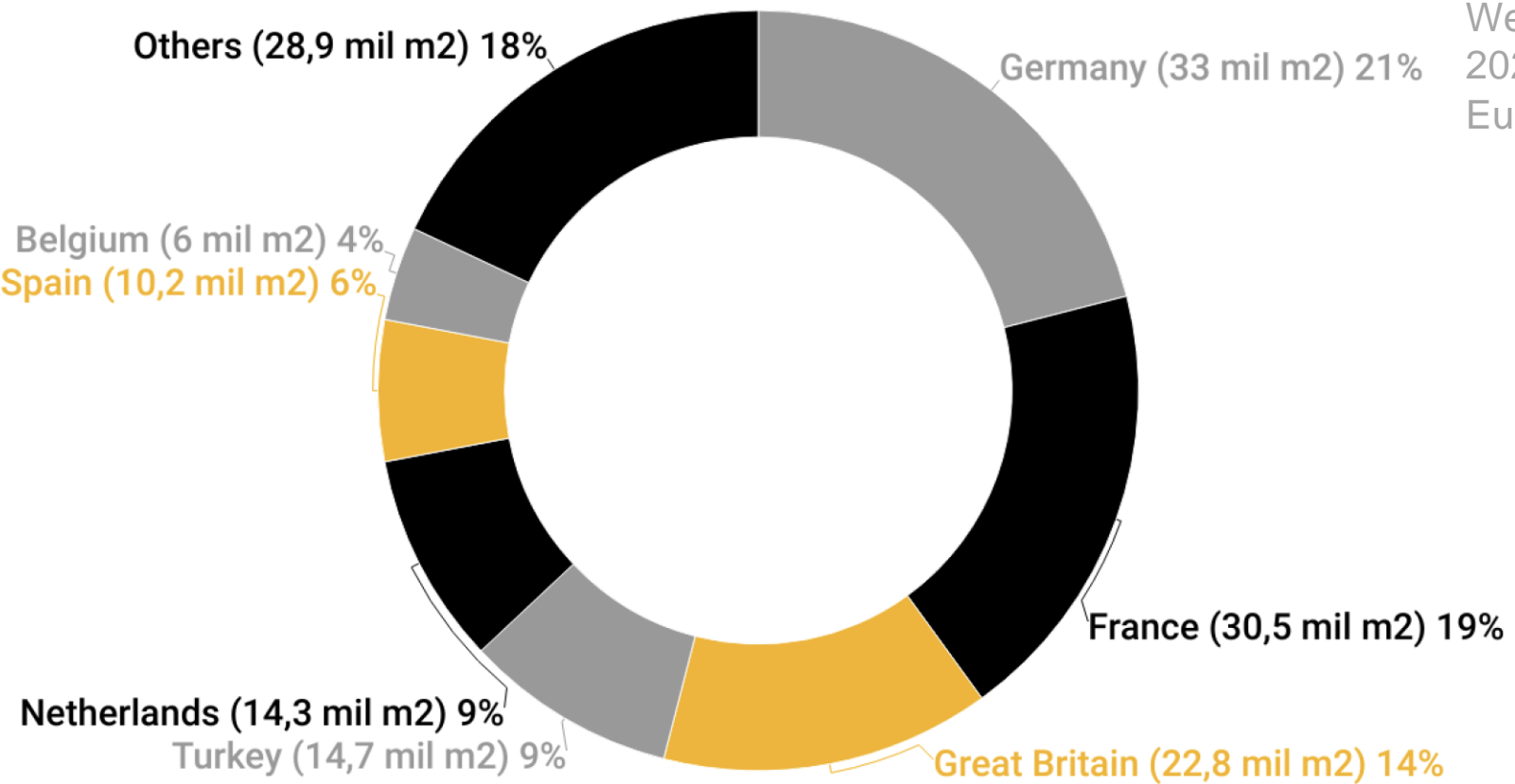
Western Europe remains the largest market



Sales increased in the Netherlands, Turkey and Italy



Germany leads the pack in Western Europe 18

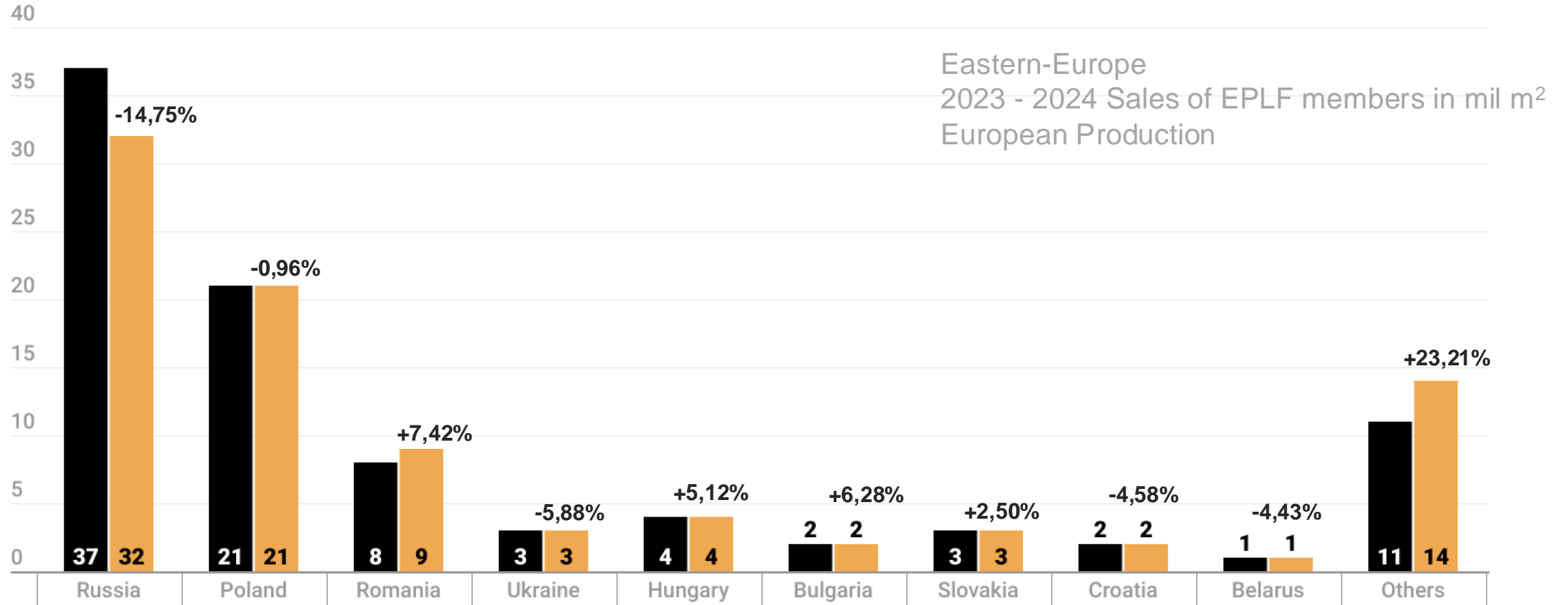


Western Europe
2024 Sales of EPLF members in mil m²
European Production

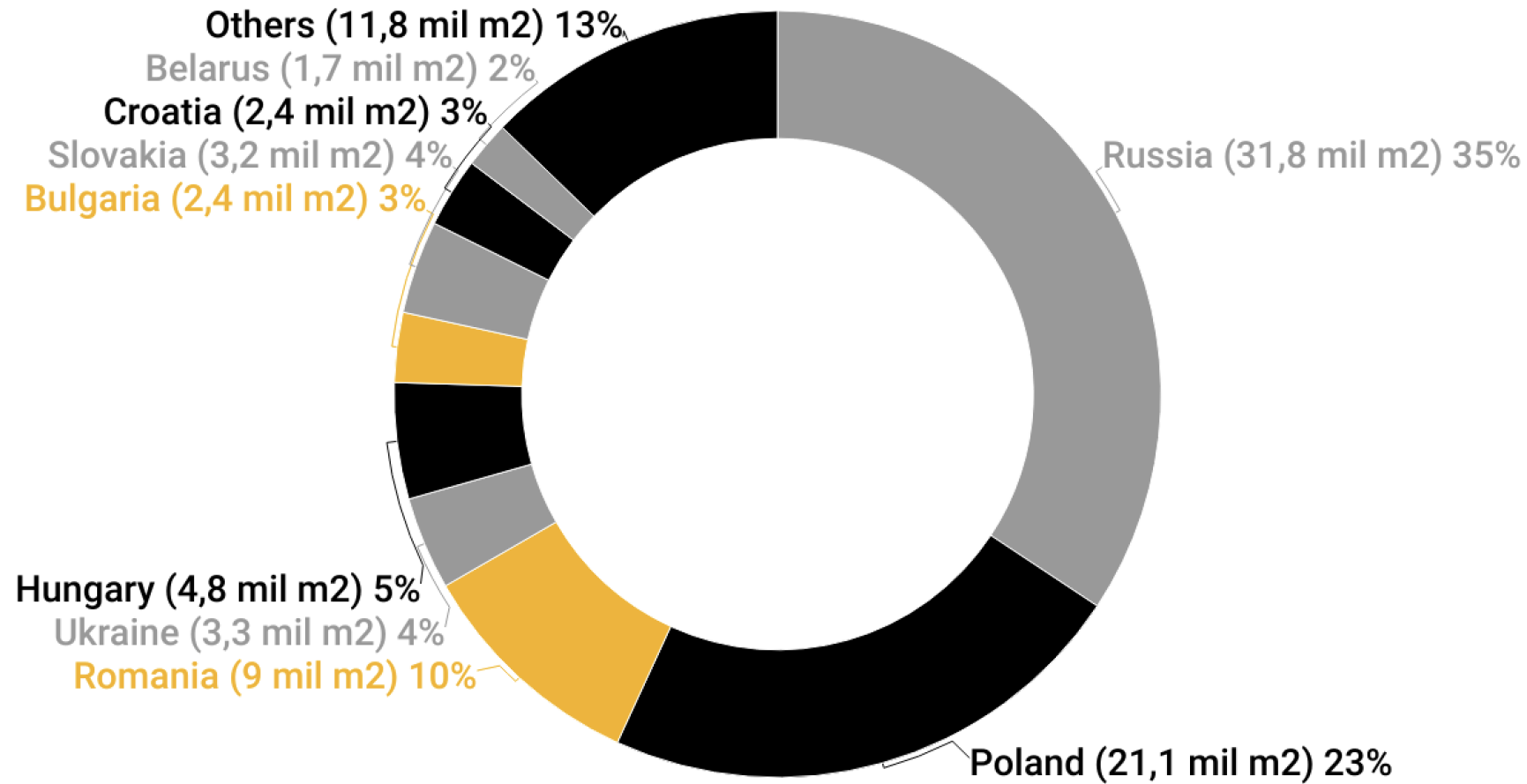


Mixed markets in Eastern Europe

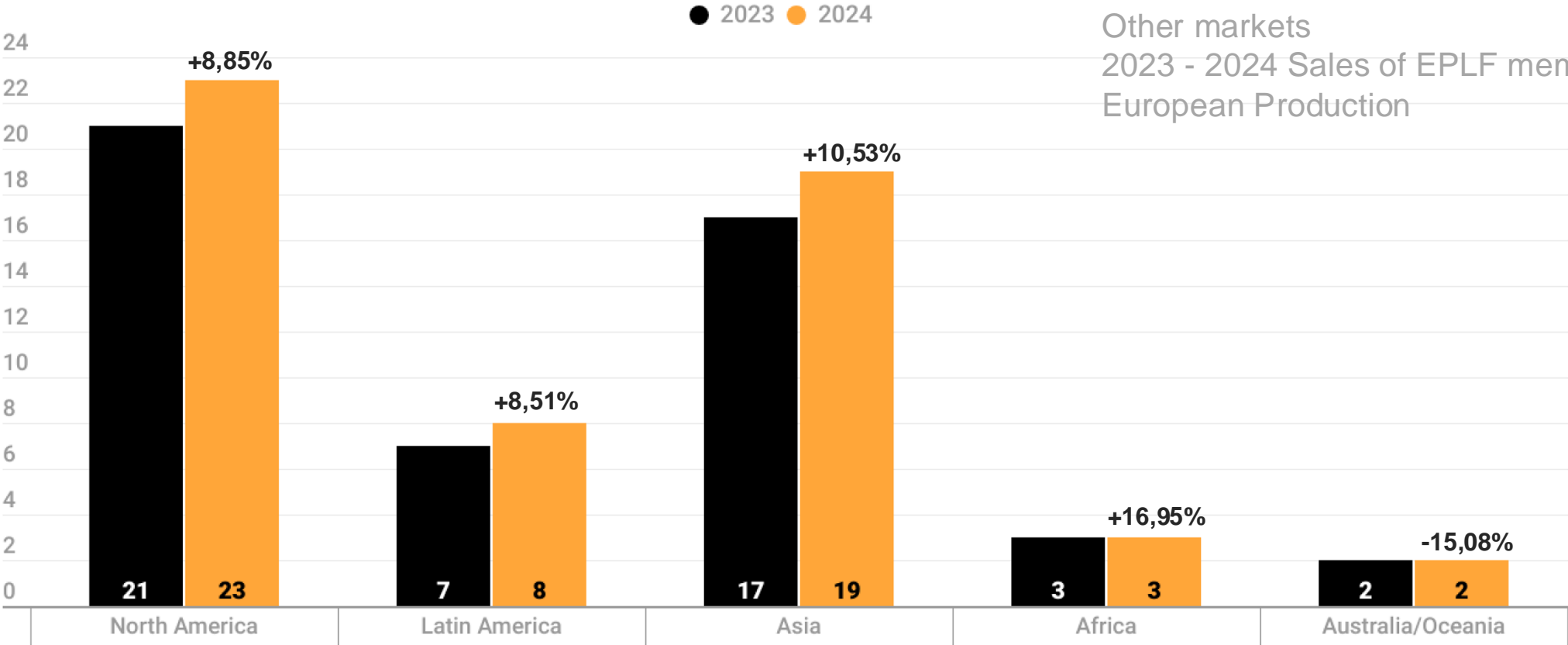
● 2023 ● 2024



Russia took lion's share again



North America bounces back!

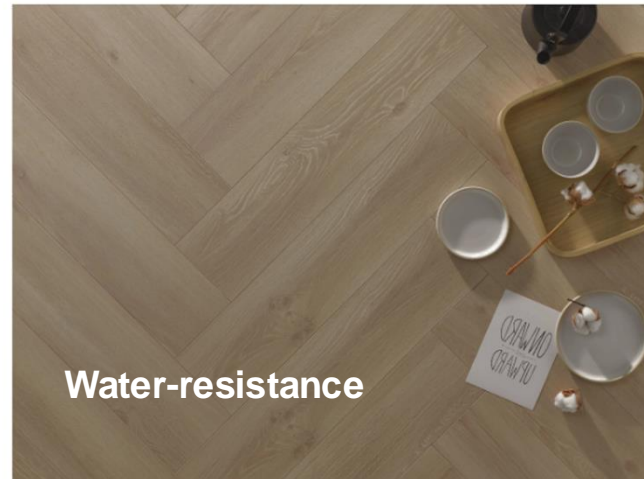
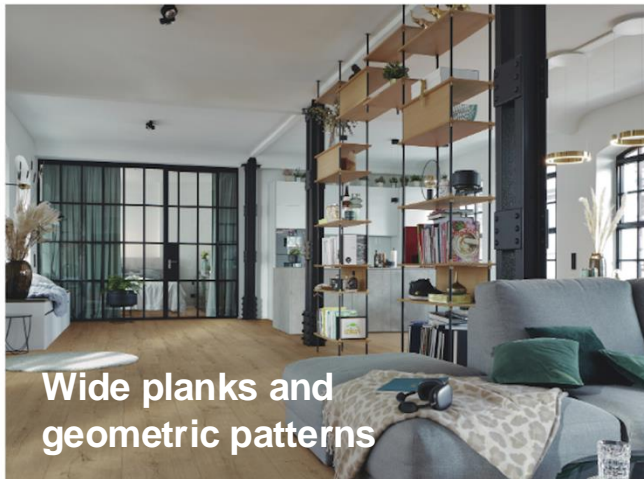
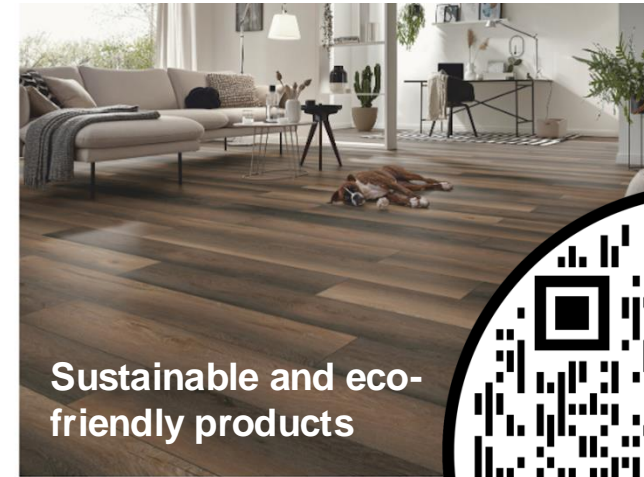


Closing remarks

Fabian Kölliker, SWISS KRONO

Board member

Sustainable, durable and elegant



Q&A



Thank you!

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