European Federation of the Parquet Industry
Fédération Européenne de l'Industrie du Parquet
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The European parquet market progressed significantly in 2021 and reached level not seen since 10 years

While an increase in parquet consumption was expected in 2021, reflecting a compensation of the impacts of covid-19 and the related measures, such as lockdowns, taken in 2020 in some FEP countries, we observe that consumption is higher than in 2019, before the pandemic, and even reaches a level not seen since 10 years.

After a stable-to-positive year in 2020 (+1.3%), the European consumption of parquet rose by 6.2% in 2021. Consumption of parquet has increased on almost all European markets especially during the first semester, when compared to the same period in 2020. During the rest of the year, demand continued to grow but at a slower pace as consumers restarted to dedicate their spendings to areas such as leisure and travels. Nevertheless, renovation, and adaptation of homes to "post-covid-19" life, remains the driver of the parquet consumption growth.

As usual, the results show variations from country to country. Countries such as Italy and France, which were not able to offset the loss experienced during the spring 2020 lockdown and reported declines in parquet consumption for the year 2020 as a whole, are showing large increases in parquet consumption in 2021 compared to 2020. Croatia, Romania and Switzerland are also reporting significant increases in parquet consumption while Portugal is focusing more on exports.

On the other hand, countries which totally, or partially, compensated, during the second half of 2020, the bad performance observed in March-April of the same year, generally report lower but still sustained rising rates. This is the case of Scandinavia, Austria and Spain, while the German parquet market stabilizes.

The **production** in FEP territory rose by almost 7% in 2021 and exceeded the 82 million square meter threshold. A level not seen since the start of the financial crisis. The European production outside FEP countries is at an estimated 15.3 million square meters – 9.7 million square meters produced in EU countries and 5.6 million square meters in European non-EU countries.

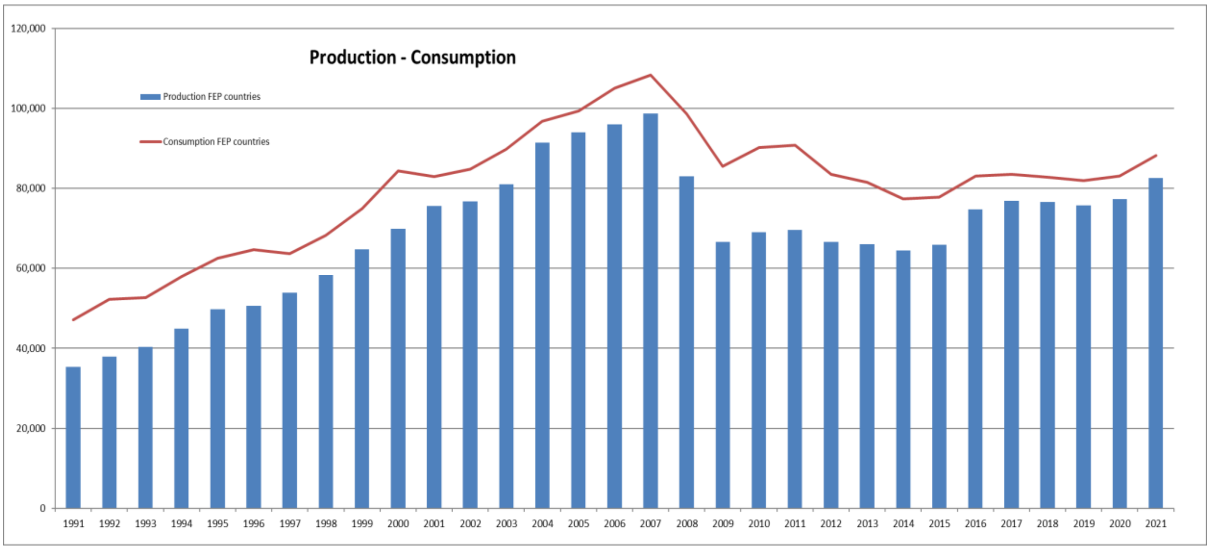
Parquet production in Europe

	FEP Countries		Non-FEP countries in Europe (**)	Total	
	000 m²	+ / - %	000 m²	000 m²	+ / - %
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	98,634	*2.84%*		98,634	
2008	83,024	*-15.83%*		83,024	
2009	66,522	*-19.88%*		66,522	
2010	69,000	*3.73%*		69,000	
2011	69,654	*0.95%*		69,654	
2012	66,570	*-4.43%*	7,000	73,570	
2013	66,077	*-0.74%*	10,000	76,077	3.41%
2014	64,407	*-2.53%*	13,500	77,907	2.41%
2015	65,842	*2.23%*	14,600	80,442	3.25%
2016 (*)	74,749	*13.53%*	14,500	89,249	10.95%
2017	76,840	*2.80%*	14,500	91,340	2.34%
2018	76,601	*-0.31%*	14,800	91,401	0.07%
2019	75,728	*-1.14%*	14,200	89,928	-1.61%
2020	77,274	*2.04%*	13,500	90,774	0.94%
2021	82,624	*6.92%*	15,300	97,924	7.88%

(*) As of 2016, figures are covering all European FEP countries – data for Croatia, Estonia & Portugal have been added.
(**) Best estimates according to information received from FEP affiliates

The total production in FEP territory significantly increased (+6.92%) in 2021 to a volume of 82,624,000 m². Taking into account the total production in Europe (FEP countries + non-FEP countries in Europe) implies that production in 2021 rose by 7.88% and reached almost 98 million m².

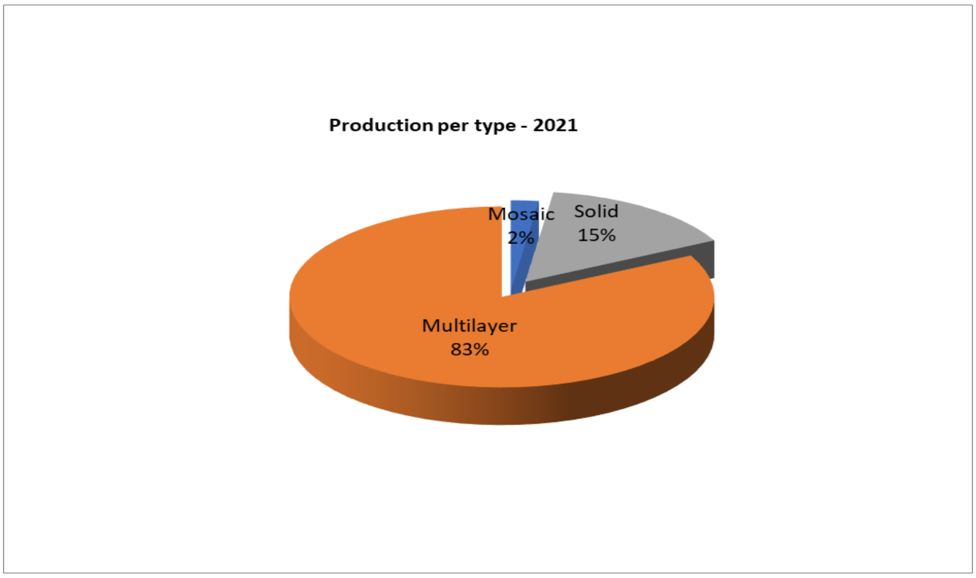


Consumption in FEP area improved (+6.18%) to a level of 88,155,000 m².

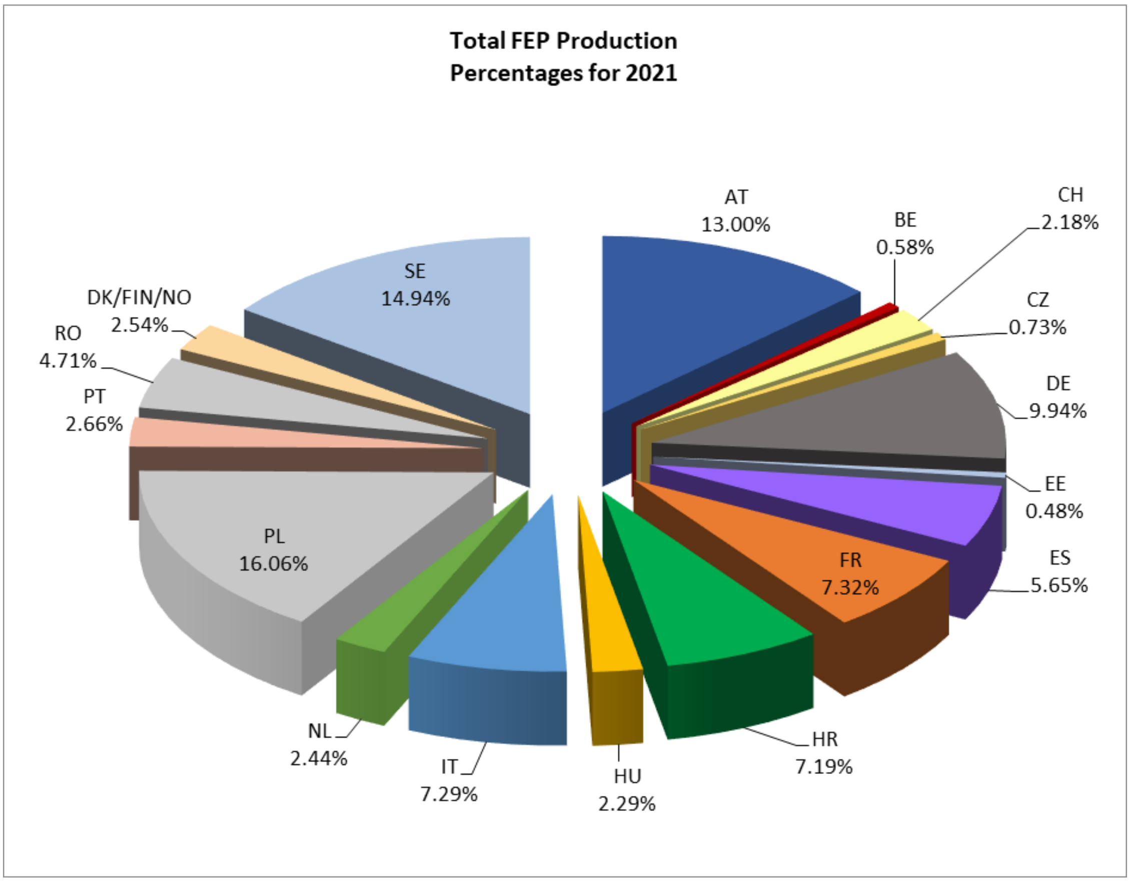
	Production development 2021/2020	Consumption development 2021/2020
AT	10.00%	2.99%
BE	3.93%	5.00%
CH	9.00%	12.16%

CZ	-21.98%	3.96%
DE	-4.66%	0.09%
EE	47.41%	6.00%
ES	3.34%	2.97%
FR	17.57%	10.59%
HR	10.39%	17.41%
HU	5.33%	8.93%
IT	24.79%	20.80%
NL	4.55%	5.20%
PL	6.91%	1.00%
PT	22.22%	-10.38%
RO	1.12%	15.01%
Scandinavia	2.51%	4.13%
DK/FIN/NO	5.00%	2.77%
SE	2.09%	5.08%
FEP	**6.92%**	**6.18%**

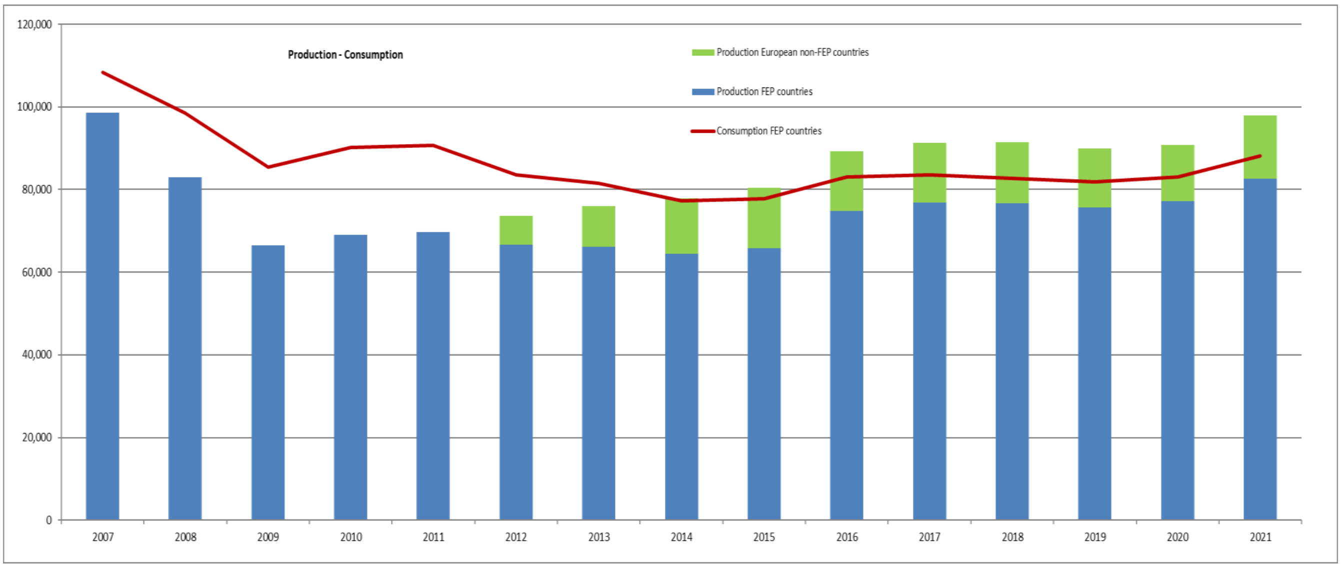
The 2021 total parquet **production per type** remains similar to the picture already presented from 2010 onwards, whereby multilayer comes in first with 83% (compared to 82% in 2020), being followed by solid (including lamparquet) at 15% (compared to 16% in 2020) and mosaic with a stable 2% of the total cake.



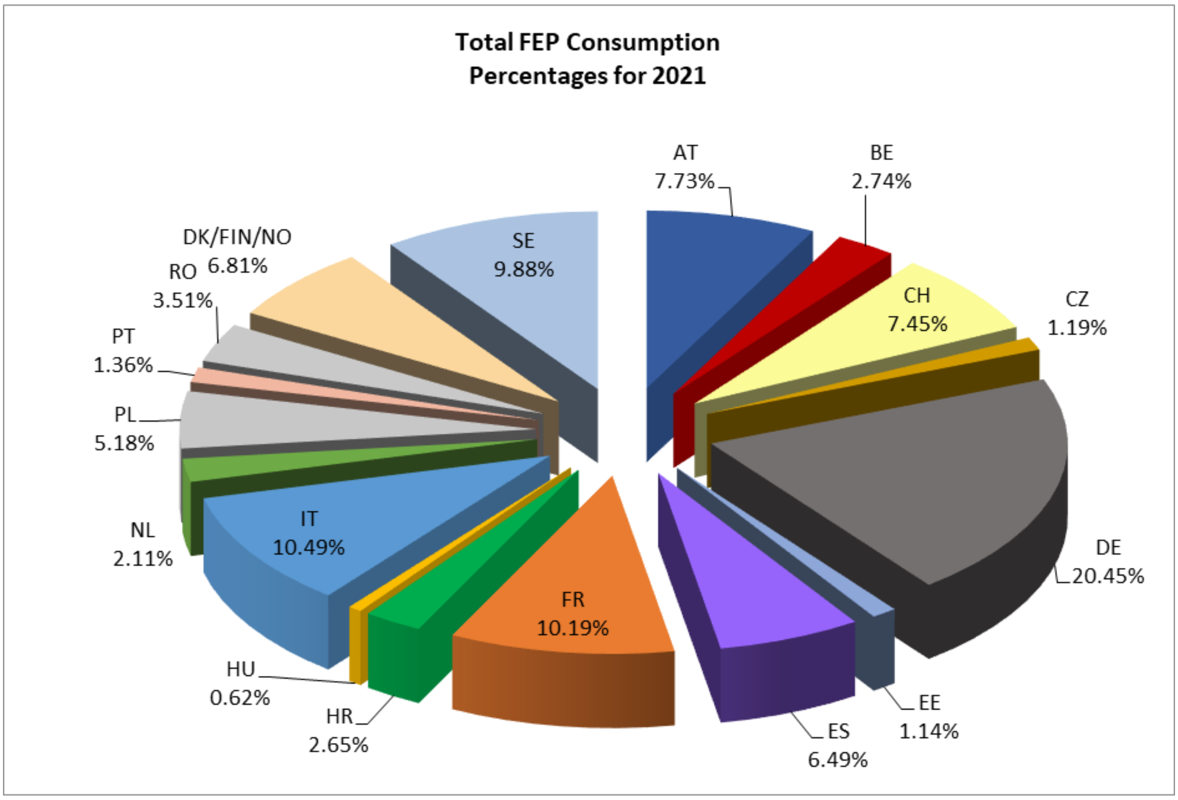
In absolute **production** figures by country, Poland maintains its top position at 16.06%. Sweden keeps its second place on the podium with 14.94%. It is followed by Austria at 13.00%, while Germany comes in as fourth (9.94%).



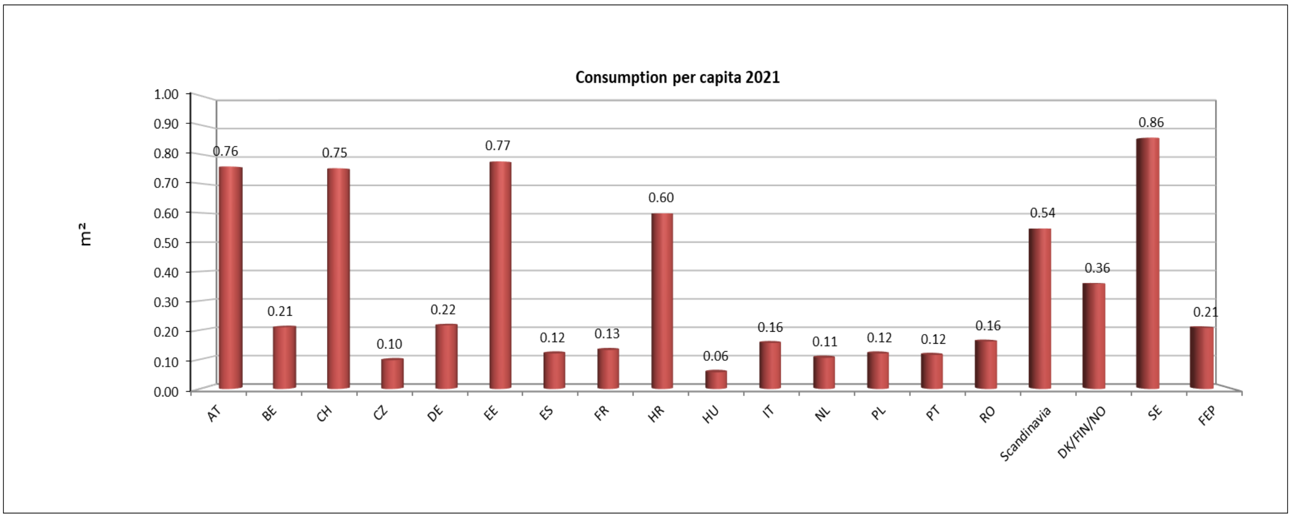
Consumption in FEP area also increased significantly in 2021 (+6.18%) and reached 88,155,000 m² compared to 83,023,000 m² the year before.



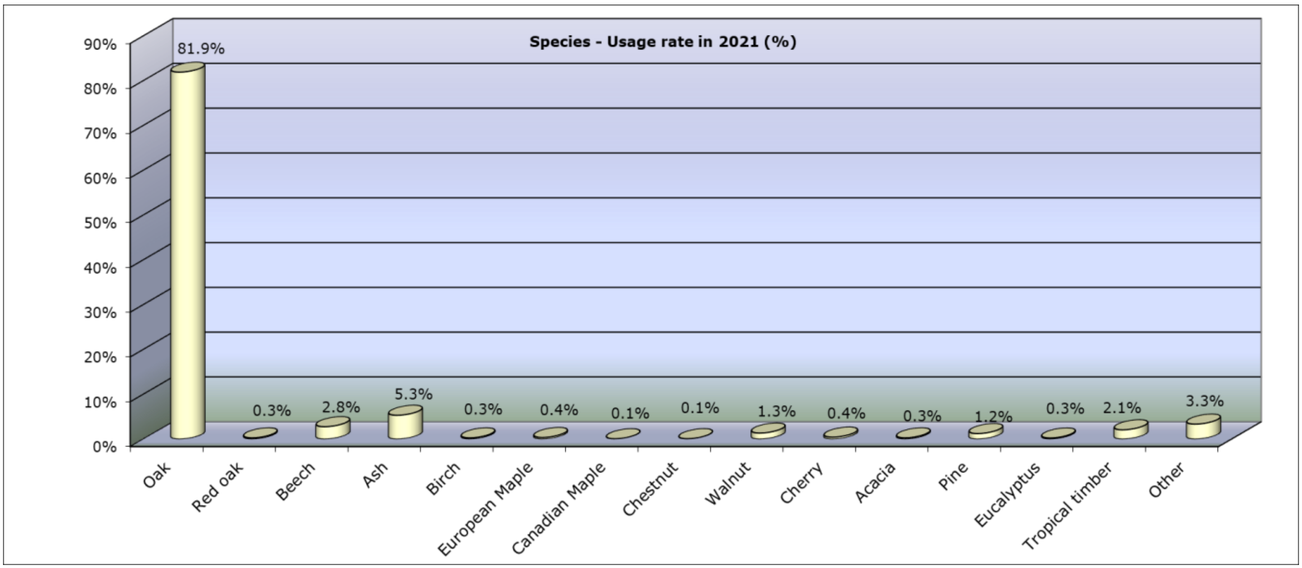
In terms of consumption per country, Germany keeps its first position with 20.45%. Italy at 10.49% and France at 10.19% overtake Sweden (9.88%). Austria with 7.73% remains in fifth position while Switzerland (7.45%), the Nordic Cluster (6.81%) and Spain (6.49%) follow.



As regards the per capita parquet consumption, Sweden keeps the first seat (0.86 m²) before Estonia (0.77 m²), Austria (0.76 m²) and Switzerland (0.75 m²). In the total FEP area, the consumption per inhabitant slightly increases at 0.21 m² in 2020 and 2021.



Use of wood species



The usage of wood species in 2021 as shown on the above graph indicates that the share of oak remains stable at 81.9% compared to 81.8% in 2020. Tropical wood species represent 2.1% of used wood. Ash and beech are still the two other most common chosen species with 5.3% and 2.8% respectively.

Outlook for 2022 & 2023

The European parquet markets show diverse evolutions for the first quarter 2022 compared to the same period last year. While Italy, Scandinavia and Spain report still significant increases in demand, Benelux, France and Switzerland present flat evolutions. On the other hand, Austria and Germany are already experiencing decreases, reflecting the difficulty to fill in orders. This phenomenon is expected to be reported by all markets in the coming months as most of the FEP members are facing issues of wood supplies.

Issues of wood & wood products availability and affordability are limiting the positive evolution of the parquet industry since the outburst of the pandemic, reflecting high demand for wood and supply chains' disruptions, but they are now getting even more acute with the geopolitical turmoil. A significant part of wood raw material and semi-finished products used by European parquet producers came from Ukraine, Russia and Belarus. These trade flows have been impacted by the situation and the related measures.

Due to the already very tense situation on the wood markets and the ecological responsibility, it is not possible for the sector to fully diversify sources of wood to other species and/or other countries.

The European parquet industry is thus asking the EU authorities for temporary safeguarding, mitigation and support measures to the sector, for a tool, such as a quota, to keep oak logs within Europe and for coherent policies allowing higher mobilization of existing European wood resources (Forestry Strategy, Biodiversity Strategy…) as long as principles of Sustainable Forest Management are applied. A longer-term perspective to explore sustainable (and recyclable) substitutes and alternatives to oak should also be adopted.

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