FNB
FÉDÉRATION NATIONALE DU BOIS

SYNTHÈSE

STATISIQUES 2023



AVEC LE SOUTIEN DE

France Bois Forêt
INTERPROFESSION NATIONALE

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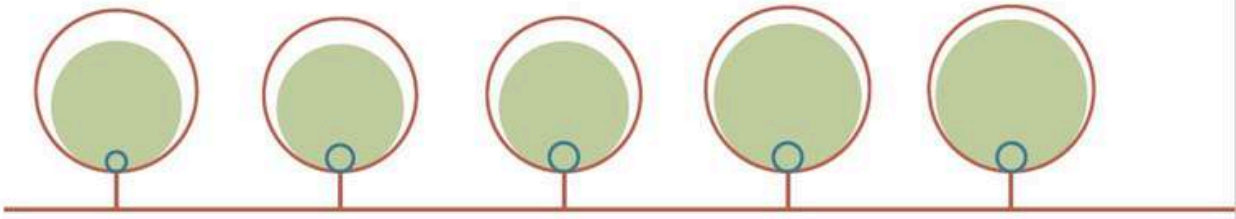
LE MARCHÉ EUROPÉEN DU PARQUET SEMBLE AVOIR ATTEINT SON NIVEAU LE PLUS BAS EN 2023

Après une bonne année 2022 qui a permis de consolider le niveau de 2021, le marché européen du parquet a connu une baisse importante de 30,5% en 2023.

Des baisses ont été observées sur tous les marchés européens, reflétant le déclin de l'activité de construction, les taux d'intérêt élevés, le manque de confiance des consommateurs et la concurrence déloyale.

La production sur le territoire FEP a chuté de 30,5 % en 2023 pour atteindre 54,4 millions de mètres carrés. La production européenne en dehors des pays FEP est estimée à 10,4 millions de mètres carrés.

Si l'on tient compte de la production totale en Europe (pays FEP + pays européens hors PEF), la production en 2023 a chuté de 29,52 % pour atteindre 64,74 millions de m².



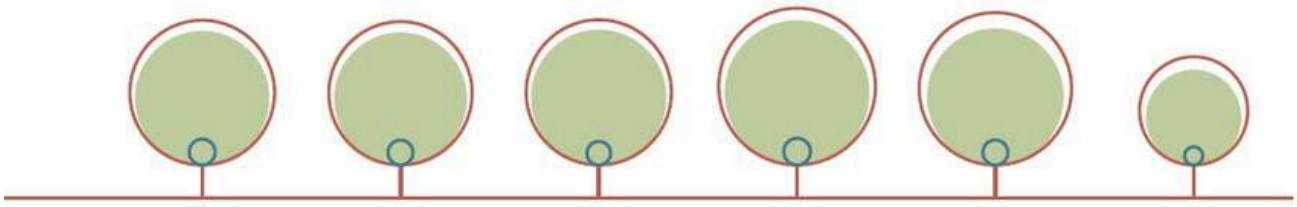
Million sqm	2013	2014	2015	2016	2017
Production FEP countries	66,077	64,407	65,842	74,749	76,840
Production European non-FEP countries	10,000	13,500	14,600	14,500	14,500
Consumption FEP countries	81,521	77,329	77,718	83,043	83,506

PRODUCTION DE PARQUET EN EUROPE

(*)
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

	FEP Countries		Non-FEP countries in Europe (**)	Total	
	000 m²	+ / - %	000 m²	Total	+ / - % Total
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	81,851	5.92%	15,300	97,151	7.03%
2022	78,012	-4.69%	14,300	92,312	-4.98%
2023	54,394	-30.50%	10,350	64,744	-29.52%



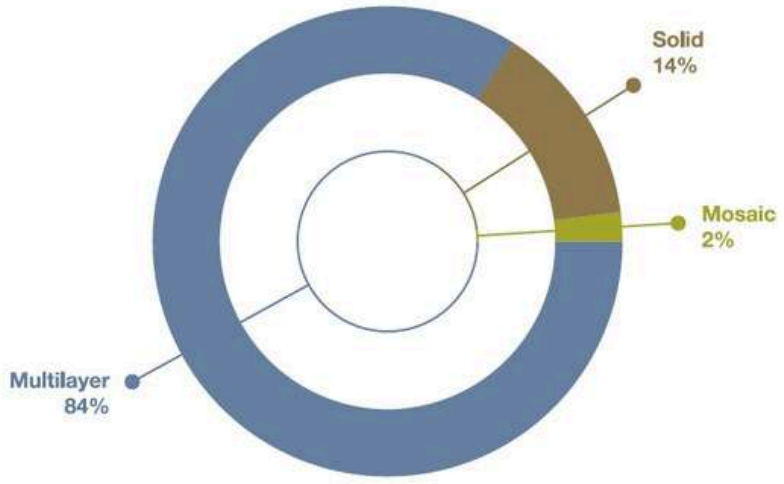
2018	2019	2020	2021	2022	2023
76,601	75,728	77,274	81,851	78,012	54,394
14,800	14,200	13,500	15,300	14,300	10,350
82,717	81,946	83,022	89,625	87,116	61,869

La consommation a atteint 87 116 000 m². La consommation dans la zone FEP a également chuté de 30,5 %, pour atteindre près de 62 millions de m².

	Production development 2023/2022	Consumption development 2023/2022
	%	%
AT	-27.16	-13.33
BE	-20.12	-24.99
CH	-28.15	-20.14
CZ	-41.67	-45.04
DE	-46.62	-45.79
EE	-60.00	-52.46
ES	-23.95	-23.37
FR	-21.67	-19.39
HR	-35.92	-49.43
HU	-34.71	-46.92
IT	-21.90	-27.79
NL	-29.98	-30.35
PL	-28.63	-40.00
PT	-12.50	-15.87
RO	-32.61	-31.97
Scandinavia	-34.40	-22.69
DK/FIN/NO	-35.50	-35.00
SE	-34.21	-13.53
FEP	**-30.50**	**-30.50**

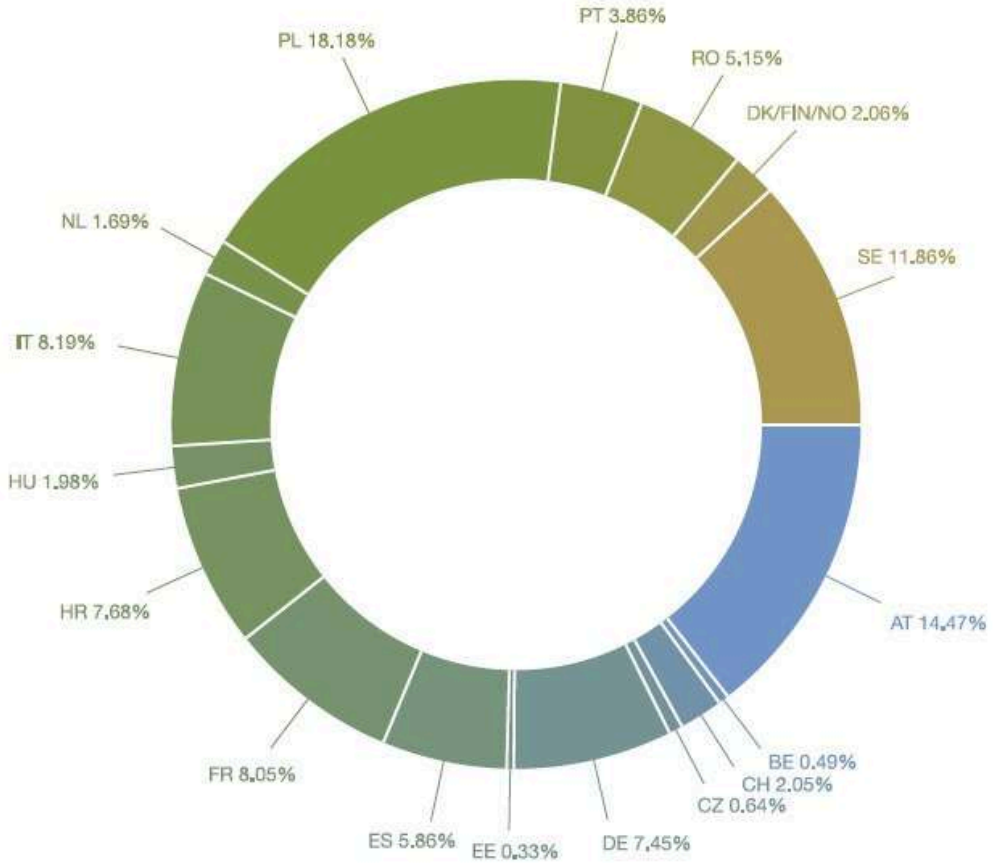
Production par type de produit - 2023

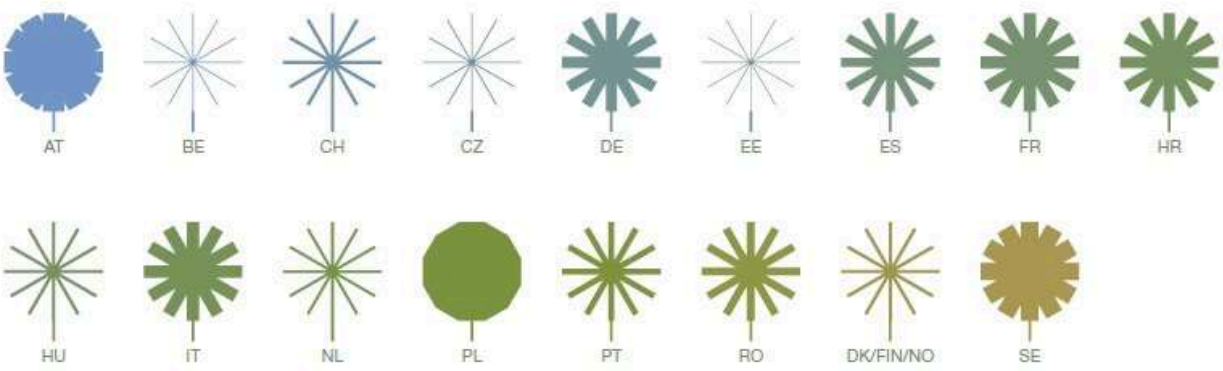
La production totale de parquet par type en 2023 reste similaire à l'image déjà présentée depuis 2010, le multicouche arrivant en tête avec 84% (contre 83% en 2022), suivi du massif avec 14% (contre 15% en 2022) et de la mosaïque avec un pourcentage stable de 2% du gâteau total.



Pourcentage de production totale FEP - 2023

En chiffres absolus de production par pays, la Pologne conserve sa première place avec 18,18%. L'Autriche, avec 14,47 %, conserve la deuxième place du podium et la Suède la troisième (11,86 %). L'Italie prend la 4e place devant l'Allemagne qui se classe 7e.

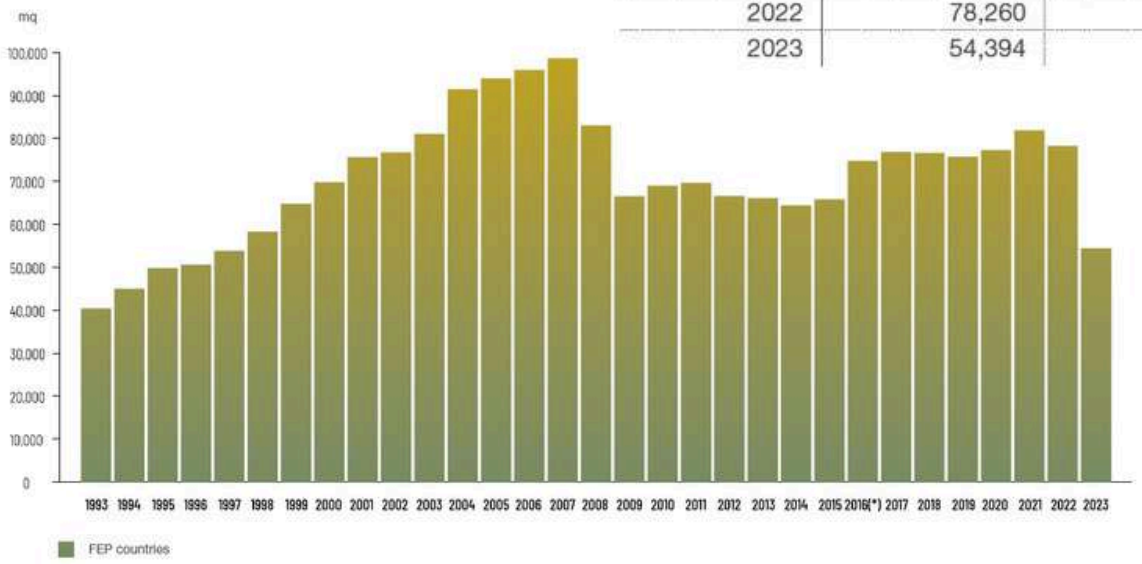




Production de parquet dans les pays membres de la FEP 1992 - 2023

(*) Depuis 2016, les chiffres couvrent tous les pays européens du PEF (EE, HR & PT ont été ajoutés).

	FEP Countries	
	000 m²	+ / - %
1993	40,396	
1994	44,972	11.33%
1995	49,798	10.73%
1996	50,578	1.57%
1997	53,836	6.44%
1998	58,308	8.31%
1999	64,774	11.09%
2000	69,812	7.78%
2001	75,621	8.32%
2002	76,741	1.48%
2003	81,039	5.60%
2004	91,453	12.85%
2005	93,977	2.76%
2006	95,911	2.06%
2007	98,634	2.84%
2008	83,024	-15.83%
2009	66,522	-19.88%
2010	69,000	3.73%
2011	69,654	0.95%
2012	66,570	-4.43%
2013	66,077	-0.74%
2014	64,407	-2.53%
2015	65,842	2.23%
2016 (*)	74,749	13.53%
2017	76,840	2.80%
2018	76,601	-0.31%
2019	75,728	-1.14%
2020	77,274	2.04%
2021	81,851	5.92%
2022	78,260	-4.39%
2023	54,394	-30.50%



Production de parquet dans les pays membres de la FEP 1992 - 2023

000 m²	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2023-2022	2023-2022
AT	8,275,000	8,993,000	9,106,000	9,197,060	9,385,000	9,573,000	9,668,730	9,765,690	10,743,000	10,808,000	7,873,000	-2,935,000	-27.16%
BE	390,000	390,000	455,000	473,200	402,000	361,800	407,000	458,000	476,000	333,000	266,000	-67,000	-20.12%
CH	1,747,100	1,753,600	1,699,800	1,643,500	1,841,600	1,676,200	1,753,000	1,656,350	1,805,000	1,549,000	1,113,000	-436,000	-28.15%
CZ	1,350,000	1,230,000	1,141,000	1,350,000	1,344,000	1,065,000	1,098,000	769,000	600,000	600,000	350,000	-250,000	-41.67%
DE	10,377,350	8,254,783	7,656,421	7,854,360	7,525,100	8,632,900	7,083,000	8,611,000	8,209,000	7,313,000	4,055,000	-3,542,000	-46.62%
EE				441,000	568,000	400,000	312,000	270,000	398,000	450,000	180,000	-270,000	-60.00%
ES	4,588,000	4,293,000	4,741,000	4,784,000	4,621,000	4,447,000	4,488,200	4,516,000	4,667,000	4,188,000	3,185,000	-1,003,000	-23.95%
FR	4,900,000	5,125,000	5,130,000	5,285,000	5,444,000	5,285,500	5,439,000	5,144,000	6,049,000	5,590,000	4,377,800	-1,211,000	-21.67%
HR				4,475,000	4,603,000	4,266,000	4,671,000	5,381,000	5,940,000	6,520,000	4,178,000	-2,342,000	-35.92%
HU	1,695,000	1,761,000	1,724,000	2,204,000	2,253,000	2,095,000	1,812,000	1,800,000	1,852,000	1,648,000	1,076,000	-572,000	-34.71%
IT	4,000,000	4,200,000	4,100,000	4,200,000	4,529,000	4,914,000	5,315,000	4,825,000	6,021,000	5,707,000	4,457,000	-1,250,000	-21.90%
NL	1,445,000	1,597,000	1,845,000	2,092,000	2,170,000	1,995,000	1,673,000	1,932,000	1,966,000	1,349,000	920,000	-394,000	-29.98%
PL	13,280,000	13,170,000	13,000,000	12,498,000	13,779,000	13,050,000	11,826,000	12,408,000	13,266,000	13,856,000	9,889,000	-3,967,000	-28.63%
PT				1,732,000	1,882,000	1,798,000	1,900,000	1,800,000	2,200,000	2,400,000	2,100,000	-300,000	-12.50%
RO	2,250,000	2,250,000	2,254,000	3,001,000	2,783,000	3,324,000	3,883,000	3,847,000	3,840,000	4,155,000	2,800,000	-1,355,000	-32.61%
Scandinavia	11,780,000	11,390,000	12,990,000	13,519,000	13,710,000	13,718,000	14,399,000	14,091,000	13,819,000	11,546,000	7,574,000	-3,972,000	-34.40%
DK/FI/NO	3,000,000	2,100,000	2,350,000	2,375,000	2,565,000	2,298,000	2,093,000	2,000,000	1,927,000	1,738,000	1,121,000	-617,000	-35.50%
SE	8,780,000	9,290,000	10,640,000	11,144,000	11,145,000	11,420,000	12,306,000	12,091,000	11,892,000	9,808,000	6,453,000	-3,355,000	-34.21%
FEP	66,077,450	64,407,383	65,842,221	74,749,120	76,839,700	76,601,400	75,727,930	77,274,040	81,851,000	78,012,000	54,393,800	-23,866,000	-30.50%

Production de parquet par type 2012-2023
Mosaïque

m²	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2023-2022	2023-2022
AT	166,000	180,000	182,000	183,821	187,525	191,000	193,375	195,314	215,000	216,000	157,000	-59,000	-27.31%
BE	0	0	0	0	0	0	0	0	0	0	0	0	0%
CH	18,200	15,400	10,800	5,000	4,400	4,440	4,600	3,810	5,000	16,000	36,000	20,000	125.00%
CZ	90,000	80,000	0	0	0	0	0	0	0	0	0	0	0%
DE	302,300	435,219	334,850	322,450	324,000	57,500	230,000	55,000	53,000	49,000	26,000	-23,000	-46.94%
EE				0	0	0	0	0	0	0	0	0	0%
ES	18,000	38,000	5,000	4,000	1,000	1,000	1,200	1,000	1,000	11,000	20,000	9,000	81.82%
FR	20,000	15,000	15,000	20,000	8,000	8,500	0	0	27,000	19,000	15,000	-4,000	-21.05%
HR				537,000	552,360	511,920	560,520	645,720	685,000	609,000	549,000	-60,000	-9.85%
HU	20,000	11,000	11,000	14,000	15,000	15,000	13,000	13,000	18,000	16,000	11,000	-5,000	-31.25%
IT	0	0	0	0	0	0	0	0	0	0	0	0	0%
NL	0	0	0	0	0	0	0	0	0	0	0	0	0%
PL	580,000	570,000	550,000	493,000	544,000	515,000	473,000	496,000	530,000	554,000	396,000	-158,000	-28.52%
PT				0	0	0	0	0	0	0	0	0	0%
RO	0	0	0	0	0	0	0	0	0	0	0	0	0%
Scandinavia	0	0	0	0	0	0	0	0	0	0	0	0	0%
DK/FI/NO	0	0	0	0	0	0	0	0	0	0	0	0	0%
SE	0	0	0	0	0	0	0	0	0	0	0	0	0%
FEP	1,214,500	1,344,619	1,108,650	1,579,271	1,636,285	1,304,360	1,475,695	1,409,844	1,534,000	1,490,000	1,210,000	-280,000	-18.79%

Production de parquet par type 2012-2023
Contrecollé

000 m²	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2023-2022	2023-2022
AT	6,455,000	7,014,000	7,102,000	7,173,827	7,316,625	7,467,000	7,541,605	7,617,238	8,380,000	8,430,000	6,141,000	-2,289,000	-27.15%
BE	220,000	220,000	256,000	264,992	225,000	202,608	228,000	256,480	267,000	200,000	160,000	-40,000	-20.00%
CH	1,681,900	1,690,700	1,655,300	1,619,100	1,820,900	1,649,140	1,727,400	1,634,200	1,776,000	1,510,000	1,057,000	-453,000	-30.00%
CZ	1,000,000	900,000	799,000	1,000,000	996,000	788,000	812,000	569,000	444,000	444,000	262,000	-182,000	-40.99%
DE	9,756,870	7,542,566	7,070,481	7,296,190	6,979,000	8,361,200	6,649,000	8,500,000	8,103,000	7,499,000	4,003,000	-3,496,000	-46.62%
EE				441,000	568,000	400,000	312,000	270,000	398,000	450,000	180,000	-270,000	-60.00%
ES	3,200,000	2,850,000	3,215,000	3,370,000	3,400,000	3,141,000	3,175,000	3,190,000	3,378,000	2,954,000	2,277,000	-677,000	-22.92%
FR	2,650,000	2,650,000	2,565,000	2,765,000	2,861,000	2,679,000	2,820,000	2,751,000	3,418,000	3,362,000	2,543,000	-819,000	-24.36%
HR				3,848,500	3,958,580	3,668,760	4,019,640	4,627,660	5,255,000	5,911,000	3,629,000	-2,282,000	-38.61%
HU	1,375,000	1,485,000	1,452,000	1,856,000	1,897,000	1,764,000	1,551,000	1,541,000	1,575,000	1,401,000	914,000	-487,000	-34.76%
IT	3,789,831	3,897,209	3,916,964	3,990,000	4,470,000	4,619,000	4,996,000	4,610,000	5,763,000	5,475,000	4,281,000	-1,194,000	-21.81%
NL	1,400,000	1,325,000	1,565,000	1,724,000	1,820,000	1,693,000	1,427,000	1,689,000	1,716,000	1,156,000	810,000	-346,000	-29.93%
PL	9,700,000	9,700,000	9,750,000	9,443,000	10,410,000	9,859,000	8,988,000	9,430,000	10,082,000	10,531,000	7,516,000	-3,015,000	-28.63%
PT				1,732,000	1,882,000	1,798,000	1,900,000	1,800,000	2,200,000	2,400,000	2,100,000	-300,000	-12.50%
RO	2,000,000	2,000,000	2,004,000	2,670,890	2,476,870	2,958,350	3,455,870	3,423,830	3,415,000	3,698,000	2,492,000	-1,206,000	-32.61%
Scandinavia	9,900,000	9,500,000	11,235,000	11,709,000	11,792,000	11,978,000	12,738,000	12,494,000	12,226,000	10,146,000	6,578,000	-3,568,000	-35.17%
DK/FI/NO	1,500,000	600,000	1,000,000	1,011,000	1,092,000	978,000	891,000	850,000	810,000	730,000	448,000	-282,000	-38.63%
SE	8,400,000	8,900,000	10,235,000	10,698,000	10,700,000	11,000,000	11,847,000	11,644,000	11,416,000	9,416,000	6,130,000	-3,286,000	-34.90%
FEP	53,128,601	50,774,475	52,585,745	60,903,499	62,872,975	63,026,058	62,340,515	64,403,408	68,396,000	65,567,000	44,943,000	-20,624,000	-31.45%

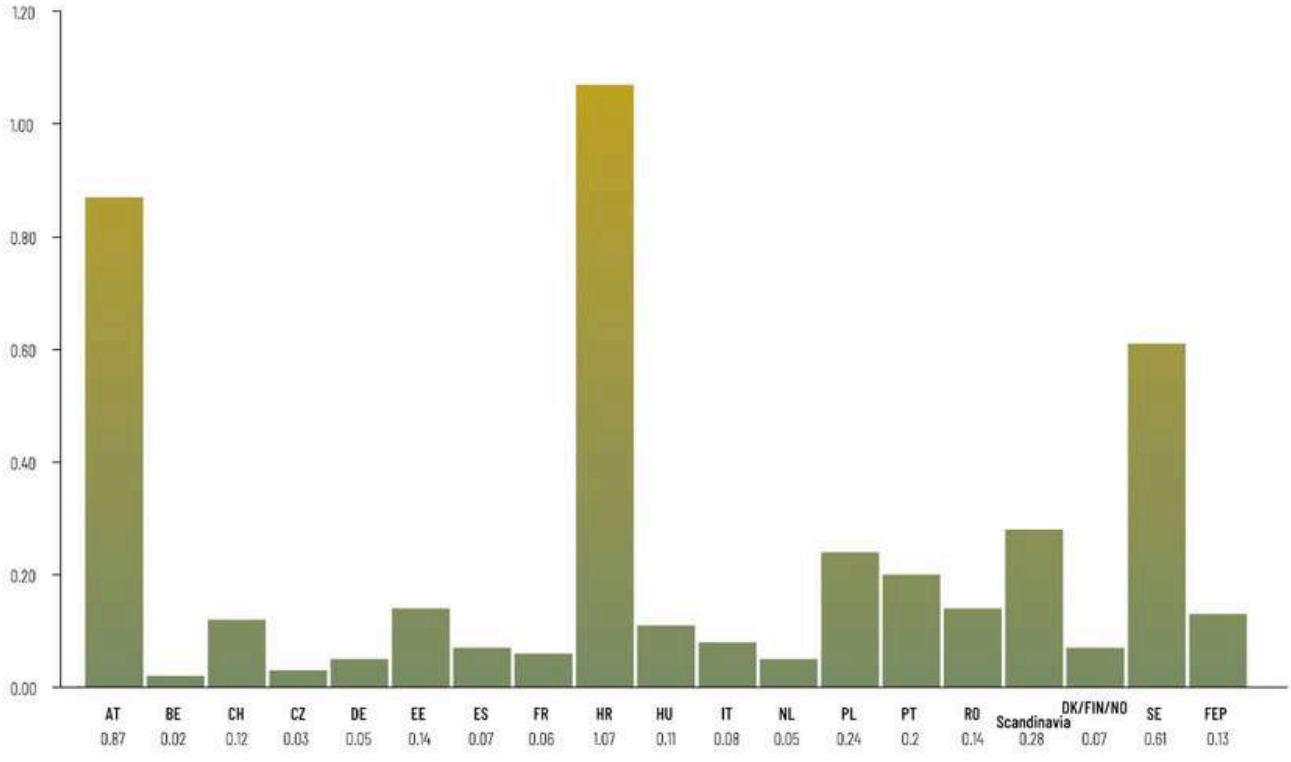
Production de parquet par type 2012-2023
Massif

000 m²	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2023-2022	2023-2022
AT	1,654,000	1,799,000	1,822,000	1,839,412	1,880,850	1,915,000	1,933,750	1,953,138	2,148,000	2,162,000	1,575,000	-587,000	-27.15%
BE	170,000	170,000	199,000	208,208	177,000	159,192	179,000	201,520	209,000	133,000	106,000	-27,000	-20.30%
CH	47,000	47,500	33,700	19,400	16,300	22,620	21,000	18,340	24,000	23,000	20,000	-3,000	-13.04%
CZ	260,000	250,000	342,000	350,000	348,000	277,000	286,000	200,000	156,000	156,000	88,000	-68,000	-43.59%
DE	318,180	276,998	251,090	235,720	222,100	214,200	204,000	56,000	53,000	49,000	26,000	-23,000	-46.94%
EE				0	0	0	0	0	0	0	0	0	0%
ES	1,370,000	1,405,000	1,521,000	1,410,000	1,220,000	1,305,000	1,312,000	1,325,000	1,288,000	1,223,000	888,000	-335,000	-27.39%
FR	2,230,000	2,460,000	2,550,000	2,500,000	2,575,000	2,598,000	2,619,000	2,393,000	2,604,000	2,208,000	1,820,000	-388,000	-17.57%
HR				89,500	92,060	85,320	90,840	107,620	0	0	0	0	0%
HU	300,000	265,000	261,000	334,000	341,000	316,000	248,000	246,000	259,000	231,000	151,000	-80,000	-34.63%
IT	210,169	302,791	183,036	210,000	59,000	295,000	319,000	215,000	258,000	232,000	176,000	-56,000	-24.14%
NL	45,000	272,000	280,000	368,000	350,000	302,000	246,000	243,000	250,000	158,000	110,000	-48,000	-30.38%
PL	3,000,000	2,900,000	2,700,000	2,562,000	2,825,000	2,676,000	2,365,000	2,482,000	2,654,000	2,771,000	1,977,000	-794,000	-28.65%
PT				0	0	0	0	0	0	0	0	0	0%
RO	250,000	250,000	250,000	330,110	306,130	365,650	427,130	423,170	425,000	457,000	308,000	-149,000	-32.60%
Scandinavia	1,880,000	1,890,000	1,755,000	1,810,000	1,918,000	1,740,000	1,661,000	1,597,000	1,593,000	1,400,000	996,000	-404,000	-28.86%
DK/FI/NO	1,500,000	1,500,000	1,350,000	1,364,000	1,473,000	1,320,000	1,202,000	1,150,000	1,117,000	1,008,000	673,000	-335,000	-33.23%
SE	380,000	390,000	405,000	446,000	445,000	420,000	459,000	447,000	476,000	392,000	323,000	-69,000	-17.60%
FEP	11,734,349	12,288,289	12,147,826	12,266,350	12,330,440	12,270,982	11,911,720	11,460,788	11,921,000	11,203,000	8,241,000	-2,962,000	-26.44%

Production par habitant

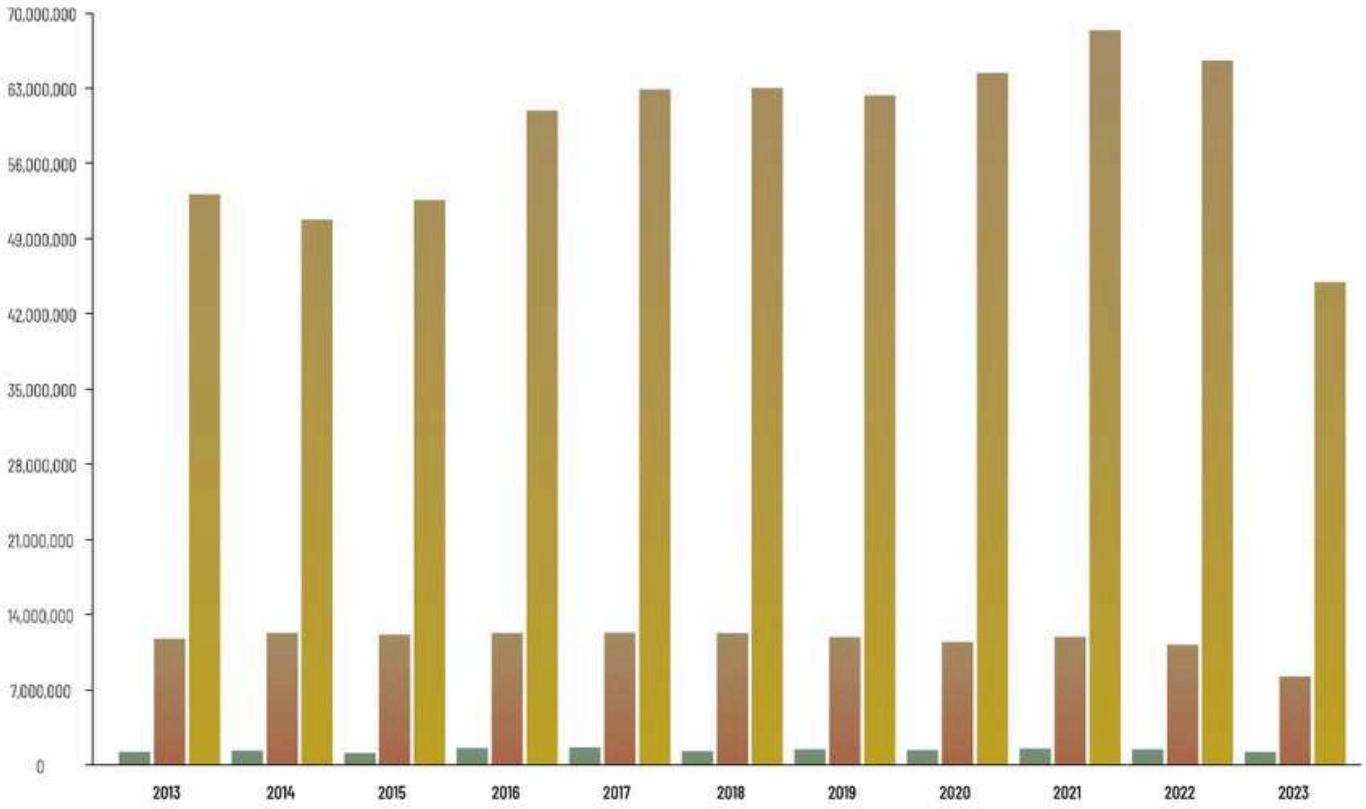
	Production in m²		Population in units		Production per capita in m²	
	2022	2023	2022	2023	2022	2023
AT	10,808,000	7,873,000	9,000,000	9,000,000	1.20	0.87
BE	333,000	266,000	11,656,000	11,686,000	0.03	0.02
CH	1,549,000	1,113,000	8,810,000	8,960,000	0.18	0.12
CZ	600,000	350,000	10,800,000	10,900,000	0.06	0.03
DE	7,597,000	4,055,000	84,400,000	84,700,000	0.09	0.05
EE	450,000	180,000	1,300,000	1,300,000	0.35	0.14
ES	4,188,000	3,185,000	47,436,000	48,085,000	0.09	0.07
FR	5,589,000	4,377,800	67,800,000	68,300,000	0.08	0.06
HR	6,520,000	4,178,000	3,900,000	3,900,000	1.67	1.07
HU	1,648,000	1,076,000	9,700,000	9,600,000	0.17	0.11
IT	5,707,000	4,457,000	59,000,000	59,000,000	0.10	0.08
NL	1,314,000	920,000	17,500,000	17,700,000	0.08	0.05
PL	13,856,000	9,889,000	39,857,000	41,026,000	0.35	0.24
PT	2,400,000	2,100,000	10,420,000	10,470,000	0.23	0.20
RO	4,155,000	2,800,000	19,660,000	19,893,000	0.21	0.14
Scandinavia	11,546,000	7,574,000	27,430,000	27,530,000	0.42	0.28
DK/FI/NO	1,738,000	1,121,000	16,910,000	17,000,000	0.10	0.07
SE	9,808,000	6,453,000	10,520,000	10,530,000	0.93	0.61
FEP	**78,260,000**	**54,393,800**	**428,669,000**	**432,050,000**	**0.18**	**0.13**

Production par habitant 2023



Production de parquet par type 2013-2023

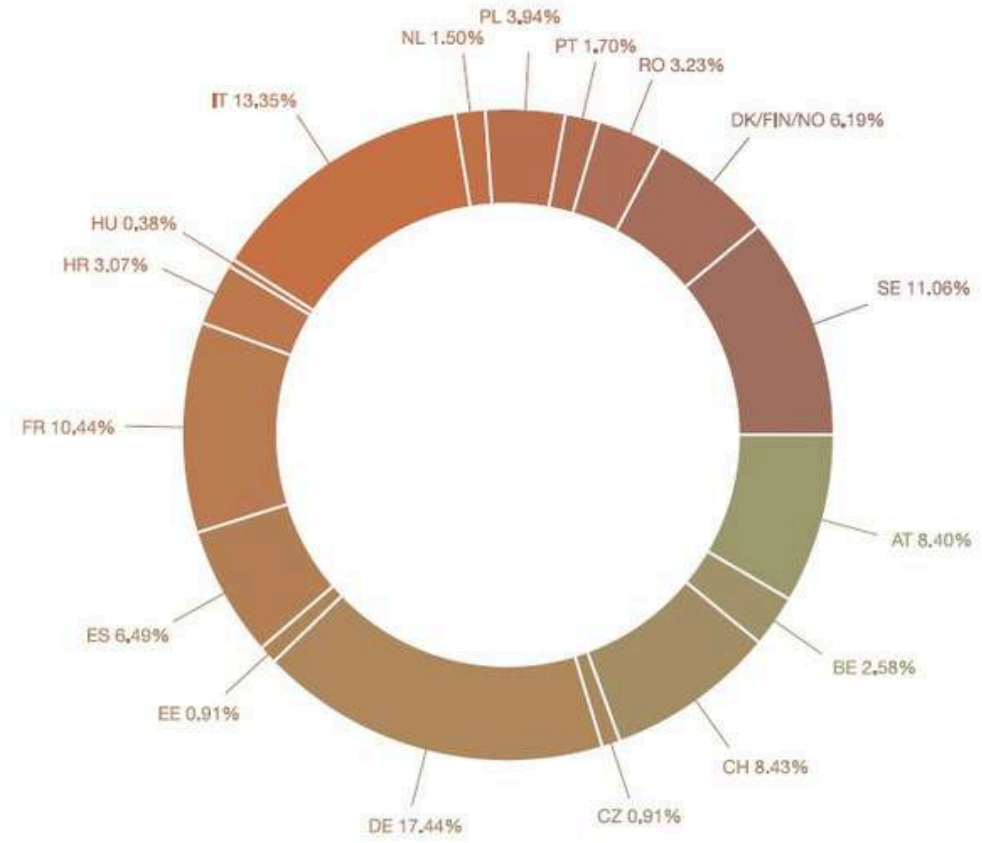
m²	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2023/2022
Mosaic	1,214,500	1,344,619	1,108,650	1,579,271	1,636,285	1,304,360	1,475,695	1,409,844	1,534,000	1,490,000	1,210,000	-18.79%
Solid	11,734,349	12,288,289	12,147,826	12,266,350	12,330,440	12,270,982	11,911,720	11,460,788	11,921,000	11,203,000	8,241,000	-26.44%
Multilayer	53,128,601	50,774,475	52,585,745	60,903,499	62,872,975	63,026,058	62,340,515	64,403,408	68,396,000	65,567,000	44,943,000	-31.45%
Total	**66,077,450**	**64,407,383**	**65,842,221**	**74,749,120**	**76,839,700**	**76,601,400**	**75,727,930**	**77,274,040**	**81,851,000**	**78,260,000**	**54,394,000**	**-30.50%**

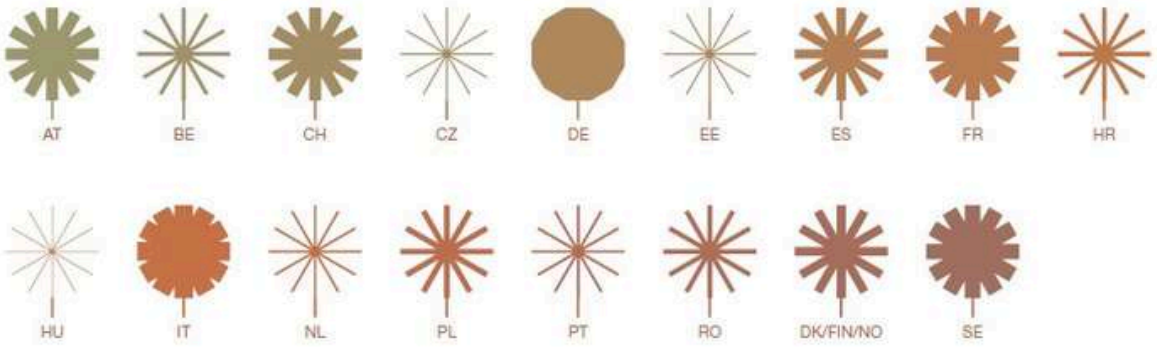


CONSOMMATION DE PARQUET EN EUROPE

Pourcentage de Consommation totale FEP - 2023

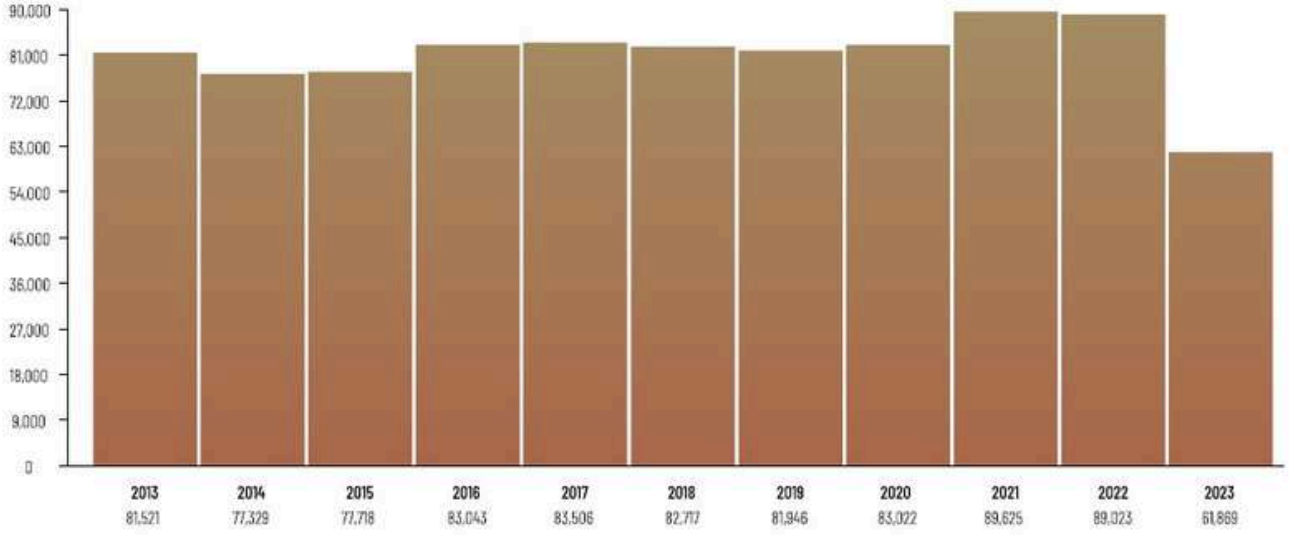
En termes de consommation par pays, l'Allemagne conserve sa première place malgré une part en baisse à 17,44%. L'Italie (13,35 %) et la Suède (11,06 %) complètent le podium, suivies par la France (10,44 %).





Consommation totale de parquet 2013-2023

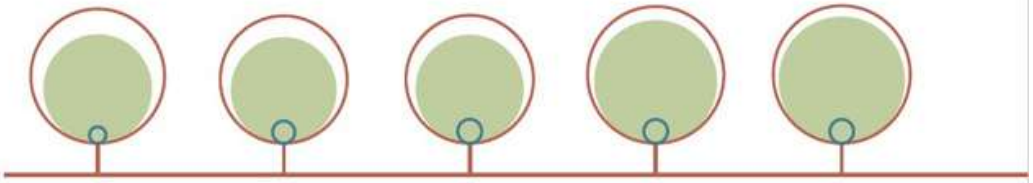
000 m²	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2023-2022	2023-2022
AT	6,500	6,175	6,175	6,299	6,424	6,488	6,553	6,619	6,817	6,000	5,200	-800	-13.33%
BE	2,162	2,097	2,160	2,246	2,336	2,243	2,221	2,300	2,415	2,125	1,594	-531	-24.99%
CH	6,417	6,227	6,345	6,203	6,217	5,771	5,716	5,856	6,568	6,533	5,217	-1,316	-20.14%
CZ	1,020	965	965	1,000	1,025	1,000	1,020	1,010	1,050	1,019	560	-459	-45.04%
DE	19,765	18,055	17,775	18,216	16,759	16,677	15,800	18,014	18,091	19,899	10,788	-9,111	-45.79%
EE				713	781	859	848	950	1,019	1,178	560	-618	-52.46%
ES	5,600	5,329	5,380	5,499	5,607	5,637	5,724	5,557	5,722	5,238	4,014	-1,224	-23.37%
FR	9,600	7,430	7,865	8,190	8,299	8,429	8,584	8,122	8,982	8,014	6,460	-1,554	-19.39%
HR				1,861	2,115	2,115	2,009	1,987	2,334	3,759	1,901	-1,858	-49.43%
HU	452	457	489	494	504	559	525	504	549	439	233	-206	-46.92%
IT	8,600	8,300	8,200	8,500	8,909	8,445	8,613	7,657	9,937	11,442	8,262	-3,180	-27.79%
NL	990	1,892	1,961	1,878	2,000	1,708	1,616	1,769	1,861	1,328	925	-403	-30.35%
PL	4,090	3,950	3,870	3,986	4,185	4,311	4,527	4,520	4,565	4,063	2,438	-1,625	-40.00%
PT				1,208	1,240	1,290	1,350	1,339	1,200	1,248	1,050	-198	-15.87%
RO	2,563	2,563	2,563	2,563	2,589	2,680	2,760	2,691	3,095	2,940	2,000	-940	-31.97%
Scandinavia	13,762	13,889	13,970	14,187	14,516	14,505	14,080	14,127	15,420	13,798	10,667	-3,131	-22.69%
DK/FI/NO	7,462	7,449	6,610	6,533	6,633	6,215	5,873	5,838	6,400	5,888	3,827	-2,061	-35.00%
SE	6,300	6,440	7,360	7,654	7,883	8,290	8,207	8,289	9,020	7,910	6,840	-1,070	-13.53%
FEP	**81,521**	**77,329**	**77,718**	**83,043**	**83,506**	**82,717**	**81,946**	**83,022**	**89,625**	**89,023**	**61,869**	**-27,154**	**-30.50%**



Consommation par habitant

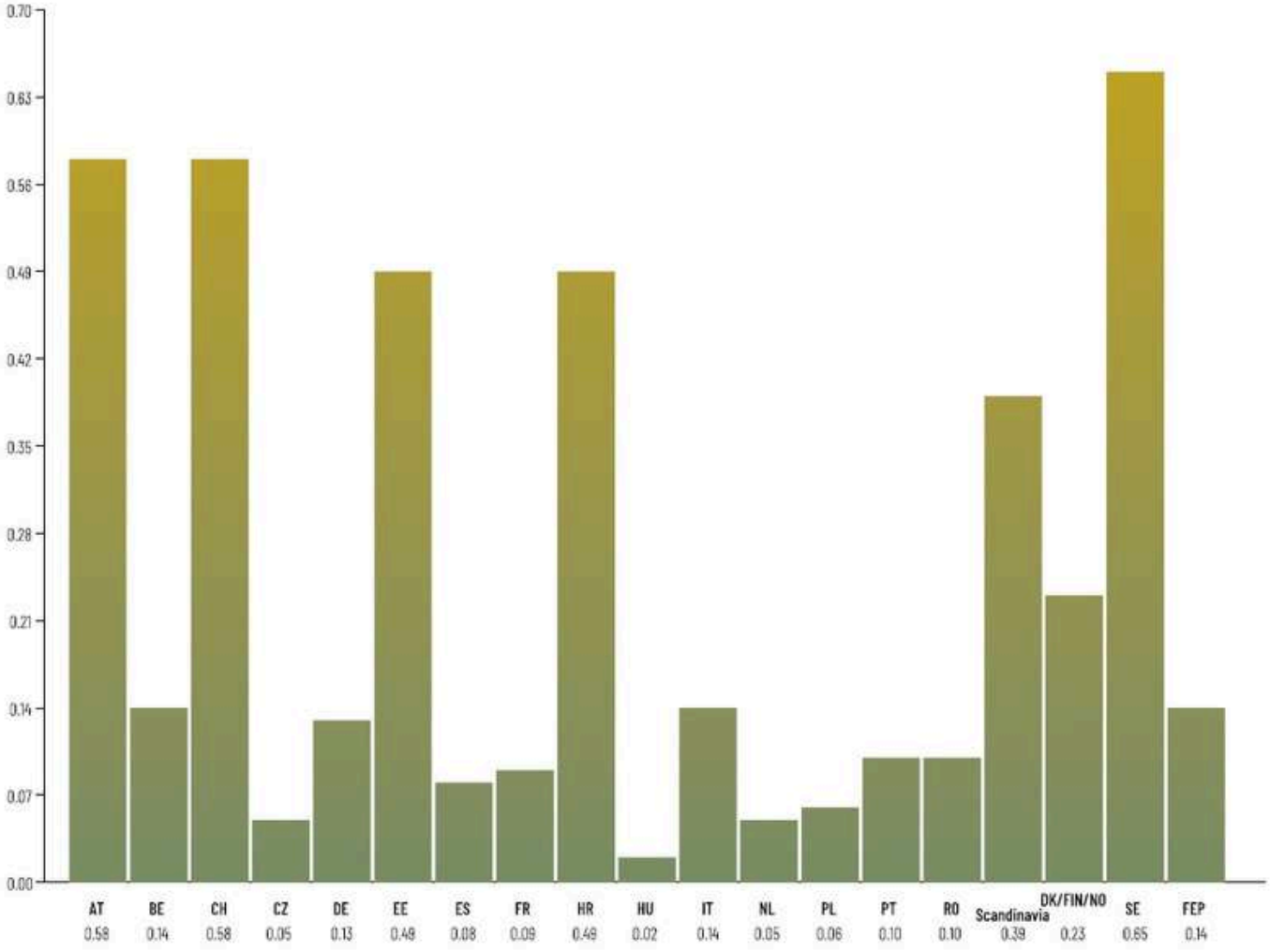
	Production in m³		Population in units		Production per capita in m³	
	2022	2023	2022	2023	2022	2023
AT	6,000,000	5,200,000	9,000,000	9,000,000	0.67	0.58
BE	2,125,000	1,594,000	11,656,000	11,686,000	0.18	0.14
CH	6,533,000	5,217,000	8,810,000	8,960,000	0.74	0.58
CZ	1,019,000	560,000	10,800,000	10,900,000	0.09	0.05
DE	19,899,000	10,788,000	84,400,000	84,700,000	0.24	0.13
EE	1,178,000	636,000	1,300,000	1,300,000	0.91	0.49
ES	5,238,000	4,014,000	47,436,000	48,085,000	0.11	0.08
FR	8,014,000	6,460,000	67,800,000	68,300,000	0.12	0.09
HR	3,759,000	1,901,000	3,900,000	3,900,000	0.96	0.49
HU	439,000	233,000	9,700,000	9,600,000	0.05	0.02
IT	11,442,000	8,262,000	59,000,000	59,000,000	0.19	0.14
NL	1,328,000	925,000	17,500,000	17,700,000	0.08	0.05
PL	4,063,000	2,438,000	39,857,000	41,026,000	0.10	0.06
PT	1,248,000	1,050,000	10,420,000	10,470,000	0.12	0.10
RO	2,940,000	2,000,000	19,660,000	19,893,000	0.15	0.10
Scandinavia	13,798,000	10,667,000	27,430,000	27,530,000	0.50	0.39
FI/NO/DK	5,888,000	3,827,000	16,910,000	17,000,000	0.35	0.23
SE	7,910,000	6,840,000	10,520,000	10,530,000	0.75	0.65
FEP	**89,023,000**	**61,945,000**	**428,669,000**	**432,050,000**	**0.21**	**0.14**

Consommation par habitant 2023

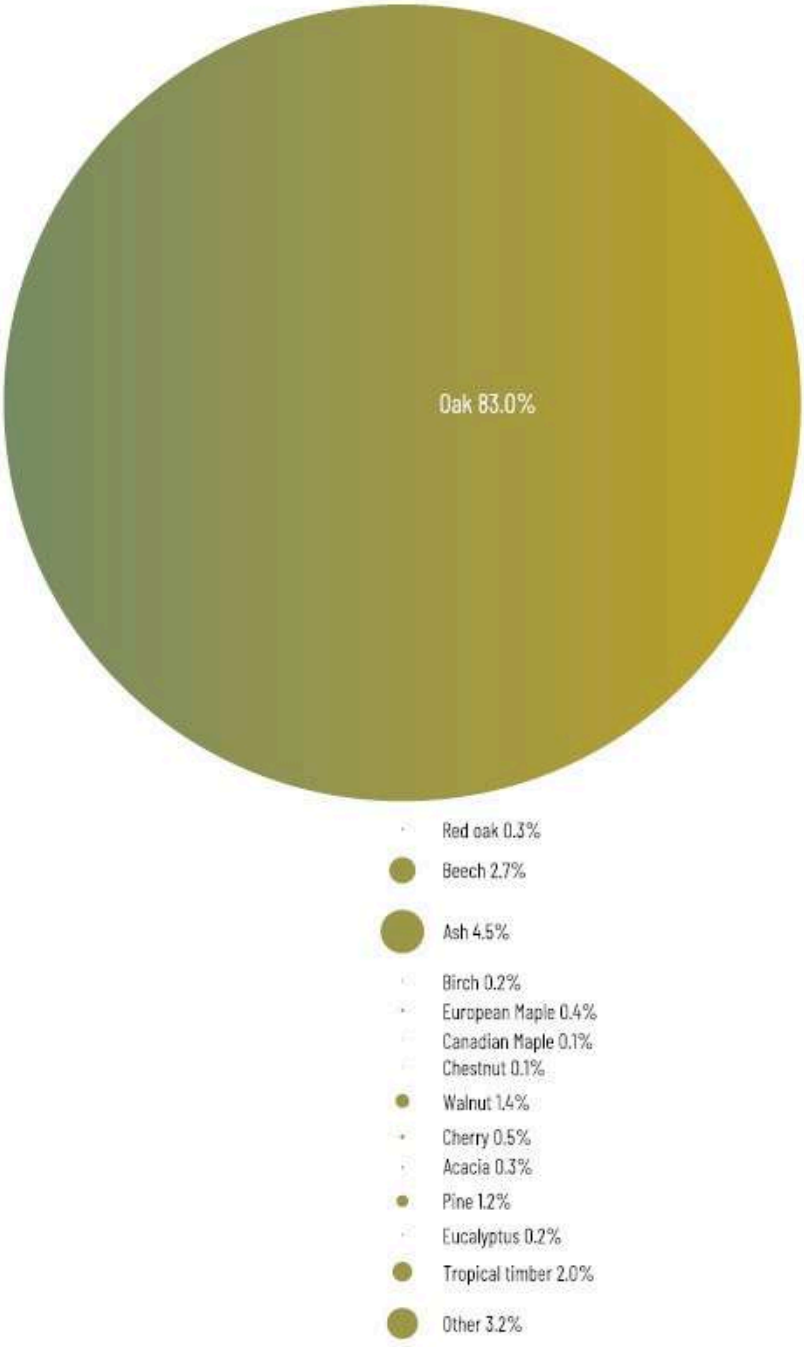


Million sqm	2013	2014	2015	2016	2017
Production FEP countries	66,077	64,407	65,842	74,749	76,840
Production European non-FEP countries	10,000	13,500	14,600	14,500	14,500
Consumption FEP countries	81,521	77,329	77,718	83,043	83,506

En ce qui concerne la consommation de parquet par habitant, l'Autriche, la Suisse, l'Estonie, la Croatie et la Suède sont en tête du classement. Dans la zone totale du PEF, la consommation par habitant diminue considérablement, passant de 0,20 m² en 2022 à 0,14 m2 en 2023.



UTILISATION DES ESSENCES DE BOIS



L'utilisation des essences de bois en 2023 indique que la part du chêne augmente légèrement pour atteindre 83,0 % contre 82,1 % en 2022.

Les essences tropicales représentent une part stable de 2,0 % du bois utilisé (bien que la catégorie "autres", avec 3,2 %, puisse, en partie, être ajoutée aux bois tropicaux).

Le frêne et le hêtre restent les deux autres essences les plus choisies avec respectivement 4,5% et 2,7%.

L'INDUSTRIE DE LA CONSTRUCTION EN EUROPE

En 2023, l'activité de construction européenne, mesurée par la production de construction selon Euroconstruct, a connu une baisse de 1,7 % en termes réels (après ajustement pour l'inflation). Cette baisse est due au ralentissement des secteurs de la construction résidentielle et de la construction non résidentielle neuve, causé par la hausse des taux d'intérêt et l'explosion des coûts de construction. Tous les pays ont contribué à cette performance, à l'exception de l'Irlande (+3,2%), des Pays-Bas (+0,6%), de la Pologne (+1,5%), du Portugal (+1,2%), de l'Espagne (+2,8%) et de la République slovaque (+2,3%).

La production de la construction en 2023 est restée inférieure aux niveaux prépandémiques de 2019 dans la plupart des pays, à l'exception de la Belgique (+1,3 % en 2023 par rapport à 2019), du Danemark (+11 %), de l'Italie (+25 %), des Pays-Bas (+6,5 %), de la Pologne (+16 %), du Portugal (+17 %) et de l'Espagne (+2,8 %).

La production dans le secteur de la construction ne devrait pas reprendre sa croissance avant 2025, associée à une légère reprise dans les secteurs de la construction résidentielle (+1,1 % par an en 2025-2026) et non résidentielle (+1,6 % par an en 2025-2026).

Ces prévisions tablent sur une baisse des taux d'intérêt, ce qui aura un effet positif sur l'accessibilité du marché du logement et sur les investissements dans le secteur de la construction non résidentielle. Le génie civil devrait maintenir un taux de croissance stable proche de 2,4 % par an.

Au niveau national, une évolution positive de la production de la construction en 2025-2026 est prévue dans tous les pays, à l'exception de l'Allemagne (-1 % par an), en raison d'exigences de construction de plus en plus complexes et contraignantes dans la construction résidentielle (-1,9 % par an en 2025-2026). La baisse de la construction résidentielle en Allemagne compensera probablement une légère croissance du secteur de la construction non résidentielle (+0,4 %) et du génie civil (+1,7 % par an). Dans les autres pays, une croissance modérée dans le bâtiment et le génie civil devrait soutenir une légère croissance de la production dans le secteur de la construction au cours des deux prochaines années.

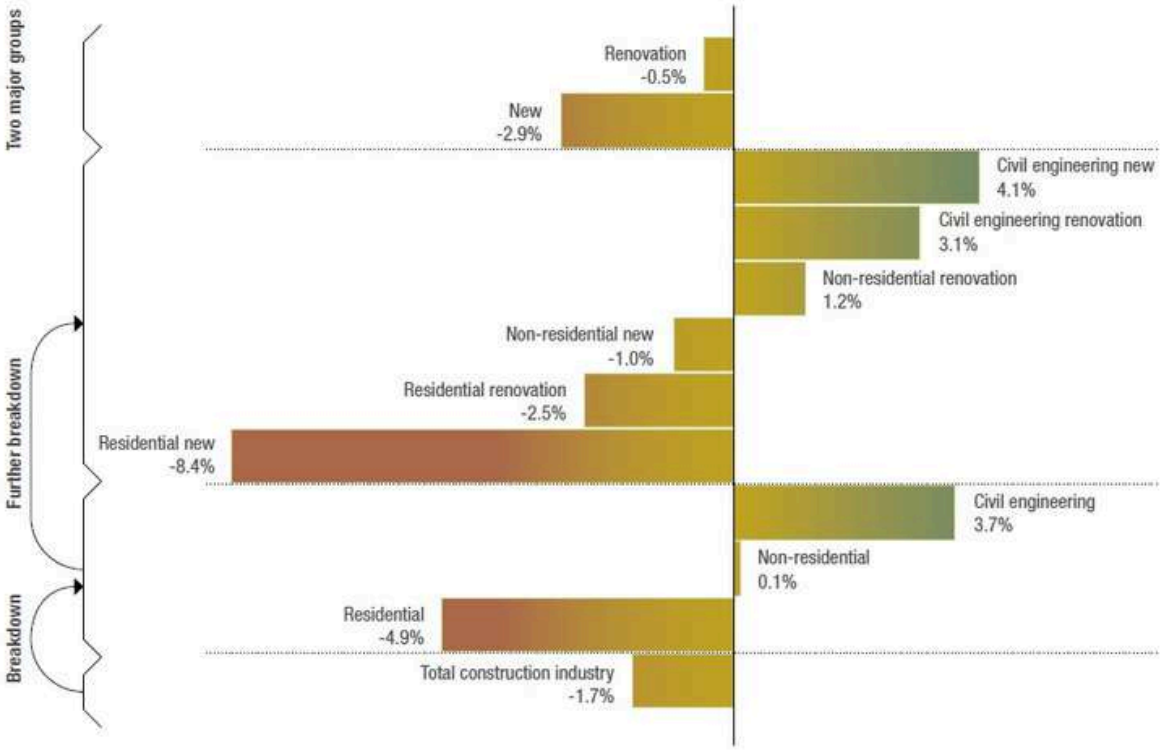
Vue d'ensemble de l'industrie de la construction en Europe de l'Ouest et de l'Est en 2022 et 2023

* Le total de la construction comprend également la rénovation civile et les services/construction par d'autres secteurs, le bricolage, l'économie souterraine.

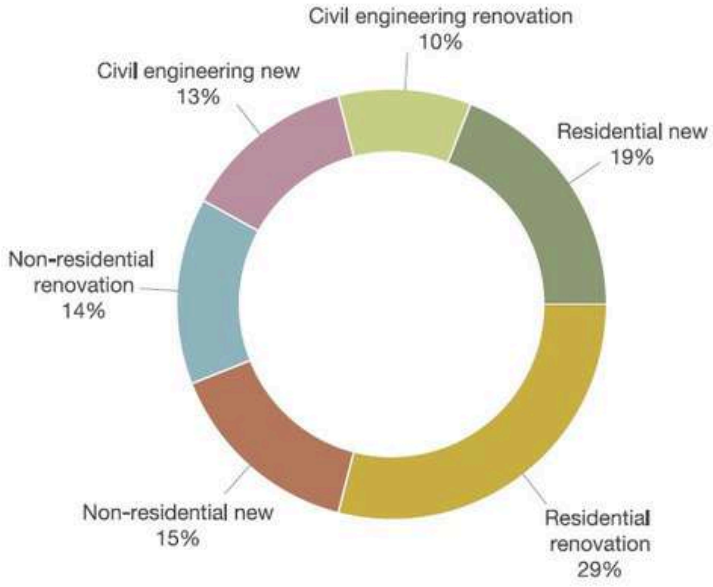
	total construction*			new residential			residential renovation		
	2022	2023	%	2022	2023	%	2022	2023	%
Austria	48,214	47,087	-2.3	15,225	14,007	-8.0	7,067	7,272	2.9
Belgium	51,888	51,846	-0.1	9,443	8,777	-7.0	15,878	16,034	1.0
Denmark	44,164	41,273	-6.5	6,326	5,257	-16.9	16,134	15,327	-5.0
Finland	37,872	34,000	-10.2	8,654	5,430	-37.3	8,657	8,544	-1.3
France	219,225	214,947	-2.0	44,331	39,188	-11.6	60,475	61,564	1.8
Germany	412,979	403,532	-2.3	74,466	69,626	-6.5	163,377	160,926	-1.5
Ireland	25,175	25,976	3.2	6,583	6,853	4.1	3,752	3,876	3.3
Italy	256,133	254,242	-0.7	19,306	19,421	0.6	128,551	116,493	-9.4
Netherlands	101,256	101,838	0.6	19,638	18,460	-6.0	26,027	26,860	3.2
Norway	49,727	48,336	-2.8	10,463	8,830	-15.6	9,263	9,109	-1.7
Portugal	26,408	26,732	1.2	4,252	4,282	0.7	8,993	9,038	0.5
Spain	141,815	145,808	2.8	46,337	46,800	1.0	24,829	25,450	2.5
Sweden	59,927	53,368	-10.9	13,076	8,666	-33.7	9,313	8,392	-9.9
Switzerland	60,814	60,146	-1.1	19,230	18,654	-3.0	8,587	8,374	-2.5
UK	240,435	236,500	-1.6	64,963	57,676	-11.2	47,214	47,529	0.7
Total Western Europe	**1,776,032**	**1,745,631**	**-1.7**	**362,294**	**331,929**	**-8.4**	**538,115**	**524,787**	**-2.5**
Czech Republic	26,270	25,796	-1.8	7,144	6,069	-15.0	2,642	2,778	5.1
Hungary	18,385	16,922	-8.0	2,439	2,146	-12.0	2,646	2,064	-22.0
Poland	62,327	63,276	1.5	17,855	16,962	-5.0	3,913	4,031	3.0
Slovak Republic	4,887	4,999	2.3	990	959	-3.1	412	407	-1.0
Total Central Europe	**111,869**	**110,993**	**-0.8**	**28,427**	**26,136**	**-8.1**	**9,613**	**9,280**	**-3.5**
Total Europe	**1,887,901**	**1,856,624**	**-1.7**	**390,721**	**358,065**	**-8.4**	**547,728**	**534,066**	**-2.5**

	New non-residential			Non-residential renovation			New civil engineering		
	2022	2023	%	2022	2023	%	2022	2023	%
Austria	13,462	13,125	-2.5	4,051	4,039	-0.3	6,738	6,920	2.7
Belgium	8,218	7,989	-2.8	9,096	9,343	2.7	7,317	7,764	6.1
Denmark	7,690	6,598	-14.2	3,682	3,645	-1.0	7,665	7,757	1.2
Finland	8,500	8,281	-2.6	5,339	5,333	-0.1	4,886	4,567	-6.5
France	30,898	29,720	-3.8	31,220	31,688	1.5	23,536	23,754	0.9
Germany	43,105	41,596	-3.5	56,108	55,266	-1.5	38,967	39,162	0.5
Ireland	8,423	8,664	2.9	2,808	2,888	2.9	2,382	2,438	2.4
Italy	18,232	18,872	3.5	42,066	43,872	4.3	15,818	20,516	29.7
Netherlands	17,040	17,756	4.2	15,039	14,858	-1.2	15,320	15,688	2.4
Norway	7,436	7,928	6.6	10,123	9,941	-1.8	7,934	7,420	-6.5
Portugal	4,521	4,585	1.4	2,235	2,271	1.6	3,746	3,844	2.6
Spain	25,721	26,233	2.0	16,896	17,319	2.5	17,430	19,085	9.5
Sweden	9,944	9,353	-5.9	8,437	8,351	-1.0	13,741	13,096	-4.7
Switzerland	8,649	8,638	-0.1	10,343	10,388	0.4	4,048	4,040	-0.2
UK	50,495	50,090	-0.8	29,380	30,638	4.3	34,404	35,894	4.3
Total Western Europe	**262,334**	**259,428**	**-1.1**	**246,823**	**249,841**	**1.2**	**203,933**	**211,945**	**3.9**
Czech Republic	5,106	5,243	2.7	3,697	3,956	7.0	2,451	2,457	0.3
Hungary	4,616	4,470	-3.2	3,524	3,277	-7.0	2,537	2,385	-6.0
Poland	15,279	15,325	0.3	6,171	6,387	3.5	13,121	14,237	8.5
Slovak Republic	1,243	1,228	-1.2	690	618	-10.5	1,270	1,524	20.0
Total Central Europe	**26,244**	**26,267**	**0.1**	**14,082**	**14,238**	**1.1**	**19,379**	**20,602**	**6.3**
Total Europe	**288,578**	**285,694**	**-1.0**	**260,905**	**264,078**	**1.2**	**223,312**	**232,547**	**4.1**

Taux de croissance des différents segments du marché européen de la construction, 2023



Parts relatives des différents segments dans le marché global de la construction en Europe, 2023



PERSPECTIVES POUR 2024

L'année 2024 devrait être stable avec un faible niveau de consommation - le secteur semble avoir atteint un plancher où il pourrait rester pendant un certain temps. Le déstockage est terminé et nous n'observons donc plus de spéculation mais une consommation réelle.

En général, la situation reste difficile sur les marchés européens du parquet, bien que certains signes - légèrement positifs - indiquent, au moins, une stabilisation de la consommation dans les mois à venir. Cependant, les taux d'intérêt restent trop élevés, l'activité de construction est faible et la concurrence déloyale en provenance de l'extérieur de l'UE est forte.

Il est à noter que les consommateurs peuvent compter sur l'industrie européenne du parquet dans un contexte de crises successives (Covid, guerres, Mer Rouge, etc.). Les délais de livraison de l'industrie européenne du parquet ont retrouvé leur niveau d'avant Covid.

Dans ce contexte difficile, la FEP se félicite de la décision de la Commission européenne d'ouvrir une enquête antidumping sur les importations de parquet multicouche en provenance de Chine. Cette action est une étape nécessaire pour égaliser les conditions de concurrence sur le marché de l'UE, étant donné les prix injustement bas des importations de parquet chinois qui résultent d'une surcapacité significative et de distorsions structurelles sur leur marché.

FRANCE : CHIFFRES CLÉS 2023

1. General economy

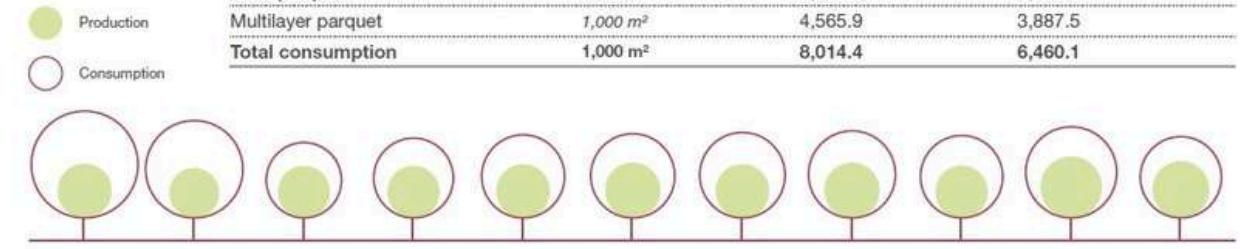
	unit	2022	2023
Population	million	67.8	68.3
Inflation rate	%	5.2	4.9
Finished dwellings	units	376,200	296,400
Unemployment rate	%	7.2	7.5
Wages development	%	5.0	3.9
Average working time	hrs/week	39	39

2. Parquet production

	unit	2022	2023
Mosaic	1,000 m²	19.0	14.7
Solid parquet	1,000 m²	2,208.5	1,820.0
Multilayer parquet	1,000 m²	3,361.9	2,543.1
Total production	**1,000 m²**	**5,589.4**	**4,377.8**

3. Parquet consumption

	unit	2022	2023
Mosaic	1,000 m²	67.3	83.6
Solid parquet	1,000 m²	3,381.2	2,489.0
Multilayer parquet	1,000 m²	4,565.9	3,887.5
Total consumption	**1,000 m²**	**8,014.4**	**6,460.1**



	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Production	4.900	5.125	5.130	5.285	5.444	5.286	5.439	5.144	6.048	5.589	4.378
Consumption	9.600	7.430	7.865	8.190	8.299	8.429	8.584	8.122	8.982	8.014	6.460

4. Parquet imports

	unit	2022	2023
Mosaic	1,000 m²	53.2	74.7
Solid parquet	1,000 m²	1,525.0	915.0
Multilayer parquet	1,000 m²	1,920.0	1,690.0
Total imports	**1,000 m²**	**3,489.2**	**2,679.7**

5. Parquet exports

	unit	2022	2023
Mosaic	1,000 m²	4.9	5.8
Solid parquet	1,000 m²	352.3	246.0
Multilayer parquet	1,000 m²	716.0	345.6
Total exports	**1,000 m²**	**1,073.2**	**597.4**

6. Wood species used

	unit	2022	2023
Oak	%	98	96
Beech	%	1	2
Chestnut	%	1	2
Tropical timber	%	0	0
Other	%	0	0