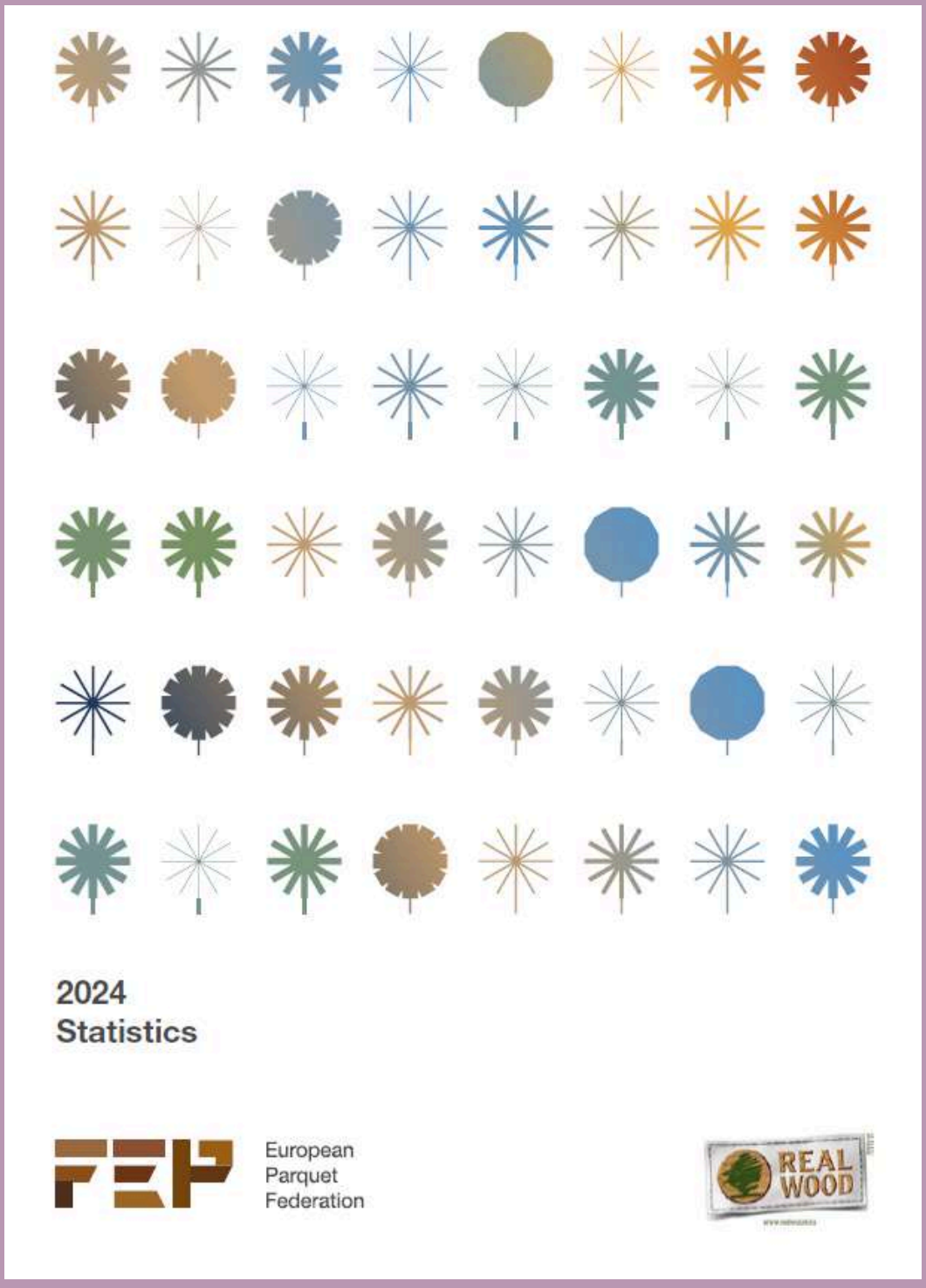
FNB
FÉDÉRATION NATIONALE DU BOIS

SYNTHÈSE

STATISTIQUES 2024



AVEC LE SOUTIEN DE
France Bois Forêt
INTERPROFESSION NATIONALE

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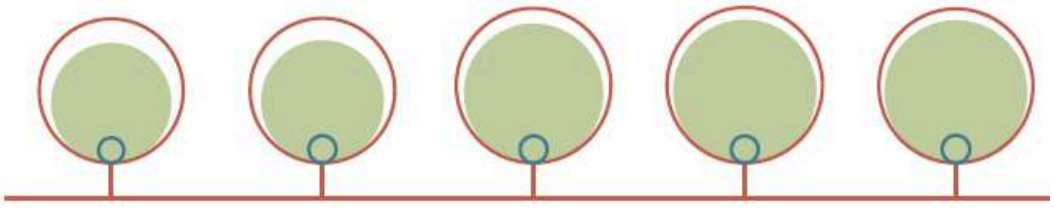
Le marché européen du parquet a ralenti sa baisse et a commencé à se stabiliser en 2024

Après une année 2023 difficile, marquée par une chute spectaculaire de la consommation, le marché semble avoir atteint son niveau le plus bas en 2024. Cependant, la consommation européenne du parquet a continué à baisser, mais à un rythme plus lent, reflétant l'activité encore modérée du secteur de la construction et la pression accrue des importations chinoises.

Le pouvoir d'achat des consommateurs ayant été affecté, des alternatives moins coûteuses telles que les revêtements de sol imitation bois ont été plus fréquemment envisagées, ainsi que le parquet à prix déloyal provenant de Chine. Compte tenu d'une éventuelle, puis formellement confirmée, à compter du 25 octobre 2024, enregistrement des importations, une augmentation des flux de parquet multicouche en provenance de Chine a été observée sur le marché de l'UE, potentiellement dans le but de constituer des stocks avant l'imposition de mesures antidumping.

La production sur le territoire de la FEP a diminué de 5,29 % en 2024 pour atteindre 51,5 millions de mètres carrés. La production européenne hors pays membres de la FEP est estimée à 10,7 millions de mètres carrés.

Si l'on tient compte de la production totale en Europe (pays membres du FEP + pays non membres du FEP en Europe), cela signifie que la production en 2024 a baissé de 3,85 % pour atteindre 62,2 millions de m².



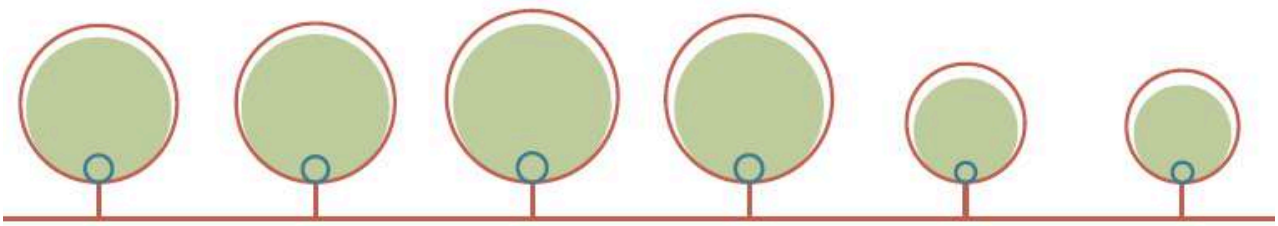
Million sqm	2014	2015	2016	2017	2018
Production FEP countries	64,407	65,842	74,749	76,840	76,601
Production European non-FEP countries	13,500	14,600	14,500	14,500	14,800
Consumption FEP countries	77,329	77,718	83,043	83,506	82,717

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
1992	37,977			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	81,851	5.92%	15,300	97,151	7.03%
2022	78,012	-4.69%	14,300	92,312	-4.98%
2023	54,361	-30.54%	10,350	64,711	-29.55%
2024	51,488	-5.29%	10,730	62,218	-3.85%



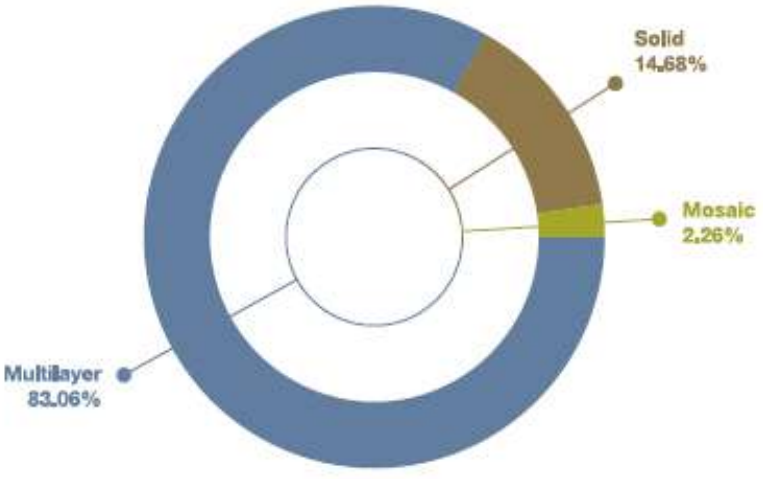
2019	2020	2021	2022	2023	2024
75,728	77,274	81,851	78,260	54,361	51,488
14,200	13,500	15,300	13,600	10,350	10,730
81,946	83,022	89,625	89,023	62,094	59,297

La consommation dans la zone FEP a également baissé de 4,5 % pour atteindre près de 60 millions de m².

	Production development 2024/2023	Consumption development 2024/2023
	%	%
AT	7.06%	-5.00%
BE	-4.14%	-7.03%
CH	11.23%	6.82%
CZ	2.86%	-1.96%
DE	2.29%	20.44%
EE	-5.00%	15.71%
ES	-16.92%	-0.60%
FR	-16.29%	-14.60%
HR	-16.99%	-42.08%
HU	3.07%	-9.87%
IT	-3.68%	-15.28%
NL	-16.63%	-8.00%
PL	2.40%	2.01%
PT	-4.76%	-9.52%
RO	0.00%	-10.00%
Scandinavia	-18.82%	-15.83%
DK/FIN/NO	-15.88%	-13.69%
SE	-19.30%	-17.04%
FEP	**-5.29%**	**-4.50%**

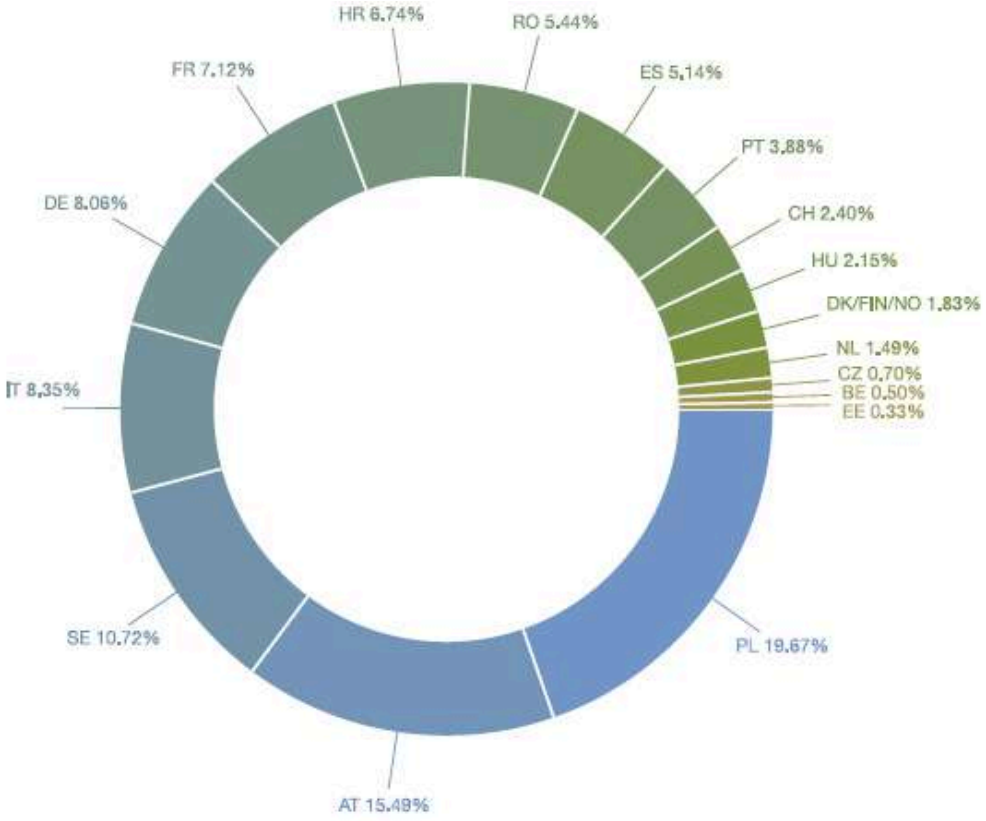
Production par type de produit - 2024

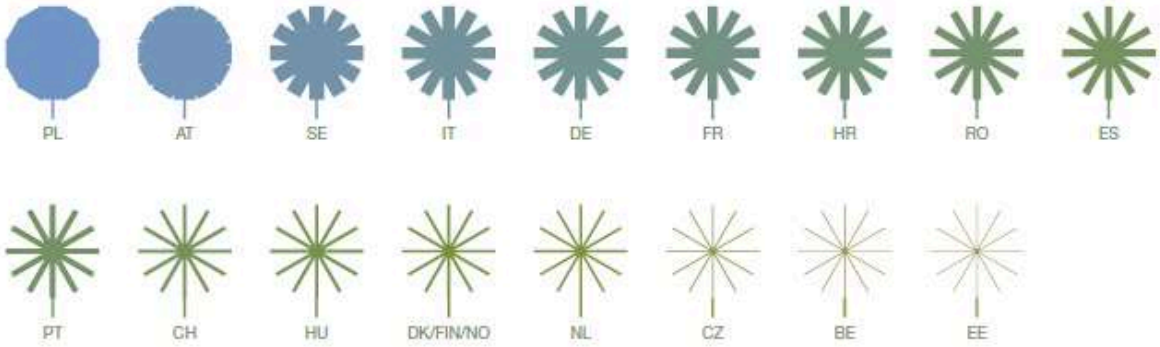
La production totale de parquet par type en 2024 reste similaire à celle déjà présentée à partir de 2010, le parquet multicouche arrivant en tête avec 83 % (contre 84 % en 2023), suivi du parquet massif avec 15 % (contre 14 % en 2023) et du parquet mosaïque avec une part stable de 2 % du total.



Pourcentage de production totale FEP - 2024

En termes de chiffres de production absolus par pays, la Pologne conserve sa première place avec un taux stable de 19,67 %. L'Autriche, avec 15,49 %, occupe la deuxième place du podium, suivie de la Suède (10,72 %). L'Italie occupe la quatrième place et l'Allemagne la cinquième.

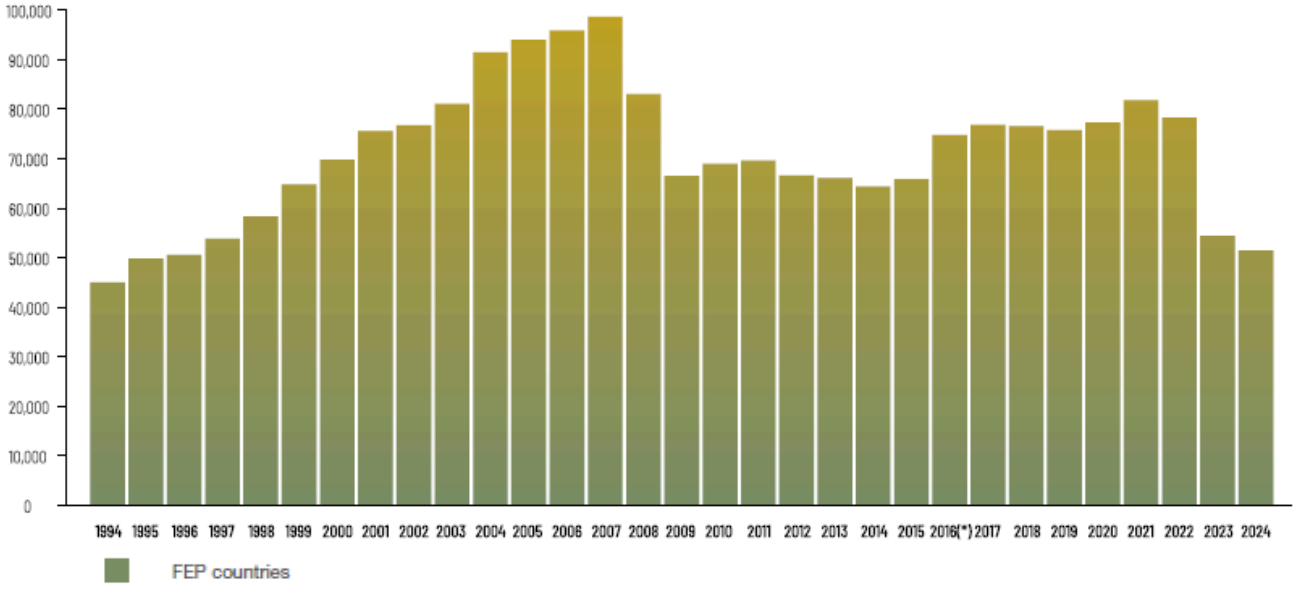




Production de parquet dans les pays membres de la FEP 1994 - 2024

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

	FEP Countries	
	000 m²	+ / - %
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	54,361	-30.54%
2024	51,488	-5.29%



Production de parquet dans les pays membres de la FEP 2014-2024

000 m²	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2024-2023	2024-2023
AT	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	7,448,000	7,974,000	526,000	7.06%
BE	390,000	455,000	473,200	402,000	361,800	407,000	458,000	476,000	333,000	266,000	255,000	-11,000	-4.14%
CH	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	1,238,000	125,000	11.23%
CZ	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	360,000	10,000	2.86%
DE	8,254,783	7,656,421	7,854,360	7,525,100	8,632,900	7,083,000	8,611,000	8,209,000	7,597,000	4,055,000	4,148,000	93,000	2.29%
EE			441,000	568,000	400,000	312,000	270,000	398,000	450,000	180,000	171,000	-9,000	-5.00%
ES	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	2,646,000	-539,000	-16.92%
FR	5,125,000	5,130,000	5,285,000	5,444,000	5,285,500	5,439,000	5,144,000	6,049,000	5,589,000	4,378,000	3,665,000	-713,000	-16.29%
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	3,468,000	-710,000	-16.99%
HU	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	1,109,000	33,000	3.07%
IT	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	4,462,000	4,298,000	-164,000	-3.68%
NL	1,597,000	1,845,000	2,092,000	2,170,000	1,995,000	1,673,000	1,932,000	1,966,000	1,314,000	920,000	767,000	-153,000	-16.63%
PL	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	10,126,000	237,000	2.40%
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	2,000,000	-100,000	-4.76%
RO	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	2,800,000	0	0.00%
Scandinavia	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	7,961,000	6,463,000	-1,498,000	-18.82%
DK/FIN/NO	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	943,000	-178,000	-15.88%
SE	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	6,840,000	5,520,000	-1,320,000	-19.30%
FEP	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	54,361,000	51,488,000	-2,873,000	-5.29%

Production de parquet par type 2014-2024

Mosaïque

m²	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2024-2023	2024-2023
AT	180,000	182,000	183,821	187,525	191,000	193,375	195,314	215,000	216,000	149,000	159,000	10,000	6.71%
BE	0	0	0	0	0	0	0	0	0	0	0	0	0%
CH	15,400	10,800	5,000	4,400	4,440	4,600	3,810	5,000	16,000	36,000	38,000	2,000	5.56%
CZ	80,000	0	0	0	0	0	0	0	0	0	0	0	0.00%
DE	435,219	334,850	322,450	324,000	57,500	230,000	55,000	53,000	49,000	97,000	99,000	2,000	2.06%
EE			0	0	0	0	0	0	0	0	0	0	0.00%
ES	38,000	5,000	4,000	1,000	1,000	1,200	1,000	1,000	11,000	20,000	7,000	-13,000	-65.00%
FR	15,000	15,000	20,000	8,000	8,500	0	0	27,000	19,000	15,000	8,000	-7,000	-46.67%
HR			537,000	552,360	511,920	560,520	645,720	685,000	609,000	549,000	438,000	-111,000	-20.22%
HU	11,000	11,000	14,000	15,000	15,000	13,000	13,000	18,000	16,000	11,000	11,000	0	0.00%
IT	0	0	0	0	0	0	0	0	0	0	0	0	0.00%
NL	0	0	0	0	0	0	0	0	0	0	0	0	0.00%
PL	570,000	550,000	493,000	544,000	515,000	473,000	496,000	530,000	554,000	396,000	405,000	9,000	2.27%
PT			0	0	0	0	0	0	0	0	0	0	0.00%
RO	0	0	0	0	0	0	0	0	0	0	0	0	0.00%
Scandinavia	0	0	0	0	0	0	0	0	0	0	0	0	0.00%
DK/FI/NO	0	0	0	0	0	0	0	0	0	0	0	0	0.00%
SE	0	0	0	0	0	0	0	0	0	0	0	0	0.00%
FEP	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	1,273,000	1,165,000	-108,000	-8.48%

Production de parquet par type 2014-2024
Contrecollé

000 m²	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2024-2023	2024-2023
AT	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	5,809,000	6,220,000	411,000	7.08%
BE	220,000	256,000	264,992	225,000	202,608	228,000	256,480	267,000	200,000	160,000	150,000	-10,000	-6.25%
CH	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	1,184,000	127,000	12.02%
CZ	900,000	799,000	1,000,000	996,000	788,000	812,000	569,000	444,000	444,000	262,000	270,000	8,000	3.05%
DE	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	3,861,000	3,950,000	89,000	2.31%
EE			441,000	568,000	400,000	312,000	270,000	398,000	450,000	180,000	171,000	-9,000	-5.00%
ES	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	2,012,000	-265,000	-11.64%
FR	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	2,197,000	-346,000	-13.61%
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	3,030,000	-599,000	-16.51%
HU	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	904,000	932,000	28,000	3.10%
IT	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	4,286,000	4,128,000	-158,000	-3.69%
NL	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	675,000	-135,000	-16.67%
PL	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	7,696,000	180,000	2.39%
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	2,000,000	-100,000	-4.76%
RO	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	2,492,000	0	0.00%
Scandinavia	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	7,048,000	5,657,000	-1,391,000	-19.74%
DK/FI/NO	600,000	1,000,000	1,011,000	1,092,000	978,000	891,000	850,000	810,000	730,000	448,000	377,000	-71,000	-15.85%
SE	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	6,600,000	5,280,000	-1,320,000	-20.00%
FEP	**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**	**44,934,000**	**42,764,000**	**-2,170,000**	**-4.83%**

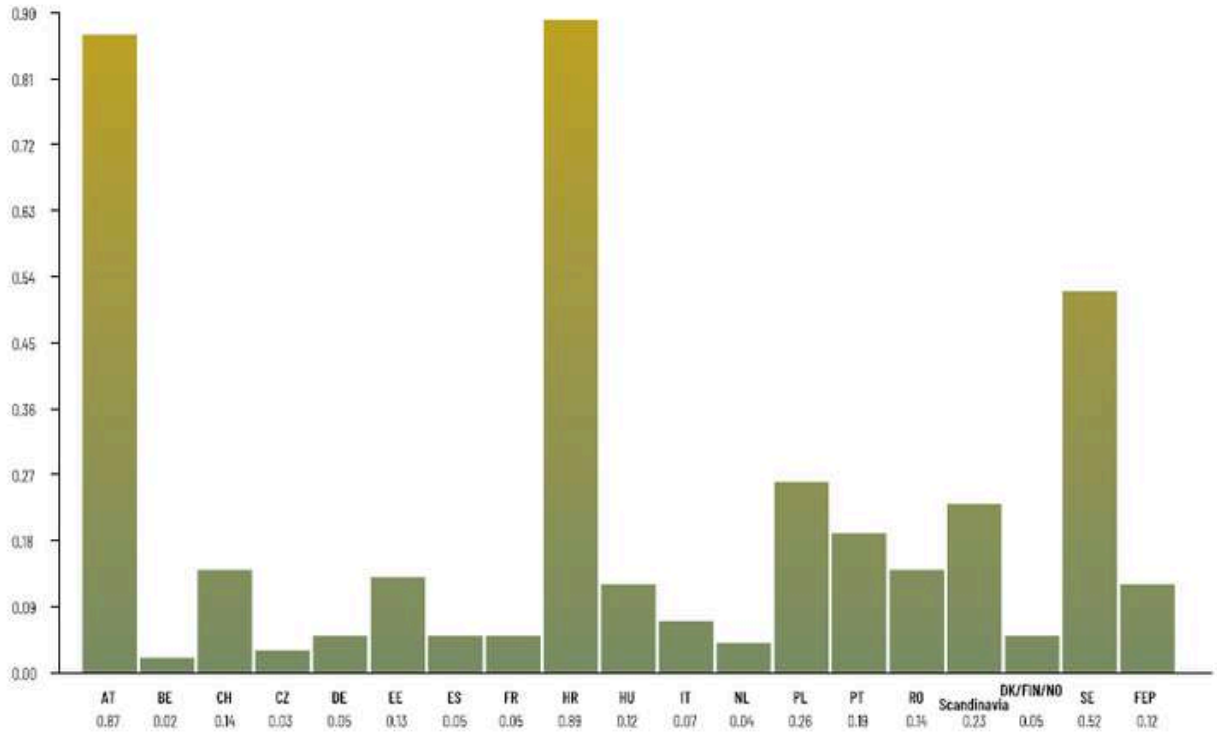
Production de parquet par type 2014-2024
Massif

000 m²	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2024-2023	2024-2023
AT	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	1,490,000	1,595,000	105,000	7.05%
BE	170,000	199,000	208,208	177,000	159,192	179,000	201,520	209,000	133,000	106,000	105,000	-1,000	-0.94%
CH	47,500	33,700	19,400	16,300	22,620	21,000	18,340	24,000	23,000	20,000	16,000	-4,000	-20.00%
CZ	250,000	342,000	350,000	348,000	277,000	286,000	200,000	156,000	156,000	88,000	90,000	2,000	2.27%
DE	276,998	251,090	235,720	222,100	214,200	204,000	56,000	53,000	49,000	97,000	99,000	2,000	2.06%
EE			0	0	0	0	0	0	0	0	0	0	0.00%
ES	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	627,000	-261,000	-29.39%
FR	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	1,460,000	-360,000	-19.78%
HR			89,500	92,060	85,320	90,840	107,620	0	0	0	0	0	0.00%
HU	265,000	261,000	334,000	341,000	316,000	248,000	246,000	259,000	231,000	161,000	166,000	5,000	3.11%
IT	302,791	183,036	210,000	59,000	295,000	319,000	215,000	258,000	232,000	176,000	170,000	-6,000	-3.41%
NL	272,000	280,000	368,000	350,000	302,000	246,000	243,000	250,000	158,000	110,000	92,000	-18,000	-16.36%
PL	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	2,025,000	48,000	2.43%
PT			0	0	0	0	0	0	0	0	0	0	0.00%
RO	250,000	250,000	330,110	306,130	365,650	427,130	423,170	425,000	457,000	308,000	308,000	0	0.00%
candinavia	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	913,000	806,000	-107,000	-11.72%
DK/FI/NO	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	566,000	-107,000	-15.90%
SE	390,000	405,000	446,000	445,000	420,000	459,000	447,000	476,000	392,000	240,000	240,000	0	0.00%
FEP	**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**	**8,154,000**	**7,559,000**	**-595,000**	**-7.30%**

Production par habitant

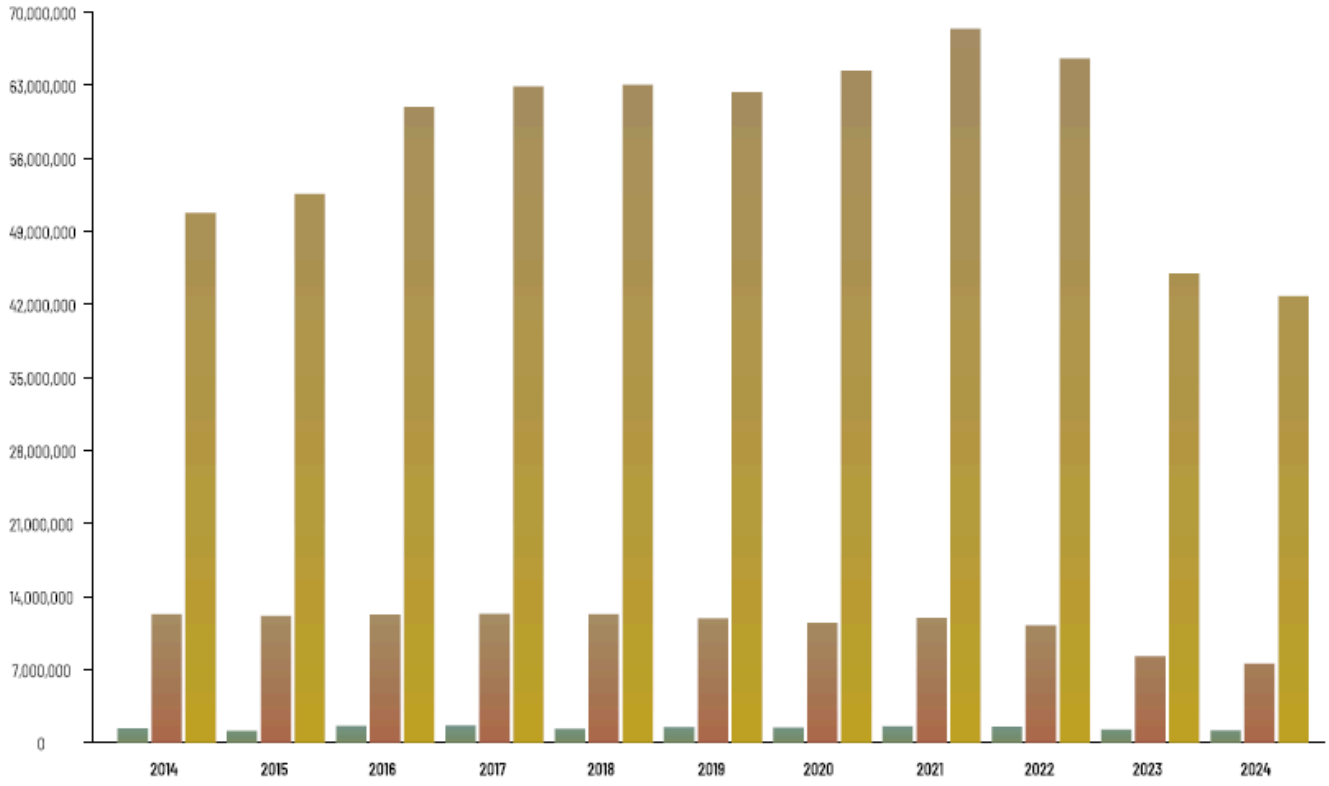
	Production in m²		Population in units		Production per capita in m²	
	2023	2024	2023	2024	2023	2024
AT	7,448,000	7,974,000	9,100,000	9,160,000	0.82	0.87
BE	266,000	255,000	11,690,000	11,740,000	0.02	0.02
CH	1,113,000	1,238,000	8,960,000	9,050,000	0.12	0.14
CZ	350,000	360,000	10,860,000	10,900,000	0.03	0.03
DE	4,055,000	4,148,000	83,500,000	83,600,000	0.05	0.05
EE	180,000	171,000	1,300,000	1,300,000	0.14	0.13
ES	3,185,000	2,646,000	48,085,000	48,590,000	0.07	0.05
FR	4,378,000	3,665,000	68,300,000	68,400,000	0.06	0.05
HR	4,178,000	3,468,000	3,900,000	3,900,000	1.07	0.89
HU	1,076,000	1,109,000	9,600,000	9,580,000	0.11	0.12
IT	4,462,000	4,298,000	59,000,000	59,000,000	0.08	0.07
NL	920,000	767,000	18,090,000	18,230,000	0.05	0.04
PL	9,889,000	10,126,000	38,760,000	38,540,000	0.26	0.26
PT	2,100,000	2,000,000	10,467,000	10,700,000	0.20	0.19
RO	2,800,000	2,800,000	19,890,000	19,620,000	0.14	0.14
Scandinavia	7,961,000	6,463,000	27,600,000	27,770,000	0.29	0.23
DK/FIN/NO	1,121,000	943,000	17,070,000	17,180,000	0.07	0.05
SE	6,840,000	5,520,000	10,530,000	10,590,000	0.65	0.52
FEP	**54,361,000**	**51,488,000**	**429,102,000**	**430,080,000**	**0.13**	**0.12**

Production par habitant 2024



Production de parquet par type 2014-2024

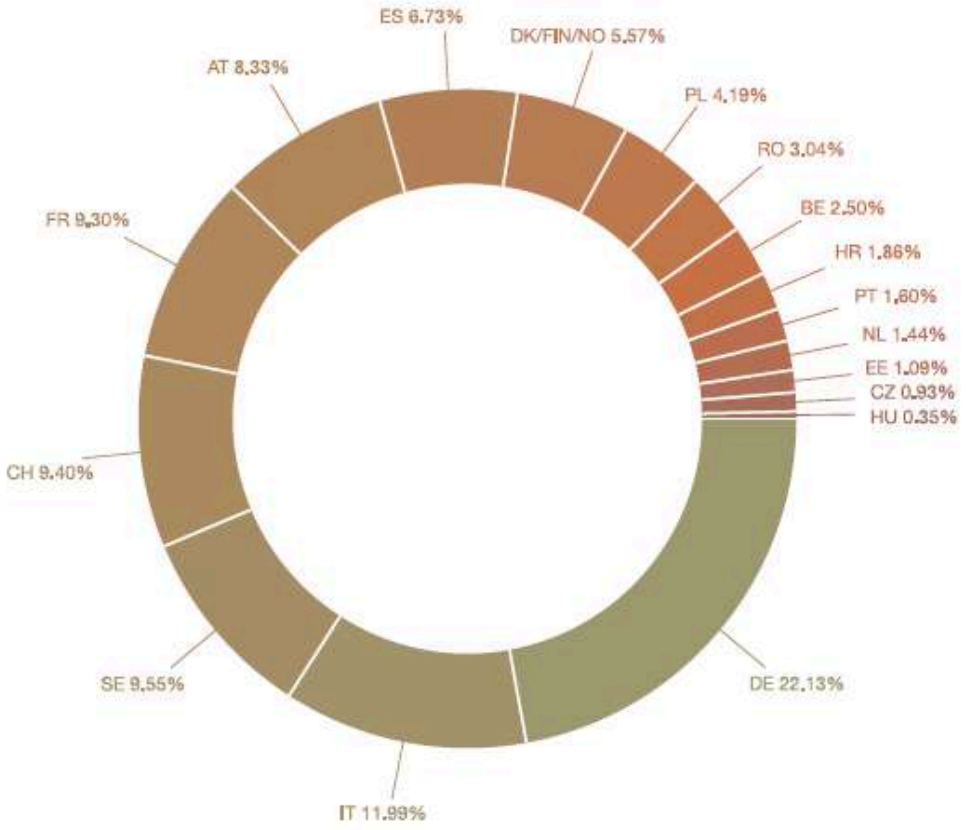
m²	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2024/2023
Mosaic	1,344,619	1,108,650	1,579,271	1,636,285	1,304,360	1,475,695	1,409,844	1,534,000	1,490,000	1,273,000	1,165,000	-8.48%
Solid	12,288,289	12,147,826	12,266,350	12,330,440	12,270,982	11,911,720	11,460,788	11,921,000	11,203,000	8,154,000	7,559,000	-7.30%
Multilayer	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	44,934,000	42,764,000	-4.83%
Total	**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**	**54,361,000**	**51,488,000**	**-5.29%**

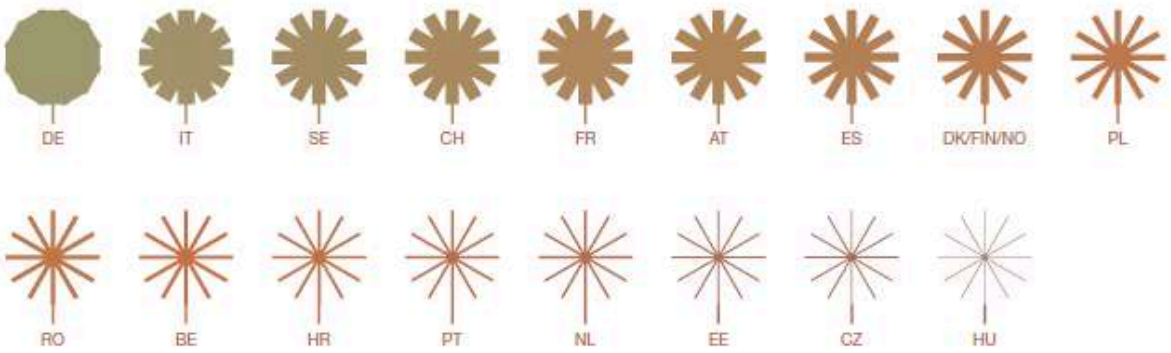


CONSOMMATION DE PARQUET EN EUROPE

Pourcentage de Consommation totale 2014-2024

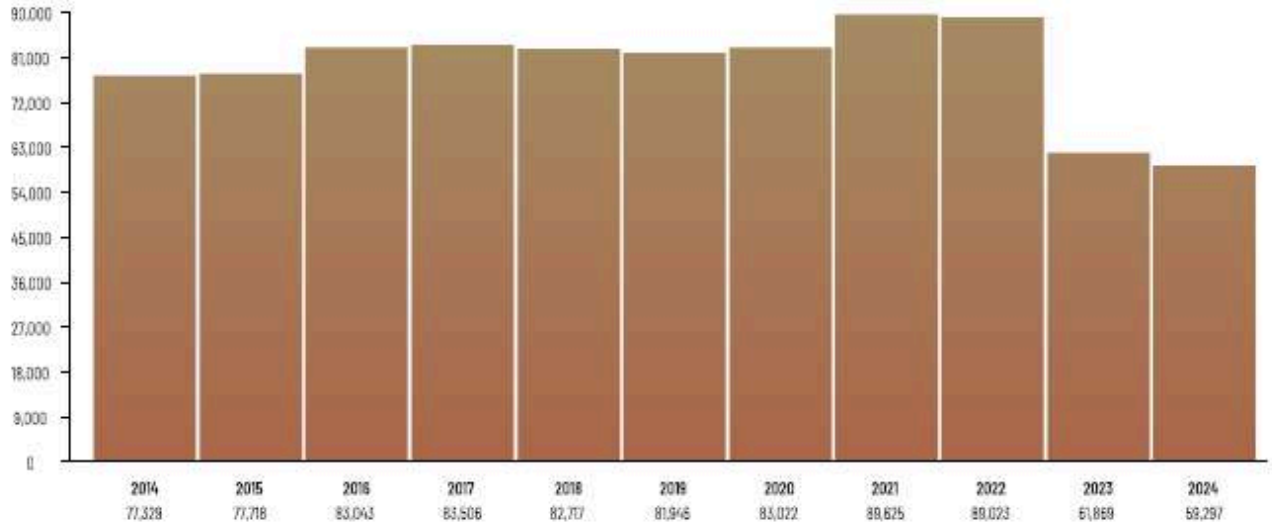
En termes de consommation par pays, l'Allemagne conserve sa première place avec une part en hausse de 22,13 %. Comme l'année dernière, l'Italie (11,99 %) et la Suède (9,55 %) complètent le podium, suivies par la Suisse (9,40 %).





Consommation totale de parquet 2014-2024

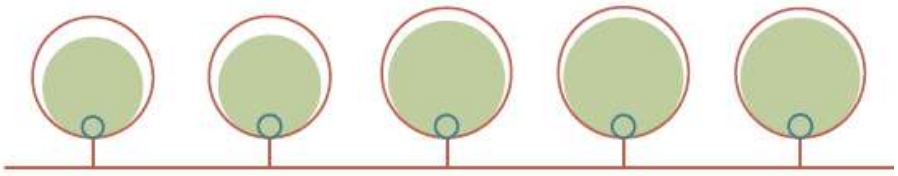
000 m²	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2024-2023	2024-2023
AT	6,175	6,175	6,299	6,424	6,488	6,553	6,619	6,817	6,000	5,200	4,940	-260	-5.00%
BE	2,097	2,160	2,246	2,336	2,243	2,221	2,300	2,415	2,125	1,594	1,482	-112	-7.03%
CH	6,227	6,345	6,203	6,217	5,771	5,716	5,856	6,568	6,533	5,217	5,573	356	6.82%
CZ	965	965	1,000	1,025	1,000	1,020	1,010	1,050	1,019	560	549	-11	-1.96%
DE	18,055	17,775	18,216	16,759	16,677	15,800	18,014	18,091	19,899	10,894	13,121	2,227	20.44%
EE			713	781	859	848	950	1,019	1,178	560	648	88	15.71%
ES	5,329	5,380	5,499	5,607	5,637	5,724	5,557	5,722	5,238	4,014	3,990	-24	-0.60%
FR	7,430	7,865	8,190	8,299	8,429	8,584	8,122	8,982	8,014	6,460	5,517	-943	-14.60%
HR			1,861	2,115	2,115	2,009	1,987	2,334	3,759	1,901	1,101	-800	-42.08%
HU	457	489	494	504	559	525	504	549	439	233	210	-23	-9.87%
IT	8,300	8,200	8,500	8,909	8,445	8,613	7,657	9,937	11,442	8,394	7,111	-1,283	-15.28%
NL	1,892	1,961	1,878	2,000	1,708	1,616	1,769	1,861	1,328	925	851	-74	-8.00%
PL	3,950	3,870	3,986	4,185	4,311	4,527	4,520	4,565	4,063	2,438	2,487	49	2.01%
PT			1,208	1,240	1,290	1,350	1,339	1,200	1,248	1,050	950	-100	-9.52%
RO	2,563	2,563	2,563	2,589	2,680	2,760	2,691	3,095	2,940	2,000	1,800	-200	-10.00%
Scandinavia	13,889	13,970	14,187	14,516	14,505	14,080	14,127	15,420	13,798	10,654	8,967	-1,687	-15.83%
DK/FI/NO	7,449	6,610	6,533	6,633	6,215	5,873	5,838	6,400	5,888	3,827	3,303	-524	-13.69%
SE	6,440	7,360	7,654	7,883	8,290	8,207	8,289	9,020	7,910	6,827	5,664	-1,163	-17.04%
FEP	**77,329**	**77,718**	**83,043**	**83,506**	**82,717**	**81,946**	**83,022**	**89,625**	**89,023**	**62,094**	**59,297**	**-2,797**	**-4.50%**



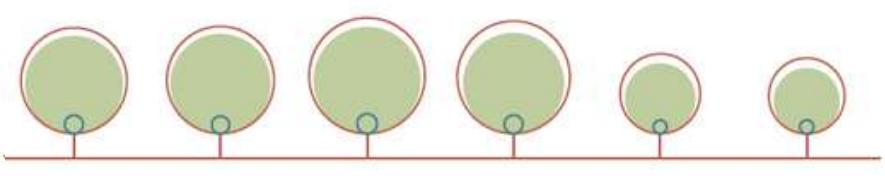
Consommation par habitant

	Production in m²		Population in units		Production per capita in m²	
	2023	2024	2023	2024	2023	2024
AT	5,200,000	4,940,000	9,100,000	9,160,000	0.57	0.54
BE	1,594,000	1,482,000	11,690,000	11,740,000	0.14	0.13
CH	5,217,000	5,573,000	8,960,000	9,050,000	0.58	0.62
CZ	560,000	549,000	10,860,000	10,900,000	0.05	0.05
DE	10,894,000	13,121,000	83,500,000	83,600,000	0.13	0.16
EE	560,000	648,000	1,300,000	1,300,000	0.43	0.50
ES	4,014,000	3,990,000	48,085,000	48,590,000	0.08	0.08
FR	6,460,000	5,517,000	68,300,000	68,400,000	0.09	0.08
HR	1,901,000	1,101,000	3,900,000	3,900,000	0.49	0.28
HU	233,000	210,000	9,600,000	9,580,000	0.02	0.02
IT	8,394,000	7,111,000	59,000,000	59,000,000	0.14	0.12
NL	925,000	851,000	18,090,000	18,230,000	0.05	0.05
PL	2,438,000	2,487,000	38,760,000	38,540,000	0.06	0.06
PT	1,050,000	950,000	10,467,000	10,700,000	0.10	0.09
RO	2,000,000	1,800,000	19,890,000	19,620,000	0.10	0.09
Scandinavia	10,654,000	8,967,000	27,600,000	27,770,000	0.39	0.32
DK/FIN/NO	3,827,000	3,303,000	17,070,000	17,180,000	0.22	0.19
SE	6,827,000	5,664,000	10,530,000	10,590,000	0.65	0.53
FEP	**62,094,000**	**59,297,000**	**429,102,000**	**430,080,000**	**0.14**	**0.14**

Consommation par habitant 2024

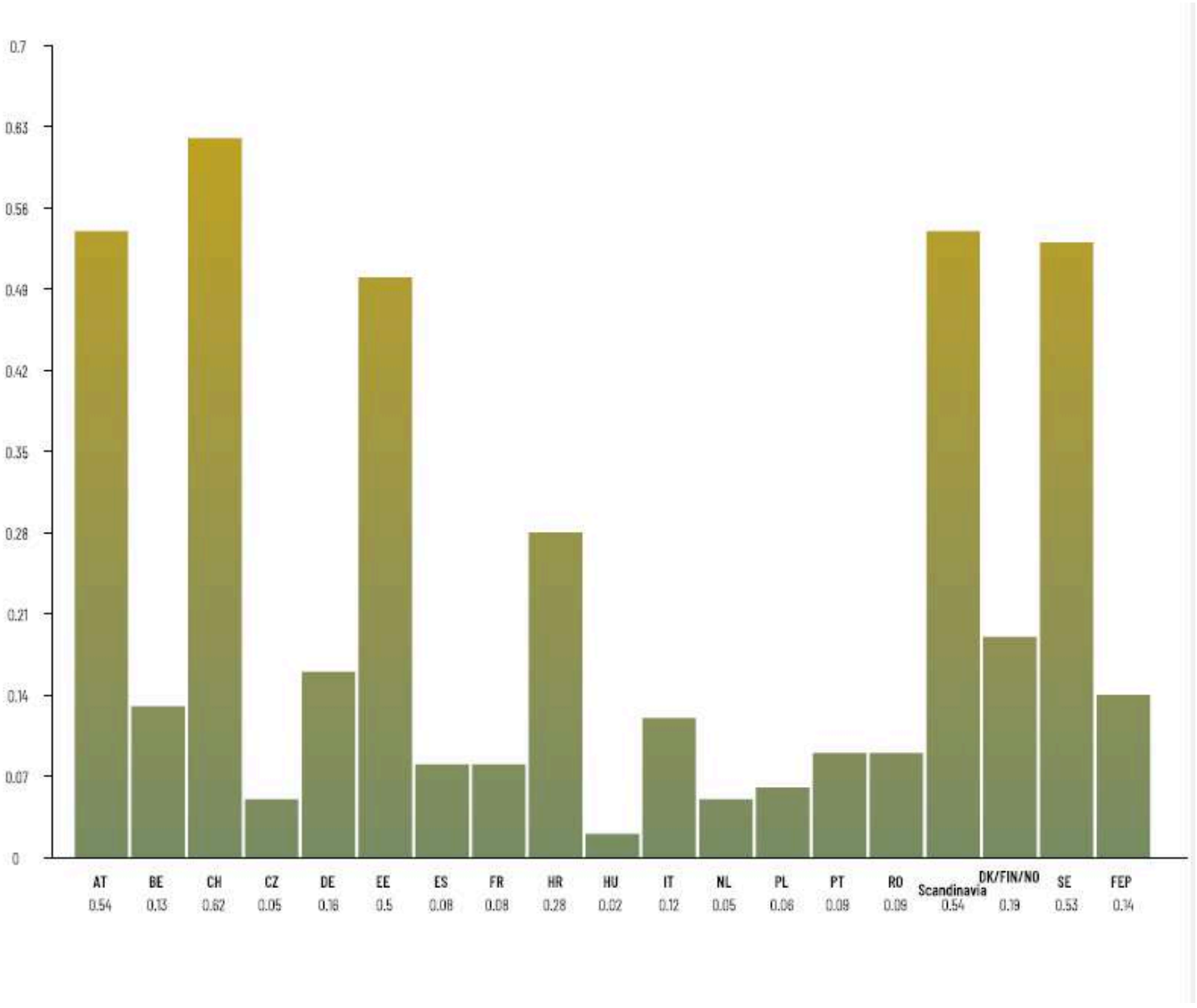


Million sqm	2014	2015	2016	2017	2018
Production FEP countries	64,407	65,842	74,749	76,840	76,601
Production European non-FEP countries	13,500	14,600	14,500	14,500	14,800
Consumption FEP countries	77,329	77,718	83,043	83,506	82,717



Million sqm	2019	2020	2021	2022	2023	2024
Production FEP countries	75,726	77,274	81,851	78,260	54,361	51,488
Production European non-FEP countries	14,200	13,500	15,300	13,600	10,350	10,730
Consumption FEP countries	81,946	83,022	89,625	89,023	62,094	59,297

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 FEP totale, la consommation par habitant reste stable à 0,14 m² en 2024.

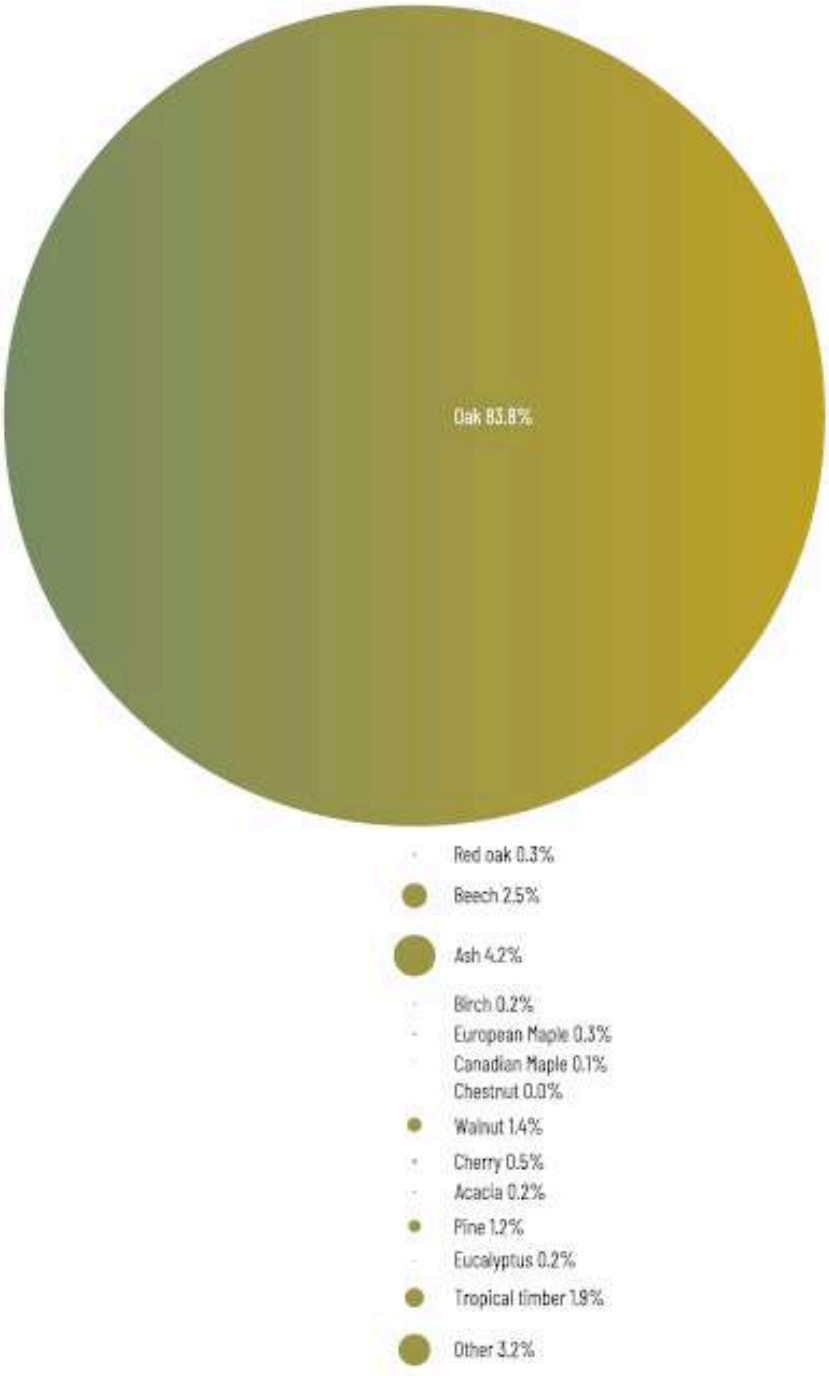


UTILISATION DES ESSENCES DE BOIS

L'utilisation des essences de bois en 2024 indique que la part du chêne augmente légèrement pour atteindre 83,8 %, contre 83,0 % en 2023.

Les essences tropicales représentent une part stable de 1,9 % du bois utilisé (bien que la catégorie « autres », qui représente 3,2 %, puisse, en partie, être ajoutée au bois tropical).

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



L'INDUSTRIE DE LA CONSTRUCTION EN EUROPE

En 2024, l'activité européenne dans le secteur de la construction, mesurée par la production de la construction selon Euroconstruct, a connu une baisse de 2,2 % en termes réels (après ajustement pour tenir compte de l'inflation).

Cette baisse est due au ralentissement des secteurs de la construction résidentielle et non résidentielle, causé par la récession économique, la faible confiance des consommateurs et les coûts élevés de la construction. Tous les pays ont contribué à cette performance, à l'exception de l'Irlande (+1,5 %), du Portugal (+1,5 %), de l'Espagne (+2 %) et de la Suisse (+0,9 %).

La production dans le secteur de la construction ne devrait pas renouer avec la croissance avant 2026, grâce à une légère reprise dans les secteurs de la construction résidentielle (+1,7 % par an en 2026-2027) et non résidentielle (+1,7 % par an entre 2025 et 2027).

Ces prévisions supposent une baisse des taux d'intérêt, qui aurait un effet positif sur l'accessibilité du marché immobilier et les investissements dans le secteur de la construction non résidentielle. Le génie civil devrait maintenir un taux de croissance stable proche de 2,1 % par an.

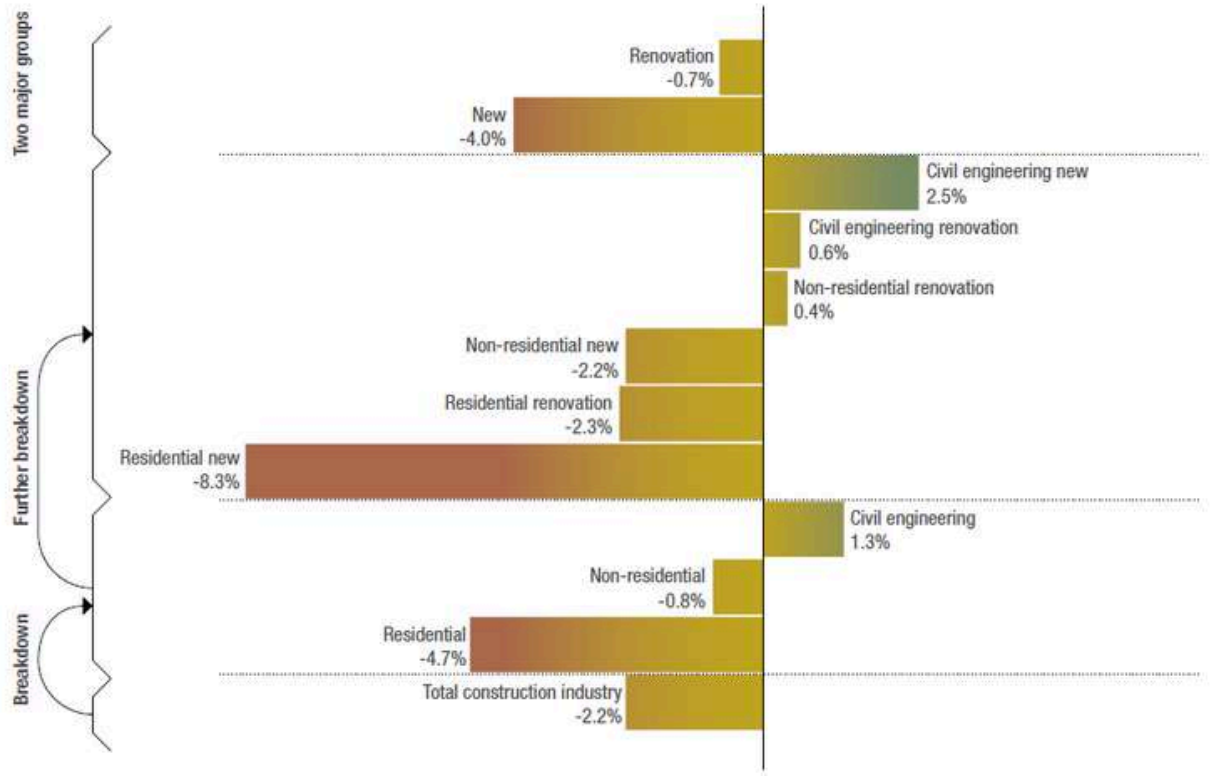
Vue d'ensemble de l'industrie de la construction en Europe de l'Ouest et de l'Est en 2023 et 2024

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

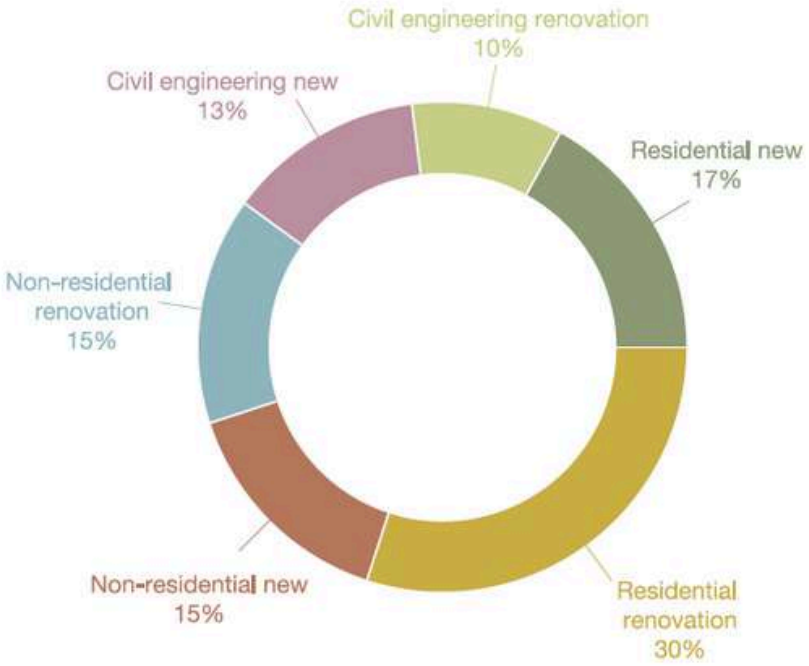
	total construction*			new residential			residential renovation		
	2023	2024	%	2023	2024	%	2023	2024	%
Austria	46,177	44,237	-4.2%	13,796	12,168	-11.8%	7,126	7,397	3.8%
Belgium	52,597	52,382	-0.4%	8,617	7,986	-7.3%	16,516	16,604	0.5%
Denmark	42,087	41,260	-2.0%	5,122	4,411	-13.9%	15,060	15,101	0.3%
Finland	33,474	31,676	-5.4%	5,658	3,983	-29.6%	8,508	8,474	-0.4%
France	213,806	205,108	-4.1%	37,807	29,457	-22.1%	63,516	64,278	1.2%
Germany	398,502	386,944	-2.9%	64,733	55,670	-14.0%	162,887	161,258	-1.0%
Ireland	26,485	26,883	1.5%	6,991	6,742	-3.6%	6,440	6,646	3.2%
Italy	262,295	254,094	-3.1%	19,421	18,625	-4.1%	122,580	106,644	-13.0%
Netherlands	103,258	100,944	-2.2%	18,936	17,989	-5.0%	27,449	27,938	1.8%
Norway	47,426	44,987	-5.1%	8,240	6,804	-17.4%	9,222	9,224	0.0%
Portugal	27,735	28,150	1.5%	4,282	4,320	0.9%	9,038	9,092	0.6%
Spain	145,273	148,226	2.0%	46,757	48,160	3.0%	25,336	25,970	2.5%
Sweden	51,059	48,554	-4.9%	6,363	4,877	-23.4%	8,146	8,206	0.7%
Switzerland	58,784	59,300	0.9%	18,093	18,002	-0.5%	8,394	8,391	0.0%
UK	245,523	243,742	-0.7%	57,287	53,911	-5.9%	50,318	52,164	3.7%
Total Western Europe	**1,754,483**	**1,716,487**	**-2.2%**	**322,105**	**293,106**	**-9.0%**	**540,535**	**527,388**	**-2.4%**
Czech Republic	26,870	26,687	-0.7%	7,605	7,369	-3.1%	3,746	3,847	2.7%
Hungary	16,994	16,258	-4.3%	2,169	1,952	-10.0%	2,194	2,238	2.0%
Poland	61,595	60,096	-2.4%	12,564	13,293	5.8%	3,790	3,892	2.7%
Slovak Republic	5,038	4,702	-6.7%	918	822	-10.4%	429	446	3.9%
Total Central Europe	**110,498**	**107,743**	**-2.5%**	**23,256**	**23,436**	**0.8%**	**10,158**	**10,422**	**2.6%**
Total Europe	**1,864,980**	**1,824,230**	**-2.2%**	**345,361**	**316,542**	**-8.3%**	**550,693**	**537,810**	**-2.3%**

	New non-residential			Non-residential renovation			New civil engineering		
	2023	2024	%	2023	2024	%	2023	2024	%
Austria	12,872	12,267	-4.7%	3,823	3,716	-2.8%	6,879	6,934	0.8%
Belgium	8,121	8,238	1.4%	9,444	9,245	-2.1%	7,952	8,363	5.2%
Denmark	6,727	5,905	-12.2%	3,794	4,035	6.3%	7,719	8,020	3.9%
Finland	7,572	7,807	3.1%	5,229	5,145	-1.6%	4,663	4,420	-5.2%
France	27,995	25,618	-8.5%	31,688	32,322	2.0%	23,760	24,045	1.2%
Germany	41,772	40,728	-2.5%	55,151	54,599	-1.0%	37,994	38,184	0.5%
Ireland	6,712	7,079	5.5%	2,237	2,275	1.7%	2,709	2,733	0.9%
Italy	19,329	21,447	11.0%	45,037	46,613	3.5%	20,227	23,706	17.2%
Netherlands	17,451	16,038	-8.1%	15,216	15,219	0.0%	15,279	14,946	-2.2%
Norway	7,343	6,382	-13.1%	9,962	10,088	1.3%	7,917	7,772	-1.8%
Portugal	4,585	4,686	2.2%	2,271	2,312	1.8%	4,588	4,712	2.7%
Spain	26,148	25,890	-1.0%	17,265	17,524	1.5%	18,879	19,635	4.0%
Sweden	9,354	8,272	-11.6%	8,256	8,209	-0.6%	13,312	13,257	-0.4%
Switzerland	7,971	8,045	0.9%	10,022	10,179	1.6%	3,902	4,008	2.7%
UK	53,714	54,245	1.0%	33,654	33,865	0.6%	35,968	33,080	-8.0%
Total Western Europe	**257,667**	**252,648**	**-1.9%**	**253,049**	**255,345**	**0.9%**	**211,749**	**213,815**	**1.0%**
Czech Republic	4,489	4,426	-1.4%	3,912	4,053	3.6%	2,497	2,592	3.8%
Hungary	4,325	4,252	-1.7%	3,282	2,954	-10.0%	2,678	2,732	2.0%
Poland	15,419	14,417	-6.5%	8,022	7,645	-4.7%	15,521	14,388	-7.3%
Slovak Republic	1,295	1,277	-1.4%	663	657	-0.9%	1,467	1,259	-14.2%
Total Central Europe	**25,529**	**24,373**	**-4.5%**	**15,879**	**15,309**	**-3.6%**	**22,163**	**20,970**	**-5.4%**
Total Europe	**283,196**	**277,020**	**-2.2%**	**268,929**	**270,654**	**0.6%**	**233,912**	**234,785**	**0.4%**

Taux de croissance des différents segments du marché européen de la construction, 2024



Parts relatives des différents segments dans le marché global de la construction en Europe, 2024



PERSPECTIVES POUR 2025

Le secteur du parquet s'attend à une reprise de l'activité dans le domaine de la construction plus tard en 2025, ainsi qu'à un soulagement à court terme grâce à l'imposition, par la Commission européenne depuis le 16 janvier 2025, de mesures antidumping provisoires sur les importations de parquets multicouches originaires de Chine, comme publié au Journal officiel de l'UE le 15 janvier 2025.

La FEP et les producteurs de parquet de l'UE continueront à coopérer activement avec l'équipe d'enquête de la Commission pendant les étapes restantes de ce processus d'enquête jusqu'à son achèvement officiel au cours de l'été 2025.

FRANCE : CHIFFRES CLÉS 2024

1. General economy

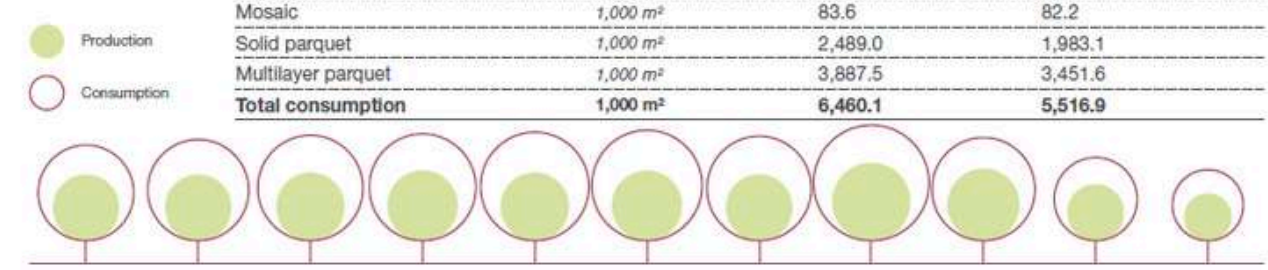
	unit	2023	2024
Population	million	68.3	68.4
Inflation rate	%	4.9	2.0
Finished dwellings	units	296,400	263,100
Unemployment rate	%	7.5	7.3
Wages development	%	3.9	3.3
Average working time	hrs/week	39	39

2. Parquet production

	unit	2023	2024
Mosaic	1,000 m²	14.7	7.7
Solid parquet	1,000 m²	1,820.0	1,460.0
Multilayer parquet	1,000 m²	2,543.1	2,197.3
Total production	**1,000 m²**	**4,377.8**	**3,665.0**

3. Parquet consumption

	unit	2023	2024
Mosaic	1,000 m²	83.6	82.2
Solid parquet	1,000 m²	2,489.0	1,983.1
Multilayer parquet	1,000 m²	3,887.5	3,451.6
Total consumption	**1,000 m²**	**6,460.1**	**5,516.9**



	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Production	5,125	5,130	5,285	5,444	5,286	5,439	5,144	6,048	5,589	4,378	3,665
Consumption	7,430	7,865	8,190	8,299	8,429	8,584	8,122	8,982	8,014	6,460	5,517

4. Parquet imports

	unit	2023	2024
Mosaic	1,000 m²	74.7	77.8
Solid parquet	1,000 m²	915.0	763.1
Multilayer parquet	1,000 m²	1,690.0	1,567.0
Total imports	**1,000 m²**	**2,679.7**	**2,407.9**

5. Parquet exports

	unit	2023	2024
Mosaic	1,000 m²	5.8	3.3
Solid parquet	1,000 m²	246.0	234.0
Multilayer parquet	1,000 m²	345.6	312.8
Total exports	**1,000 m²**	**597.4**	**550.1**

6. Wood species used

	unit	2023	2024
Oak	%	98	99.3
Beech	%	1	0.1
Chestnut	%	1	0.1
Pine	%	0	0.1
Tropical timber	%	0	0.1
Other (temperate hardwood)	%	0	0.3