

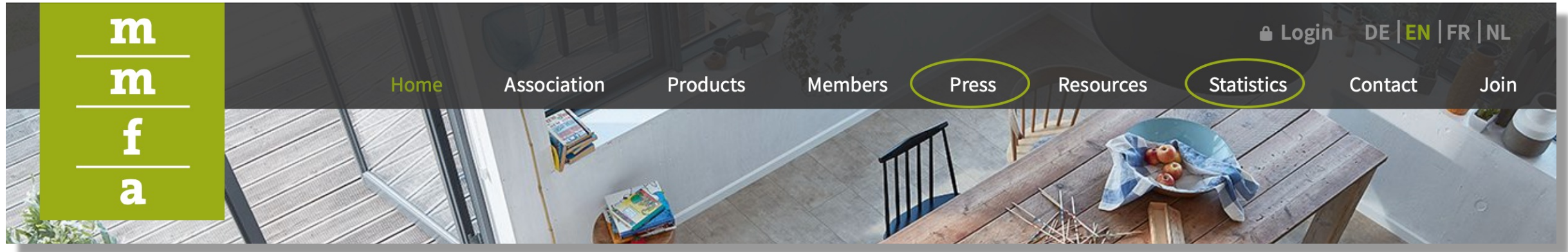
MMFA Annual Press Conference

28 February 2024

Meeting Etiquette

- Please mute your microphone to avoid background noise.
- Participation is encouraged so:
 - Use Chat to ask questions.
 - Raise Hand to speak and activate your video/microphone when you have the floor.

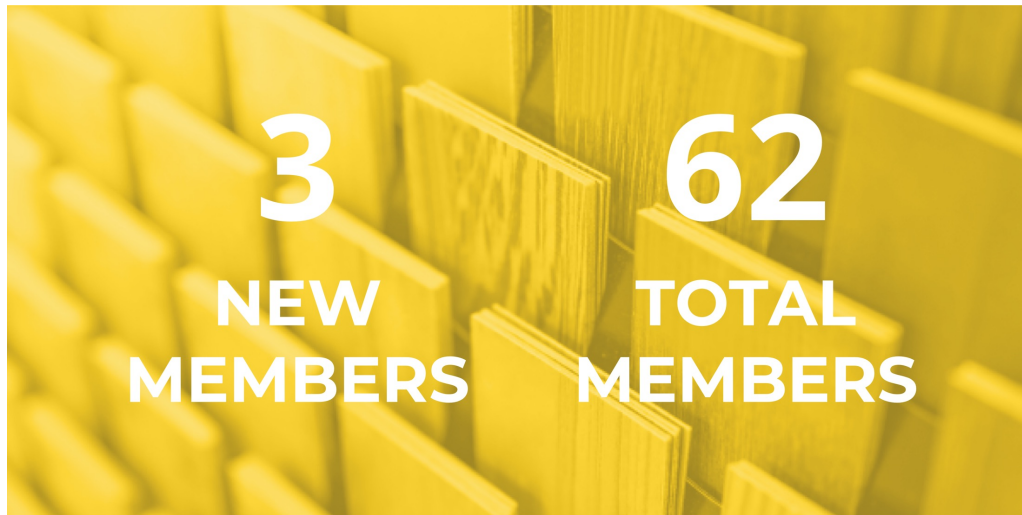
Practicalities and contact: press@mmfa.eu



2023 Overview

Jan Dossche, COREtec
President

MMFA continues to grow



ONE
FLOR
EUROPE



klöckner pentaplast

Keeping floors in the loop!

Circularity

- Circular Economy Workshop
- Digital Product Passport (DPP)
- CISUFLO project

Sustainability

- Environmental Product Declarations

Standards

- CEN
- ISO

Our drivers in 2023

Circularity

- Circular Economy Workshop
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Sustainability

- Environmental Product Declarations

Standards

- CEN
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Circular Economy Workshop

- Held in Brussels on 23 November 2023.
- Exchange of views with industry stakeholders:
 - Sorting and recycling companies.
 - Flooring associations.
 - Traders.
 - Suppliers to MMF manufacturers.
- Focused on **collection possibilities, sorting and recycling of flooring products.**



Digital Product Passport

Policy
engagement

Engaged with the
EC to monitor
developments
(feasibility study)

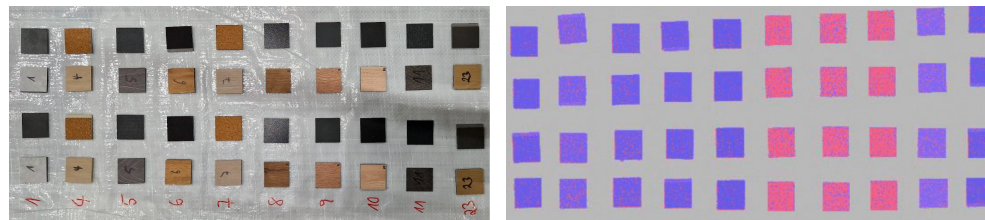
Sorting tests

First MMFA test &
2024 project with
ERFMI

CISUFLO

Monitor eProdis
database
progress

MMFA - Multilayer Modular Flooring Association



X-ray transmission test to analyse the density
difference between samples

CISUFLO Policy Brief

- **Policy brief** highlighting drivers and barriers for the transition to a circular flooring sector.
- **Includes preliminary recommendations** on:
 - Digital Product Passport & standards
 - Standards to promote design for circularity.
 - Targets for minimum recycled content.
 - Mandatory waste collection schemes.
 - Incentivising sorting and recycling.



Our pillars in 2023

Circularity

- Circular Economy Workshop
- Digital Product Passport (DPP)
- CISUFLO project

Sustainability

- Environmental Product Declarations

Standards

- CEN
- ISO

Environmental Product Declarations

- Development of MMFA's 1st Environmental Product Declarations:
 - **Wood** EPD for Vinyl – HDF Floor Covering (PVC layer on HDF with cork).
 - EPD for **SPC** Floor Covering (Solid Polymer).



Our pillars in 2023

Circularity

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Sustainability

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Standards

- CEN
- ISO

Looking into 2024

Circularity

- Partner with ERFMI/EPLF for large-scale sorting tests
- Contribute to feasibility study on DPP
- Contribute to CISUFLO project
- Policy monitoring, focus on ECHA

Sustainability

- Finalise Environmental Product Declarations

Standards

- Continue work at CEN/ISO level

Technical Overview

Sebastian Wendel, Classen

Convenor of the Technical Committee

Circular Economy Workshop

Collection

- Industry has to work together.
- Different solutions required for project and residential waste.
- Sector should engage with all players (incl. e.g., traders) for material collection from end-consumers.
- Issue re. material collection of products coming outside of the EU.

Next step: Launch ad-hoc group on collection

Sorting

- Main hurdles are:
 - Mixed materials.
 - Attached pads.
 - Black core (potential issues for NIR sorting).
 - Technologies (e.g. panels cannot be sorted unless shredded).
- Legacy additives and old plasticisers must be found and separated.

Next step: Sorting ad-hoc group to work with ERFMI/EPLF

Recycling

- Challenges:
 - Finding a common industry base for design for recycling.
 - Glue and subfloor residues.
- Opportunities:
 - Remanufacturing examples (suitable for other producers).
 - Reuse and potential to develop “second hand flooring platforms”.
 - Exploring new gluing technologies.

Next step: Launch ad-hoc group on recycling

Environmental Product Declarations

- **Why an EPD?**
 - Internationally recognised and standardized tool for sustainability data.
 - Becoming more and more important with regards to the new CPR.
- **Wood EPD for Vinyl – HDF Floor Covering (PVC layer on HDF with cork)**
 - Status: under third-party verification at IBU. EPD expected in March.
- **EPD for SPC Floor Covering (Solid Polymer)**
 - Status: data collection process started in January. EPD expected in November.

Technical Bulletin updates

- Technical Bulletin on installation updated in December. Additional information on:
 - Moisture-sensitive flooring systems.
 - Floor heating/cooling systems.
- Available in DE, EN, FR and NL ([Resources](#) section of MMFA website).



Standardization CEN/ISO

- **Circularity** (CEN TC 134 WG 10):
 - **New EN 17861** “Circular Economy Terms and Definitions” (e.g., design for recycling, reuse, recycled material content, pre- and post-consumer waste, etc.).
 - Design for Circularity document focusing on a product’s life-cycle and how to avoid waste.
 - Digital Product Passport (principles and content).

Standardization CEN/ISO

- **Revised EN 16511**: published in May 2023.
- Discussions on introducing an ISO standard for MMF-floorings in the **revision of EN ISO 14486**.
- Revision EN ISO 20326 including melamine surfaces on polymer cores.
- New CEN work item “Hot-spot method for dimensional stability as results of the IHD/MMFA research project”.
- New CEN work item “Requirements on underlays for MMF-floorings”.
- New amendment of EN 16511 to cover all flooring constructions.

Main projects 2024

Circularity

- Launch ad-hoc group on collection
- Launch MMFA/ERFMI/EPLF ad-hoc group on sorting
- Continue work on CISUFLO project

Sustainability

- Finalise SPC EPD
- Draft new Technical Bulletin on Lifespan and R-strategies

Standards

- Continue to drive standardization work at CEN/ISO

2023 MMFA Sales figures*

Carl Ruland, Novalis

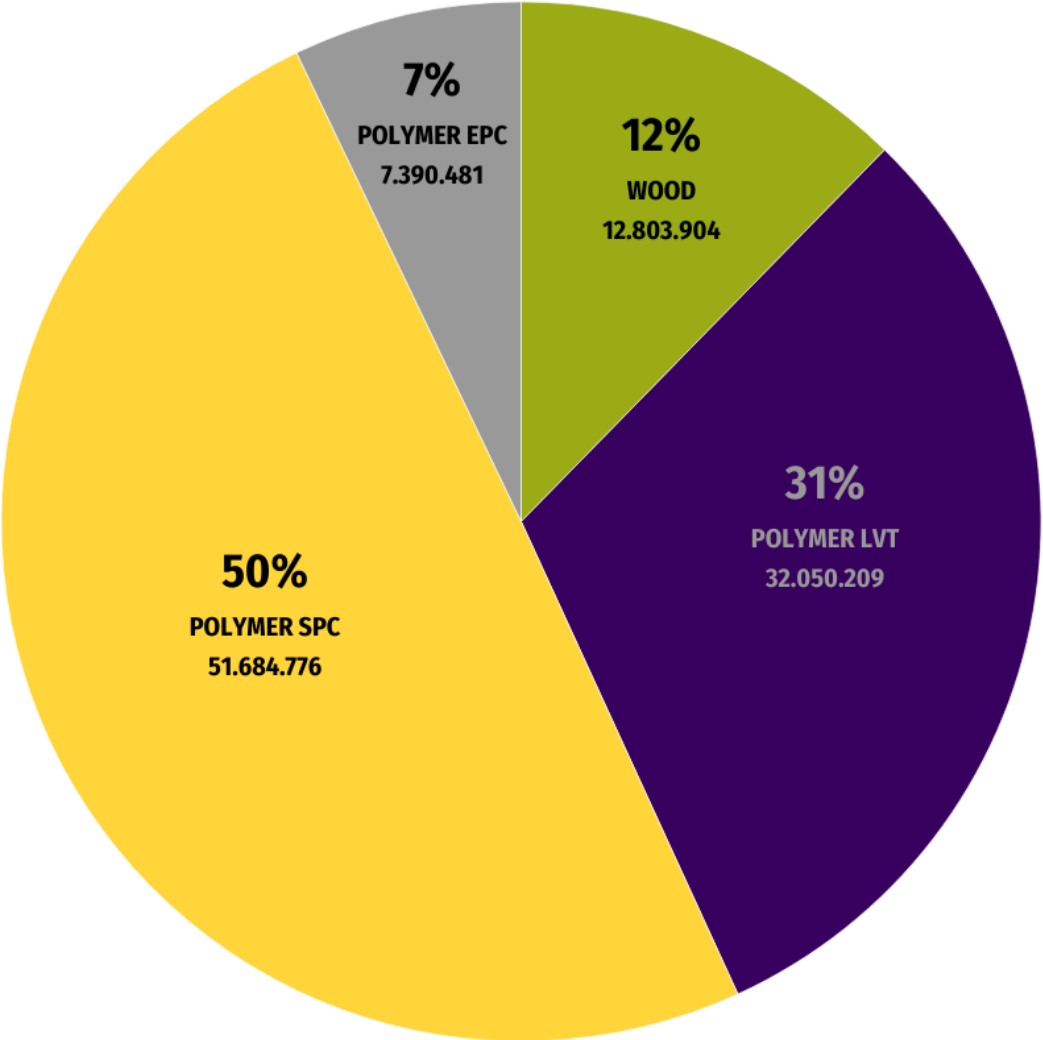
Convenor of the Market Development Committee

**Scope: sales of MMFA members into the indicated markets.*

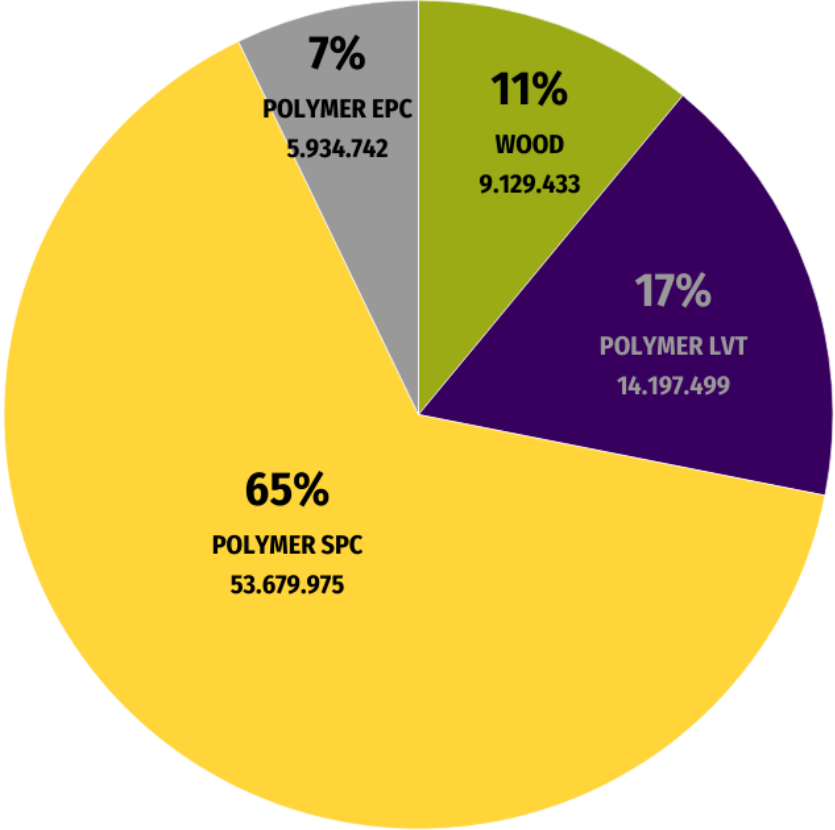
MMFA - Multilayer Modular Flooring Association



Market: MMFA members sold less in 2023 vs 2022



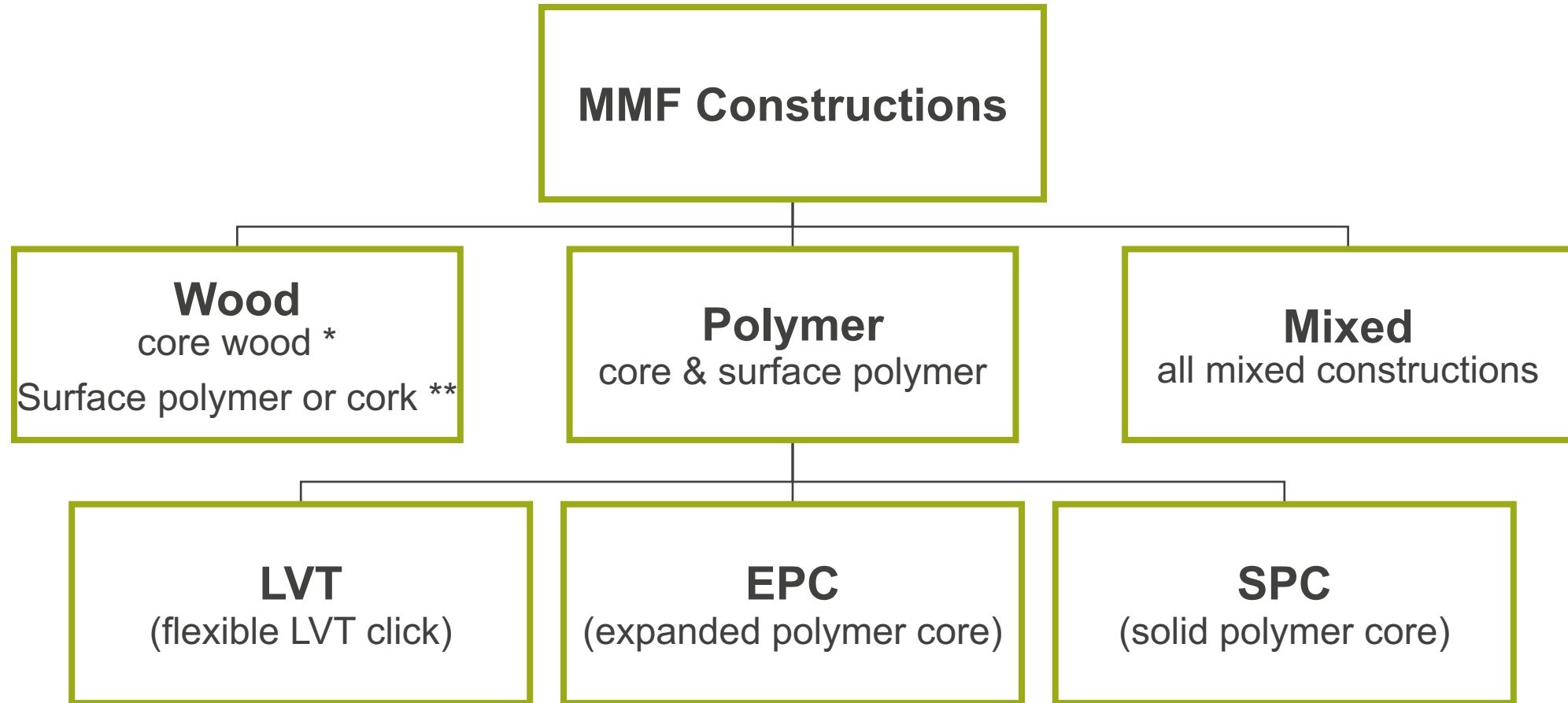
Total MMFA sales 2022
103.929.370 m²



Total MMFA sales 2023
82.941.648 m²



MMFA categories

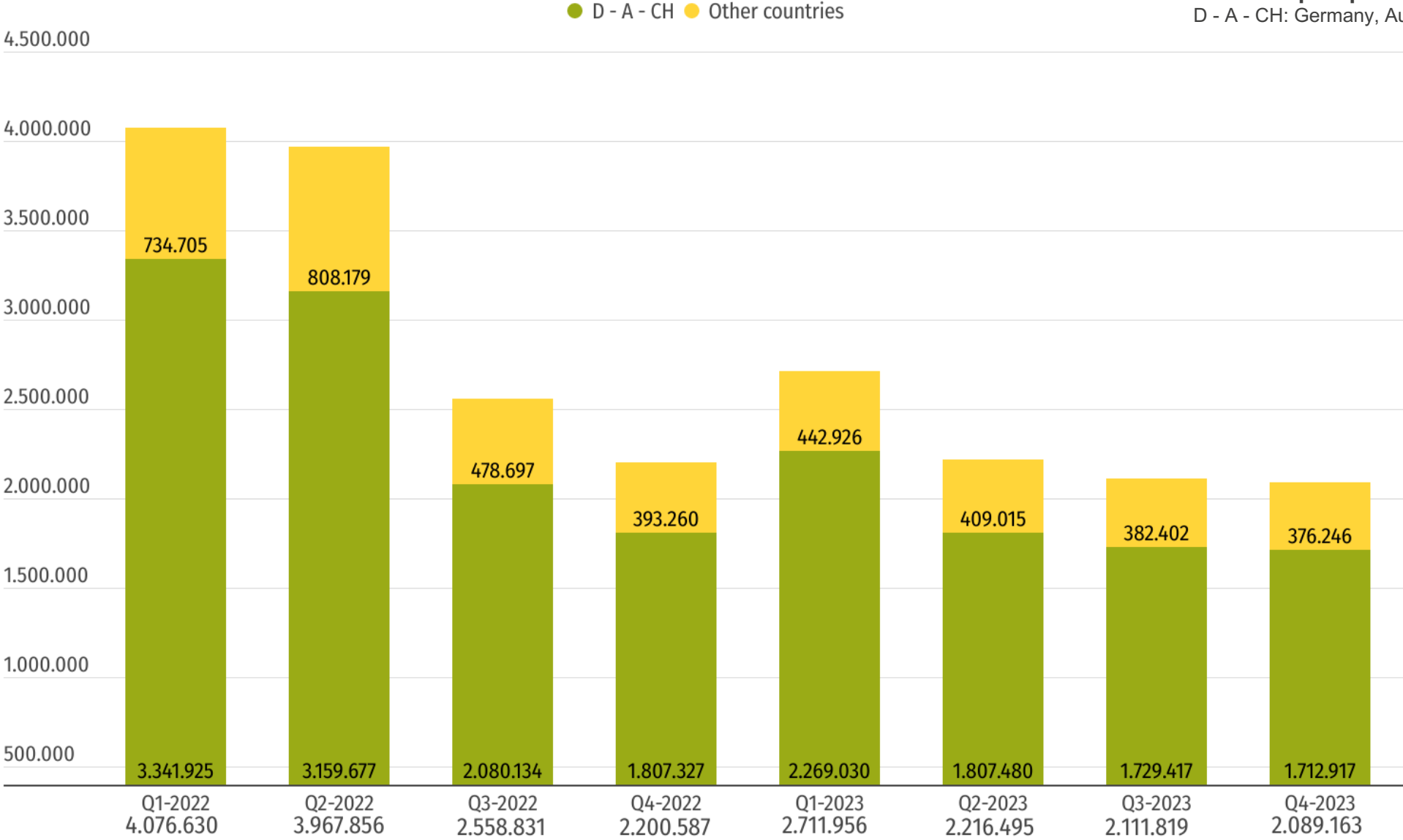


* Wood-based substrates with $\geq 65\%$ content of wood particles/fibres in the core

** Cork surface layer with cork thickness < 2.5 mm

Wood: Category wood plateauing at 2,1 million m²/quarter

MMFA sales per quarter 2022-2023 (m²)
 D - A - CH: Germany, Austria, Switzerland



Total 2023
9.129.433 m²

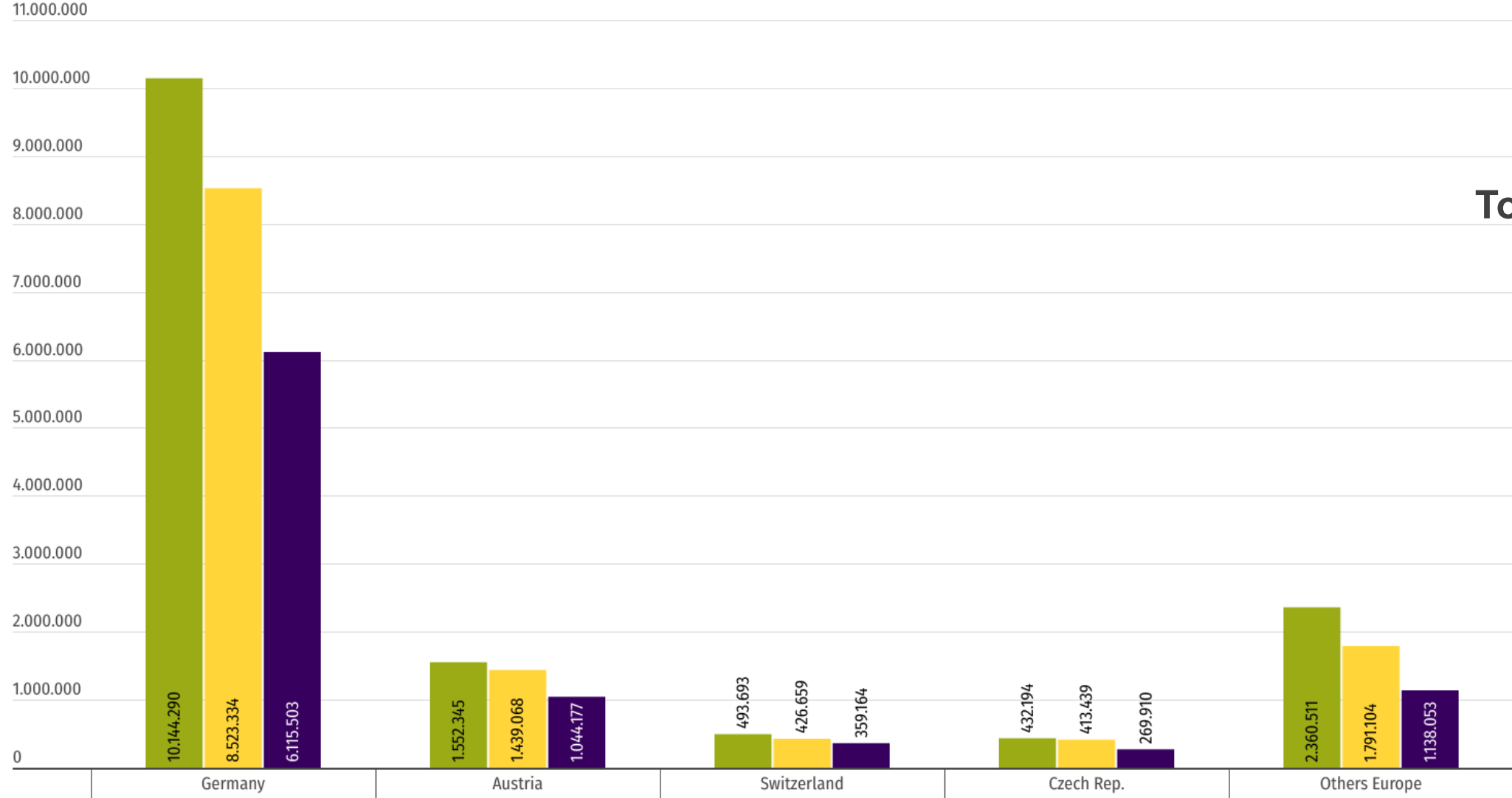
Total 2022
12.803.904 m²



Wood: D/A/CH account for almost 80% of total sales

MMFA sales Europe 2021-2023 (m²)

● 2021 ● 2022 ● 2023



Total Europe 2023
8.926.807 m²

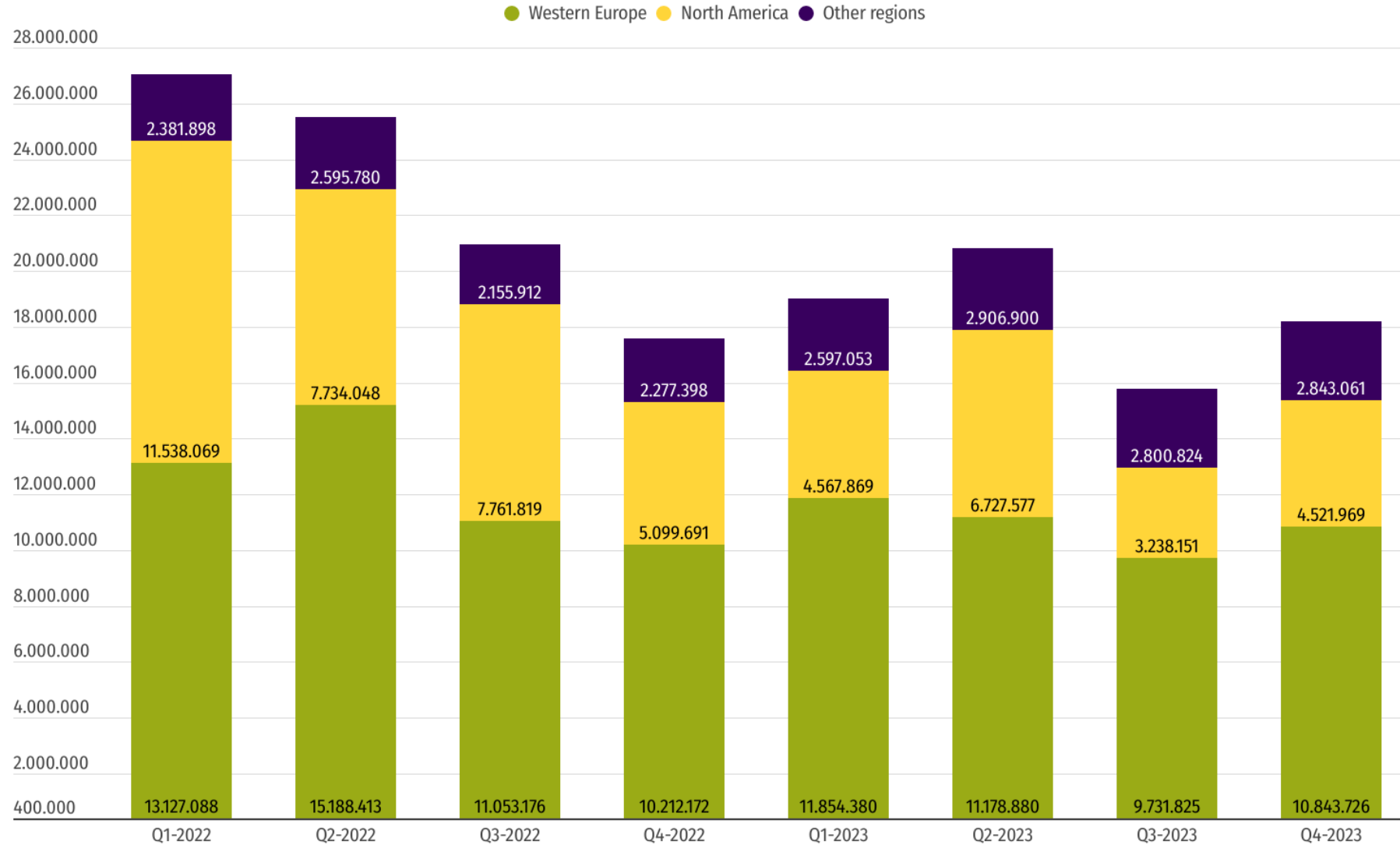
Total Europe 2022
12.593.605 m²

Total Europe 2021
14.983.034 m²



Polymer: Another challenging year

ALL POLYMERS Accrued – MMFA sales per quarter 2022-2023 (m²)



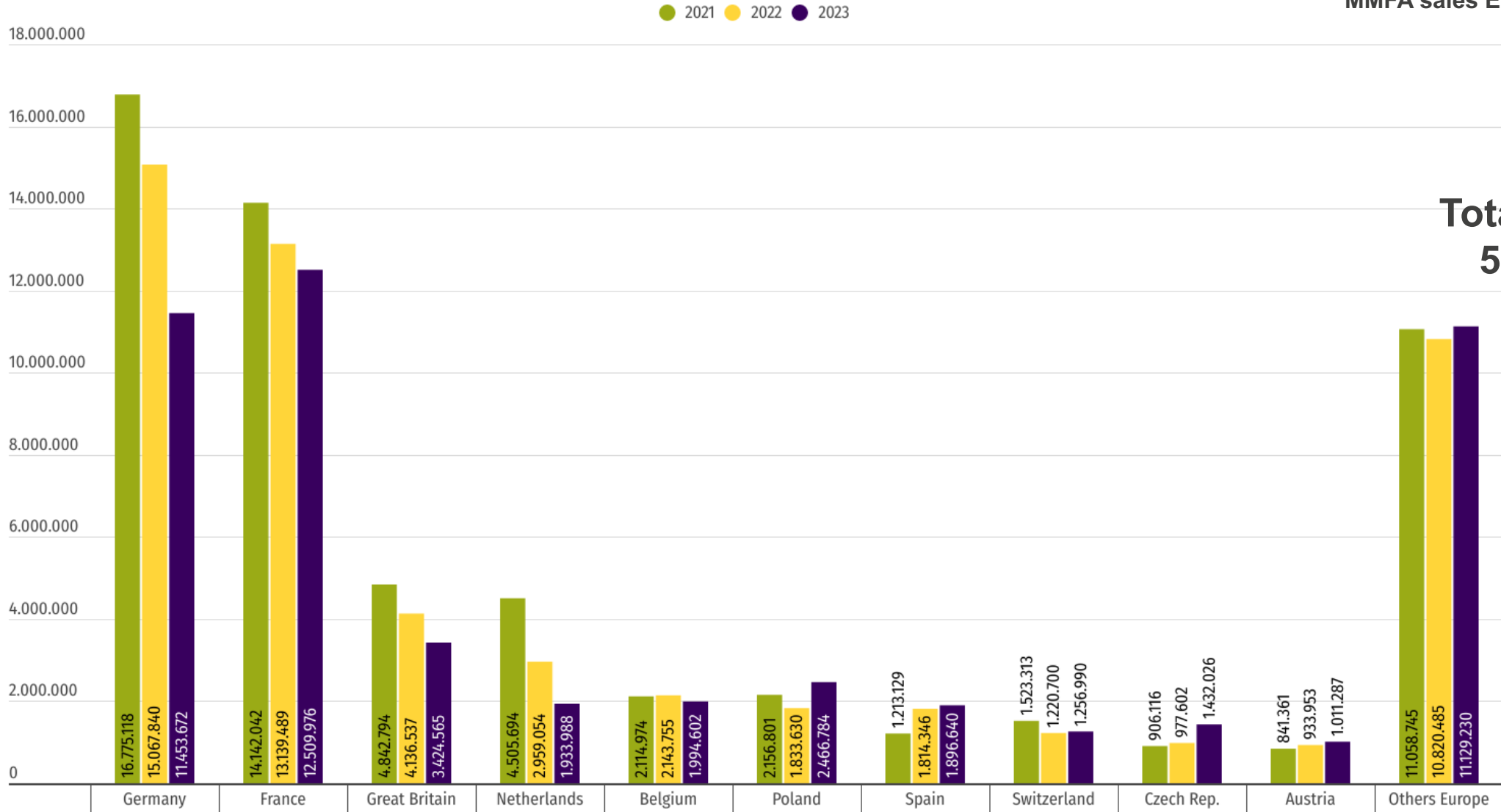
Total 2023
73.812.215 m²

Total 2022
91.125.465 m²



Polymer Accrued: France ahead of Germany

MMFA sales Europe 2021-2023 (m²)



Total Europe 2023
50,509,760 m²

Total Europe 2022
55,047,391 m²

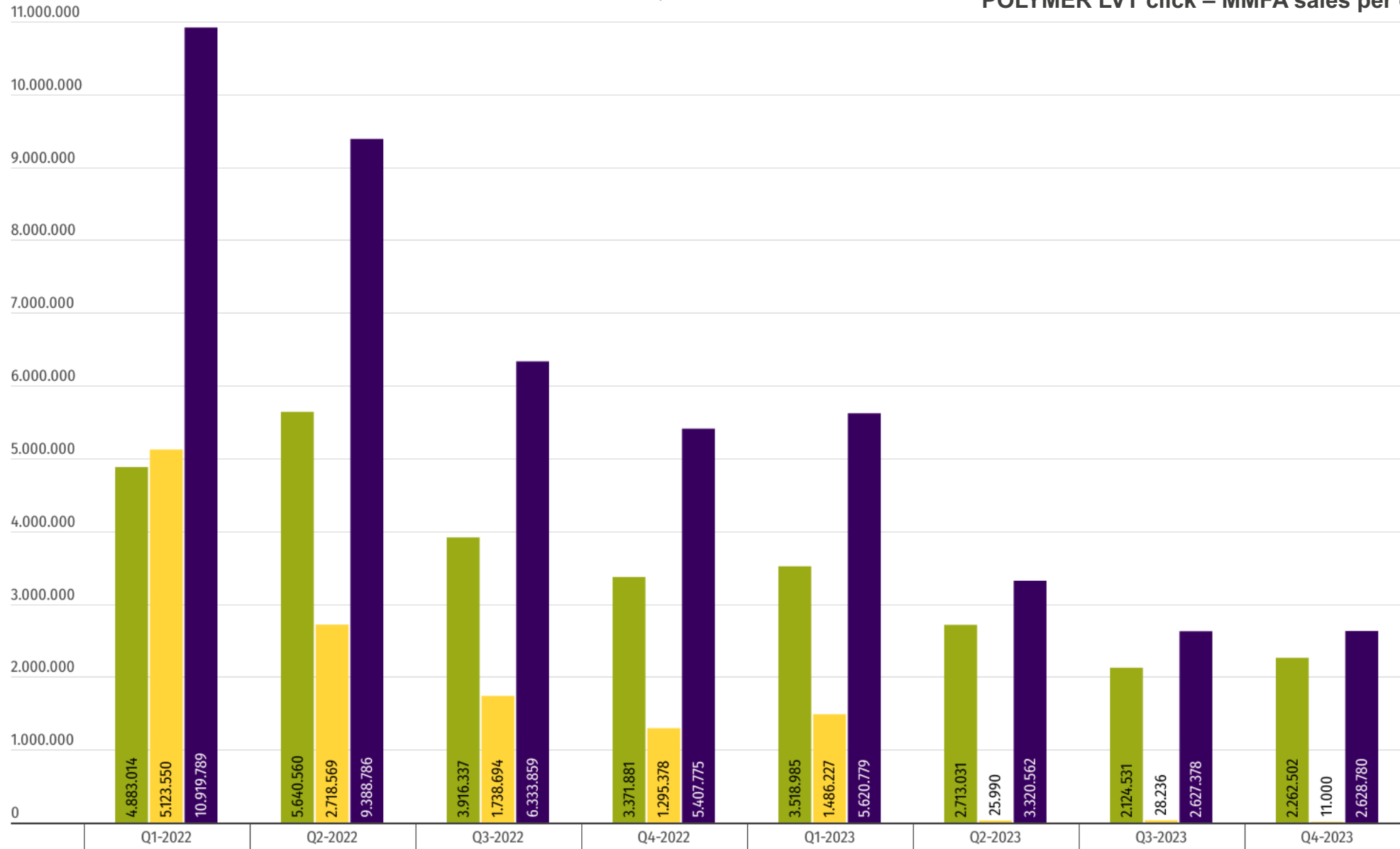
Total Europe 2021
60,080,086 m²



Flexible click: Disappeared in the US

● Western Europe ● North America ● Total

POLYMER LVT click – MMFA sales per quarter 2022-2023 (m²)



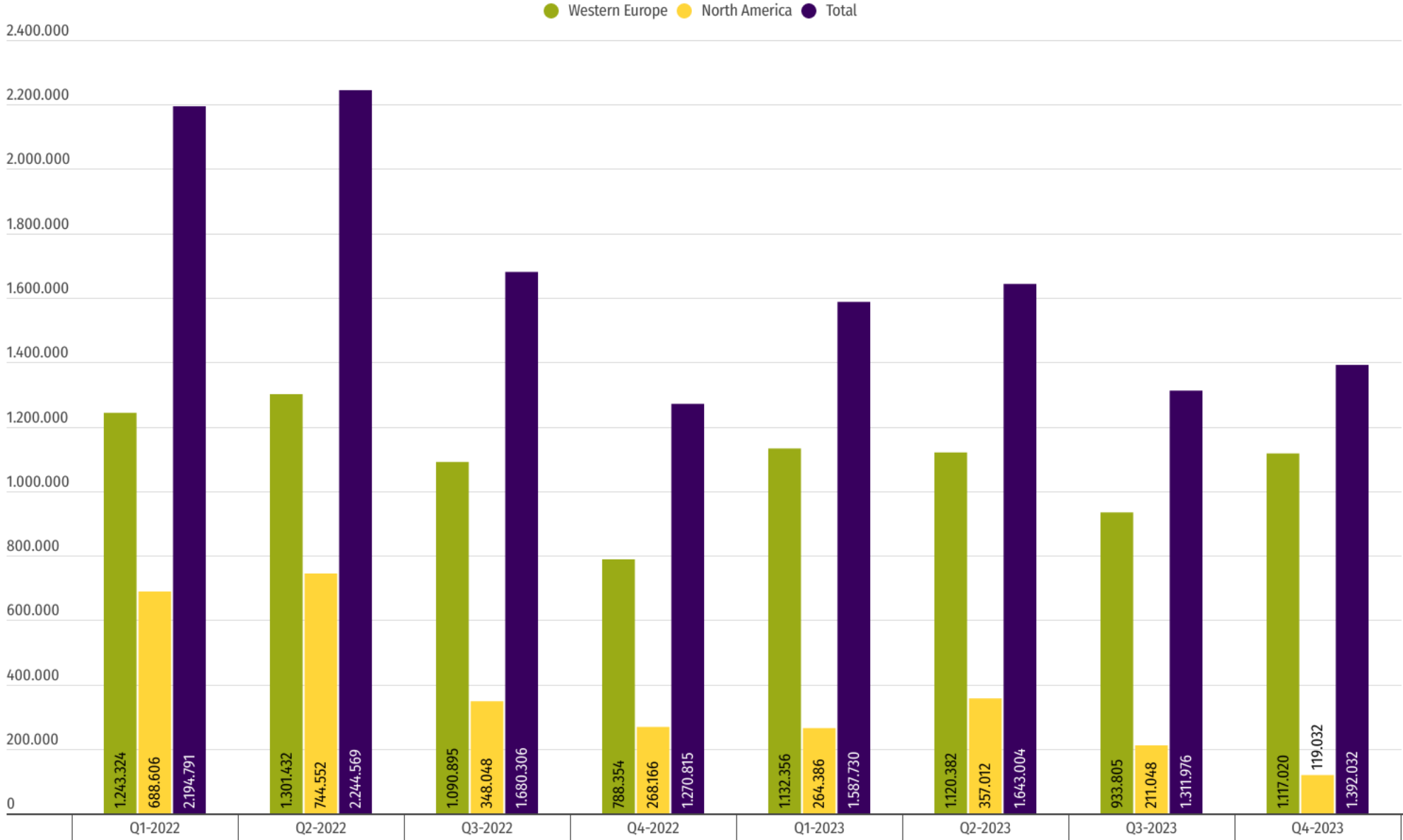
Total 2023
4.197.499 m²

Total 2022
32.050.209 m²

m
m
f
a

EPC: Smallest category 7% of total sales

POLYMER Rigid EPC – MMFA sales per quarter 2022-2023 (m²)

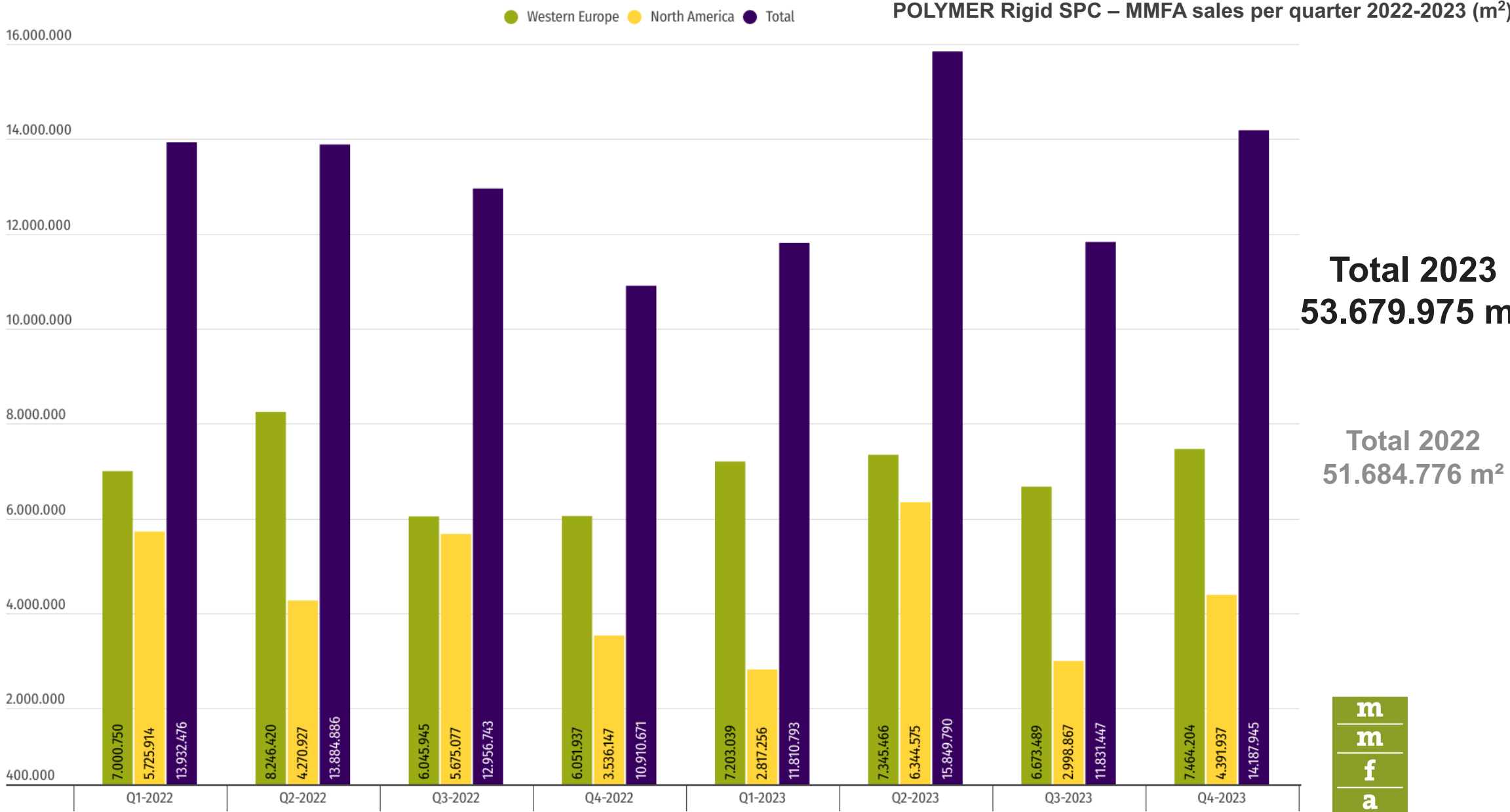


Total 2023
5.934.742 m²

Total 2022
7.390.481 m²



SPC: A growing category



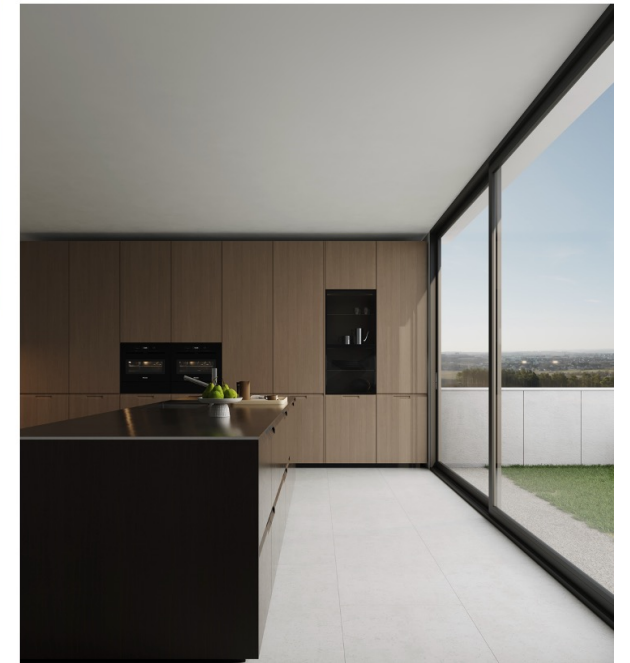
m
m
f
a

Closing remarks

Jan Dossche, COREtec
President

Product Trends

- **Sustainability:** concern for eco-conscious materials.
- **Performance:** mix of functionality and durability.
- **Natural palette:** soft hues and classic tones to offer calm and comfort.
- **Versatility:** matte finishes and realistic-looking textures and patterns.



Q&A

THANK YOU

press@mmfa.eu