

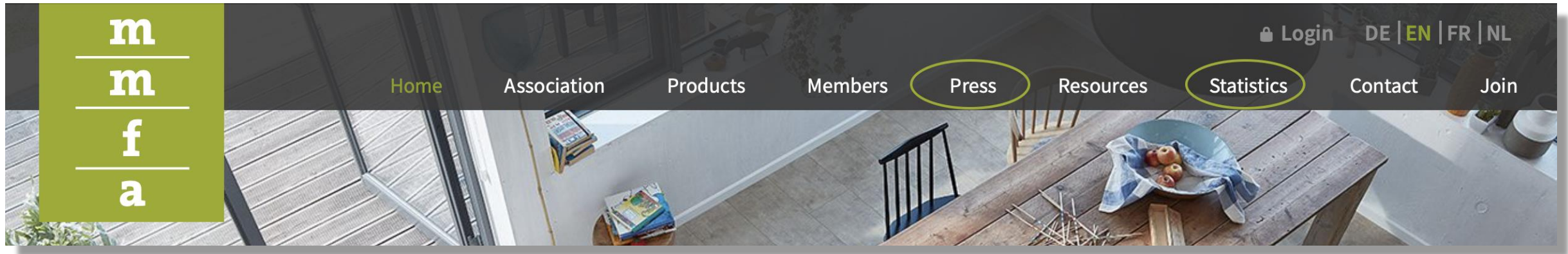
MMFA Annual Press Conference

17 March 2026

Meeting Etiquette

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

Practicalities and contact: press@mmfa.eu



MMFA welcomes new Board member



Carlos Duarte

Global Flooring Director & Executive Board Member

Amorim Cork Solutions

2025 Overview

Jan Dossche, COREtec
President

Global construction and flooring market impacted by:

Economic and geopolitical uncertainties

Persistent inflation

Disruptions to supply chains

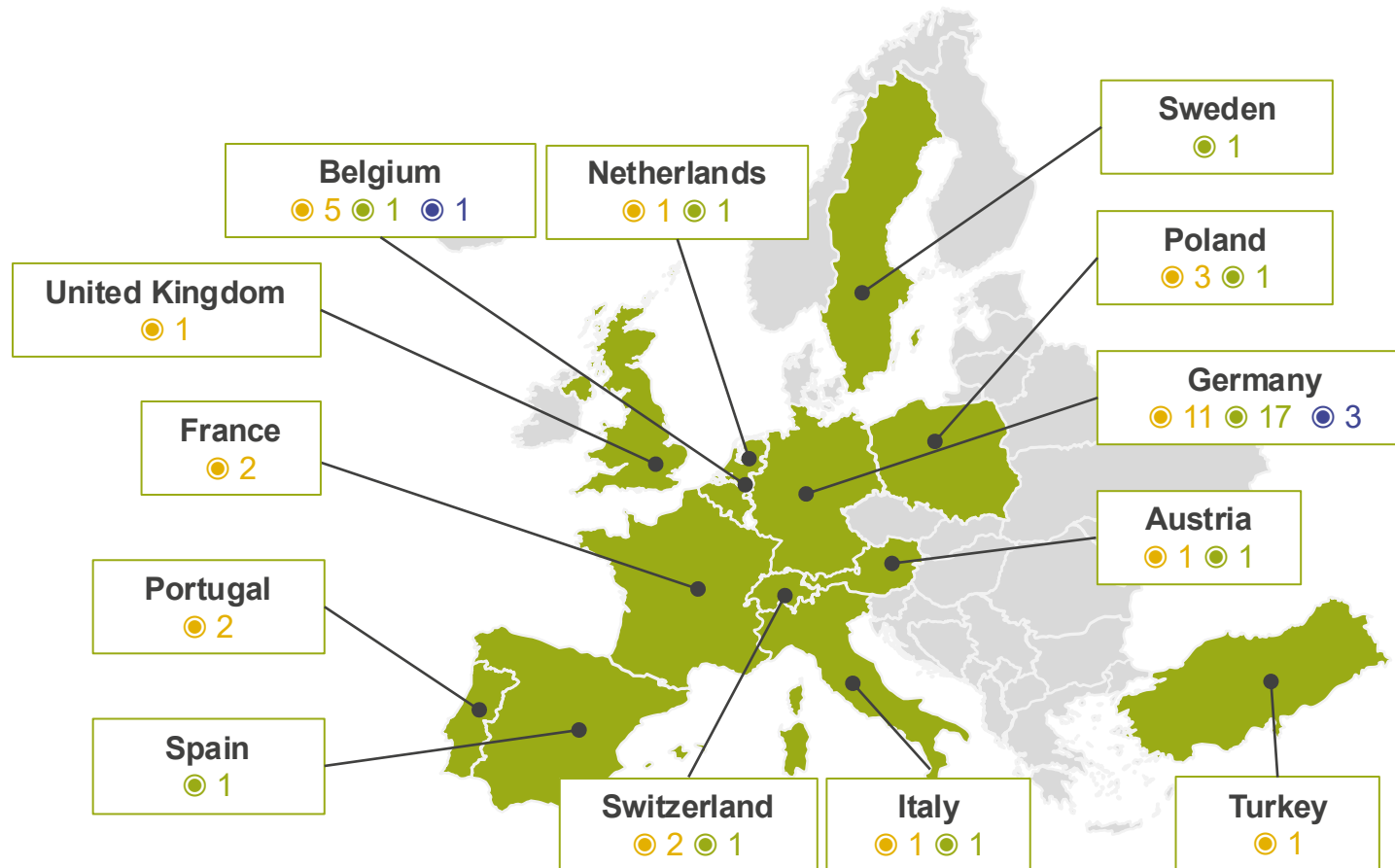
High material costs

Skilled labour shortages

MMFA - Multilayer Modular Flooring Association



MMFA welcomes new member:



● 30 Ordinary members
● 25 Associate members
● 4 Supporting members

59 members

Report from the Technical Committee

Sebastian Wendel, Classen
Convenor of the Technical Committee

Content

- Standardization
 - CEN TC 134
 - ISO TC 219
- EPD
- Circular Economy
- CPR

The requirements standard for MMF flooring -EN 16511- has been modified.

- EN 16511:2025, '**Modular mechanical locked floor coverings (MMF) - Specification, requirements and test methods for multilayer modular panels for floating installation**', was refined and republished in summer 2025.
- The standard is becoming increasingly popular and is now also commonplace in Asia.

CEN TC 134

Development of a European standard for underlay materials for MMF.

- E DIN EN 18234, '**Modular mechanical locked floor coverings for floating installation – Underlays – Specification, requirements and test methods**': the draft requirements standard was approved.
- The European requirements are based on the MMFA guideline for underlay materials.
- This enables technical compatibility between MMF flooring and underlay materials.
- **The standard is expected to be published at the end of 2026.**

CEN TC 134

Development of a European standard for the temperature resistance of MMF.

- With the approval of draft E DIN EN 18243, '**Modular mechanical locked floor coverings for floating installation – Evaluation of thermal behavior using hot spot testing**', a test procedure is now available.
- The method was developed in an IHD/MMFA research project.
- It simulates the practical behavior of installed MMF flooring when exposed to sunlight.
- **The standard is expected to be published at the end of 2026.**

ISO TC 219

Development of an ISO standard for MMF.

- ISO TC 219 WG 4 has begun developing an ISO standard for MMF based on EN 16511.
- **The aim is to establish uniform requirements for MMF products worldwide.**
- The ISO and EN standards will exist in parallel, but their content should be as consistent as possible.

EPD

Following the successful EPD projects, MMFA is moving to the next level with a Life Cycle Assessment (LCA) software tool.

- Optimal preparation for upcoming requirements in the Construction Products Regulation (CPR).
- Unlimited number of EPD's possible.
- Individualisations can optimise Global Warming Potential (GWP) figures of product.
- Can be used for product construction simulations (e.g., grid mix, raw materials, recycling content) - perfect for transition plan calculations.

Circular Economy

Solutions for sorting, collection and recycling.



Looking into our members' **take-back programs** and recycling initiatives



Monitoring the development of **EPR systems** in the various EU Member States



Sharing experience gained in the field of **sorting**, including all industry contacts



Partnering with an internationally active **recycling company** that takes back MMF products and returns recyclates

CPR Acquis Process

The update to the Construction Products Regulation will bring changes for manufacturers of MMF products by the end of 2030.

The Technical Working Group is supporting this process by:

- Monitoring and providing information on decisions taken by the European Commission.
- Actively supporting as an observer.
- Collaborating on the upcoming task of standardization.

2025 MMFA Sales figures*

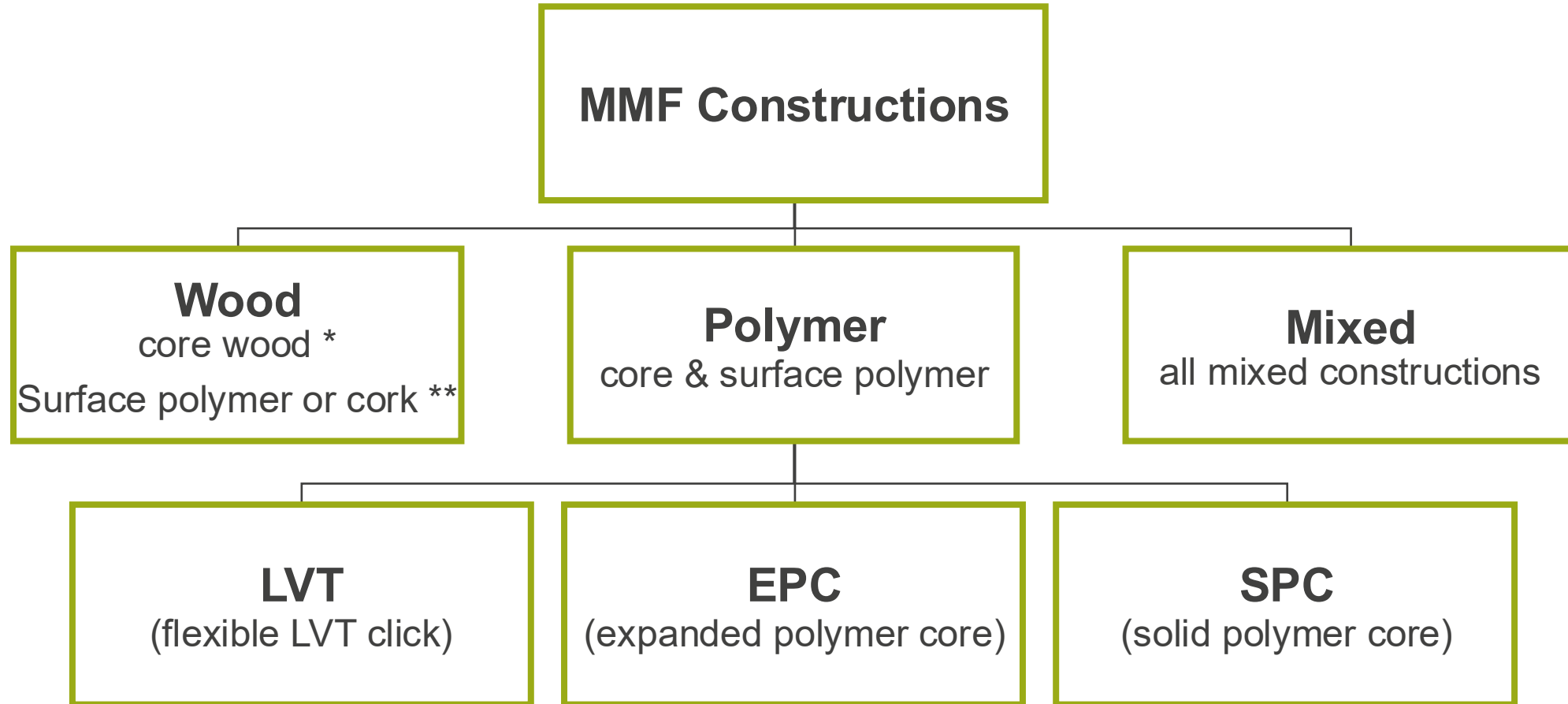
Feriel Saouli
Managing Director

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

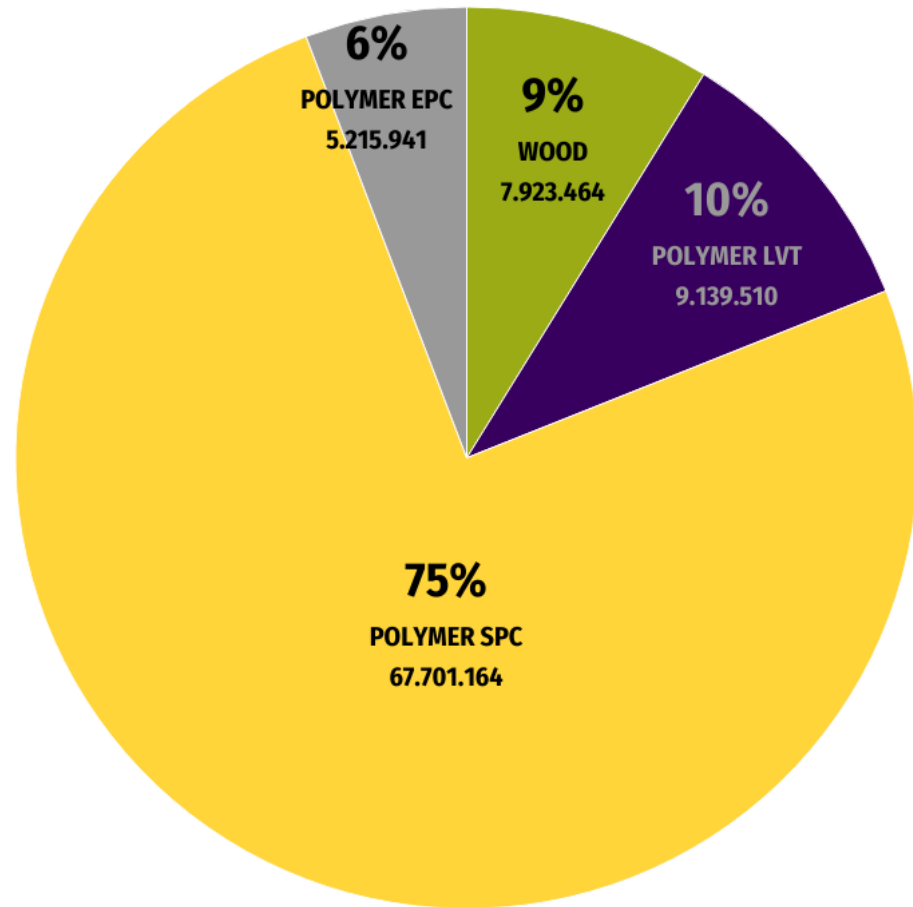
MMFA - Multilayer Modular Flooring Association



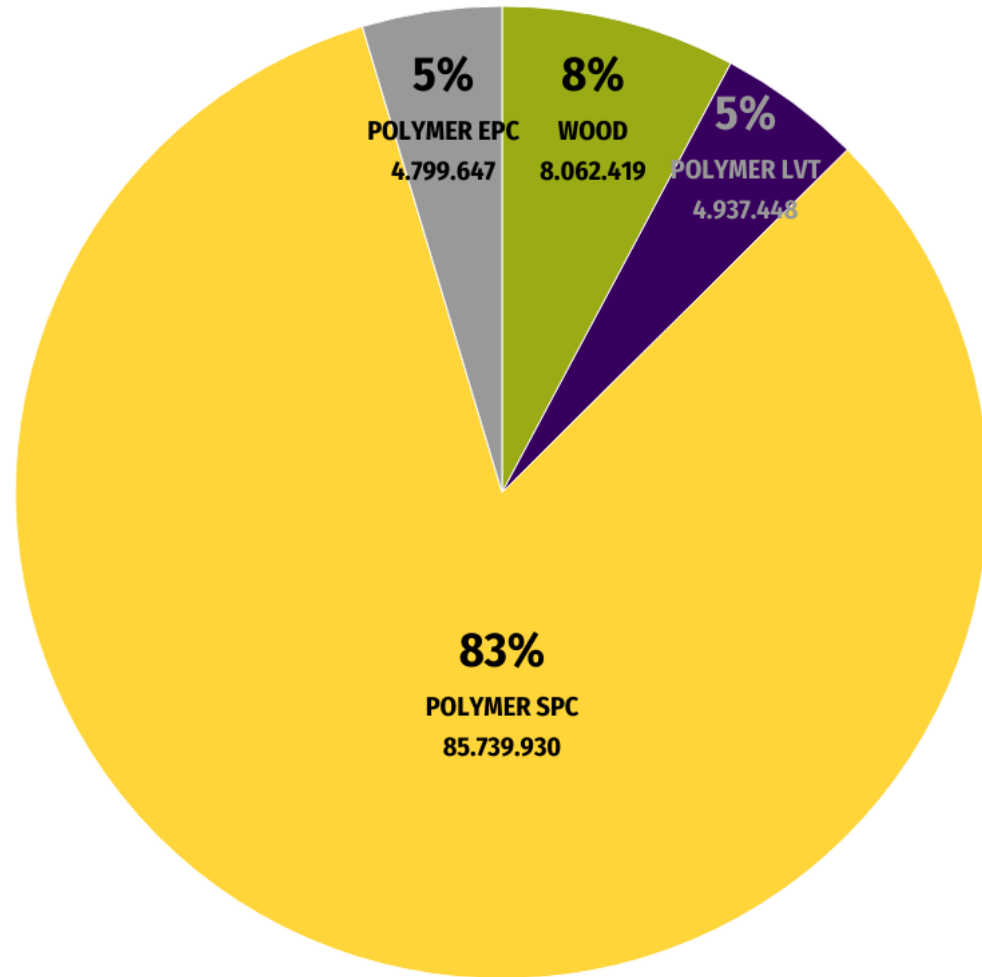
MMFA categories



Breaking the 100 million m2 mark (+15%)!



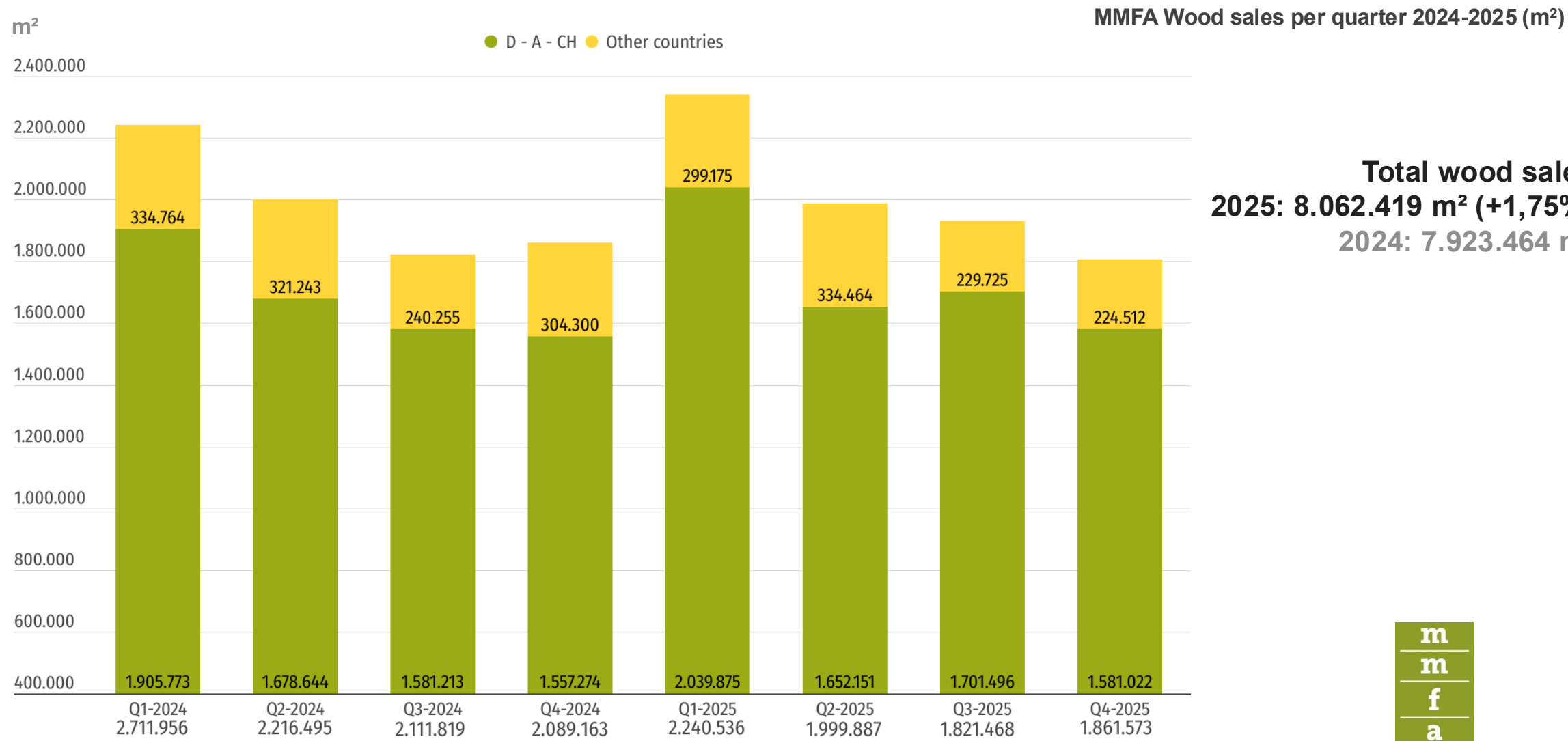
Total MMFA sales 2024
89.980.079 m²



Total MMFA sales 2025
103.539.445 m²



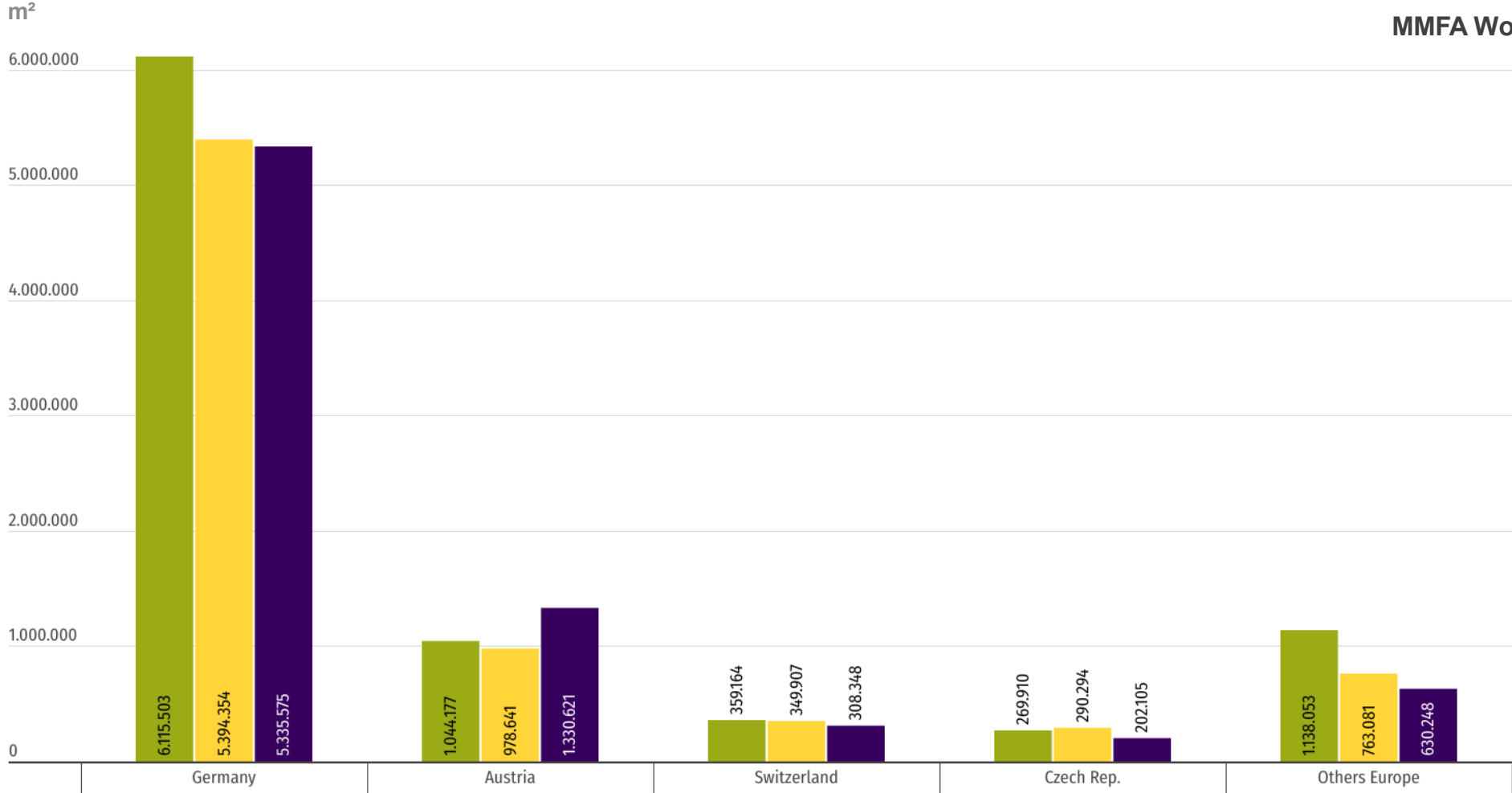
Wood: holding stable in 2025 at ca. 2 Mio m²/quarter



Wood sales driven by Germany and Austria (83% of total sales)

● 2023 ● 2024 ● 2025

MMFA Wood sales Europe 2023-2025 (m²)

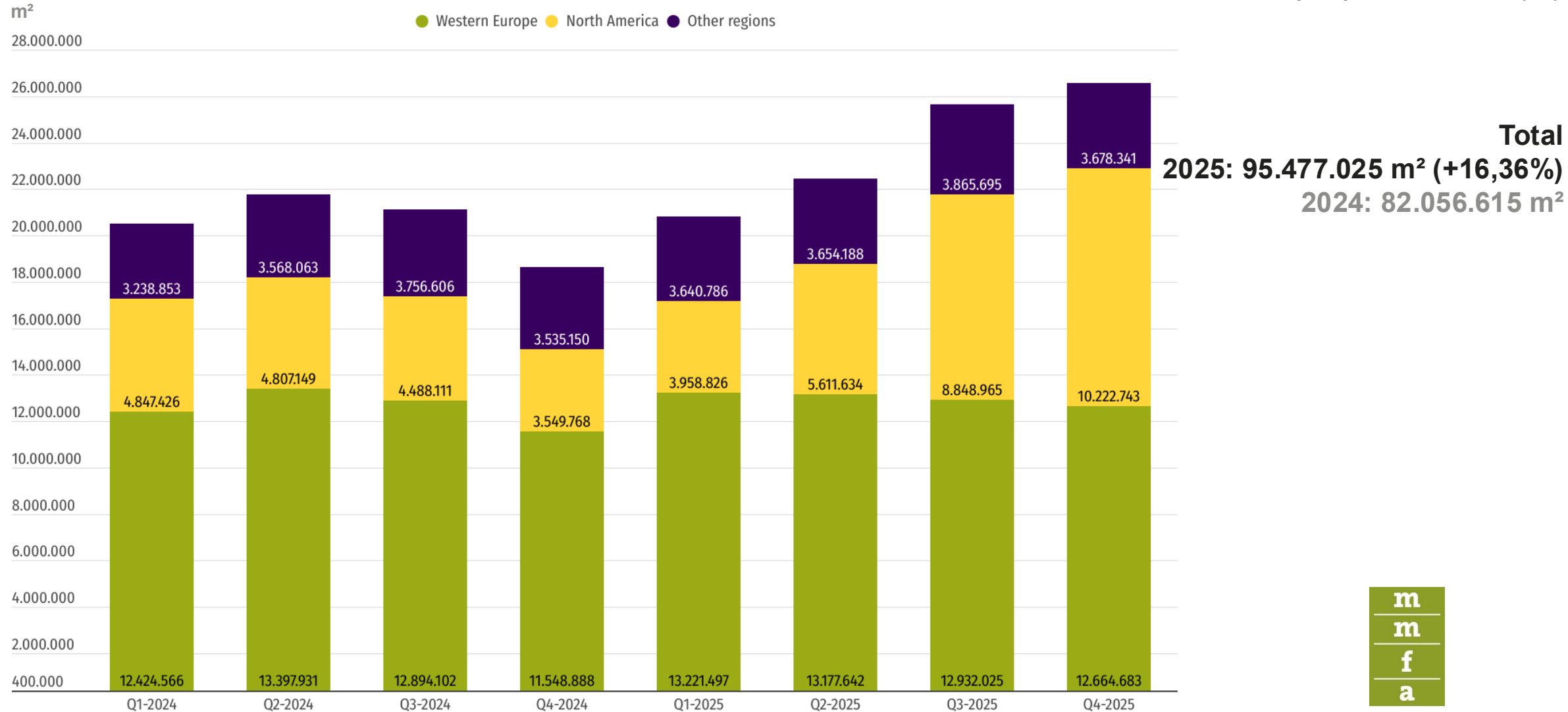


Wood sales Europe
2025: 7.806.897 m²
2024: 7.776.279 m²
2023: 8.926.807 m²



Polymers drive growth with 16% increase

ALL POLYMERS Accrued – MMFA sales per quarter 2024-2025 (m²)

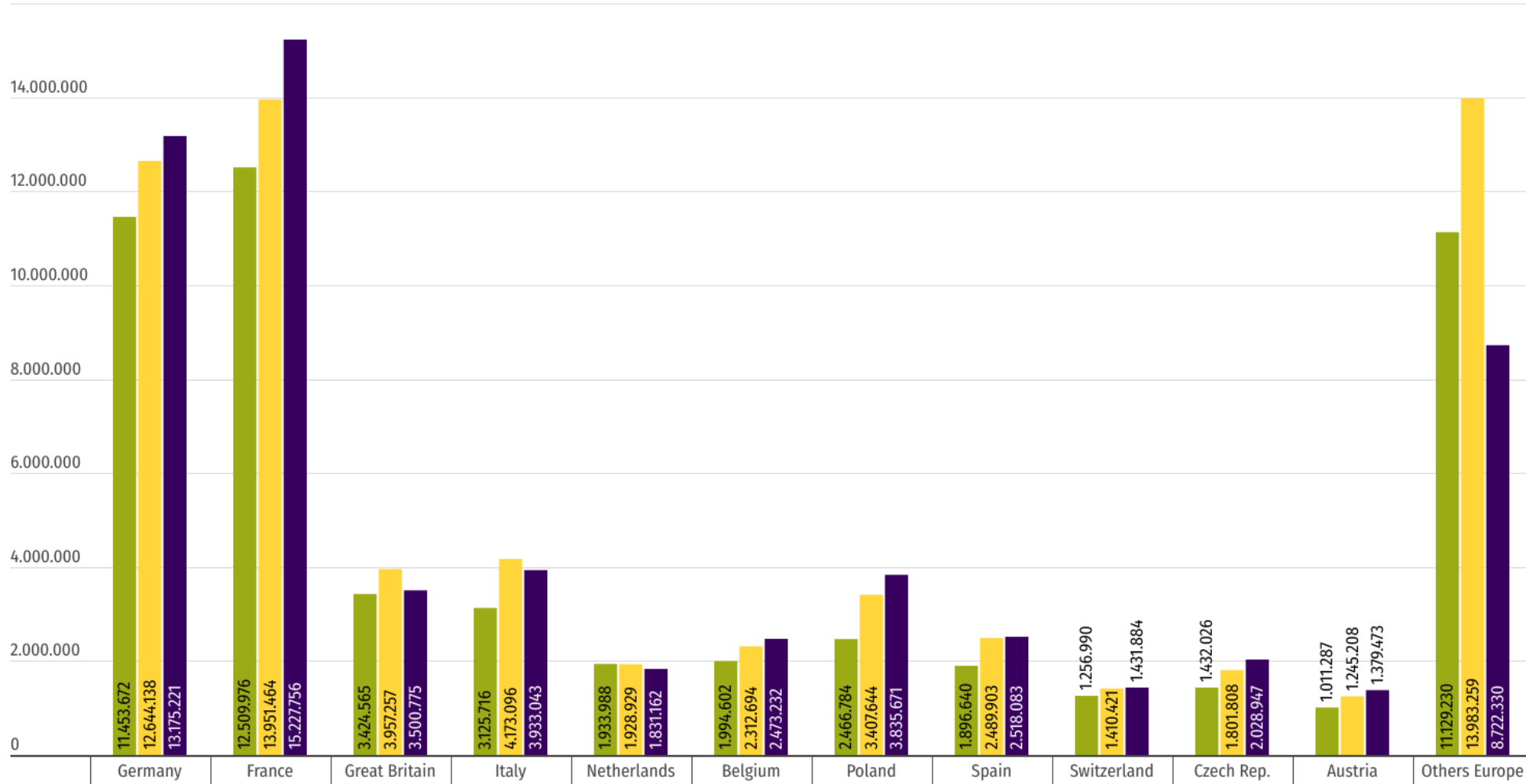


Polymer Accrued: a mixed market picture

m²

● 2023 ● 2024 ● 2025

MMFA sales Europe 2023-2025 (m²)

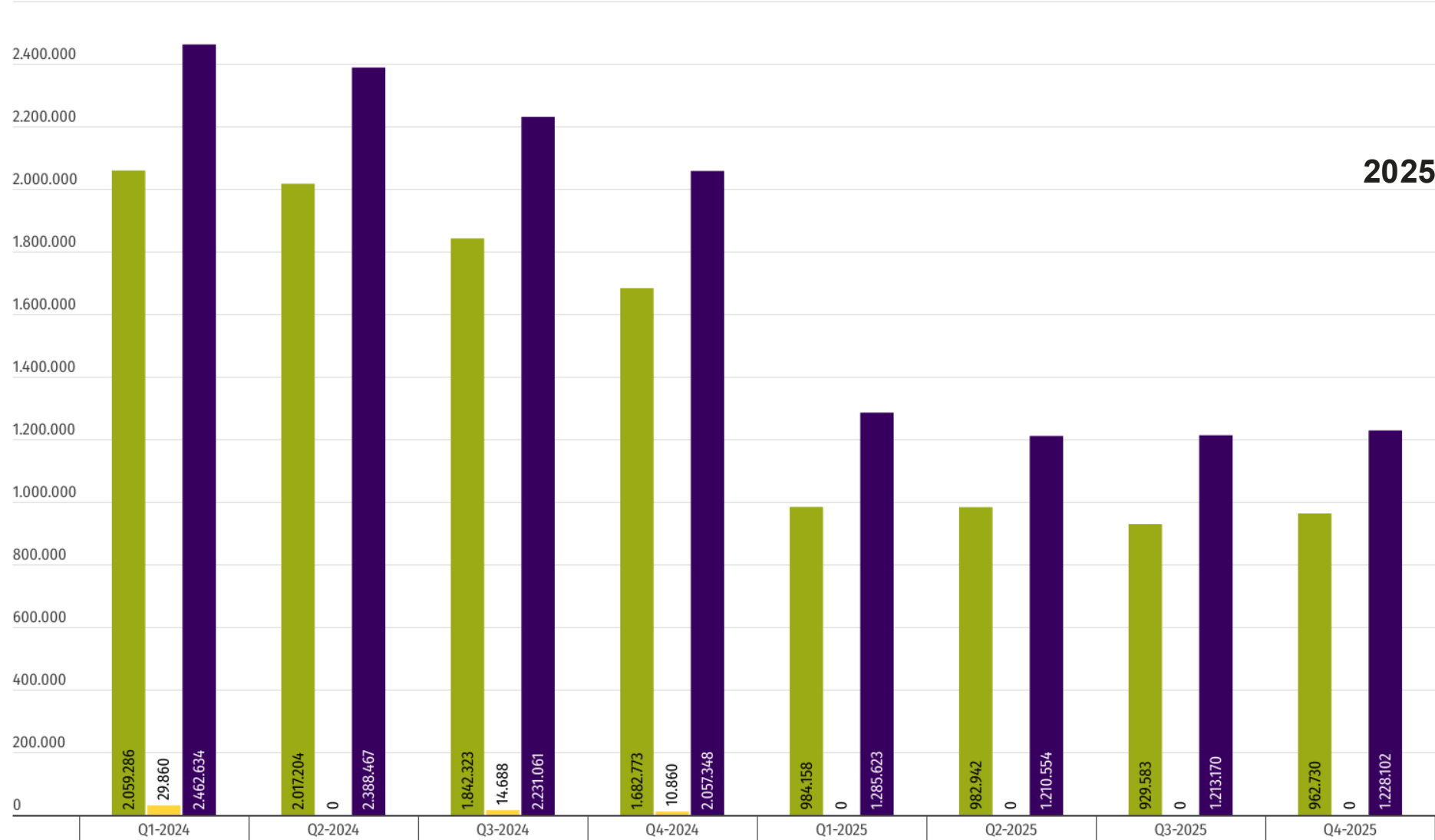


Total Europe
 2025: 61.560.122 m²
 2024: 59.132.725 m²
 2023: 50.509.760 m²



Flexible click: structural shift underway

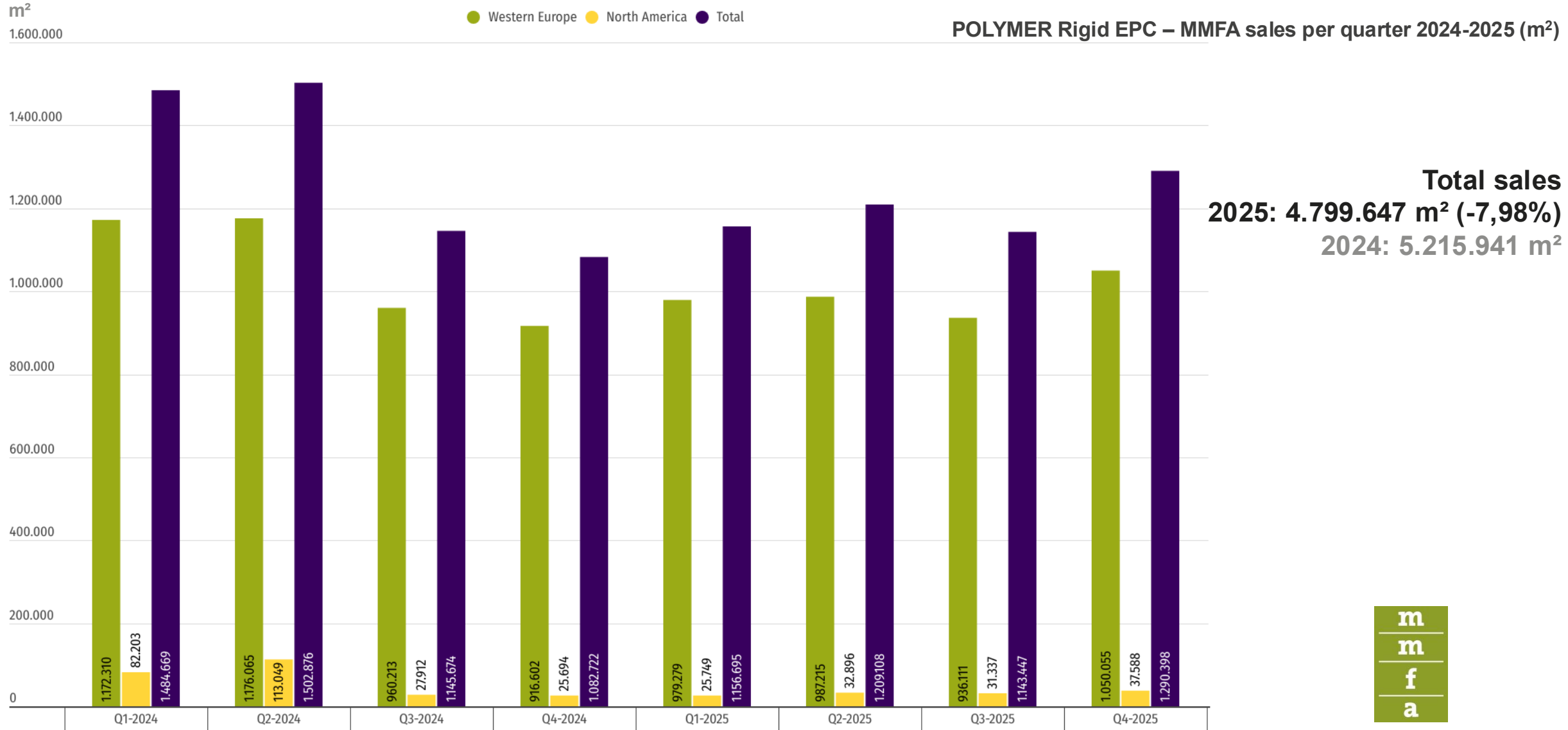
m² ● Western Europe ● North America ● Total POLYMER LVT click – MMFA sales per quarter 2024-2025 (m²)



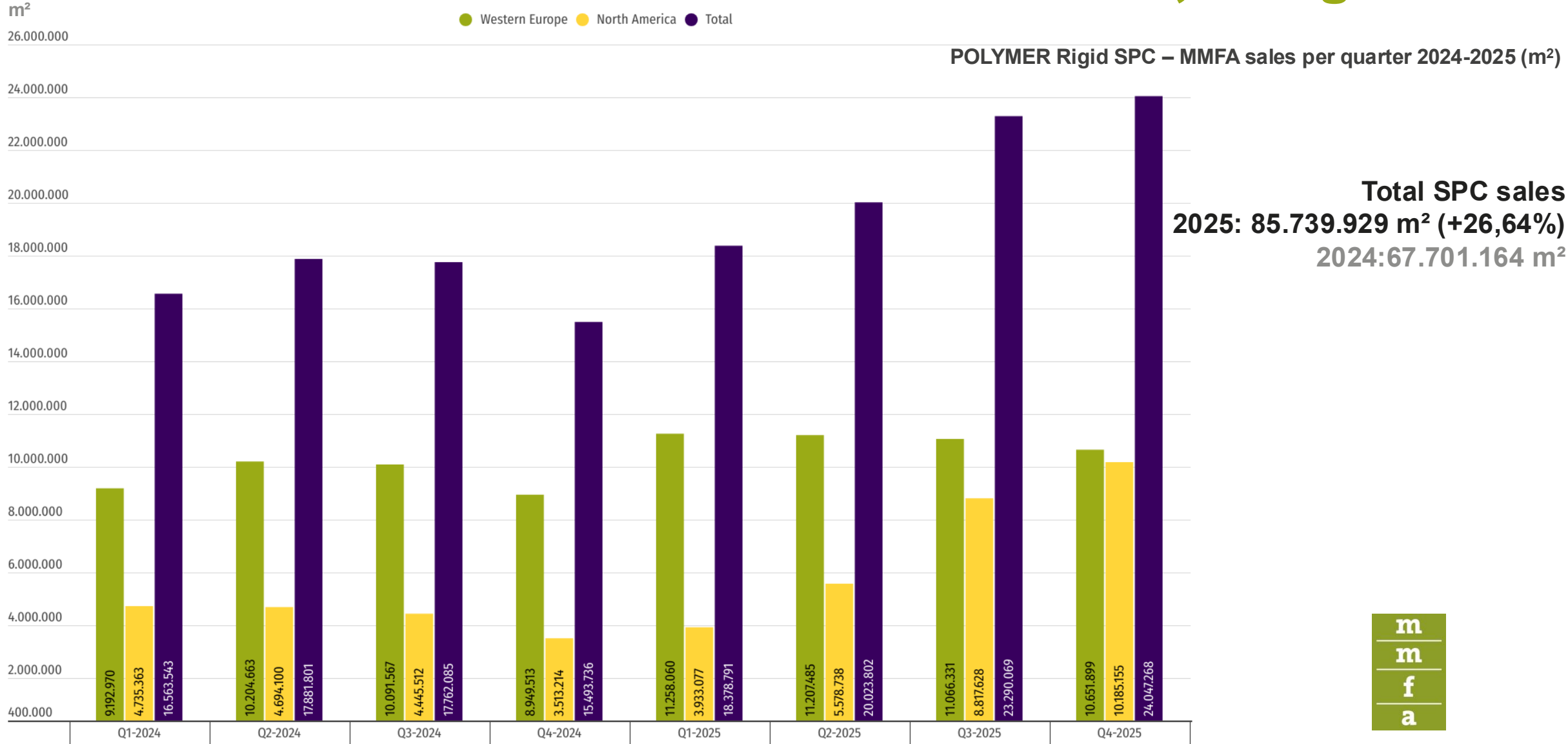
Total sales
2025: 4.937.448 m² (-45,98%)
2024: 9.139.510 m²



EPC remains smallest category with 5% of total sales



SPC continues to lead the market with +26,64% growth



Closing remarks

Feriel Saouli
Managing Director

Product Trends



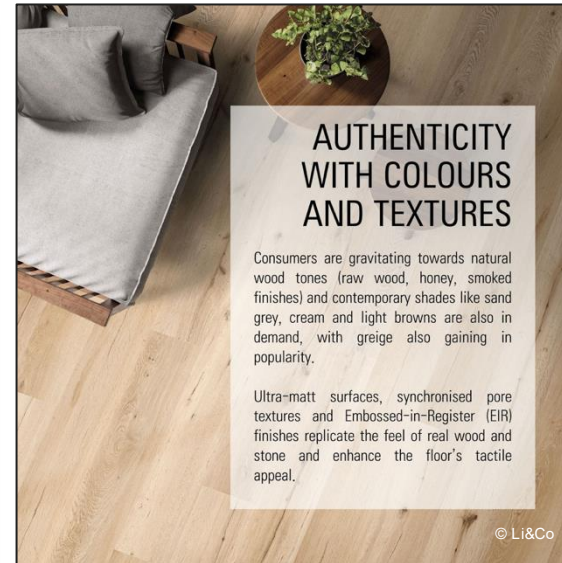
SPOTLIGHT ON SUSTAINABLE MATERIALS

With increased demand for eco-conscious and sustainable products, circular design and recyclability are becoming central to product development.

PVC-free floors, real wood and paper-based and PET-based design are gaining traction, and consumers are also looking into natural materials like cork for its environmental performance.

There is also a growing request for products with post-consumer recycled content and that can be recycled.

© Amorim Cork Solutions



AUTHENTICITY WITH COLOURS AND TEXTURES

Consumers are gravitating towards natural wood tones (raw wood, honey, smoked finishes) and contemporary shades like sand grey, cream and light browns are also in demand, with greige also gaining in popularity.

Ultra-matt surfaces, synchronised pore textures and Embossed-in-Register (EIR) finishes replicate the feel of real wood and stone and enhance the floor's tactile appeal.

© Li&Co



FORMATS THAT BOOST CREATIVITY

Design flexibility is in demand. With wide boards and long planks (over 2 meters), to herringbone, chevron and tile-like patterns, consumers can play around with different formats and layouts.

Some brands are even extending their MMF floor offering to walls, creating new design opportunities for seamless interiors, where the same decor can be used on the floor and wall.

© Decora



BLENDING AESTHETICS AND PERFORMANCE

Integrated systems combining flooring and acoustic underlays are redefining comfort, with acoustic performance becoming as important as visual appeal (to help make interiors quieter).

Innovations in click systems, grout line technology and underfloor heating compatibility are making installation easier and more efficient, without having to compromise on design.

© MeisterWerke

- Increased demand for **sustainable materials**.
- Designs that **look and feel authentic**.
- Flexibility in **design formats**.
- Blending aesthetics with **performance**.

Looking into 2026

- Finish our work on **sorting**, in cooperation with other associations.
- **Standardisation** work at CEN and ISO level.
- **Monitoring** EU policy developments.

Q&A

THANK YOU

press@mmfa.eu