DRAFT BUSINESS PLAN
CEN/TC 134
Resilient, textile and laminate floor coverings

EXECUTIVE SUMMARY

Business Environment
The carpet (textiles) industry is an important sector of the floor coverings industry since it supplies more than 50% of all floor coverings. The industry is concentrated in the Benelux, Germany, Northern France and the U.K.
The well-established resilient floor-covering sector products are rubber, polyvinyl chloride, cork and linoleum floor coverings. Total Western European consumption for 1997/1998 was approximately 280 million m². This has not risen significantly since.

Laminate floor coverings have, since their introduction around 1985, grown to about 130 million m² (production) in Europe in 1998. The total world production is estimated at 170 million m² but has not risen significantly since.

Benefits
To define and prepare European standards for Resilient, textile and laminate floor coverings including methods of test, taking account of work already carried out by ISO, European trade associations and national standard bodies whilst taking into account political, economical, social, technical, legal and international factors.

Priorities
a) to elaborate standards on Resilient, textile and laminate floor coverings;
b) The need to harmonise product specifications throughout an ever expanding European market.
c) to adjust its work programme to meet market needs;
d) to work in cooperation with committees in ISO, particularly ISO/TC 219
1 BUSINESS ENVIRONMENT OF THE CEN/TC

1.1 Description of the Business Environment

The following political, economic, technical, regulatory, legal, societal and/or international dynamics describe the business environment of the industry sector, products, materials, disciplines or practices related to the scope of this CEN/TC, and they may significantly influence how the relevant standards development processes are conducted and the content of the resulting standards:

- **Market situation**
  The carpet industry is an important sector of the floor coverings industry since it supplies more than 50% of all floor coverings. The industry is concentrated in the Benelux, Germany, Northern France and the U.K. The production is 1.2 billion m² per year in woven, tufted and needlefelt types. The total value ex works is approximately 7.5 billion ECU which is equivalent to approximately 15 billion ECU in consumer value. The industry is a mixture of large and medium sized companies employing about 65 000 people. 60% of the total production is consumed in the EU and 40% is exported to more than 90 countries. Of the 60% sold in the EU, approximately 25% are used in sectors such as construction, automotive etc.

  Products in the well-established resilient floor-covering sector are rubber, polyvinyl chloride, cork and linoleum floor coverings. Total Western European consumption for 1997/1998 was approximately 280 million m², the major product being polyvinyl chloride floor coverings at 225 million m². Total worldwide consumption in 1997/1998 was approximately 1 400 million m² of which polyvinyl chloride floor coverings accounted for 1 300 million m².

  Laminate floor coverings have, since their introduction around 1985, grown to about 130 million m² (production) in Europe in 1998. The total world production is estimated at 170 million m². The product category has at present about 4.5 % of the total floor covering market in W. Europe while in U.S.A. the consumption is estimated at about 1 % market share. Further expansion can be expected particularly in the Americas, in Asia and in Eastern Europe. The growth rate in Western Europe will gradually slow down.

- **Stakeholders**
  Interested parties in the standardization process for floor coverings are:
  
  Producers
  Test houses
  National standardization bodies
  Fire regulators
  National authorities
  Building industry
  Architects, specifiers and interior designers
  Private and public consumers and users.

  The standards published by TC 134 are used throughout the countries represented by the members of CEN.

1.2 Quantitative Indicators of the Business Environment

The following list of quantitative indicators describes the business environment in order to provide adequate information to support actions of the CEN/TC:

Since the end of the nineties the total Western and Midden European Consumption of resilient floorcoverings has shown some decrease in favour of laminate floorcoverings. This is particularly true for domestic PVC floorcoverings. Furthermore the business cycle had during recent years a depressing effect. Exports to the former CIS countries has compensated further volume losses.
Solid statistical figures are missing because of the way products are grouped by Eurostat.

For the resilient industry exports are important. Only limited quantities of PVC products are imported from the far East.

There are about 20 companies in the EU, Norway and Switzerland producing PVC floorcoverings, 3 of them are also producing linoleum. There are 2 main producers of rubber floorcoverings and some small producers. Cork floorcoverings are mainly made by one company.

The industry is very international, all major companies are selling their products throughout the EU.

Therefore having European standards and no additional local requirements is vital.

The fulfilment of ISO 9000 and 14000 standards is widely spread.

The industry has as an objective to be proactive on environmental issues. Therefore the VOC standard 15052 was developed. So far rejected because of forces outside the resilient flooring industry.

The industry is in favour of making the CE a strong safety label.

The work on product standards is with the exception of new developments completed. At present work is done to develop these standards further as ISO standards.

The industry is in favour to channel all standard work in their area via CEN and not to make exceptions via EOTA.

With good internal cooperation there is not time to be gained via EOTA, but the industry is open for a special fast track procedure via CEN.

2 BENEFITS EXPECTED FROM THE WORK OF THE CEN/TC

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3 PARTICIPATION IN THE CEN/TC

All the CEN national members are entitled to nominate delegates to CEN Technical Committees and experts to Working Groups, ensuring a balance of all interested parties. Participation as observers of recognized European or international organizations is also possible under certain conditions. To participate in the activities of this CEN/TC, please contact the national standards organization in your country.
4 OBJECTIVES OF THE CEN/TC AND STRATEGIES FOR THEIR ACHIEVEMENT

4.1 Defined objectives of the CEN/TC

Elaboration of standards on terminology, test methods, classification and specification of resilient, textile and laminate floor coverings.

4.2 Identified strategies to achieve the CEN/TC’s defined objectives.

CEN/TC 134 has decided to carry out the work on development of textile floor coverings in a Working Group (WG 8) because textile floor coverings have a dominant share of the total floor covering market and the work was considered to need different expertise to take account of the very different manufacturing techniques and materials used. Working Group 1 developed three related classification/specification standards for carpets and the test methods for the characteristics addressed.

For similar reasons to those given above it was found necessary to form a separate Working Group (WG 9) to deal with the market area of laminate floor coverings. This was also felt to be necessary as a compromise between the competing claims of TC 134 and TC 112 (Woodbased panels) to take ownership of this area of technical activity.

The work on resilient floor coverings is carried out in working group 7. The separate specification standards all relate to a classification standard relevant to all resilient floor coverings and to laminate floor coverings.

5 FACTORS AFFECTING COMPLETION AND IMPLEMENTATION OF THE CEN/TC WORK PROGRAMME

Factors that could place constraints on the completion of the proposed Work Programme.

- Delays in translation, particularly at updating stage after Enquiry and before Formal Vote.
- Problem of adequate liaison with “horizontal” TCs such as TC 127, especially at the working group or ad hoc group meeting level, particularly as TC 127 is responsible for making proposals on fire classification to the fire regulators.
- Financial costs of participation in meetings.