

Wood surface industries on INDIA-EU FREE TRADE AGREEMENT EPF and ICDLI Urge EU to Safeguard Industrial Competitiveness

Brussels / Frankfurt am Main, 18/09/2026. The European Panel Federation (EPF) and the International Committee of the Decorative Laminates Industry (ICDLI) have published a joint position paper on the Free Trade Agreement (FTA) between the European Union and India. While both organisations support open and rules-based trade, they emphasise the need for effective safeguards to ensure a level playing field for the European wood-based panels and the decorative high-pressure laminates (HPL) industry.

According to the associations, the proposed agreement presents both opportunities and challenges. In particular, the removal of tariffs could increase competitive pressure on European manufacturers and, through rising imports from India, have indirect consequences for the entire value chain of wood-based panels and HPL. Of particular concern is the indirect route through furniture: increased furniture imports from India risk displacing European furniture manufacturers, a major outlet for panels and HPL, which would directly reduce demand for European panel production and weaken the entire value chain. This dynamic has already been observed in other sectors following unconstrained trade liberalisation.

“Europe benefits from open markets and international trade. At the same time, free trade agreements must ensure that European companies can compete under fair and comparable conditions. Our joint position paper outlines the key requirements that should be addressed within the framework of the EU-India FTA,” said Matti Rantanen, Managing Director of the EPF.

EPF and ICDLI also point to structural differences in competitiveness, global overcapacities and the risk of circumvention practices and re-exports via third countries. In addition, the organisations see a need for stronger enforcement of existing EU legislation and more effective controls on imported products. Data from a recent EU Commission report illustrate the scale of the problem: only 82 out of every one million imported products are inspected by customs authorities and of those inspected, 13 are refused entry due to non-compliance, a failure rate of approximately 16%. The organisations also flag the specific risk that plywood and HPL incorporating inputs from sanctioned Russian and Belarusian wood could enter the EU market under Indian origin.

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Press release

Industry calls for safeguards and stronger market surveillance

In their position paper, EPF and ICDLI call for robust and rapidly deployable safeguard measures, enhanced monitoring of trade flows and stricter enforcement of compliance with European standards. Furthermore, the European Commission should address existing non-tariff barriers in India to ensure fair market access for European manufacturers. Concretely, this means securing the removal of Indian import tariffs on EU panels and HPL, and reforming India's Bureau of Indian Standards (BIS) certification process, currently a significant obstacle for European exporters due to its divergence from internationally recognised ISO standards. The organisations also stress that safeguard measures must be activable for injury that has already commenced: ICDLI data indicate that HPL import growth from India into the EU has already been outpacing EU production, meaning the challenge is not merely prospective.

"The challenges facing the European wood-based panels and HPL value chain can only be addressed through close cooperation. By publishing this joint position paper, EPF and ICDLI are combining their expertise and sending a clear message to policy-makers: free trade and industrial competitiveness must go hand in hand," said Sven Weihe, General Secretary of the ICDLI.

Through this joint initiative, EPF and ICDLI underline their commitment to strengthening the competitiveness, resilience and long-term sustainability of the European wood-based panels, decorative laminates and furniture industries within the framework of future trade agreements.

The full position paper is available on the websites of EPF and ICDLI.

About the EPF

The European Panel Federation has members in 30 European countries and represents the manufacturers of particleboard, MDF, OSB, hardboard, softboard and plywood. The EU wood-based panels industry has an annual Turnover of about 25 billion euro and creates over 100,000 jobs annually. Our panels are deeply embedded in key European value chains: approximately half of production supplies the furniture industry, supporting millions of additional jobs downstream, while a further 40% serves the construction sector. The remainder feeds into packaging and other applications.

About the ICDLI

The ICDLI International Committee of the Decorative Laminates Industry is the association of European HPL manufacturers and their suppliers. It is the European voice of the HPL industry and an important interface to the media, politics, society and science.

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