



International Committee of the Decorative Laminates Industry

Press release

EUROPEAN HPL SUMMIT 2026: new data presented

European HPL market remains under pressure – but sales point to resilience

Frankfurt am Main, 13/10/2026. The European High Pressure Laminate (HPL) community met last week in Helsinki for the EUROPEAN HPL SUMMIT 2026, organised by the International Committee of the Decorative Laminates Industry (ICDLI). Around 80 participants from across Europe – including HPL manufacturers, suppliers, designers and further industry experts – came together to discuss current market developments, regulatory challenges, sustainability and design solutions as well as future technologies.

The latest ICDLI market data presented at the Summit show that European HPL manufacturers continued to face a challenging market environment in 2025. Production by European manufacturers organised in the ICDLI amounted to approximately 275 million square metres, compared with around 292 million sqm in 2024. HPL accounted for approximately 201 million sqm, while thin laminates contributed 47 million sqm and compact laminates around 27 million sqm.

The decline reflects continued pressure in several important downstream markets. High financing costs, subdued consumer demand and geopolitical uncertainties have affected investment in furniture, interior design and construction. At the same time, manufacturers continue to face high energy and raw-material costs and increasing international competition.

The latest ICDLI member survey underlines this growing competitive pressure. 85% of respondents reported either moderate or significant increases in competition from non-European suppliers over the past two years. India was identified most frequently as a source of increasing competitive pressure, mentioned by 84.6% of respondents, followed by China at 30.8%.

“European HPL manufacturers are operating in an increasingly competitive international environment,” said Miguel Nogueira, President of ICDLI. “This makes it all the more important that we strengthen our industry through innovation, quality and close cooperation across the value chain. The European HPL Summit is an important platform to drive this forward.”

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Experts discuss design, technology and regulation

Against this market backdrop, the Summit provided a broad programme reflecting the diverse challenges and opportunities facing the HPL industry.

Elke Malek, Head of Design at Hadi Teherani Design, opened the conference with a perspective on the relationship between design and sustainability in her presentation “Designing Beauty, Sustaining the Earth”. **Dr Antti-Jussi Tahvanainen**, Head of Strategic Foresight at VTT Technical Research Centre of Finland, then explored the potential of artificial intelligence to support foresight and the future of the forest-based economy.

Regulatory developments were another important focus of the programme. **Dr Michael Peham** of Fundermax and Speaker of the ICDLI Technical Commission addressed EU chemicals policy, with a particular focus on melamine. **Maija Rantamäki** of the Finnish Forest Industries Federation provided insights into the concrete implications of the EU Deforestation Regulation (EUDR) for the Finnish forest industry supply chain.

The programme then turned to the HPL industry's raw-material supply chain. **Kimmo Kohvakka**, member of the Management Team at MM Kotkamills, presented current dynamics in the saturating kraft paper market. **Markus Höchli** of the ICDLI Market Research Group concluded the programme with the latest ICDLI Market Report.

“The strength of the European HPL Summit lies not only in the quality of its presentations, but also in the conversations that take place between them,” said Miguel Nogueira. “Bringing together different perspectives from across our value chain helps us understand where our industry is heading and how we can shape its future together.”

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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