



Cerameunie The European Ceramic Industry Association

**Activity report
2013**

Published by Cerame-Unie

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Foreword

Dear Reader,

We are pleased to present Cerame-Unie's Activity Report for the year 2013.

Throughout 2013 the association has advanced its role as the voice of the ceramic industry to the EU institutions. Cerame-Unie covers a wide range of dossiers affecting the ceramic industry including environment & health, climate & energy, trade & internal market, research and construction.

Through its *Ceramic Days* and European Parliament Ceramic Forum (EPCF), Cerame-Unie actively facilitates discussion between EU officials and representatives of the European ceramic industry on topics of mutual interest.

Moreover, Cerame-Unie holds the Secretariat of seven out of its nine sectors and therefore organises and participates in a number of sector-specific activities.

The association was involved in many environment and health issues, ranging from the Industrial Emissions Directive and the REACH Regulation to Respirable Crystalline Silica, by providing input to studies and consultations.

Regarding climate and energy, Cerame-Unie participated in consultations on the reform of the ETS, the revision of the carbon leakage list and the 2030 Climate & Energy Framework. Furthermore, Cerame-Unie contributed to the study requested by the European Commission on energy prices in several sectors, including two ceramic sectors. Last but not least, the association was active in the revision of the Environmental and Energy State Aid

Guidelines which were adopted in April 2014.

Cerame-Unie continued to tackle market access issues and to represent the industry in relation to trade defence inside and outside the EU. Origin marking was brought to the foreground in 2013 in the EU with the Product Safety and Market Surveillance Package and in the EPCF with two high-level debates.

Cerame-Unie was also active in a number of research projects and Public-Private Partnerships dealing with various aspects of energy and resource efficiency in the ceramic industry.

Construction activities centred around the environmental performance of construction products and the creation of a harmonised European standard based on a Life Cycle Assessment approach. This topic was also the subject of one of Cerame-Unie's two public events held during the *Ceramic Days*, the other being EU enforcement of trade rules.

The EPCF calendar was especially full in 2013 with debates on origin marking, energy prices and the 14th Plenary. The Ceramic Industry Roadmap to 2050 and its messages continued to be discussed at events throughout the year. Finally, sectoral events also featured on Cerame-Unie's calendar with the celebration of PRE's 60th anniversary, the 20th meeting of the World Ceramic Tiles Forum and the creation of international platforms for the sanitaryware and refractory sectors.

After a successful and invigorating year, we can only look forward to what 2014 will bring.

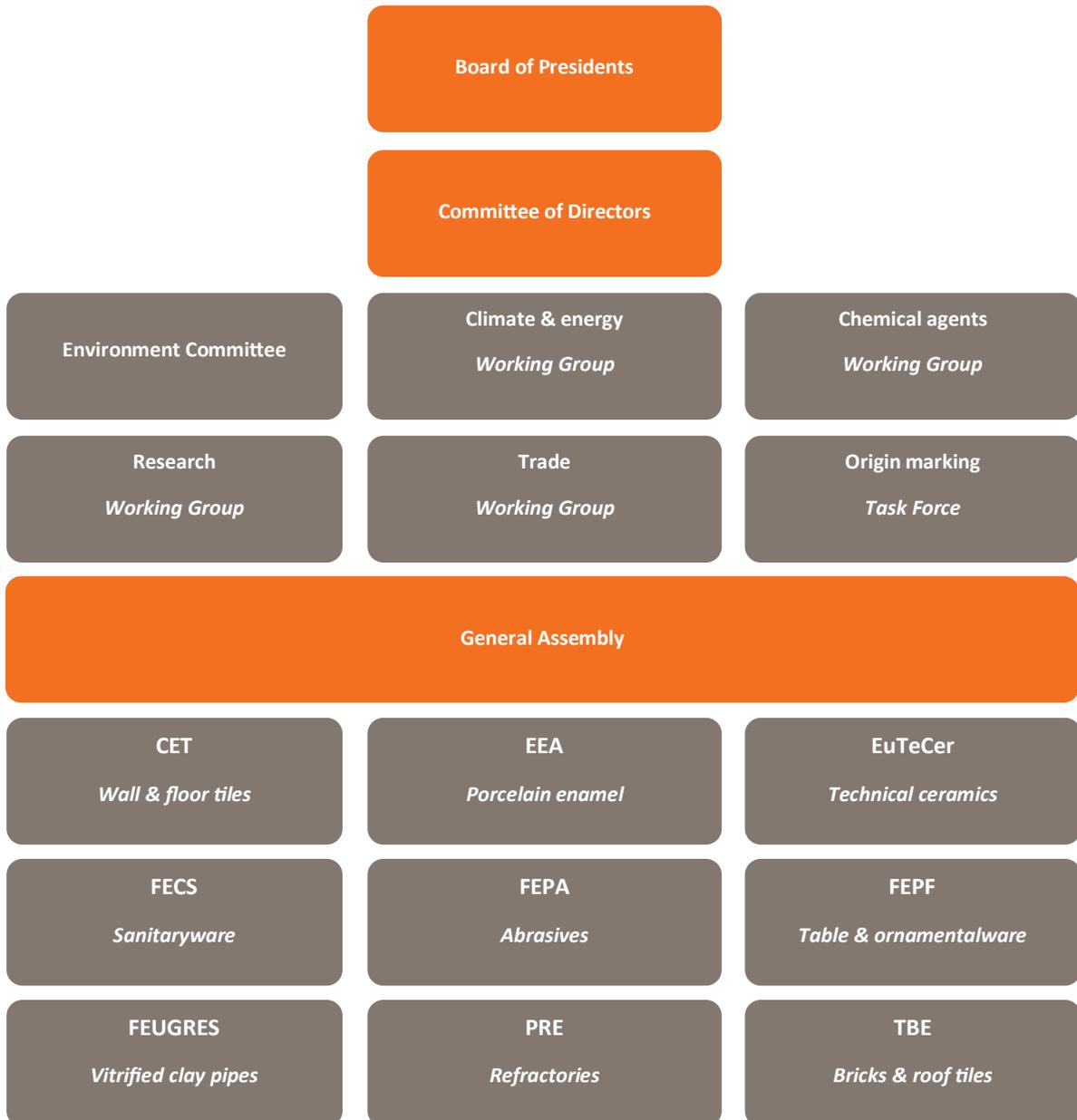


Alain Delcourt
President



Renaud Batier
Director General

Cerame-Unie structure



External network

Alliance of energy intensive industries
 Alliance on industrial emissions
 Alliance on origin marking
 Alliance on REACH—Registration, Evaluation, Authorisation and Restriction of Chemical substances
 Alliance on Trade Defence Instruments
 A.SPIRE—Association for Sustainable Process Industry through Resource and Energy Efficiency (Board and Working Groups (WGs))
 BUSINESSEUROPE (Committees and WGs)
 Construction Products Europe (Board and WGs)

CheMI Platform—Platform for Downstream Users of Chemicals in the Manufacturing Industry
 E2BA—Energy Efficient Buildings Association
 ECO Platform
 EPCF—European Parliament Ceramics Forum
 FAIB—Federation of European and International Associations
 Masonry Alliance
 NEEIP—Non-Energy Extractive Industry Panel
 NEPSI—European network for silica
 World Ceramic Tiles Forum

Europe's ceramic industry in 2013

2013 was another difficult year for the European ceramic industry. According to preliminary Eurostat statistics, the production value decreased by 3% compared to 2012, reaching € 26.5 billion. This is very close to 2009 levels and around 28% lower than pre-crisis level.

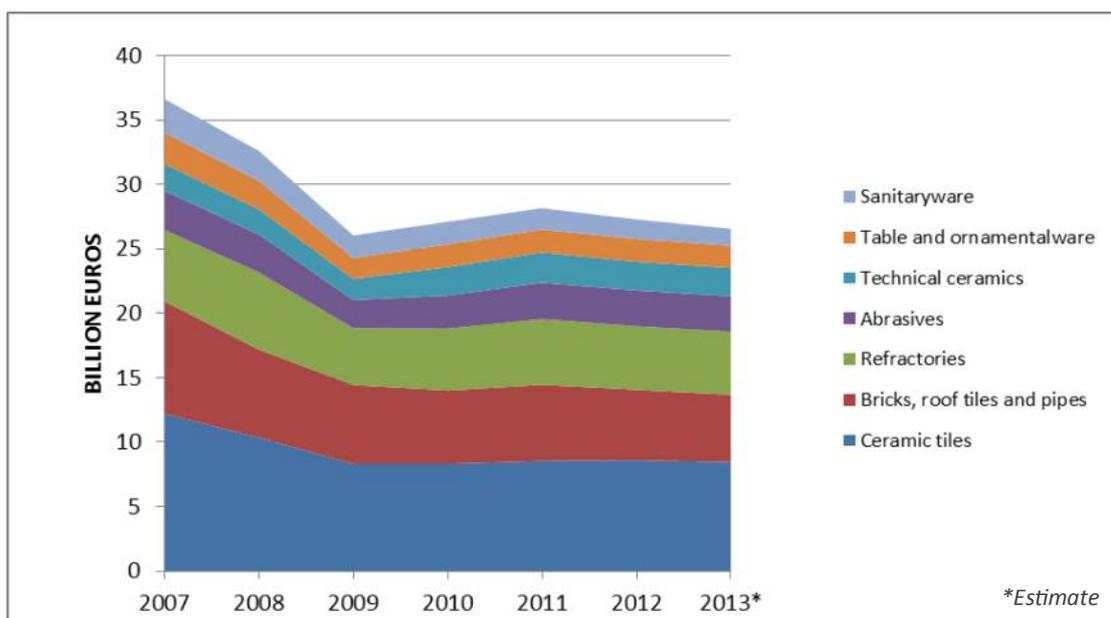
These results were related to the fragile outlook of the EU economy and of the construction sector in particular. According to Eurostat statistics, in 2013 the euro area GDP fell by -0.4% and the EU27 GDP saw a very light recovery of +0.1%. In the same year, production value fell by 2.3% in the whole construction industry and by 1.9% in the building sector.

Other elements affecting the industry's performance were the negative impact of austerity measures, the restricted access to credit, higher

energy costs and more generally the low level of confidence related to the uncertain political situation.

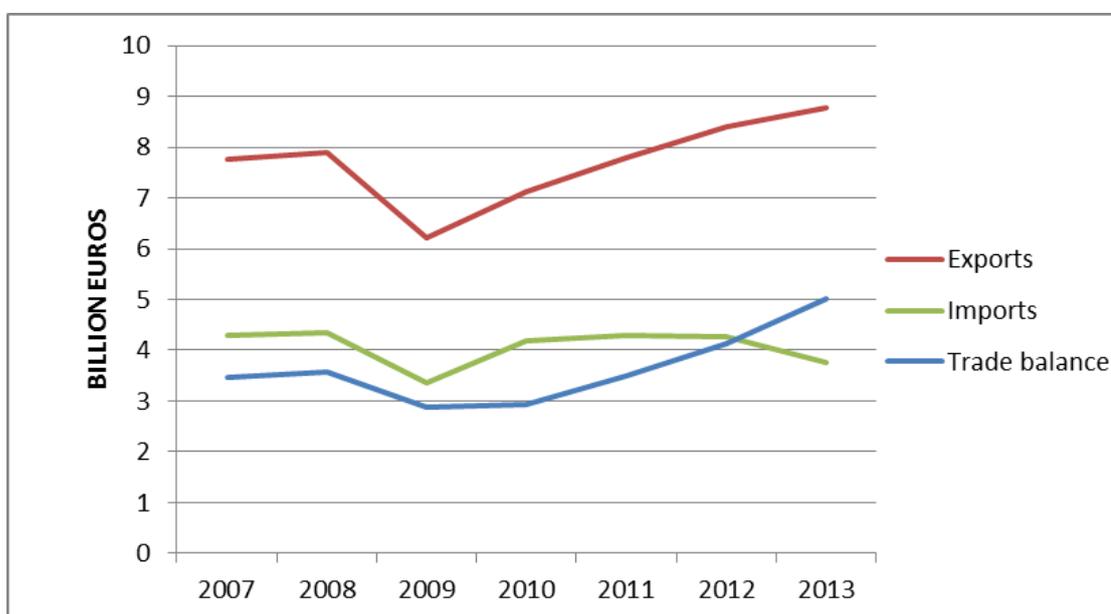
The leading member states producing ceramics are Italy, Germany, Spain, France, the UK, Poland, Portugal and Austria. However, ceramic manufacturing is present in all Member States; it provides more than 200,000 direct jobs and many more indirect jobs in the upstream and downstream sectors.

The ceramic sector contributes significantly to the trade balance of the EU. Around one third of the production value is related to exports outside the EU, which accounted for € 8.7 billion in 2013 and increased by 4.3% compared to the previous year. On the contrary, imports decreased by 11.8%, leading to a positive trade balance of € 5 billion.



Production value of EU ceramic sectors 2007-2013

Source: Eurostat



Trade flows of EU ceramic sectors 2007-2013

Source: Eurostat

Environment & Health

Clean Air Policy Package

The European Commission published its [Clean Air Policy Package](#) on 18 December 2013. This package includes a proposal for a revised NEC (National Emission Ceilings) Directive with updated ceilings for six key air pollutants (PM, SO₂, NO_x, VOCs, NH₃ and CH₄) for 2020 and 2030; a proposal for a Directive on Medium Combustion Plants (MCP); the ratification proposal for the Gothenburg protocol and the Communication on a Clean Air Programme for Europe. In line with the Cerame-Unie position, the proposed MCP Directive specifically excludes those combustion installations where the gaseous products of combustion are used for the direct heat treatment of products, thereby excluding kilns and dryers from the scope of the Directive. The package will go to the European Parliament and Council for a co-decision process.



Industrial Emissions Directive

The Joint Research Centre (JRC) is preparing a Reference Report on Monitoring (ROM). As this reference report is not prepared by the IPPC Bureau in Seville, no Technical Working Group will be established. The Industrial Emissions Alliance (IE Alliance), of which Cerame-Unie is a member, raised a number of concerns regarding the scope, the legal status of the document and the general approach taken. Throughout 2013, Cerame-Unie submitted comments on the different chapters as they were drafted. A draft final version was circulated in October. The final document is expected in the first half of 2014.

At the end of 2013, the European Commission initiated the review of the Management of tailings and

waste-rock in mining activities (MTWR) BREF (Best Available Technique Reference Document). The MTWR BREF document was first published in 2009. Industry concerns on the review relate to proposals to broaden the scope of the BREF to cover areas that fall within the scope of the Industrial Emissions Directive and into other areas such as the extraction processes.



REACH

The REACH Candidate List of Substances of Very High Concern (SVHC) is one of the main instruments under the REACH Regulation. Manufacturers of 'articles' containing an SVHC in a concentration of 0.1% weight/weight have a number of communication requirements laid down in the REACH Regulation. The placing of these substances in the Candidate List is also the first step towards an authorisation procedure. The REACH Candidate List is updated twice a year and is preceded by a public consultation. The REACH Candidate List was updated with an additional 13 substances in 2013, bringing the total to 151 substances.

In June, ECHA published its fifth draft recommendation for the inclusion of substances in Annex XIV, the authorisation list. (Zirconia-) Aluminosilicate Refractory Ceramic Fibres (RCF) are among the substances put forward for prioritisation. As many ceramic companies use RCF in their kilns, they are affected by this prioritisation. Cerame-Unie provided its input during the 3-month consultation.

Cerame-Unie also organised a number of meetings with various downstream user industry associations affected by the prioritisation of RCF and



helped them to submit their comments.

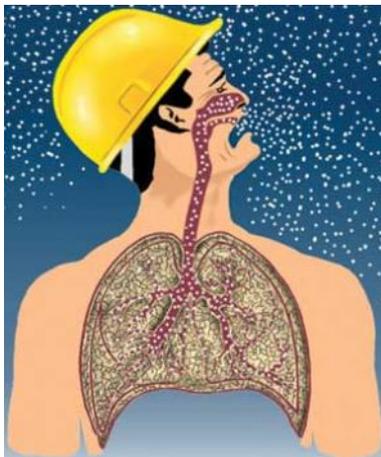
In December the ECHA Member State Committee recommended prioritising both types of Refractory Ceramic Fibres. However, the UK, Austria, Hungary and the Czech Republic stated that this recommendation might be flawed for several reasons. The dossier is now in the hands of the European Commission and Member State authorities who will the final decision (expected in late 2014).

Cerame-Unie is also an active member of the CheMI platform, an alliance representing the article manufacturers, which met three times in 2013.

Respirable Crystalline Silica

The European Commission (EC) is revising the Carcinogens and Mutagens at Work Directive (2004/37). As part of this revision, it is considering the possible inclusion of (process generated) Respirable Crystalline Silica (RCS) to Annex III of the Directive. In 2013, the EC launched an impact assessment on this matter.

The EU Industry Silica Task Force, of which Cerame-Unie is a member, contributed to this assessment by publishing an extensive position paper. The industry is not opposed to a binding European Occupational Emission Limit Value (OEL), but considers that this is best regulated through the Chemical Agents at Work Directive (98/24). In order to quantify the socio-economic impacts of both options, Cerame-Unie members contributed to a study which was carried out in the autumn of 2013. This impact assessment will continue over the course of 2014.



Eco-design for furnaces: site visit

Cerame-Unie and the British Ceramic Confederation (BCC) organised a site visit with the European Commission desk officer responsible for the dossier on the eco-design for industrial furnaces. The two-day site visit included visits to the CERAM institute



and to companies representing five different ceramic sectors: bricks, tiles, tableware, technical ceramics and refractories.

The key messages stressed were the fact that there can be no generic rules to cover 'furnaces'. Each furnace is different and optimised according to the type of product, kiln load, local conditions, etc. In addition, the furnace is only part of the total installation so any rules or criteria covering only the furnace could hamper the integrated approach to achieve the best energy efficiency at installation level. An official consultation forum on the eco-design for furnaces is expected in the first half of 2014.

Revision of Food Contact Materials

Following discussions in 2012 in the Food Contact Materials Working Group, in 2013 Cerame-Unie attended two workshops of the Steering Committee, composed of the European Commission, the European Reference Laboratory (EURL) and experts from the ceramic and glass industries. The meetings aimed at discussing the appropriate testing method and analytical equipment. Cerame-Unie has stressed the need to retain the current testing method (i.e. 4% acetic acid, 22°C for 24 hours), as internationally recognised by ISO 6486, and to take into account the correlation between the product leaving the factory and the product in real use.

The EURL visited a UK tableware factory and the CERAM research institute in Stoke-on-Trent, UK, and an Italian tableware factory in April and July 2013, respectively. Following the preparation of the EURL's proposal for a more precise experimental design that implicates the provision of test samples, Cerame-Unie has coordinated the collection of test samples from its members. Cerame-Unie will attend the third meeting of the Steering Committee in June 2014.



Climate & Energy

The European ceramic industry is committed to contributing to the EU's long term climate and energy objectives. The industry is continuously investing in sustainable production and energy efficiency technologies in order to minimise the environmental impact of all clay products throughout their lifecycle.

European Emissions Trading Scheme (ETS)

2013 was particularly busy as regards the climate dossiers with the debate on short term and structural reform of the EU ETS.



The work of the European Parliament focused on the issue of backloading, i.e. the proposal to change the timing of emission allowances auc-

tions. In spite of a negative opinion from the ITRE Committee, the ENVI Committee supported the proposal on 19 February 2013. However, the plenary did not approve the proposal in a first vote in April, hence a second vote was necessary in the ENVI Committee. This took place in June and resulted in significant amendments to the Commission's proposal. On 3 July, the plenary rejected the ENVI Committee's amended report and supported a text that was very close to the original proposal. Triilogue negotiations were successfully concluded in January 2014. According to the adopted text, 900 million allowances will be removed from the market in 2014-2016 and will be returned in 2019 (300 million) and 2020 (600 million).

Cerame-Unie also participated in the public consultation and stakeholder events on the structural reform of the EU ETS. The debate focused on the six options presented by the European Commission in the first report on the status of the carbon market. In its contributions, Cerame-Unie underlined the importance of ensuring legal predictability and stability until 2020 and of having a comprehensive framework for climate and energy policies that also takes industrial competitiveness into account.

Last but not least, Cerame-Unie responded to the consultation on the revision of the carbon leakage list, underlining the need to use the same criteria as was used to establish the first list, namely a car-

bon price of €30/ton. Cerame-Unie also stressed the importance of considering the impact of carbon costs on the profitability of a sector. During the last quarter of 2013 the TBE Secretariat and its members launched the internal process to prepare background data for the qualitative assessment of the sector 2332 ("bricks, tiles and construction products in baked clay").

2030 Climate & Energy Framework

Cerame-Unie contributed to the wide debate on the future of the EU's climate and energy policy by replying to the consultation on the 2030 climate and energy framework. The reply focused on the need to rethink the current cost-driven approach based on unilateral binding targets, the call for secure energy sources at affordable prices and the promotion of investments in R&D and low carbon technologies. Cerame-Unie underlined the importance of taking into account the technical and economic feasibility of emission reductions.

The European Commission adopted the 2030 package in January 2014. It proposed a GHG reduction target of -40% compared to 1990 levels and a renewable energy target of



27%, while the need for the definition of an energy efficiency target will be assessed at a later time.

Energy prices

Energy was one of the priorities discussed by Heads of State and Government at the European Council on 22 May 2013. In particular, they requested the European Commission (EC) to prepare a report on the impact of energy prices on the competitiveness of energy-intensive industries and SMEs. Following that decision, the EC commissioned a study on energy prices in several sectors, including bricks and roof tiles and wall and floor tiles. In the second half of 2013 the Cerame-Unie Secretariat and members actively contributed to the study by providing data and figures as required by the consultant.

The report, which was published on 22 January 2014 in the context of the 2030 climate and energy package, showed that natural gas prices for European ceramic companies have increased by around



30% between 2010 and 2012 and they are four times higher than in Russia and more than three

times higher than in the US. Similarly, electricity costs may be more than twice as high in the EU than in the US and Russia. Such figures clearly confirm that energy, which represents around 30% of production costs in the ceramic sector, is a crucial element for the competitiveness of our industry.

In September 2013, Cerame-Unie contributed to this debate by organising an event in the framework of the European Parliament Ceramics Forum (EPCF). The dinner debate, “Empowering ceramic competitiveness—the challenge of energy prices for the European ceramic industry”, was hosted by MEP Andrés Barea (see *Events* section).

State Aid Guidelines

In 2013 the European Commission continued the process of reviewing state aid rules in the field of environment and energy. Following the public consultation in 2012, a new consultation paper was published in March 2013.

Cerame-Unie monitored these developments on a regular basis and informed its membership accordingly. The final public consultation was launched in December 2013. Cerame-Unie Secretariat and members contributed to this consultation with a paper highlighting the need to ensure consistency with the existing Energy Taxation Directive and to preserve the competitiveness of energy-intensive industries like ceramics against the increasing trend of renewable charges. Similar messages were also delivered during numerous contacts in early 2014.

These concerns were largely taken into account in the [final text](#) of the Environmental and Energy State Aid Guidelines (EEAG) adopted by the European Commission on 9 April 2014.

The new EEAG allow for reducing the burden of renewable energy sources (RES) charges for a list of energy-intensive sectors identified on the basis of their trade and electro intensity. The list of eligible sectors includes the following ceramic sub-sectors: bricks and roof tiles, wall and floor tiles, refracto-

ries, sanitaryware, clay pipes and ceramic insulators. Highly electro-intensive companies (i.e. electro-intensity over 20% of their Gross Value Added) from other sectors like abrasives and tableware can also be eligible. These provisions are essential for the industry’s competitiveness as renewable charges are an increasing proportion of the energy bill.

Furthermore, the guidelines promote a gradual move to market-based support for renewable energy to address the market distortions related to subsidies granted to RES. In particular, they foresee the progressive replacement of feed-in tariffs by feed-in premiums and the introduction of competitive bidding processes for allocating public support.

Carbon footprint for refractory products

In September 2013, [PRE](#) presented the results of its first product carbon footprint exercise. The outcome is based on data collected from 40 individual sites, representing over 40% of the total annual turnover of the PRE membership. This exercise is a gate-to-gate exercise, focusing on the different refractory product production stages. The product carbon footprint was calculated for five product groups.

The results documented in the report show that the product carbon footprint shows a direct correlation with the energy intensity, which in turn is mainly dependent on the kiln load. The exercise also demonstrated the significant impact of environmental requirements, such as mandatory post-process combustion of waste gas, which can increase energy intensity by up to 30%.



The UK consultancy Carbon Trust supported the development of this report. This important exercise increases general knowledge of the European refractories industry and helps to analyse their individual environmental positions. It will also support PRE members in their communication with refractory-using industries and help these industries in turn to accurately calculate a carbon footprint for their products. It is therefore important to note that the specific resource consumption of European refractory products is very low, with only 10 kg of refractories required per tonne of steel.

Trade & Internal market

Anti-dumping in ceramic tableware and ceramic tiles

In the first half of 2013, Cerame-Unie regularly provided advice to supporting companies and associations during the anti-dumping investigation on imports of ceramic table- and kitchenware. The investigation terminated after fifteen months resulting in the imposition of definitive anti-dumping duties applicable for five years from 16 May 2013. The duties range from 13.1% to 23.4% for cooperating Chinese companies (representing around 400 companies) and 36.1% for non-cooperating companies.

The duties had an immediate effect on EU imports in tableware from China and resulted in a decrease by 44% in 2013 in comparison with the volume of imports in 2011 (see chart).

Cerame-Unie/FEPF has continued to monitor the implementation of measures since May. When a legal challenge was brought to the European Court of Justice, Cerame-Unie and its members registered as interveners and supported the Council in defending the case.

Regarding ceramic tiles, Cerame-Unie has is monitoring the implementation of anti-dumping duties and has so far intervened in two legal challenges brought to the European Court of Justice. Cerame-Unie is closely following the ex-officio interim review launched by the Commission in early 2014.

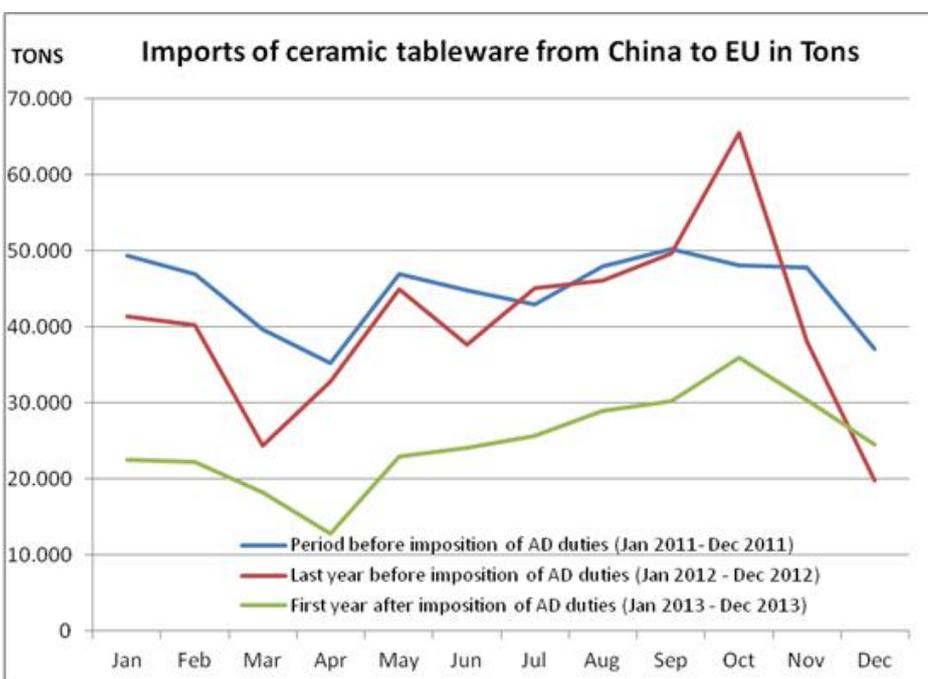
Modernising trade defence instruments

Cerame-Unie/CET continued to advocate for increasing the level of assistance to SMEs in the trade defence instruments by strengthening the SME Help Desk, simplifying streamlining and explaining the rules and procedures of trade defence investigations to adapt the trade defence procedures to the SME sectors.



In April 2013 the European Commission proposed a modernisation of trade defence instruments. The draft report of Rapporteur MEP Christofer Fjellner called for advance notice of as much as four weeks before imposing trade defence measures (the so-called 'shipping clause'). It also risked extending investigation deadlines, further weakening the instrument.

Cerame-Unie has therefore been closely following this modernisation process along with other eighteen industry associations, which together form the Trade Defence Instruments Alliance opposing the 'shipping clause'. Furthermore, we are defending important proposed changes regarding the lesser duty rule, SMEs and transparency. Cerame-Unie welcomed the positive outcome for SMEs in the vote in January 2014 in the [INTA Committee](#) and in February 2014 in the European Parliament Plenary.



Imports of ceramic tableware from China to EU in Tons; year-over-year comparison in relation to imposition of anti-dumping (AD) duties.

Source: Eurostat

Usually the next step would be to enter into triologue negotiations between the Commission, Parliament and the Council. However, due to the Parliament's mandate coming to an end and the Council's current lack of position, the negotiations might be postponed until after the new Parliament is formed and the Italian Presidency has begun.

Market access

Cerame-Unie actively monitored market access issues in 39 countries outside of the European Union. Some hurdles were removed in 2012: in Ecuador for instance, but technical barriers to trade on ceramic tiles were reintroduced in 2013. Some countries introduced new trade barriers, namely Morocco, Russia, Saudi Arabia, Thailand and Ukraine.

Regarding the Russian Safeguard Investigation, Cerame-Unie was working closely with a team of Russian trade lawyers. In January 2013 Cerame-Unie attended the hearing in Moscow on the safeguards investigation on imports of porcelain table- and kitchenware into the Customs Union, where it defended the interests of the European ceramic tableware industry. In early February 2013 the post-hearing comments were submitted on behalf of the European Federation of Ceramic Table- and Ornamentalware (FEPPF).

Despite these efforts as well as close cooperation with the European Commission, in September 2013 the Eurasian Economic Commission (EEC) imposed safeguard measures on imports of porcelain tableware and kitchenware into the Customs Union. The ceramic tableware sector is now looking at possible legal actions to challenge the imposed punitive duties.

Regarding the Free Trade Agreements (FTAs), Cerame-Unie focused on progressing trade negotiations with the US and Japan as well as Thailand. Cerame-Unie attended several meetings with BUSINESSEUROPE and the European Commission on the state of play of bilateral negotiations with the EU's trading partners.



Cerame-Unie also took part in the first two meetings of Thematic Group 5 on the international competitiveness of the construction sector, organised by the European Commission's DG Enterprise. Another two meetings are scheduled in 2014. The aim of this initiative is to identify key critical market access countries and address trade barriers in the construction sector.

Made in EU

In February 2013 the European Commission proposed a new legislative package comprising the Product Safety Regulation (COM(2013)78) and Market Surveillance Regulation (COM(2013)75). This package intends to improve consumer product safety and to strengthen market surveillance of consumer products in the EU. In line with its historical position, Cerame-Unie has supported this provision and attentively followed the discussions in the European Parliament and Council in 2013.



According to Article 7 of the proposed product safety regulation, the indication of origin would become mandatory for all consumer products for EU manufacturers and importers. Cerame-Unie believes that origin marking would facilitate customs controls and enforcement of the proposed legislation. However, the main aim of the regulations should be to simplify market surveillance while avoiding any disproportionate and unnecessary burdens. For Cerame-Unie, origin marking, when applied to consumer goods, is in line with the growing demand for more transparency and better information for consumers.

Following the European Parliament Ceramics Forum (EPCF) origin marking breakfast debate in July 2013 (see *Events* section), Cerame-Unie participated in various debates and meetings on the Consumer Product Safety Regulation (CPSR) proposal.

In the Council Working Party on Consumer Protection in July, Cerame-Unie expressed its support for the entire package proposal and in particular for

origin marking, but recommended a clarification of the scope for construction products, ceramic tableware and abrasives.

Cerame-Unie has continued to support Article 7 on origin marking together with the Origin Marking Alliance by raising the issue at various public meetings and debates in the European Parliament (EP). Furthermore, Cerame-Unie backed Article 8.7 which ensures that obligations of economic operators include an option to indicate a contact address on a website or in the accompanying documents. With a view to providing clearer information for consumers, Cerame-Unie supported the amendment on Article 8.8 which would allow visual instructions for use such as cartoons and pictograms.

Ultimately, the Internal Market Committee's (IMCO) vote in October expressed wide support for the principle of mandatory origin marking for consumer goods and obligations for economic operators have been accepted in line with the Cerame-Unie position.

Although the rapporteurs received a mandate by the IMCO committee to enter into trialogue negotiations, EU member states have been wary of moving forward. Following the EP Plenary of mid-April 2014, the EU Member States will be handling the dossier and can still amend the text.

Review of international codes for ceramic tiles: HS 6807 and 6808

As a result of the good cooperation between the members of the World Ceramic Tiles Forum, the review of HS codes for ceramic tiles promoted by the ceramic tiles industry throughout the world was recently approved by the World Customs Organisation's (WCO) Revision Committee. This decision remains to be formally approved by the Council of the WCO in May 2014. The new classification to come into force in 2017 will no longer distinguish between glazed and unglazed tiles. Instead the new classification will better reflect the distinction between porcelain and non-porcelain tiles.

New HS classification for ceramic tiles, to come into force in 2017:

69.07

– Ceramic flags and paving, hearth or wall tiles; ceramic mosaic cubes and the like, whether or not on a backing; finishing ceramics.

– Flags and paving, hearth or wall tiles, other than those of subheadings 6907.30 and 6907.40:

6907.21—Of a water absorption coefficient by weight not exceeding 0.5%

6907.22—Of a water absorption coefficient by weight exceeding 0.5% but not exceeding 10%

6907.23—Of a water absorption coefficient by weight exceeding 10%

6907.30—Mosaic cubes and the like, other than those of subheading 6907.40

6907.40—Finishing ceramics

Next steps: At this stage, the WCO has reached an agreement on the "legal notes". The customs officials will now start the discussions on "explanatory notes", which is the text providing more detailed definitions of the new categories under this classification.



WORLD CUSTOMS ORGANIZATION
ORGANISATION MONDIALE DES DOUANES

Research

CU activities under Horizon 2020

Research and innovation are essential to keep European industry at the forefront globally. Horizon 2020 is the new research and innovation programme of the European Commission. It runs from 2014 to 2020 and has an overall budget of nearly € 80 billion. It is based on three pillars: “Excellent science”, “Industrial leadership” and “Societal challenges”. The first calls under Horizon 2020 were published in December 2013.



In July 2013 the European Commission published its Communication on Public-Private Partnerships (PPP). Horizon 2020 funds seven contractual PPP proposals that the European Commission acknowledged as highly relevant areas for both its industrial partners and for the European strategic agenda. Amongst these is the PPP [SPIRE](#). The official memorandum of understanding between A.SPIRE and the European Commission was signed on 17 December.



SPIRE aims to enhance resource and energy efficiency in the process industries. The association that will govern the proposed SPIRE PPP is called [A.SPIRE](#), of which Cerame-Unie is one of the founding members. In the first half of 2013, Cerame-Unie contributed to the development of the SPIRE Roadmap to 2030. The various A.SPIRE working groups met in the first half of 2013 to discuss priority areas for the years 2014-2015. A.SPIRE organised a brokerage event in October 2013, which was attended by Cerame-Unie together with a number of ceramic companies and research centres. The ceramic industry also participated in the PPP info days organised by the European Commission in December 2013.

Another PPP of high interest to the ceramic industry is the PPP on the energy efficiency of buildings (EEB). Cerame-Unie is a proud member of the association governing the private part of this PPP, the Energy Efficient Buildings Association ([E2BA](#)).



SILC: Sustainable Industry Low Carbon initiative

The Sustainable Industry Low Carbon (SILC) initiative was launched in 2011 in order to help the European energy intensive manufacturing industries to combine the economic and environmental goals in a competitive way. In the first phase (2011-2013), eight projects were selected, including a project on ceramics: REDUCER: Reduction of carbon dioxide emissions in the ceramic manufacturing process. Cerame-Unie was a dissemination partner for another project proposal submitted in 2013, but this project was not selected.

In late 2013 Cerame-Unie was involved in the discussions with the European Commission on the set-up of SILC II. An agreement was reached with Member States in early 2014.

EU funds refractory research project

In March 2013 the European Commission awarded funding to the ReStaR refractory research project. [ReStaR](#) – “Review and improvement of testing Standards for Refractory products” – brings together 13 partners including RTDs and SMEs. The total budget for the project is € 1.6 million, of which more than € 1.2 million is funded through the FP7 programme “Research for the benefit of SME associations”. PRE will play an active role in the dissemination of the results of the project.

Following a six month negotiation period with the European Commission, the ReStaR project officially began on 1 October and will last for 24 months. The project was kicked off at the PRE offices in Brussels on 7 and 8 October where representatives from the 13 different partners



attended a two-day meeting. ReStaR is the first multi-national refractory project supporting SMEs that has been accepted for European funding.

The central objective is to improve, promote and ensure the reliability, precision and efficiency of the current European testing standards which form the base of the technical data sheets for refractory products. The key approach will be an extensive investigation of the current EN testing methods, the design of experiments and the execution of interlaboratory tests, more specifically collaborative tests.

Masonry enclosures project selected for EU funding

The INSYSME project, selected for EU funding, was officially launched in October with the kick-off meeting taking place at the University of Padua, Italy. INSYSME, which stands for “INnovative SYStems for earthquake resistant Masonry Enclosures in reinforced concrete framed buildings”, involves cooperation between national associations, research institutes and

INSYSME

companies from seven European countries. Participants also include Tiles & Bricks Europe (TBE) members from Italy, Germany and Portugal. TBE will play an active role in the dissemination of the results of the project.

The project aims at developing innovative systems for masonry enclosures. These would be used for façades, envelopes and internal partitions of reinforced concrete framed buildings, to derive sound concepts for their analysis and to develop reliable, simple and efficient methods for their design in the everyday engineering practice. The research will offer innovative solutions to scientific and technological problems which have a broad-spectrum impact. The involvement of SME associations in the project, with the aid of all partners, will ensure that the needs of large communities of SMEs are met.

Construction

Product Category Rules (PCR) for clay construction products

If a manufacturer of a clay construction product voluntarily decides to communicate the environmental performance of their product, this can be achieved with an Environmental Product Declaration (EPD). EPDs are a standardised way to communicate the environmental impact of a product on the basis of a Life Cycle Assessment (LCA) methodology. EPDs can be used for different purposes. For instance, designers often request EPDs of construction products as input in assessing the environmental performance of buildings.



CEN Technical Committee 350 developed a harmonised European standard EN 15804 – *Sustainability of construction works* – that provides the core PCR for developing EPDs. However, each product is different requiring specific PCRs for different products. In late 2012, TBE and CET identified a lack of harmonised PCRs for the development of EPDs for clay construction products. With a common PCR, EPDs developed at national and/or European level will be based on the same guidelines and similar assumptions.

CET PCR for ceramic tiles

Two CET environment working group meetings took place in 2013 to develop a harmonised PCR for ceramic tiles for covering floors and walls. At these meetings, experts defined the scope of the PCR, technical scenarios, system boundaries, reference service life and functional unit. On the occasion of the CET Congress in Istanbul in June 2013, CET held a panel debate entitled “Environmental Product Declarations—an adequate tool for the market compatible with the regulator’s expectations”. The debate helped CET members to better

understand the importance of EPDs for the ceramic tiles sector and the added value of EPDs from a producer/customer point of view. The third draft PCR was presented to the CET Executive Committee in November. The final CET PCR is expected in 2014.

TBE PCR for clay bricks, blocks, roof tiles and pavers

TBE has launched an LCA ad-hoc group and placed a contract with an external consultant for developing a PCR for clay construction products (bricks, blocks, roof tiles and pavers). TBE members have been very active in the PCR project (five meetings were held in 2013) and volunteered to draft various sections of the PCR. In the PCR, TBE recommends the inclusion of additional environmental impact indicators (land use, ecotoxicity and human toxicity) in order to draw up a more complete environmental profile of clay construction products. A cradle-to-grave approach and a reference service life of 150 years must be considered. The TBE PCR project was finalised in early 2014.

On the occasion of the *Ceramic Days* in November 2013, both CET and TBE draft PCRs were presented to Cerame-Unie members, European Commission officials and stakeholders at the conference on construction (see *Events* section).

Sustainable buildings consultation

The European Commission launched a public consultation on sustainable buildings on 9 July 2013. The intention of the Commission was to collect views and further information on the possibility of



introducing EU-wide measures to improve the environmental performance of buildings. The consultation included an extensive questionnaire and focused on resource use and related environmental impact across the life cycle of a building. The closing date for the consultation was 1 October 2013.

Cerame-Unie discussed the first set of replies at its Environment Committee meeting of 17 September 2013. On behalf of all ceramic sectors, Cerame-Unie replied to the questionnaire and stressed the following messages:

- The European ceramic industry supports voluntary Environmental Product Declarations (EPDs) and the CEN/TC 350 methodology;
- The still underestimated durability of ceramic construction products contributes to sustainable buildings;
- In order to draw a more complete environmental profile of buildings, the Life Cycle Assessment (LCA) study could include additional environmental impact indicators;
- The European ceramic industry supports the development of a common EU market for secondary materials in order to reach the target set for construction and demolition waste.

In addition to this set of replies, Cerame-Unie also helped [Construction Products Europe](#) draft their answers to the consultation.

Founding member of ECO Platform

The ECO Platform's objective is to support the provision of reliable information in the form of a European-wide accepted Environmental Product Declaration (EPD) in order to remove potential barriers to trade and to reduce the effort required for the construction industry to develop EPDs.

The ECO Platform was established between EPD programme operators, European trade associations, green building councils or green building rating schemes owners and Life Cycle Assessment (LCA) practitioners. It is articulated in three working groups (WG) dealing with different topics: WG I for technical issues, content, format and technical



background of core-EPD; WG II for quality management and common quality system, and WG III for internal and external affairs communication with the industry and the European Commission.

Cerame-Unie is proud to be a founding member of the ECO Platform. The next General Assembly will be held in Brussels on 10 June 2014.

Guidance documents for the implementation of the Construction Products Regulation (CPR)

The Construction Products Regulation (CPR) entered into force on 1 July 2013. Manufacturers of clay construction products have to draw up and supply a copy of the Declaration of Performance (DoP) and apply CE marking to their products whenever they place a clay construction product on the market that is covered by a harmonised European standard.

To that end, the federations TBE, CET and FECS have each developed guidance documents with a proposed set of common procedures for the implementation of the CPR. All affected manufacturers within the membership received these to help them answer all the questions related to the implementation of the CPR, particularly the provision of the DoP and CE marking together with all clay construction products that are put on the EU market as of 1 July 2013.



Events

Dinner debate on research & innovation

The industry requires real breakthroughs to achieve the ambitious EU targets for 2030 and 2050. To that end, Cerame-Unie hosted a dinner debate on 12 March 2013 on EU research policy as the EU budget was being negotiated.



Head of Unit Renzo Tomellini, from DG Research and Innovation, complimented the ceramic industry on their broad involvement in research. The cross-sectoral Public-Private Partnership SPIRE demon-

strates how intensely Cerame-Unie has been collaborating with other process industries over the last year. British Ceramic Confederation CEO Laura Cohen stressed the position shared by many industries: if the EU is serious about emission reductions and resource efficiency, the industry cannot shoulder everything alone.

The obvious is often forgotten. Many companies are struggling to recover, reported Mr Lanuza, CET President and CEO of a major Spanish tile producer. Sufficient funds from the public sector enable pilot projects and can also advance already existing technologies.

Industries will further explore the benefits of cooperation and knowledge exchange. In this regard, Mr Lutz Walter presented vital examples from his PROsumer.NET project where techniques from the ceramic industry were applied to consumer goods, and vice versa. Similarly, Mr Luc Bourdeau demonstrated the potential of the Public-Private Partnership on energy efficiency in buildings (EEB). The construction sector is one domain of many where the ceramic industry offers indispensable expertise.

Origin marking breakfast debate

Cerame-Unie and six other trade associations co-organised a European Parliament Ceramics Forum (EPCF) origin marking breakfast debate in Strasbourg in July 2013. The event was chaired by EPCF Chair MEP Malcolm Harbour and EPCF Co-Chair

MEP Michael Cashman. Members of the European Parliament and colleagues from other European industries also attended this event together with Cerame-Unie members from concerned sectors.



EPCF dinner debate on energy prices

On 17 September 2013 more than 50 representatives from industry and EU institutions participated in the European Parliament Ceramics Forum (EPCF) dinner debate “Empowering ceramic competitiveness—the challenge of energy prices for the European ceramic industry”.

This was a good opportunity to discuss several initiatives in this field such as the European Commission conclusions of 22 May, Energy Efficiency Directive, Energy Taxation Directive, Energy Roadmap 2050, 2030 climate and energy framework and the completion of energy market.

MEP Andrés Barea hosted the event and gave the opening speech, which was followed by interventions from Mr Cozigou (DG Enterprise), Mr Gross (DG Energy), Mr Ferri (French Permanent Representation) and Mr Cafiero (Confindustria Ceramica). Representatives from the ceramic industry and other relevant sectors like glass and steel then engaged in a lively debate on the industry’s competitiveness and the future of European energy policy.



Ceramic Days 2013 and 14th EPCF Plenary

Cerame-Unie's *Ceramic Days 2013* took place in Brussels from 25 to 27 November and welcomed 150 participants from EU institutions, industry and relevant stakeholders. The *Ceramic Days* centred around 26 November, a day featuring two public conferences, the 14th Plenary meeting of the European Parliament Ceramics Forum (EPCF) and keynote speeches by Commissioner for Energy Günther Oettinger and Director General of BUSINESSEUROPE Markus Beyrer.

The 14th Plenary meeting of the EPCF covered key topics, namely the EU climate and energy policy, the Product Safety and Market Surveillance Package and the competitiveness of SMEs. MEPs, Commission officials and industry representatives discussed these significant questions and what they mean for the ceramic industry. The EPCF, chaired by MEPs Malcolm Harbour and Michael Cashman, was concluded with a discussion on the future of the Forum after the 2014 Parliamentary elections.



Above left: Commissioner Oettinger; Above right: Mr Beyrer;
Below: 14th EPCF Plenary



The day's events culminated in memorable keynotes by eminent speakers at the EPCF cocktail reception hosted by Cerame-Unie. Commissioner Oettinger discussed the 2020 targets and the need to create realistic and pragmatic new targets for 2030, taking into consideration the reality faced by energy-intensive industries in Europe. He affirmed that the responsibility to address climate change should not only be borne by Europe, as it only represents 10% of global CO₂ emissions. Finally, he stated that if Europe wants to solve its budget and labour market problems, it needs more – not less – manufacturing industry.

Mr Beyrer offered insight into the high energy prices in the EU and the challenges this presents to businesses. He asserted the need to find the right balance between energy and climate policy, thereby favouring industrial competitiveness and climate goals on an equal footing. Both speakers agreed on the need to diversify energy supply sources in the EU, which means leaving the shale gas option open. Cerame-Unie President Alain Delcourt wrapped up the evening and stressed the vital importance of the EU's forthcoming decisions on climate and energy for the ceramic industry.

Trade conference: International trade principles, how to ensure better enforcement?

The *Ceramic Days* conference on trade dealt with vital concerns regarding the European Union's enforcement of international trade rules to tackle unfair trade practices affecting market access for EU businesses. The event was moderated by Carlo Pirrone from Confindustria, who pointed out the par-

adox of the increasing number of trade barriers despite the growing amount of free trade agreements and legislation.

Commission official Signe Ratso affirmed that the European ceramics industry is a “global player” and “export champion”. Ms Ratso presented the toolbox available to the European Commission to fight unfair trade practices and indicated that between 2008 and 2012 one third of the 220 most harmful business obstacles identified in 32 main export markets across various industry sectors were either solved or progress was made.

Despite this fact, the industry faces an increasing trend in barriers to trade, including high tariffs, burdensome certification and counterfeiting, as evidenced by the testimony of Steelite International CEO and FEPF President, Kevin Oakes. Mr Oakes underlined that it is essential to overcome obstacles such as increasing energy costs, taxes and bureaucracy and make huge investments in design, quality and employees in order to stay competitive and successful on the market.

Lawyer and Professor Jacques Bourgeois took a more critical approach and underlined that although Europe has resolved tariff barrier issues with its economic partners, it is currently impacted by ‘behind the border measures’. He also stressed that companies could make more use of the Trade Barriers Regulation (TBR) and urged the Commission to be “a little bit more daring and a little less cautious in handling the TBR”.



Construction conference: How do ceramic PCRs contribute to a better environment?

The *Ceramic Days* conference revealed the importance of standardisation, harmonised Product Category Rules (PCR) and Environmental Product Declarations (EPDs) as useful tools for the European construction industry.

Gerhard Koch (Wienerberger AG) emphasised the proliferation of environmental declaration tools in the construction products industry. According to Pere Fullana (UNESCO Chair), a life cycle perspective helps to achieve real environmental improvement. Gonçalo Ascensão (CEN) discussed the development of the horizontal standard EN 15804 in CEN/TC 350/WG3, which establishes the rules for the creation of a type III EPD for a construction product or service.

Michele Galatola (DG ENVI) presented the Product Environmental Footprint (PEF), an alternative methodology. He highlighted that the Commission intends to promote convergence rather than competition between PEF and EN 15804. Victoria Zaera (ASCER) explained that the CET environment working group is currently developing a PCR covering ceramic tiles for flooring and walls in line with EN 15804. The third draft CET PCR is expected to be finalised in the first quarter of 2014.

Carolin Spirinckx (VITO) presented the third draft TBE PCR for clay bricks, blocks, roofing tiles and pavers, also in line with EN 15804, stating, “The TBE PCR includes additional environmental impact indicators which are very important for drawing up a complete environmental profile of construction products.”

Left: Panelists at the Trade conference

Below left: A full house at the Construction conference

Below: Panelists at the Construction conference



External events

Presentation of Ceramic Roadmap to 2050

Cerame-Unie continued to disseminate the industry's Ceramic Roadmap to 2050 and its messages throughout 2013:

- EXCA, the European Expanded Clay Association, invited Cerame-Unie to present the Ceramic Roadmap at its General Assembly in June.
- In June, Cerame-Unie and the Roadmap were also presented on the occasion of the plenary session of the 13th International Conference of the European Ceramic Society ([ECERS](#)) in Limoges (France) and in September at the 56th International Colloquium on Refractories in Aachen (Germany).
- At a meeting in December on innovation and climate policy, jointly organised by the Center for Clean Air Policy (CCAP-Europe) and the Centre for European Policy Studies (CEPS), Cerame-Unie reported on the state of the Ceramic Roadmap and the next steps to be taken.

Other events

On 19 April, Cerame-Unie was invited to present the "Challenges in applying CHP in the ceramic sector" at Cogen Europe's annual conference, the European Association for the Promotion of Cogeneration, on the occasion of its 20th anniversary.



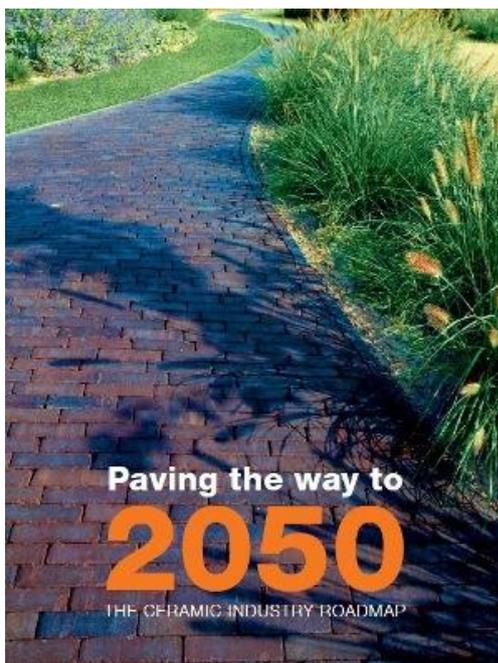
On 6-7 June Cerame-Unie was invited by the European associations of kaolin and feldspar producers to share its experience with anti-dumping cases at the EUROFEL-KPC Europe Conference, held in Regensburg, Germany.

On 11 June, Cerame-Unie was invited to the BCC Annual General Meeting to give an overview of



the key lobby actions where joint efforts between CU and national associations successfully promote the interests of UK and EU ceramic industries.

On 17 October Cerame-Unie participated in the French Confederation of Ceramic Industries (CICF) *Journée de la céramique* conference in Paris, France. The theme of the conference was "Exports: Strategies for success" and CU was involved in the panel on "Success Stories". The event was notably attended by MEDEF President Pierre Gattaz.



Sectoral activities

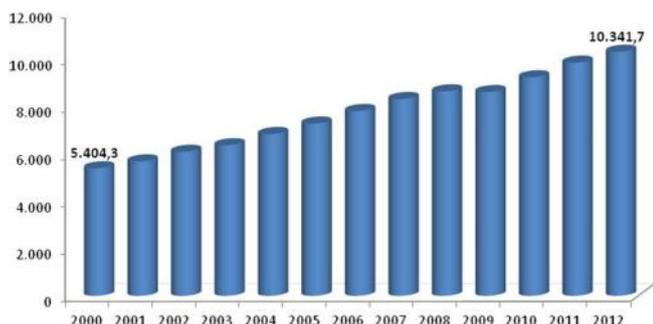
20th World Ceramic Tiles Forum

The European Ceramic Tile Manufacturers' Federation (CET) participated in the 20th World Ceramic Tiles Forum (WCTF) in Rio de Janeiro, Brazil on 5-8 November 2013. Representatives of the ceramic tiles industry, together representing around 90% of the global production, came from all corners of the world to discuss issues of common interest.



The WCTF revealed upwards trends in global consumption and production and provided an update of the current process in the World Customs Organisation (WCO) to review the outdated Harmonised System (HS) classification determining customs codes for ceramic tiles. Moreover, this session of the Forum presented an opportunity to discuss the developments in standardisation at national and international level. Participants also used this fitting occasion to share key trends, challenges and experiences in trade from their respective countries.

The consistent rise in consumption and production reflects a healthy and growing global market for ceramic tiles. Global consumption in 2012 has increased by 4.7% compared to 2011, representing a rise of over 91% compared to 2000 levels (see



World consumption of ceramic tiles 2000-2012
Source: *Confindustria Ceramica*

chart). Moreover, production in 2012 has exceeded 2000 levels by over 89%, equivalent to more than 10.3 billion square meters of ceramic tiles.

First International Ceramic Sanitaryware meeting

The First International Ceramic Sanitaryware meeting was held on 27 September 2013 in Bologna during the CERSAIE exhibition. The purpose of the meeting was to assess the need for and interest in a World Ceramic Sanitaryware Forum. The event brought together ceramic sanitaryware companies, the European Federation of Ceramic Sanitaryware Manufacturers (FECS) and national associations from all over the world, including Italy, Spain, Turkey, China and Brazil. Participants unanimously supported the development of an annual ceramic sanitaryware forum to discuss such issues as standardisation and sustainability. The second international meeting will take place in September 2014 in Bologna during CERSAIE.



Creation of World Refractories Association

A first meeting bringing together the worldwide refractory industry was held on 12 September 2013 in Victoria, Canada, in conjunction with the UNITECR technical conference. The meeting was organised by PRE and attended by 20 representatives of continental or national associations from the US, Latin America, Europe, India, China and Japan as well as CEOs from world-leading companies. At the meeting the creation of a World Refractories Association (WRA) was agreed. Such an association can exchange information on aggregated statistics, regulatory trade policies, regional and national policies in the fields of environment, energy, health and safety, industry standardisation activities and a possible revision of the HS codes. A second preparatory meeting took place in April 2014 in Brussels.

European Masonry Alliance

TBE is a founding member of the European Masonry Alliance together with the calcium silicate, precast concrete and aerated concrete industries. The purpose of the alliance is to develop common messages

towards the European institutions and a platform to exchange information. Two European Masonry Alliance meetings were held in the end of 2013. In the beginning of 2014, the members of the European Masonry Alliance organised a dinner with MEPs to deliver key messages and held a meeting to define future steps.

PRE turns 60

In 2013 the European Refractories Producers Federation (PRE) celebrated its 60th anniversary and participated in a number of activities to mark the occasion.

In May PRE participated in the 15th International Scientific Conference, organised every other year in Wisla-Javornik, Poland, on “Refractory materials: manufacture, methods of testing, application”.

In June PRE members and technical institutes met with representatives of the European Steel Technology Platform (ESTEP) to get to know the different associations and their activities. Both the steel industry and the refractory industry (through Cerame-Unie) are partners in A.SPIRE, a Public-Private Partnership focusing on research and innovation in the process industries.

PRE and ECREF (European Centre for Refractories) jointly organised the 1st common European [seminar on refractories](#) entitled, “Refractories—key technologies and its applications”, in early September. The three-day seminar welcomed experts from the field and targeted new employees in the refractories and related industries.

The 13th UNITECR Conference, a technical confer-



ence on refractories, took place in Victoria, Canada in September. PRE participated with a presentation entitled, “Raw materials for refractories: the European perspective”.

PRE also gave a presentation on the association and on raw materials for refractories in October 2013 at

a conference on raw materials in Castellón, Spain organised by the Spanish refractory association ANFRE.

EuTeCer

EuTeCer held its Spring meeting during the Hannover Messe 2013 trade fair (Germany) in April. At the fair, 16 German producers of technical ceramics participated under the banner of “Think ceramics”. This joint booth covered nearly the whole spectrum of appliances for advanced ceramics from kiln furniture to welding ceramics, electrical and electronic components, mechanical components and medical implants.



Sectoral Congresses

As per usual, CET, PRE and TBE held annual Congresses in 2013.

CET, the European Ceramic Tile Manufacturers' Federation, met in June in Istanbul, Turkey. The Turkish Ceramic Tiles Federation hosted the Congress which was attended by representatives from nine European countries. The 2014 CET Congress will be hosted by Confindustria Ceramica from 26 to 28 June 2014 in Rome, Italy.

The European Refractories Producers Federation PRE held the 2013 Congress in June in Berlin, Germany. Kindly organised by the German Refractories Association, more than 60 participants from 13 different countries attended the Congress. The 2014 PRE Congress will be hosted by ZPOK from 4 to 6 June 2014 in Portorož, Slovenia.

Tiles & Bricks Europe (TBE) held its Congress in October in Moscow, Russia. Around 100 members attended the meetings and contributed to the success of the annual event, which in 2013 was organised by Russian Association of Manufacturers of Ceramic Wall Materials. The 2014 TBE Congress will be hosted by ANDIL on 19-20 June in Naples, Italy.

The European Parliament Ceramics Forum

The European Parliament Ceramics Forum (EPCF) is a cross-party discussion group with the objective of facilitating dialogue between the European institutions and the ceramic industry on all relevant policy developments.

It provides a platform for the exchange of views, the identification of key issues, and for taking action on behalf of the industry and of the people working in this crucial EU sector. Participants in this Forum are Members of the European Parliament, decisionmakers from the ceramic industry and representatives from European trade unions. The European Commission actively supports the Forum and Commission officials regularly attend the meetings to provide updates on current and forthcoming issues.

The EPCF has its roots in the 1994-1999 Parliament, when a Ceramics Intergroup was founded by Michael Tappin, former Member of the European Parliament from North Staffordshire (UK). It was re-established by **Michael Cashman** and **Malcolm Harbour** following their election to the European Parliament in June 1999.

EPCF Members (as of 2013)



European Parliament Ceramics Forum



Malcolm Harbour
(UK, ECR)



Michael Cashman
(UK, S&D)



Josefa Andres
Barrea (ES, S&D)



Phil Bennion
(UK, ALDE)



Miguel Angel
Martinez (ES, S&D)



Elisabeth Morin-Chartier
(FR, PPE)



Ria Oomen
(NL, PPE)

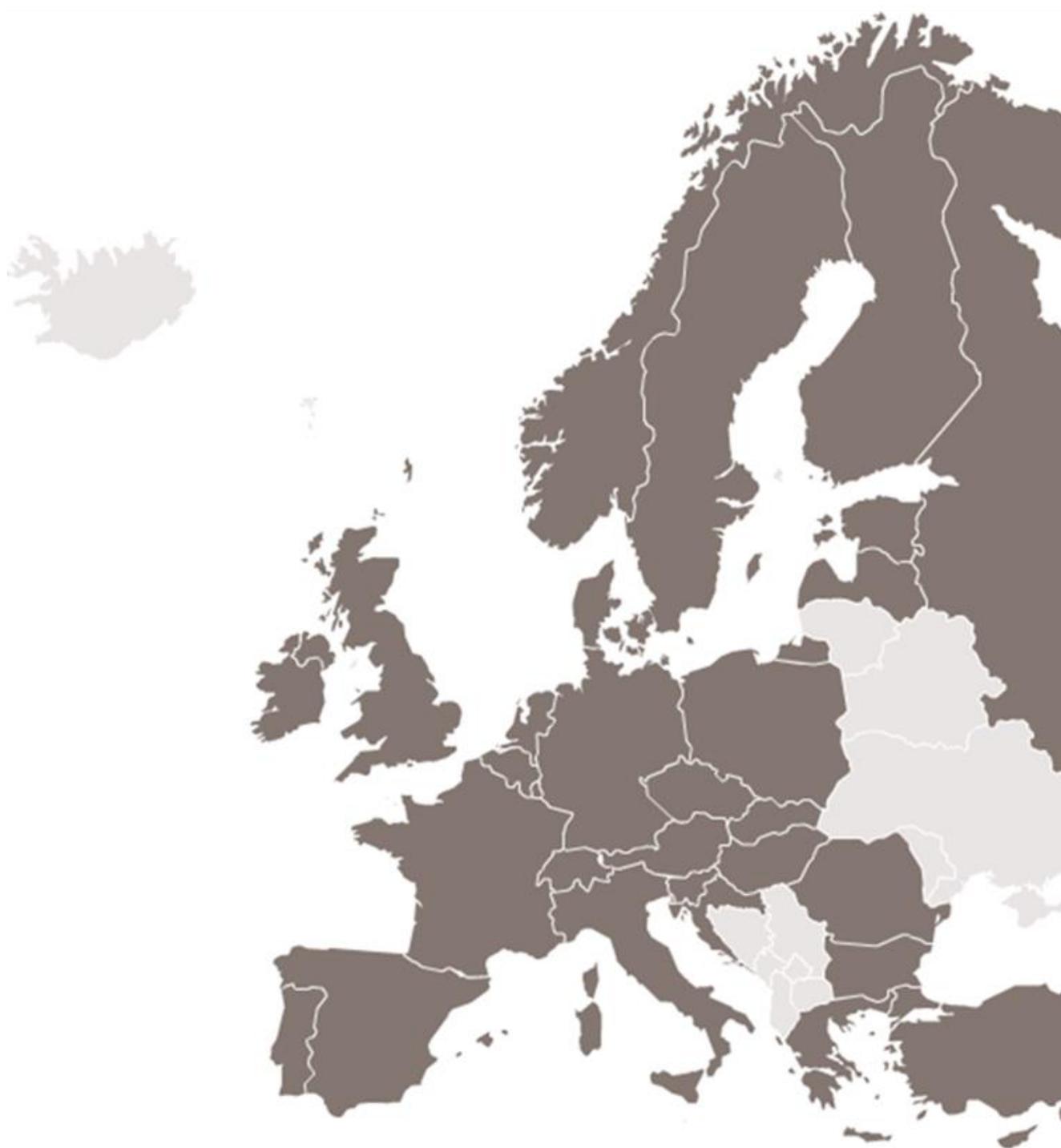


Andres Perello
Rodriguez (ES, S&D)



Paul Rübzig
(AT, PPE)

Cerame-Unie members



Overview of CU membership: countries where CU is represented are marked in dark grey

Service and membership

As a member you benefit from:

- * up-to-date and efficient monitoring of European issues relevant for the ceramic industry
- * access to statistical information on the specific sector and the ceramic industry as a whole
- * involvement in all stages of the legislative process, from the development of the proposal to the implementation at national level
- * access to expertise in the field of climate, energy, trade, environment and construction policies
- * invitations to participate in expert meetings organised by Cerame-Unie or European institutions, the Cerame-Unie General Assembly and the European Parliament Ceramics Forum

Conditions to become a full member:

According to Article 6.1 of the Cerame-Unie by-laws: *“The following may be admitted as full members of the Association:*

- * *professional Federations with a European dimension representing ceramic manufacturers,*
- * *national Federations representing national ceramic manufacturers of EU member states, only if no European Federation having the legal personality exists,*
- * *private companies manufacturing ceramics with their head office in a EU Member State, only if no National Federation exists. May however become a member private companies having the legal personality and being a member of a European association of ceramic manufacturers lacking the legal personality.”*

Conditions to become an associate member:

According to Article 7.1 of the Cerame-Unie by-laws, *“The following may be admitted as associate members of the Association:*

- * *national Federations that do not belong to a member state of the European Union representing national ceramic industries of their country;*
- * *in exceptional cases European Federations or, for lack of those National Federations or, for lack of those private Companies, whose business is linked to the ceramic industry.”*

Companies interested in becoming a member of Cerame-Unie are warmly welcomed to contact the Cerame-Unie Secretariat indicating to which sector they belong.

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