Deeply rooted in Europe

No other industry has a heritage that goes as far back as ceramics. Bronze age pottery, Roman aqueducts and medieval roof tiles are but a few examples that show both our history and the durability of our products. Today, Europe is the world leader in high quality and strategic ceramic products such as wall and floor tiles, bricks and roof tiles, sanitary ware, tableware, vitreous clay pipes or refractory ceramics for most high temperature processes, or advanced ceramics for transport, defence, medical devices and other value chains.

The ceramic industry is mainly SME driven and provides local jobs and local value creation.

Why ceramics matter

€37 billion
Production value

200,000
direct employment

€5.3 billion
positive trade balance

Resilience
Producing in and for Europe enhances the EU’s strategic supply chain security, reduces dependencies on third countries and supports a resilient Europe.

Sustainability
R&D and investments in decarbonisation have ensured that European ceramics have the lowest carbon footprint in the world.

Building a net zero future
Ceramics support climate adaptation measures and are key for CO₂ neutral, circular and long-lasting buildings by significantly reducing the embodied carbon of new houses and by supporting the energy-efficient renovation of existing buildings.

Innovation
The European ceramics industry is the world leader in both product innovation and innovation in manufacturing technologies.

Numerous challenges facing ceramic industry

Over the past years, ceramics manufacturing has overcome many challenges (COVID pandemic, war in Ukraine, energy crisis). However, today, the industry is facing multiple threats simultaneously. Because of its broad product offering and specialisation, not all ceramics companies face the same issues, but some challenges are common to most companies.

High cost of energy
On average, energy accounts for 30% of production costs. The ceramics sectors are therefore very vulnerable to energy price volatility.

Lack of international level playing field
European ceramics compete with low-cost products from third countries produced with far less stringent environmental requirements, which risks carbon, jobs and investment leakage.

High capital costs
In order to remain competitive and reduce emissions for the green transition, continuous investments are required which have become costly to finance.

Challenging exports
European ceramics face tariff and non-tariff barriers in several countries, which are threatening fair access to important markets.
For the manufacturing of ceramics in Europe to be viable and sustainable, a range of EU and national policies must be adapted to restore competitiveness and create the conditions that will allow for further investments to secure the future of the sector in Europe.

The role of EU policy

No wishful thinking - effective support for technology readiness and green energy infrastructure is a key requirement

The green transition and the sustainable decarbonisation pathway of the ceramic sector as described in the "Ceramic Roadmap to 2050 – Continuing our path towards climate neutrality", needs to be acknowledged. The current EU decarbonisation target for 2030 requires technologies, infrastructure and decarbonised energy sources that might become reality in the future but are not available in the short term.

No unilateral policies without considering the bigger picture

In parallel, the implementation of unilateral climate policies without assessing the social and economic sustainability of the decarbonisation pathway, has left the industry without any real possibility of significant short-term progress on decarbonisation. This leads to an increase in costs for European companies and, thus, a loss of international competitiveness.

Our 6 key policy priorities

ETS Review
An urgent review of the EU ETS which includes:
- expanding access to equivalent measures for SMEs/small emitters
- enabling indirect cost compensation to promote the electrification of production processes
- ensuring free allocation rules effectively protect from the risk of carbon leakage
- establishing fair allocation rules for cogeneration
- revising the role of financial entities in ETS

Export adjustments and no scope extension without proper impact assessments under the CBAM
Guarantee export adjustments under the CBAM to allow EU producers to remain competitive in export markets. Sectors should only be included in the CBAM after a thorough impact assessment demonstrating a clear benefit and feasibility, considering their trade intensity.

Material-neutral policies for construction
Ensure the adoption of material-neutral policies for construction that consider the full life cycle. This should include the long lifespan and durability of construction materials.

Access to green energy
Provide secure access to sufficient green energy sources at competitive prices in an integrated European market.

A level playing field
Ensure an effective level playing field within and beyond the EU Single Market with the rapid use of effective trade defence measures whenever justified.

A harmonised approach
Adopt coherent regulatory instruments and standards across the EU based on scientific research and economic feasibility across the industry (e.g. BRef, food contact materials, CMD, REACH, ...).