



2022

# CERAME - UNIE ACTIVITY REPORT



**Cerame-Unie Aisbl (CU)** is the European Ceramic Industry Association. Based in Brussels since 1962, it is the voice of the European ceramic industry to the EU institutions. The European ceramic industry accounts for a total annual turnover of €32 billion and generates over 200,000 direct jobs. The European ceramic industry covers a wide range of products including bricks & roof tiles, clay pipes, wall & floor tiles, refractories, sanitary ware, table- & ornamental ware, technical ceramics, expanded clay and flower pots.

---

**Contact Us At:**

Cerame-Unie A.I.S.B.L  
The European Ceramic Industry  
Association  
Rue Belliard 12  
1000 Brussels, Belgium  
sec@cerameunie.eu  
www.cerameunie.eu

---

Published by Cerame-Unie No part of this brochure may be reproduced in any form without the prior written permission of Cerame-Unie.

# TABLE OF CONTENTS

## FOREWORD

A message from the President & Director - General

01

COMMUNICATIONS

29

## EUROPEAN CERAMIC INDUSTRY

03

EVENTS

30

## WHAT WE DO

05

SECTORAL EVENTS

33

## CERAME-UNIE SECTORS

06

EUROPEAN PARLIAMENT CERAMICS FORUM

38

## TOPICS

07

CERAME-UNIE STRUCTURE

40

Climate & Energy .....	07
Ceramic Roadmap to 2050 .....	14
Construction & Sustainability .....	15
Environment, Health & Safety .....	17
Trade & Internal Market .....	22
Skills .....	25
Research & Innovation .....	27

MEMBERS, EU PLATFORMS/EXPERT GROUPS & PARTNERSHIPS

42

MEMBERSHIP

43



Since mankind started relying on ceramic products in its everyday life, from 9000 BC, ceramics have enabled and accompanied pivotal stages of humankind progress. Ceramics notably played an essential role in the industrial revolution thanks to the introduction of more heat-resistant materials, refractories, allowing furnaces to reach a temperature higher than 1.500°, hence scaling production up to industrial levels. In December 2022, the European Ceramic Days celebrated Cerame-Unie's 60th anniversary and illustrated on this occasion how ceramics continue to play an essential role in society through a long list of innovations delivering a wide range of technologies and applications including insulating clay blocks for near-zero emission houses, digital printing for ceramic tiles, longer life refractories that reduced the consumption of refractories by 80% per tonne of steel to advanced ceramic SiC coating used on the James Webb Space Telescope.

In the aftermath of the Covid-19 health & sanitary crisis and impacts of the aggression against Ukraine which illustrated Europe dependencies and the need for the EU to become more autonomous, the role of ceramic applications in so many value chains (construction, automotive, electronics and batteries, medical applications, aerospace & defense, etc.) makes it a strategic material. In addition to being strategic, ceramics are of socio-economic importance in many European regions based on the EU turnover of ceramics exceeding €30 billion, with over 800.000 direct and indirect employees and net positive contribution of ceramics to the EU's trade balance reaching of € 5.6 billion in 2021.

As a result of the predominance of natural gas in the energy mix of European ceramics (80% natural gas and 20% electricity on average), the European ceramic industry was heavily impacted by the energy crisis which started in the second half of 2021 and

further intensified as a result of the aggression against Ukraine. The resulting loss in competitiveness of EU ceramics can be observed in the trade performance of the sector, with a positive trade balance falling from € 5.6 billion to € 4.8 billion, the lowest level since 2011. Our competitiveness was also hindered by disruptions in the supply of raw materials triggered by the aggression against Ukraine.

In this context, Cerame-Unie contributed to the discussions that led to the introduction by the EU of various measures designed to address the impact of the war in Ukraine including the REPowerEU and REPowerEU Plan communications of 8 March and 18 May 2022 and the Council regulation on coordinated demand reduction measures for gas of 26 July. In the latter, the ceramic industry was mentioned as one of the "sectors running continuous processes" that deserve particular attention due to the "potential damage to installations" being included in the criteria to prioritize critical non-protected customers. The Commission also recognised the urgent need for support of the ceramic industry when reviewing its Temporary Crisis Framework on 28 October, thereby including virtually all ceramic sectors in the list of "Particularly affected sectors" eligible to the maximum support.

In parallel, Cerame-Unie also took position on all relevant legislative proposals under the European Green Deal, including the review of the CO<sub>2</sub> Emissions Trading System and the Energy Taxation Directive, the introduction of a Carbon Border Adjustment Mechanism or the implementation of the Circular Economy Action Plan. Other key regulatory priorities in 2022 included the review of the Ceramic "BREF" (the Best Available Techniques Reference Document) which provides the legal basis in terms of emissions levels required to obtain EU factory permits un-

der the Industrial Emissions Directive and the revision of the Construction Products Regulation in light of the EU Green Deal.

The year 2022 was also marked by the use by Cerame-Unie of all EU trade policy instruments likely to promote free and fair trade in ceramics with the objective of guaranteeing unrestricted access for foreign markets and protecting the EU domestic production against unfair trade practices. In particular, Cerame-Unie welcomed the initiation by the European Commission of an expiry review of anti-dumping duties against ceramic tiles imported from China.

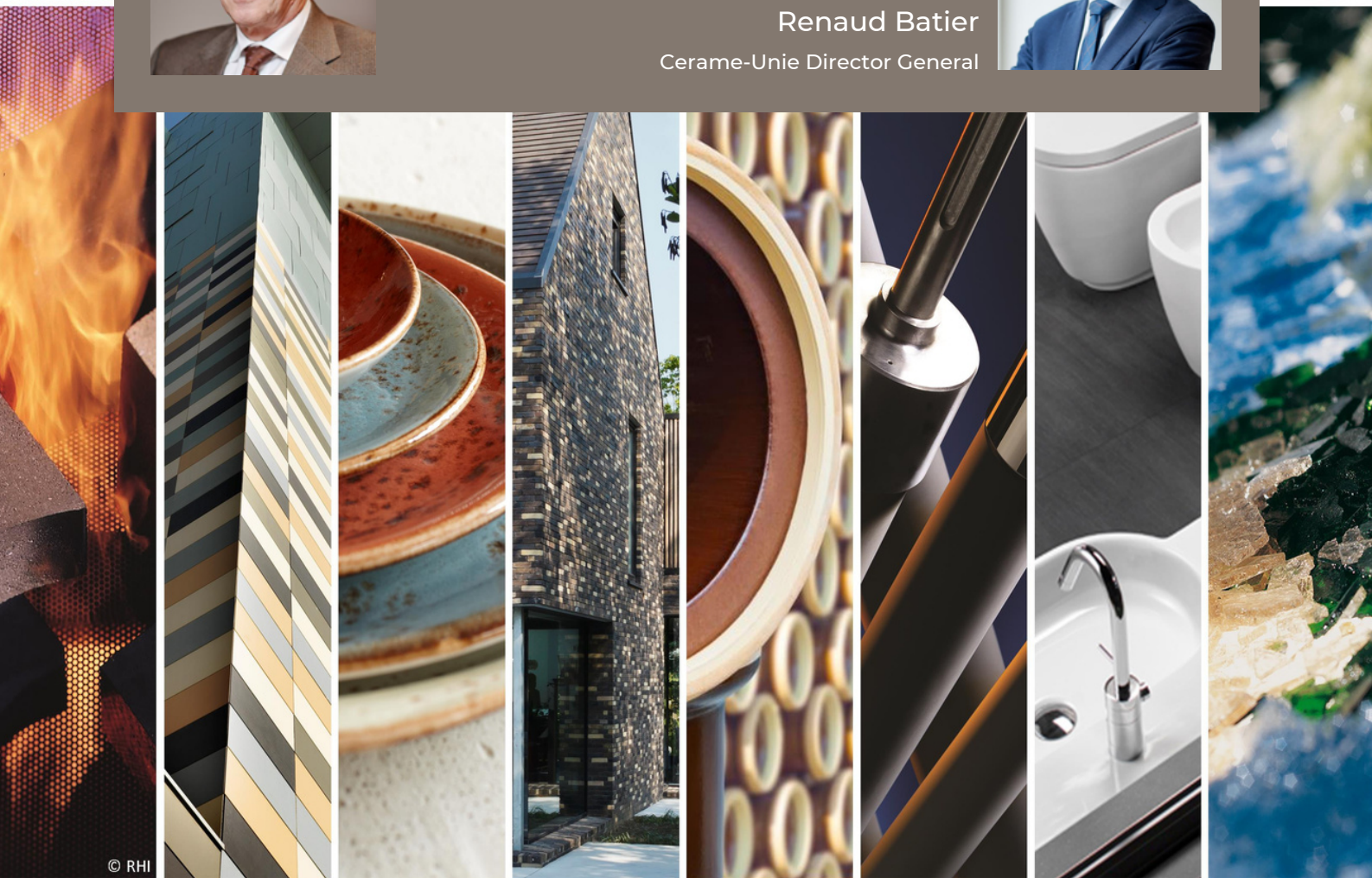
While the ceramic industry offers sustainable and innovative solutions to deliver on the EU's objectives of circularity and carbon neutrality, the industry is facing an increasingly complex regulatory environment and higher production costs than its global competitors. To achieve the objectives of the European Green Deal while maintaining manufacturing in Europe and without creating new dependencies, the EU needs to encourage investments in Europe through a strong industrial policy based on incentives and simplified access to funding and finance for all sectors and levels of the value chains. Preserving and developing further manufacturing in the EU and the skills required should be considered as a key priority.



**Alain Delcourt**  
Cerame-Unie President



**Renaud Batier**  
Cerame-Unie Director General



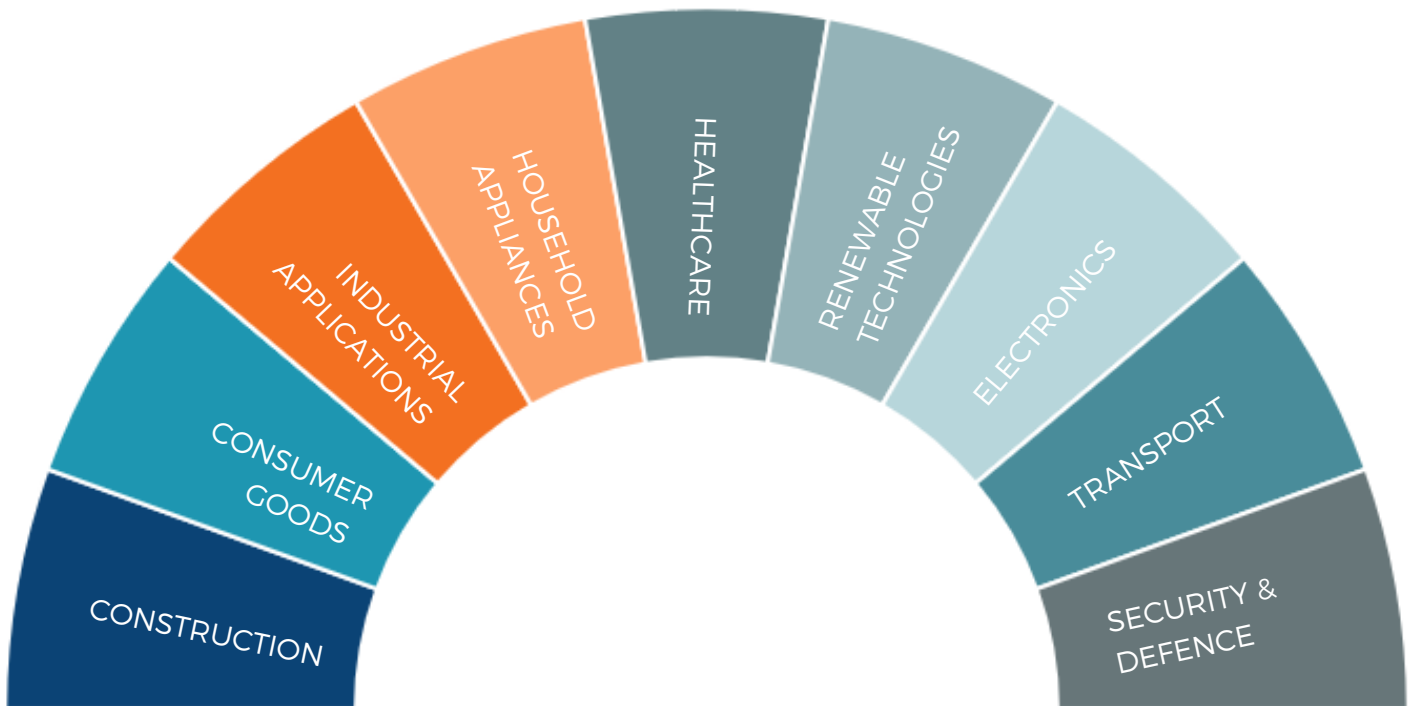
# EUROPEAN CERAMIC INDUSTRY



The European ceramic industry is one of Europe's oldest industries and is an integral part of a dynamic and innovative European economy. It covers a wide range of sectors from time-tested materials to high-tech products.

 [Watch here](#)

## CERAMIC APPLICATIONS



€4.8bn

Positive trade balance



200K

Direct jobs



80%

SMEs Local Jobs

# €32bn

in EU  
Production  
Value



# 150 Years

Average lifespan of a  
brick house

# Up to 30%

Production related to  
energy



# WHAT WE DO

## PROVIDE EXPERTISE IN

Construction & Sustainable Finance



Climate & Energy



Trade & Internal Market



Environment, Health & Safety



Research & Innovation



Skills



## MAINTAIN CONSTRUCTIVE DIALOGUE WITH

EU Institutions



European Parliament  
Ceramics Forum

EPCF



Industry Associations



Research Partners



Other Stakeholders





# SECTORS

The European ceramic industry is structured in nine sectors ranging from construction products and consumer goods to industrial processes and cutting-edge technologies

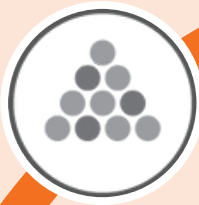
Bricks & Roof Tiles



Refractories



Expanded Clay



Clay Pipes



Wall & Floor Tiles



Flowerpots



Table-Ornamentalware  
& ceramic packaging



Technical Ceramics



Sanitaryware



# CLIMATE & ENERGY

## TOPICS COVERED

Energy Crisis and RepowerEU

Temporary Crisis Framework

"Fit for 55" package: ETS, CBAM, ETD

## SUPPORTING ACTIVITIES

4 

Position papers published

8 

Joint Letters

6 

Press releases

## ENERGY CRISIS AND REPOWEREU

Since the outbreak of the war in Ukraine, a dramatic increase in the energy prices has been observed in the EU. On 8 March 2022, the European Commission, as a reaction, published a Communication entitled: "REPowerEU: Joint European Action for more affordable, secure and sustainable energy", outlining a strategy to reduce and ultimately eliminate fossil fuel imports from Russia into the EU.

On 18 May 2022, the Commission published another Communication, called: "REPowerEU Plan", which serves as a detailed follow-up to the previous Communication. The Communication sets out a range of actions that the EU will take over the next years with a view to save energy, diversify supplies, substitute fossil fuels by boosting the EU's clean energy transition, reduce fossil fuel consumption in industry and transport, combine investments and reforms.

With regards to energy savings, the Commission proposed to enhance the long-term energy efficiency measures, including an increase from 9% to 13% of the binding Energy Efficiency Target under the 'Fit for 55' package.

For the supply diversification, the Communication recalled that the newly created EU Energy Platform, supported by regional task forces, will enable volun-

tary common purchases of gas, LNG and hydrogen by pooling demand, optimising infrastructure use and coordinating outreach to suppliers.

To accelerate the rollout of renewables, the Communication proposed to increase the headline 2030 target for renewables from 40% to 45% under the 'Fit for 55' package.

To reduce fossil fuel consumption in industry, the Commission planned to roll out carbon contracts for difference to support the uptake of green hydrogen by industry and specific financing for REPowerEU under the Innovation Fund.

On 20 July 2022, the Commission published the “Save gas for a safe winter” Communication, together with the EC Guidelines on the EU gas demand reduction plan.

The ceramic industry was mentioned as one of the “sectors running continuous

processes” that deserve particular attention due to the “potential damage to installations” being included in the criteria to prioritise critical non-protected customers.



On 26 July 2022, the Energy Council adopted the EC proposal on a Council regulation on coordinated demand reduction measures for gas, whereby Member States agreed on a voluntary reduction of natural gas demand by 15% compared to their average consumption in the past five years, to be achieved between 1 August 2022 and 31 March 2023. Between August and November 2022, gas demand reduction dropped in most Member States, 18 of which overachieved the 15% target.

During the “State of the European Union” address of 14 September 2022, the Commission President Ursula von der Leyen announced further emergency measures to cope with the energy crisis such as a Council Regulation on an emergency intervention to address high energy prices, adopted by the Extraordinary Energy Council on 30 September 2022.

The regulation included measures setting targets to reduce the total monthly gross electricity consumption of MS by 10%; the obligation to limit the revenues of certain energy producers by setting a cap on infra-marginal technologies of 180 EUR/MWh; the possibility to apply public interventions in price setting for the supply of electricity for SMEs.

On 18 October 2022, the European Commission proposed two further measures:

- Communication “Energy Emergency - preparing, purchasing and protecting the EU together”
- Proposal for a Council Regulation “Enhancing solidarity through better coordination of gas purchases, exchanges of gas across borders and reliable price benchmarks”.

The proposed measures include legal tools for the aggregation of EU gas demand and joint purchase of gas; the development of a new complementary benchmark for LNG to be established by ACER by March 2023; default solidarity rules between Member States in case of supply shortages.

On 22 November 2022 the European Commission published its Proposal for a Gas Market Correction Mechanism, which on 19 December 2022 was agreed by the EU Energy Ministers, who brought however substantial changes to the Proposal.

The market correction mechanism will be automatically activated if the month-ahead price on the Title Transfer Facility (TTF) exceeds 180€/MWh for three working days and the month-ahead TTF price is 35€ higher than a reference price for LNG on global markets for the same three working days.

The mechanism will apply as of 15 February 2023. The regulation includes a suspension mechanism if risks to security of energy supply, financial stability, intra-EU flows of gas, or risks of increased gas demand are identified. Member States agreed that the mechanism will apply to month-ahead, three months-ahead and a year-ahead derivative contracts. The regulation is temporary and will apply for one year.

Cerame-Unie has actively followed the negotiations on the measures aimed at tackling the energy crisis, with some of the main actions including a CU press release calling for an EU-wide measures limiting the price of natural gas and a letter addressed to the Commission President Von Der Leyen and Czech Ambassador Zajíček from the Alliance of the Energy Intensive Industries.



Moreover, on 21 September 2022 the representatives of the CU Board held an online meeting with the Deputy Director of DG Energy Mechthild Wörsdörfer to present the impact of the energy crisis on the ceramic industry, - amounting to a production downfall between 5% and 30 % - and to underline that the ceramic industry must be considered as a critical sector in the energy demand reduction plans.

## TEMPORARY CRISIS FRAMEWORK

To support the economy in the context of Russia's invasion of Ukraine, on 23 March 2022, the European Commission published a Temporary Crisis Framework (TCF). It allows the Member States to set up schemes to grant 3 three different types of aid:

1. limited amounts of aid not linked to increase in energy prices,
2. liquidity support in form of state guarantees and subsidised loans,
3. aid to compensate for high energy prices (up to €25 million for energy-intensive users and up to €50 million for companies active in specific sectors mentioned in Annex 1).

On 28 October 2022, the European Commission adopted an amendment to the Temporary Crisis Framework, prolonging all measures until 31 December 2023.

The “Particularly affected sectors” Annex has been reviewed and it now includes the following ceramic sectors: refractory products; ceramic tiles and flags; bricks, tiles and construction products in baked clay; ceramic household and ornamental articles; sanitary fixtures.

The maximum limits of aid for these sectors have been increased and the general conditions altered. According to TCF point 67(c): “For beneficiaries qualifying as ‘energy-intensive businesses’ active in one or more sectors or sub-sectors listed in Annex I, the overall aid per beneficiary may be increased to a maximum of 80% of the eligible costs and the overall aid per undertaking may not exceed EUR 150 million at any point in time. The beneficiary must in addition show that it has either a reduction in EBITDA (excluding aid) of at least 40% in the eligible period compared to the reference period, or a negative EBITDA (excluding aid) in the eligible period”.

Cerame-Unie has actively followed the negotiations on the TCF revision, lobbying for its extension through several actions, including a joint letter of the Energy Intensive Industries addressed to DG Competition in September 2022.

## “FIT FOR 55” PACKAGE: ETS, CBAM, ETD

On 14 July 2021 the European Commission proposed an extensive review of the EU’s energy and climate laws to bring the legislation in line with the aim of cutting carbon emissions by 55% before the end of the decade, as promised in the European Green Deal.

At the centre of the reform is the **review of the European Emission Trading System (ETS) Directive**. To reach the more ambitious goal of 55% emissions reductions by 2030, the Commission proposed a steeper linear reduction factor of 4.2% (from the current 2.2%) and a one-off reduction of the overall emissions cap. This would correspond to a reduction of emissions of 61% by 2030 (compared to 2005), which is a drastic increase compared to the

current target of -43%. With regards to the allocation of free emission allowances, the Commission proposed to increase the maximum benchmark update rate to 2,5 % per year as of 2026 instead of the current 1,6 %, resulting in a maximum reduction of 50% instead of 32% under the current ETS Directive.

The European Parliament adopted its Report on the review of the EU ETS in its plenary session of 23 June 2022. The Report served as the Parliament's mandate for the trilogue negotiations with the Council. The Members of the Parliament voted to gradually increase the linear reduction factor up to 4.6% in 2029. The Parliament also agreed with the Commission's proposal to increase the maximum benchmark update rate to 2,5 % per year, with the minimum one being increased to 0,4%.

The Council adopted its general approach on 29 June 2022. The Council mainly confirmed the European Commission's Proposal. With regards to the EU ETS and CBAM, the Council endorsed the proposal to end free allowances for sectors covered by the CBAM progressively, over a ten-year period between 2026 and 2035. However, the Council accepted a slower reduction at the beginning and an accelerated rate of reduction at the end of this 10-year period.

The trilogue negotiations were finalized on 18 December 2022. The co-legislators agreed to a rebasing of the overall emissions ceiling over two years of 90 and 27 million allowances respectively and increase the annual reduction rate of the cap by 4,3 % per year from 2024 to 2027 and 4,4% from 2028 to 2030.

Industrial installations, including ceramics, that benefit from the free allocations will need to comply with the conditionality requirements in the form of energy audits and climate neutrality plans for the certain installations.

Cerame-Unie has actively followed the legislative process for the EU ETS Directive revision, undertaking a number of advocacy actions including the reply to the Commission public consultation, position paper, the proposal of several draft amendments, and following-up with rapporteur and shadow rapporteurs. Additionally, Cerame-Unie carried out common actions with other energy intensive industries, and numerous advocacy actions ahead of the parliamentary votes, as well as at national level through the relevant ministries and the Permanent Representations. Cerame-Unie has also published its second position paper on the review ahead of the trilogue negotiations.

To mitigate the risk of carbon leakage, the Commission proposed to set up a **Carbon Border Adjustment Mechanism (CBAM)**. According to the EC Proposal, from 2026 onwards, a CBAM would be introduced for goods from the Aluminium, Cement, Electricity, Fertilizers, and Iron & Steel sectors. Importers of these goods will have to surrender the CBAM certificates, the price of which will be determined based on the price of ETS allowances. For the sectors covered by the mechanism, free allocation will be reduced by 10% annually until 2035 (according to the EC Proposal). An export rebate has not been foreseen by the Commission.

Even though the CBAM is not foreseen for any ceramic industry sector, the Commission has announced a review of the measure to possibly extend its scope.

The Parliament adopted its Report on the CBAM Proposal in its plenary session of 23 June 2022. The Members of the European Parliament voted in favour of postponing the implementation of CBAM by one year in line with the start of the phasing out of free allowances in 2027. The Parliament also agreed to include all EU ETS sectors in CBAM by January 2030; the Commission would decide on the scope extension with a delegated act to be adopted by 30 June 2025.

The Council's general approach, adopted on 15 March 2022, mainly confirmed the Commission's Proposal.

The European Parliament and the Council reached an agreement during the trilogue negotiations on 13 December 2022. The negotiators have agreed that CBAM will apply from 1 October 2023 but with a transition period (3 years) where the obligations of the importer shall be limited to reporting. CBAM will cover iron and steel, cement, aluminium, fertilisers and electricity, as proposed by the Commission, and extended to hydrogen, indirect emissions under certain conditions, certain precursors as well as to some downstream products such as screws and bolts and similar articles of iron or steel. With regards to the **scope extension to other ETS sectors**, a compromise agreement has been found in Art. 30 "Review and reporting by the Commission", which states that:

*"Before the end of the transitional period (..) the Commission shall present a report (...). The assessment shall be accompanied by a timetable ending in 2030 for the gradual inclusion of the goods of this Regulation, taking into account in particular the level of their respective carbon leakage risk."*

With regards to the automatic inclusion of certain precursors in the scope of CBAM in Annex 1, the *Kaolin and other kaolinic clays, calcined*, have been included among others.

Cerame-Unie has actively followed the legislative process of the CBAM Proposal, undertaking several advocacy actions both independently and through the AEGIS Alliance. These include the reply to the Commission public consultation, position paper, common statements on the Proposal with the Alliance of Energy Intensive Industries and AEGIS, the proposal of amendments and advocacy meetings with the Parliament, Commission and the Member States.

The Proposal for the review of the **Energy Taxation Directive (ETD)** by the Commission introduces a new structure of tax rates based on the energy content and environmental performance of the fuels and electricity. Furthermore, the Proposal broadens the taxable base by including more products in the scope and by removing some of the current exemptions and reductions (for example, the one applying to mineralogical processes, which is essential for the ceramic industry).

The European Parliament has a consultation role on the review of the ETD Directive. The Lead Committee ECON is expected to resume negotiations on the Proposal in March 2023. In the Council, the revision of the Directive requires unanimity. The Council has not yet adopted its general approach. Cerame-Unie actions have focused on maintaining consistency in the scope by continuing to exclude mineralogical processes, thereby preserving equal treatment between on the one hand mineralogical processes, and on the other metallurgical and chemical processes.

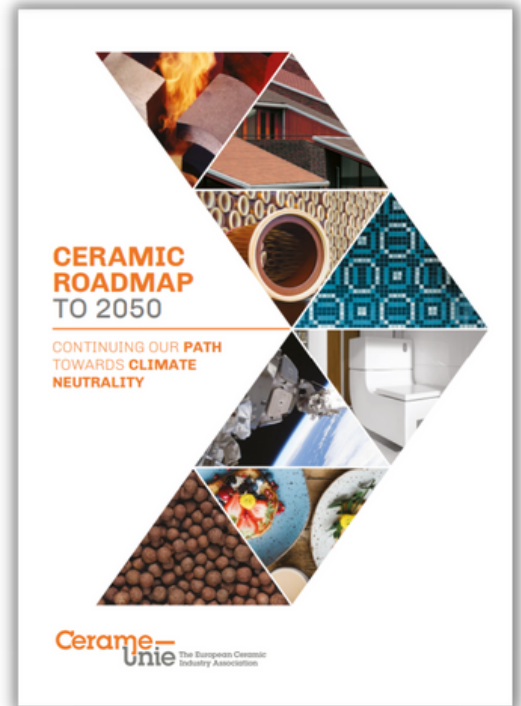




# CERAMIC ROADMAP TO 2050: CONTINUING OUR PATH TO CLIMATE NEUTRALITY

In the light of the EU's objective to achieve climate neutrality by 2050, in 2021 Cerame-Unie published the continuation of the first Ceramic Roadmap published in 2012 that showcases what climate neutrality means for ceramics. This is shown through the presentation of a **decarbonisation model and pathway, technologies and decarbonised energy required, CO<sub>2</sub> abatement costs and policy requirements** which are necessary for the European ceramic industry to successfully engage on the path towards climate neutrality.

Furthermore, the new Ceramic Roadmap to 2050 explains why and how ceramics are essential in so many value chains to deliver on the European Green Deal through their **contribution to the renovation wave with energy & resource efficient solutions, circular economy, zero pollution ambitions, biodiversity and smart mobility** while ensuring a **just transition**.



[READ THE FULL ROADMAP](#)



# CONSTRUCTION & SUSTAINABILITY

## TOPICS COVERED

Revision of the Construction Products Regulation (CPR)

Carbon Accounting for Building Materials (CA4BM)

New European Bauhaus

Circular Economy

Sustainable Finance

Unified Water Label

## SUPPORTING ACTIVITIES

4 

Position papers published  
(2 CPR, 1 ESPR, 1 Sustainable Finance)

3 

Public webinars  
(2 NEB, 1 Roadmap related)

2 

Response to public consultations  
(1 EPBD, 1 CPR)

1 

Website on the contribution of ceramics to the New European Bauhaus

## REVISION OF THE CONSTRUCTION PRODUCTS REGULATION (CPR)

The CPR lays down harmonised rules for the marketing of construction products in the EU and provides a common technical language to assess the performance of construction products. Following the publication of the proposal for a revised CPR by the European Commission in March 2022, Cerame-Unie developed its position and implemented several advocacy actions. A technical position paper presenting the ceramic industry's perspective was issued in June 2022, followed by a key messages document to policy makers in October 2022. Several meetings were organised with policy makers, such as DG GROW and key Members of the European Parliament. In parallel of CU actions, experts contributed to drafting amendments proposals through Construction Products Europe, tabled by the whole construction industry.

## ENERGY PERFORMANCE BUILDINGS DIRECTIVE (EPBD)

On 15 December 2021, the European Commission published its proposal for a revised Energy Performance Buildings Directive (EPBD). Cerame-Unie shared some technical comments as a contribution to the public consultation and prepared a position paper ahead of the vote at the European Parliament. Ceramic construction products will be pivotal to Europe's new near-zero energy building stock as well as the Renovation Wave. The energy-saving potential, durability and reusable qualities of ceramic construction materials are central to reducing energy use and benefit to energy efficient buildings.

The contribution of long-lasting building products for energy efficient buildings, such as ceramics, should be better introduced in the revised EPBD. Building materials should be assessed and promoted with respect to their reusability and recyclability potentials. Considering the fact that renovation is strongly promoted, the proposal should also support assessments to determine whether deep renovation (purely energetic renovation) or demolition and subsequent rebuilding is ecologically and economically more reasonable. In some cases, it might be more efficient to entirely rebuild a building instead of renovating an old one.

## CIRCULAR ECONOMY

In the framework of the Circular Economy Action Plan, 2022 has been marked by the publication of the proposal for a new Ecodesign for Sustainable Products Regulation (ESPR), published on 30 March 2022. The ESPR is the cornerstone of the Commission's approach to more environmentally sustainable and circular products. The proposal allows for the setting of a wide range of requirements, including on product durability, reusability, upgradability and reparability, presence of substances that inhibit circularity, energy and resource efficiency, recycled content, remanufacturing and recycling, carbon and environmental footprints, information requirements, including a mandatory Digital Product Passport. Cerame-Unie monitored this new proposal to assess its impact on the ceramic industry and issued a position paper.



## CARBON ACCOUNTING FOR BUILDING MATERIALS (CA4BM)

Achieving a net-zero carbon economy by 2050 is one of the key objectives of the European Green Deal. In the construction ecosystem, evaluating the whole life environmental effects of construction materials and products, based on comprehensive and robust data, is of critical importance to ensure the right decisions are taken to mitigate the effects of climate change. A consortium of European and global trade bodies in the field of construction products, including Cerame-Unie, published in June 2022 a peer-reviewed study entitled "Carbon Accounting for Building Materials – An assessment of Global Warming Potential of biobased construction products" undertaken by a consultancy and engineering firm specialised in the field of construction and the environment. The study provides an assessment of the science base behind the conditions of carbon neutrality of bio-based construction products, their substitution effects and a critical assessment of temporary carbon storage benefits. It highlights the need for technology and material-neutral policies at national and European level. CU experts contributed to the technical development of the study and following communication activities towards policy makers will be organised.

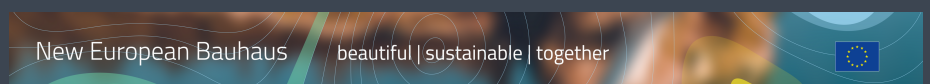
Find the complete study here: <https://ca4bm.org/>

## NEW EUROPEAN BAUHAUS

Launched in 2020 by the European Commission, the New European Bauhaus is a 'think-do tank', a creative and interdisciplinary initiative aiming to combine design, sustainability, accessibility, affordability and investment in the living environment in order to help deliver the European Green Deal. The initiative is based on three core pillars: sustainability, aesthetics and inclusion. Since June 2021, Cerame-Unie is honoured to take part in this initiative as an official partner. In this context, Cerame-Unie organised two public webinars on the contribution of ceramics to the New European Bauhaus objectives and launched a dedicated website, featuring +35 inspiring case studies with ceramics, collected among members.

Find here our dedicated website:

<https://www.ceramicsforbauhaus.eu/>

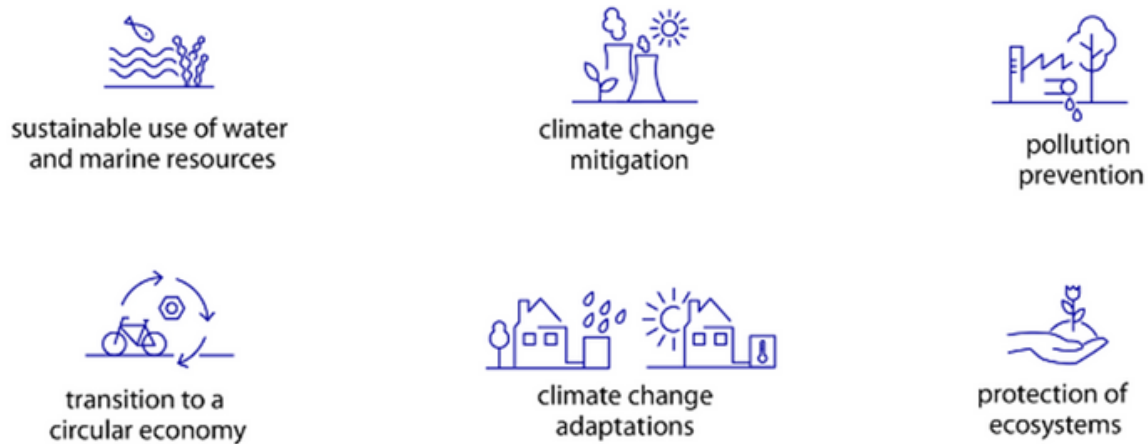


## UNIFIED WATER LABEL ASSOCIATION

A voluntary and flexible smart tool to measure the water and energy consumption of bathroom products, the Unified Water Label (UWL) helps consumers decide on the most water and energy efficient product. The scheme has attracted the support of 155-160 brands, with a live database of over 14,300 individual products that is rapidly growing. By using the UWL, ceramic sanitaryware manufacturers are committed to leading the market in water efficiency. As founding and supporting member, FECS continued the promotion of the UWL and was re-elected in the Board of the Unified Water Label Association during the annual meetings of December 2022. Please find out more in <https://uwla.eu/>

## SUSTAINABLE FINANCE

The EU Taxonomy aims at writing a common language for sustainable investments in the EU, by identifying the areas in which such ventures can have the best tangible impact on environmental protection.



*The six environmental objectives of the Taxonomy Regulation*

The ceramic industry has not directly been included in the Taxonomy regulation yet as a substantial contributor to the environmental objectives. However, some of our sectors are mentioned as enabling activities in the first Delegated Act on Climate Energy Adaptation and Mitigation, in particular bricks, roof tiles, and wall & floor tiles. It is key for the ceramic industry to ensure that its companies (both SMEs and large companies) have access to sustainable finance and can increase the potential to contribute substantially to the key taxonomy objectives by, e.g., providing alternatives for the intensive use of energy and curbing down greenhouse gas emissions.



# ENVIRONMENT, HEALTH & SAFETY

## TOPICS COVERED

Revision of EU rules on Food Contact Materials

European Network for Silica

REACH and CLP revision

Industrial Emission Directive Revision

Ceramic BREF

## SUPPORTING ACTIVITIES



Response to public consultations  
(REACH, FCMs)



Position papers published  
(CU level and joint (3 IED, BREF, REACH, FCMs))

## CERAMIC BREF

The Ceramic BREF is a document for the ceramic industry that provides the legal basis for EU factory permits under the Industrial Emissions Directive (IED). The current Ceramic Manufacturing Industry Best Available Techniques (BAT) Reference document, the so called Ceramic BREF (CER BREF), was published in 2007. The official revision process of the Ceramic BREF started in 2019 with the creation of the Technical Working Group (TWG), that is responsible for defining new Best Available Techniques - Associated emission levels (BAT-AELs) and Best Available Techniques - Associated performance level (BAT-AEPLs), which will become legally binding in the permits for plants under the IED scope.

After the 2021 kick-off meeting, the selected plants received the data-gathering questionnaire in February, along with its user manual, and were able to fill it until September 2022.

The European Integrated Pollution Prevention and Control Bureau (EIPPCB) held Workshops on Circular Economy and on Decarbonisation, respectively on 31 March and 15 June 2022. The ceramic industry took the opportunity to present its technical specificities, practices, sustainability efforts and upcoming projects. The European Commission, the European Environmental Bureau, the EU Network for the Implementation and Enforcement of Environmental Law, the Environmental Coalition on Standards, the German Environment Agency and VITO also took the floor.

Sites visits took place in this framework in Spain and Austria. The Bureau with TWG members from Italy, Spain Austria, Germany, France, Belgium, Slovakia participated. Both visits were very positive. They were a chance to see a variety of new sectors, to understand them better, to hold technical discussions and to meet other TWG members in person.

The first data assessment workshop occurred online on 16-17 November 2022. The EIPPCB presented the data collected via the questionnaires and the Qlik app tool used in order to process and analyse the data. The data assessment phase was extended until 15 February 2023 in order for the TWG to correct the data as appropriate.

The internal work at Cerame-Unie level continues with regular BREF Task Force meetings at sectorial and general level, building on the data assessment workshop and the data available on Qlik.

**10 - 25 FEB. 2021** - *Kick-off meeting*

**1 FEB. 2022** - *EIPPCB sends out final questionnaire*

**SEP. 2022** - *TWG responses to questionnaire*

**Q2 2023** - *Final draft CER BREF*

**Q3 2023** - *TWG comments on first draft*

**Q2 2024** - *Final TWG meeting*

**Q4 2024** - *Final draft CER BREF*

**Q2 2025** - *BAT conclusions voted on at IED Art. 75 Committee*

**Q4 2025** - *Publication of the BAT in the EU official journal*

## **INDUSTRIAL EMISSION DIRECTIVE REVISION (IED)**

In April 2022, the European Commission presented its proposal to review the EU measures on pollution from large industrial installations – the “Industrial Emissions Directive” (IED), to ensure industry uses techniques fostering a sustainable EU economy and a cleaner environment. The ENVI Committee (Lead) rapporteur, MEP Kanev (BG, EPP), published his draft report on 28 October 2022. Cerame-Unie has been active on this dossier for specific Ceramic industry issues as well as on horizontal topics (via the IED Alliance).

The final IED revision is expected to be published in the second half of 2023.



## NEPSI (SOCIAL DIALOGUE ON THE PREVENTION OF RISKS LINKED TO CRYSTALLINE SILICA)

The European Social Dialogue “Agreement on Workers’ Health Protection through the Good Handling and Use of Crystalline Silica and Products Containing It” (SDA Agreement) states that quantitative information on the application of the Agreement within each of the sectors represented should be collected every two years.

The biennial reporting of NEPSI Key Performance Indicators (KPIs) regarding the years 2020 and 2021 took place in 2022. The online reporting system allows signatory companies and sites to provide information on NEPSI KPIs under seven different sections. From the data that is entered into the system, a set of KPIs will be calculated automatically, for example to indicate the percentage of employees potentially exposed to Respirable Crystalline Silica (RCS) who are covered by the Agreement. The report shows that all key performance indicators are improving,



even despite the COVID situation. These figures demonstrate that NEPSI signatories continue and strengthen their commitment to NEPSI good practices to protect their employees and minimise the exposure to respirable crystalline silica.

## REACH and CLP revision

The European Commission intends to review the Registration, evaluation, authorisation and restriction of chemicals (REACH) and Hazard classification, labelling and packaging of chemicals (CLP) legislation. After launching REACH and CLP Inception Impact Assessments intending to inform citizens and stakeholders and gather their views, the European Commission launched a Public Consultation on the REACH revision in January 2022 until April 2022. The Consultation included separate surveys for interested parties and stakeholders, with sections on each topic of the REACH regulation. Key questions regarded information on critical hazard properties of substances, low tonnage substances, registration of certain polymers, endocrine disruptors, mixtures assessment factor (MAF), reform of the authorisation and restriction processes, and the creation of a new European Audit Capacity. Cerame-Unie replied to the Consultation.

The European Commission is expected to present its proposal for the REACH Revision in the fourth quarter of 2023 together with the Inception Impact Assessment results. Cerame-Unie will continue its active monitoring on the topic and ensure that our position is shared.

CARACAL 45 took place on 5 and 6 July 2022. It was the opportunity to discuss the issue of the inclusion of intermediates in the REACH revision, proposed by the European Commission and contested by the industry.

Ensure that the Intermediate status interpretation and definition will be in line with ECJ case on acrylamides.

## REVISION OF EU RULES ON FOOD CONTACT MATERIALS

The European Commission intends to review the EU measures on food contact materials (FCMs) aimed to ensure food safety, reducing the presence and use of hazardous chemicals. The policy action considers the latest science and technology, supports innovation and sustainability by promoting safely reusable and recyclable solutions.

Cerame-Unie has been actively involved in this process. In 2022 an FEFP delegation met with DG SANTE on 1 April and DG GROW on 27 June in order to exchange on the topic and on the most recent updates.

Lastly, FEFP replied to the Public Consultation on the Revision of EU rules on FCMs that closed on 11 January 2023 and that did not focus on ceramics but on the general legislation on FCMs. The Cerame-Unie reply was accompanied by an FEFP position paper.

Work towards the setting of lower limits that are scientifically justified & achievable without creating disproportionate burden and costs for the industry.





# TRADE & INTERNAL MARKET

## TOPICS COVERED

Market Access  
Trade Defence

## SUPPORTING ACTIVITIES

1



Joint Industry  
Statements

3



Press Releases

2



Responses to public  
consultations

Free and fair trade is essential for the European ceramic industry, whose products are internationally renowned and appreciated. This makes the industry very export-oriented, with 38% of EU production destined to exports and a positive trade balance of EUR 5.6bn in 2021. Protection from unfair trade is equally important for the competitiveness of our sector, both in third countries and on the EU single market. At present, EU trade defence measures are protecting the industry from dumping and duty circumvention from China in the ceramic tiles and the table- & ornamental ware sectors.

In light of the international outlook of our industry, Cerame-Unie works in close cooperation with the Commission (DG Trade) to ensure fair access to third markets and effective enforcement of trade defence instruments. Being an active user of market access and trade defence tools, Cerame-Unie has reacted to the 2021 Annual Report on implementation and enforcement of Fair Trade Agreements (FTAs) as well as the 2021 TDI Annual Report. Cerame-Unie also engages on a regular basis with EU institutions and other stakeholders at the

various Civil Society Dialogues organised on different policy initiatives related to international trade. Moreover, Cerame-Unie continues to be an active member of DG Trade's 'Market Access Advisory Committee', gathering industry stakeholders and Member States representatives to discuss market access issues in third countries. In 2022, Cerame-Unie was admitted to the 'EU-UK Domestic Advisory Group', a committee administered by the EESC dealing with the implementation of the EU-UK Trade and Cooperation Agreement.

Cerame-Unie is also advocating for free and fair trade through the industry coalition AEGIS Europe, an alliance of over 25 key industries aiming to fight trade distortions and promote an international level playing field. Through AEGIS Europe, Cerame-Unie has responded to several public consultations and engaged with decision makers with regard to a wide variety of topics, including trade defence, WTO Reform, the EU Carbon Border Adjustment, the Generalised Scheme of Preferences, Foreign Subsidies, Customs Issues, etc.



In 2022, Cerame-Unie has also reinforced its advocacy on access to raw materials, which is becoming increasingly challenging due to supply chain disruptions following the war in Ukraine as well as global logistical bottlenecks. The value chains in the ceramic industry was also the topic of the public conference of the Ceramic Days 2022, where high-level speakers exchanged their views on the resiliency of supply chains.

In this regard, Cerame-Unie is following the preparation of the Critical Raw Materials Act and participated in the first public consultation on this topic in November 2022. The new proposal on Corporate Sustainability Due Diligence has also been an important focus for 2022 and for the coming year.

## MARKET ACCESS

In 2022, Cerame-Unie continued to focus on the trade barriers affecting EU exports of ceramic tiles to Egypt and Saudi Arabia. In January 2022, the European Commission requested a dispute settlement at the World Trade Organisation (WTO) to address the **Egyptian mandatory registration for exporters**. At the consultation stage, several bilateral meetings took place with the Egyptian counterparts and Cerame-Unie/CET was consulted by the Commission to identify an acceptable solution to the case. The Egyptian authorities responded well to the requests and unblocked registrations of EU companies on hold for several years. However, a new decree suspending the issuance of letters of credit has created additional bottlenecks to EU exports and EU ceramic tiles exporters that obtained registration as a result of the WTO action were still unable to access the market. As letters of credits are no longer required since December 2022, Cerame-Unie will monitor the resumption of exports in 2023 and assess whether the WTO case can be formally closed.

With regard to the **Saudi Quality Mark** in Saudi Arabia, Cerame-Unie held several meetings with the Commission in 2022 to find a solution to the trade barrier affecting exporters of ceramic tiles since 2020. In August, Saudi Arabia sent in writings some formal commitments to solve part of the outstanding issues raised by the industry. Based on the feedback from Cerame-Unie member companies, the improvements agreed by the Saudi authorities are not fully implemented and additional elements need to be addressed by the certification bodies.

The latest development on market access requirements can be found in the **Market Access Inventory of tariff and non-tariff barriers**, updated regularly by Cerame-Unie with all the necessary information for EU exporters of ceramic products. This document is available to all Cerame-Unie members.

EU27 Trade Balance in Ceramics



## TRADE DEFENCE

Unfair trade practices continue to pose a threat to the global level playing field. Cerame-Unie regularly monitors the implementation and enforcement of the trade defence measures in place in our sectors, namely the anti-dumping measures against imports of ceramic tiles and imports of table- and ornamental ware from China. In 2022, Cerame-Unie provided comments on several investigations of Chinese tableware producers asking to be granted the NEPT status, and successfully avoided further circumvention of anti-dumping duties.

In the ceramic tiles sector, the European Commission has launched in December 2021 a new anti-dumping investigation on imports of ceramic tiles from India and Turkey following the request of the Union Industry. In addition, the industry has requested the extension of the anti-dumping measures on imports of tiles from China, due to expire in November 2022; an expiry review investigation is ongoing.

- **38%**  
of EU ceramic production
- **42%**  
of EU wall & floor tiles production
- **41%**  
of EU refractories production



# SKILLS

Economic, digital, and technological developments, as well as increasing energy efficiency and environmental demands, present the European Energy Intensive Industries with many challenges including the continuous updating of the qualifications, knowledge, and skill profile of its workforce.



A just transition and shift to a climate neutral, resilient economy can only be achieved by providing citizens with the necessary skill sets and qualifications for future job profiles.

Identifying skills shortages and ensuring adequate supply of the right skills is essential to help deliver the goals and ambitions of the recovery pathway, EU Industrial & SME Strategies, and the Green & Digital transitions.

Economic, digital, and technological developments, as well as increasing energy efficiency and environmental demands, present the European Energy Intensive Industries with many challenges including the continuous updating of the qualifications, knowledge, and skill profile of its workforce.

As partners of the **SPIRE-SAIS Project “Skills Alliance for Industrial Symbiosis - A Cross-sectoral Blueprint for a Sustainable Process Industry”** (2020-2023), **Cerame-Unie** and the **European ceramic industry** are committed to supporting the transition of EU Process Industries’ workforce, towards the goals and ambitions of the EU Green Deal, as well as to supporting the upskilling & reskilling of its workforce, by providing and ensuring continuous, specialized and life-long training, as well as building close and fruitful collaborations with academia, educational providers, and communities.

The **SPIRE-SAIS Project** brings together stakeholders from across the SPIRE community, including Industry sector associations, Education and training providers, Research & Technology organisations, Research institutions, regional institutions, companies, and others, **to enable and accelerate the uptake of Industrial Symbiosis and energy efficiency by developing a comprehensive cross-sectoral blueprint for skills.**

**SPIRE-SAIS will address possible skills shortages in the Energy Intensive Industries while providing EU citizens with the necessary skill sets for future job profiles.** The project will address updating of the curricula, qualifications, knowledge, and skills that are required to support essential cross-sectoral collaboration and Industrial Symbiosis activities.

The project aims to develop **an industry-driven and proactive skills strategy that will assist the wider implementation and exploitation of industrial symbiosis and energy efficiency across the energy intensive industrial sectors of the SPIRE community: ceramics, chemicals, steel, engineering, non-ferrous metals, minerals, water, and cement.** The new skills developed will help unfold the potential of digital transformation within SPIRE companies and beyond. The project will build on the existing coordination, projects, and activities of SPIRE in a truly cross-sectoral approach.

Educational modules and tools for greater awareness of the needs and opportunities provided by improved industrial symbiosis and energy efficiency will be developed. New skills, including digital skills, for the practical implementation of industrial symbiosis in globally competitive industries will be identified that anticipate the skills requirements of industry and allow proactive practical activities to meet the future skills needs of the Energy Intensive Industries in Europe and beyond.

In 2021, the **SPIRE-SAIS Project has signed the EC Pact for Skills**, which is the first flagship action of the European Skills Agenda and Industrial Strategy for Europe. This initiative is a new engagement and model for skills that will help deliver the ambitions of the recovery pathway, the EU Industrial & SME Strategies, and the green & digital transitions.

The objective of the **EC Pact for Skills** is to mobilise and incentivize all relevant stakeholders to take concrete actions for the upskilling & reskilling of EU Workforce. It will also foster large-scale public-private partnerships mobilising key stakeholders to work out scalable and sustainable solutions for training in Industrial Ecosystems.

For more information and to follow the progress, please consult the **[SPIRE-SAIS Project Website](#)**.



# RESEARCH & INNOVATION

## TOPICS COVERED

A.SPIRE &  
Processes4Planet  
Partnership

## SUPPORTING ACTIVITIES



Inventories/ Guide  
documents

## A.SPIRE & PROCESS4PLANET PARTNERSHIP

The Processes4Planet Roadmap 2050 or Strategic Research and Innovation Agenda (SRIA) presents A.SPIRE's vision for circular and climate neutral process industries and details the innovations needed to realize this vision by showcasing the three general objectives that the Partnership is aiming for:

- Developing and deploying climate neutral solutions,
- Closing the energy and feedstock loops, and
- Achieving a global leadership in climate neutral and circular solutions, accelerating innovation, and unlocking public and private investment.

## INVENTORIES & GUIDE DOCUMENTS



The European Ceramic Industry understands the importance of Research & Innovation to maintain its global competitiveness, create new market opportunities, become more sustainable and achieve the goals and objectives of the EU Green Deal. An innovative Ceramic Industry is vital for delivering on our objectives of becoming more sustainable, particularly in terms of energy and resource efficiency.

Cerame-Unie has put together a non-exhaustive inventory of EU-funded Projects supporting R&I in the Ceramic Industry. [This inventory](#) is continuously updated as new projects begin and others conclude.



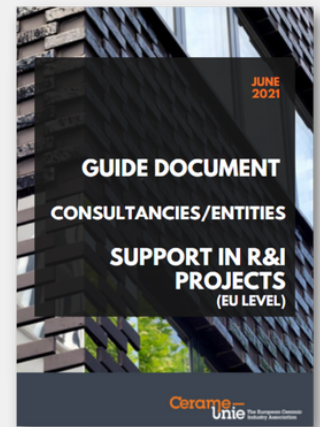
In the context of the European Ceramic Industry decarbonisation Roadmap to 2050, Cerame-Unie has prepared an Inventory of Projects on Biodiversity and Protection of Ecosystems currently being developed and implemented in the Ceramic Industry.

**This inventory** aims at promoting and reflecting the Ceramic Industry contribution and efforts to the protection of Biodiversity and Ecosystems.

The Guide Document contains a list of consultancies/entities specialized in supporting the Industry with R&I Projects (EU level):

- Preparing and drafting projects
- Establishing consortiums
- Finding the adequate funding program
- Formulating/preparing the applications for funding
- Administrating the projects (human and financial resources);
- Managing deadlines, time schedules, deliverables, etc.

The consultancies/entities are presented by Member State to facilitate partnerships and all necessary information and contacts are also provided.



The Starter-kit for the Ceramic Industry containing all relevant information regarding EU Funding Programmes. Gives an overview of:

- EU Funding Programmes
- Different funding opportunities for R&I Projects relevant to the Ceramic Industry
- Relevant contacts where further information and assistance can be found and information on how to launch EU funded research projects
- Different funding opportunities for R&I Projects relevant to the Ceramic Industry;

This document answers relevant questions pertaining to the Ceramic Industry on the topic of Sustainable Finance and EU Taxonomy.

This is a living document therefore, the information provided in this guide will be continuously updated.



# COMMUNICATION

## 3 webinars

In collaboration with the New European Bauhaus and as promotion of the Roadmap. With topics such as construction, energy-efficiency, inclusion, resource-efficiency

With more than 400 participants in attendance



Representing more than 20 countries

## 8 Publications



# 6

Social Media campaigns

# ON



Circular Economy



Sanitaryware



Ceramic Tiles



Ceramics in numbers



Essential Ceramics



Decarbonisation of the industry



3,246 followers on Social Media



Website

89 634

Impressions

46 342

Users 25 448

4248

Engagements

6315

Page views 84 325

38 newsletters sent to Cerame-Unie members





# EVENTS

In 2022, Cerame-Unie organised a number of meetings and events linked to relevant policy areas and notably related to the New European Bauhaus and to the New Ceramic Roadmap to 2050.



March & October 2022



Meetings:  
Chemical Agents WG,  
Climate and Energy WG,  
Environment Committee,  
Committee of Directors,  
PRE Technical Committee,



12 September 2022



Attended by an average of 80 participants.



Gathering stakeholders from Cerame-Unie Members, high-level representatives of the European Commission, Members of the European Parliament, representatives from Member States, European Associations, Research & Innovation entities, Universities, and stakeholders from the ceramic industry value chain.



Watch [here](#)



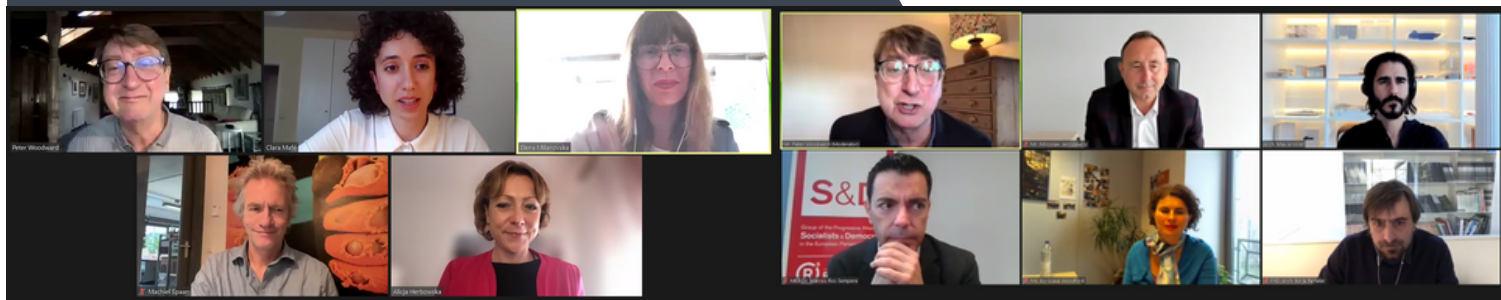
**CU Cycle of Webinars**  
**CU Roadmap to 2050**  
**Building and renovating in an energy-efficient and resource-efficient way**

Cerame-Unie has published the Ceramic Roadmap to 2050. In that context, this webinar presented the energy-saving potential, durability, and reusable qualities of ceramic construction materials (clay bricks, blocks, roof tiles, pavers, expanded clay, wall and floor tiles and sanitaryware) and how the ceramic industry will be central to reducing energy use and construction waste, and supporting the Renovation Wave, through energy efficiency and circularity.

Renovation of our existing building stock and focusing on new near-zero energy buildings are paramount to meeting Europe's decarbonisation objectives. The European ceramic industry plays a central role to reducing energy use in buildings and construction waste.

This webinar was an opportunity to discuss the importance of an EU energy efficient building stock and how the ceramic industry can contribute to meeting the decarbonisation objectives with energy-efficient and sustainable construction products.

## CU Cycle of Webinars: New European Bauhaus



The New European Bauhaus is a 'think-do tank' launched by the European Commission end of 2020, aiming to combine design, sustainability, accessibility, affordability and investment in the living environment in order to help deliver the European Green Deal. The initiative is based on three core pillars: sustainability, aesthetics and inclusion.

As an official partner of the initiative, Cerame-Unie has launched a dedicated [WEBSITE](#) featuring inspiring projects of beautiful, sustainable, and inclusive buildings made with ceramic construction products.



26 January 2022  
25 October 2022

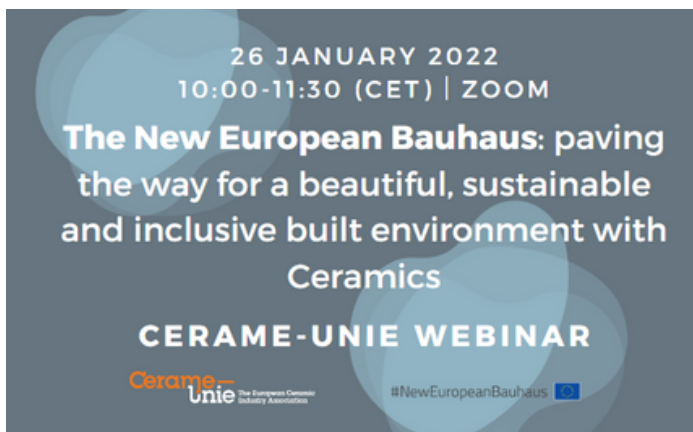


Attended by an average of 100 participants.



Bringing together high-level experts and representatives of the European Ceramic Industry with officials and policymakers from National and EU Authorities.

*Click on the images below to watch recordings of the webinars*



22 March 2022



Attended by 8 MEPs,  
21 Accredited Parliamentary  
Assistants, 41 CU Members



## EPCF Dinner

On March 22 2022, new EPCF Chair MEP Elisabetta Gualmini hosted a dinner in Brussels with Members of the European Parliament, officials, high-level representatives of the Ceramic Industry to launch the upcoming EPCF activities.

The opportunity was also taken to thank our out-going Chair, MEP Inmaculada Rodríguez-Piñero, who proactively served as EPCF Chair since 2016, for her support and dedication to this platform.



# 2022 EUROPEAN CERAMIC DAYS

## EUROPE'S STRATEGIC AUTONOMY IN KEY VALUE CHAINS

28-29-30 November 2022 | Brussels, Belgium



Attended by more than 140 participants both in-person and remotely

Full Programme: [HERE](#)



Bringing together high-level representatives of the European Ceramic Industry with officials and policymakers from National and EU Authorities.

**EPCF:**

- Panel 1- A revised CPR for a well-functioning single market for construction products
- Panel 2- A FitFor55 package adapted to the emergency situation of the energy crisis in the EU



**Public Conference:**

EU's strategic autonomy in key value chains

- The role of trade policy
- Economic analysis - the ceramic industry's contribution to added value throughout its value chains
- Executive panel - what Europe needs to achieve EU's strategic autonomy



# SECTORAL EVENTS



11-13 December 2022  
Bali, Indonesia



Attended by more than 35  
representatives from  
around the world

The Forum provided an opportunity to discuss global trends in the production and consumption of ceramic tiles. WCTF Members had the chance to also receive an update on the ongoing work and latest developments in international standardisation under ISO TC 189, the technical committee on Ceramic Tiles.



WCTF  
29th Annual meeting  
Bali, Indonesia

The 29th World Ceramic Tiles Forum (WCTF) was hosted from and 11 to 13 December in Bali, Indonesia, by ASAKI, the Indonesian association of ceramic manufacturers. The meetings were held in conjunction with the ISO/TC189 meetings successfully held from 7 to 10 December. This edition of the Forum was attended by representatives from Australia, Brazil, China, Indonesia, Italy, Japan, Mexico, Spain, Ukraine and the USA. The WCTF was honoured by the presence of HE. Mr. Bapak Ignatius Warsito, Director General for Chemical, Pharmacy, & Textile Industry at the Industry Ministry of Indonesia, who opened the WCTF.

## ABOUT WCTF:

The WCTF was created in 1994 and is the annual meeting of the ceramic tiles manufacturers worldwide. The WCTF is a platform open to all ceramic tiles manufacturers in the world. Over 30 countries from 5 continents are currently members of the WCTF.

The objectives of the WCTF are to discuss issues of common interest, including:

- national and global trends in consumption and production
- national or international standardization issues (ISO TC 189)
- key regulatory developments affecting the sector's competitiveness
- trade statistics, barriers to trade, review of HS/customs codes
- sustainability and environmental performance
- regional and global initiatives promoting ceramic tiles

For more information, please visit the [WCTF Website](#).



## Board Meeting



16 March 2022  
17 November 2022



All WRA Board Members

The meeting provides the opportunity to present the ongoing work developed by our association, notably through the WRA Communication, Technical and Safety Committees. It allows for a debate on the future orientations and objectives of the World Refractories Association



The WRA Board and General Assembly meetings offered the opportunity to present the progress of the work developed by the WRA committees, on safety, technical aspects and communication.

The new WRA President Parmod Sagar welcomed all participants and stressed the importance of intra-industry cooperation. "As a globally operating industry we need to be prepared to make constant changes to adapt to all the challenges; this requires more collaboration between us", President Sagar stated during his opening speech to the WRA Board. "WRA can be a good platform to improve in all areas of cooperation to build a more cohesive industry", added the President.

## General Assembly



17 November 2022



All WRA Members

### **ABOUT WRA:**

World Refractories Association is a forum to debate regulatory issues affecting global trade, circulate aggregated industry statistics and promote the interests of the worldwide refractory industry. It also serves as a counterpart to other world industry organisations.

The WRA consists at the moment of 6 major refractory industry associations and 16 multinational companies. The secretariat is held by the European Refractories Producers Federation, PRE.

## PRE Congress 2022



1-3 June 2022  
Vienna, Austria



Around 55 PRE members, executives from the refractory industry and national associations from all over Europe gathered in person for a 3-day Congress to discuss important information and key updates pertaining to the refractory industry at European level.



# PRE

## FEDERATION EUROPEENE DES FABRICANTS DE PRODUITS REFRACTAIRES

The Congress opened on Wednesday 1 June with the PRE Executive Committee where industry topics and administrative matters were discussed.

On the following day, the meeting sessions started with the PRE Economic Committee where members were presented with statistics concerning the 2021 trends of the European Refractory industry, the related European Union trade figures and the evolution of raw material prices and freight costs. Following this, Mr. Patrick Bikard, PRE President, gave a presentation on 'The

Refractory Industry and its Decarbonisation Pathway: Outlining the importance of Governmental action for the Green Transition'. After the presentation, a public conference took place covering the topics of the 'Fit For 55' package. The Conference opened with a Keynote Speech by Dr. Othmar Karas, Vice-President of the European Parliament, and was followed by an interesting panel debate involving government and industry representatives. Following the conference, each member took part in one of the 3 workshops that had been organised on the following topics:

1. Regulatory Framework for Decarbonisation
2. Pathway to Decarbonisation: what are the solutions?
3. Sustainable Finance: Opportunity and Challenges for the Refractory Industry.

These workshops allowed to listen to key stakeholders selected for their intimacy with the above topics and to follow up these introductory presentations with in-depth discussions between the participants.

Once the meetings, public conference and workshops drew to a close, members were welcome to take part in a guided sightseeing tour of Vienna as part of the social programme organised by Austrian Mining and Steel Association. The day ended with a beautiful gala dinner in a restaurant allowing to admire the Vienna skyline.

On Friday 3 June, the General Assembly concluded the Congress. It was introduced by a very interesting presentation from Voestalpine on their own decarbonisation pathway. Key outcomes of the workshops were then presented and discussed. The Cerame-Unie staff enriched these presentations by sharing the key actions they are undertaking on the European lobbying front. The topics included trade, chemical 2 issues, environment, research, and circular economy. Finally, a discussion and vote took place where Mr. Christian Meyre was appointed PRE President from 2023 to 2025. The name of the future vice-president is still to be determined and will be discussed during next PRE meetings. Mr. Patrick Bikard, who has faithfully served as PRE President since 2017, was warmly thanked for his work and dedication to the industry. Lastly, a teaser was presented for the 2023 PRE Congress which will take place in Prague, Czech Republic.



## CET Congress 2022



8-10 June 2022  
Rome, Italy



Executives from the European ceramic tiles industry and national associations from all over Europe

The CET Congress opened on Wednesday 8 June with the CET Executive Committee and continued with the General Assembly on the following day. The meeting addressed a broad range of developments and initiatives related to climate & energy, market access, trade defence, access to raw materials, health & safety, environment protection and the internal market.



As a key provider of sustainable construction materials it is essential that the ceramic tiles industry can continue to contribute to the EU's strategic autonomy throughout the building sector's value chain.

In the context of the "Fit For 55" package proposed by the European Commission on 14 July 2021 and currently on the agenda of the European Parliament, CET members discussed the conditions which will have to be met before the ceramic tiles industry can evolve towards decarbonisation. In addition to the availability of technologies and alternative energy sources, the decarbonisation of the industry will highly depend on the regulatory framework which will need to ensure a fair level playing field and prevent the risk of relocation, also called "carbon leakage" under Directive 2003/87/EC on the Emissions Trading System. Lastly, in order to enable investments in decarbonisation, the regulatory framework will need to avoid carbon price volatility by preventing speculative practices observed in 2021.

In the meantime, the EU ceramic tiles industry still depends at 80% on natural gas and continued access to this energy source is vital to the ceramic tiles sector. The current energy crisis and the consequences of the aggression against Ukraine need to be tackled urgently in order to prevent severe adverse social impacts and further supply chain disruptions in the housing market.

In this context, CET President Roman Blažíček called on the EU legislator "to stabilise the energy crisis, secure access to raw materials and establish a stable and predictable regulatory framework to incentivise investments in decarbonisation in the EU while preserving the competitiveness of essential industries such as the ceramic industry".

Mr Blažíček concluded the CET Congress thanking Confindustria Ceramica for its great hospitality and perfect organisation and invited CET members to join the next CET Congress to be held on 15-16 June 2023.

## TBE Congress 2022



22-24 June 2022  
Berlin, Germany



For the first time since the start of the COVID-19 pandemic that resulted in the last two TBE Annual Congress to take place online, around 100 TBE members, executives from the tiles and bricks industry, national associations from all over Europe gathered in person for a 2-day Congress to discuss important information and key updates pertaining to the tiles and bricks industry at European level.



The Congress opened on Thursday 23 June with a presentation on the LIFE Superhero Project - Permeable and Ventilated Roofs: An Emerging Solution for Building Comfort and Climate mitigation in Urban Centres and the Joint Meeting to discuss Product Group Roofing Tiles, Product Group Masonry and Technical & Environmental WG took place. In the afternoon, the TBE Executive Committee was held where administrative matters, priorities and challenges in the upcoming period and mid- and long-term topics were discussed.

Following the meetings TBE members were welcome to take part in the cultural programme by Bundesverband der Deutschen Ziegelindustrie e.V which ended with a gala dinner in the evening.

Following the meetings TBE members were welcome to take part in the cultural programme by Bundesverband der Deutschen Ziegelindustrie e.V which ended with a gala dinner in the evening.

On the final day of the Congress the 2022 International Brick and Roof Tile Conference on the 'Green Deal and Decarbonisation of the Brick and Roof Tile Industry' took place. Following the formal welcome by TBE President, Miroslaw Jaroszewicz a keynote speech on 'Germany's way to become Climate Neutral by 2045 in European Context' was given by Malte Bornkamm, Head of Division - Market framework for decarbonisation of Industry, international cooperation at the German Federal Ministry for Economic Affairs & Climate Action. After the speech, Mr. Bornkamm joined a panel with Holger Lösch, Deputy Director General, Federation of German Industry, Viviane Raddatz, Head Climate and Energy, WWF Deutschland and Dr. Heimo Scheuch, CEO, Wienerberger AG where an interesting and fruitful discussion took place. Among the topics discussed was the impact of the current energy crisis and war in Ukraine and the consequences it may have on the decarbonisation process of the bricks and roof tiles industry.

The Congress closed with a presentation from the sponsors and the TBE General Assembly. During the General Assembly discussions surrounded the successes of the past year and the priorities and challenges of specific dossiers in the upcoming period. These included climate and energy dossiers, namely the Emission Trading Scheme (ETS), the European Green Deal and the Carbon Border Adjustment Mechanism (CBAM). Furthermore, the renovation wave, ceramic BREF, the revision of CPR, the New European Bauhaus, and the Campaign for a fair competition on sustainability parameters in construction are also presented as upcoming priorities. Finally, the financial reports to closed off the General Assembly.

Thank you to the TBE Members that attended the Congress. Next year the TBE Congress will be held on 1-2 June 2023 in Spain.



# 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.

Participants in this Forum are Members of the European Parliament (MEPs), decision makers 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 MEP from North Staffordshire, UK.

The **EPCF** has hosted multiple debates and high-level meetings on various subjects of key importance to the ceramic industry, including **climate policy, energy transition, trade policy, decarbonisation** and the **role of electrification, circular economy**, etc. Due to the essential role of ceramic products and technologies in many value chains, and the commitment to deliver on the **European Green Deal**, it is fundamental to trigger discussions that support the industry in facing the challenges of the **energy, green** and **digital** transitions, while remaining **competitive** and a **provider of local jobs** throughout the **European Union**.

To read more about the EPCF, please visit <http://www.epcf.eu/>



# MEMBERSHIP



European Parliament Ceramics Forum

## CHAIR



**ELISABETTA GUALMINI MEP**  
S&D  
Italy  
[www.elisabettagualmini.eu/](http://www.elisabettagualmini.eu/)  
[twitter.com/gualminielisa](https://twitter.com/gualminielisa)

## VICE-CHAIR



**ESTEBAN GONZÁLEZ PONS MEP**  
EPP  
Spain  
[twitter.com/gonzalezpons](https://twitter.com/gonzalezpons)

## MEMBERS



**NUNO MELO MEP**  
EPP  
Portugal  
[twitter.com/nunomelocds](https://twitter.com/nunomelocds)



**ANNIE SCHREIJER-PIERIK MEP**  
EPP  
Netherlands  
[annie-schreijer.eu/nl](http://annie-schreijer.eu/nl)  
[twitter.com/AnnieSchreije](https://twitter.com/AnnieSchreije)



**TOMÁŠ ZDECHOVSKÝ MEP**  
EPP  
Czechia  
<http://www.zdechovsky.e>  
<https://twitter.com/TomZ>



**BRANDÓ BENIFEI MEP**  
S&D  
Italy  
<http://www.brandobenife>  
<https://twitter.com/brand>



**INMACULADA RODRÍGUEZ-PIÑERO FERNÁNDEZ MEP**  
S&D  
Spain  
[twitter.com/rodriguezpine](https://twitter.com/rodriguezpine)



**GIUSEPPE FERRANDINO MEP**  
S&D  
Italy  
[giosferrandino.eu](http://giosferrandino.eu)  
[twitter.com/giosferrandino](https://twitter.com/giosferrandino)



**RAFFAELE STANCANELLI MEP**  
ECR  
Italy  
[twitter.com/r\\_stancanelli](https://twitter.com/r_stancanelli)



**PAOLO DE CASTRO MEP**  
S&D  
Italy  
[paolodecastro.it](http://paolodecastro.it)  
[twitter.com/paolodecastr](https://twitter.com/paolodecastr)



**PATRIZIA TOIA MEP**  
S&D  
Italy  
[patriziatoia.info](http://patriziatoia.info)  
[twitter.com/toiapatrizia](https://twitter.com/toiapatrizia)



**MARA BIZZOTTO MEP**  
I&D  
Italy  
[marabizzotto.it/](http://marabizzotto.it/)  
[twitter.com/marabizzotto](https://twitter.com/marabizzotto)



**MARIA DA GRAÇA CARVALHO**  
EPP  
Portugal  
[www.gracacarvalho.eu/en/](http://www.gracacarvalho.eu/en/)  
[twitter.com/mgracacarvalho](https://twitter.com/mgracacarvalho)



**PAOLA GHIDONI, MEP**  
ID Group  
Italy  
[twitter.com/paolaghidoni1](https://twitter.com/paolaghidoni1)



**SANDRO GOZI MEP**  
Renew Europe  
France  
<https://twitter.com/sandr>



**GABRIEL MATO MEP**  
EPP  
Spain  
<https://twitter.com/Gabr>



**ANNA-MICHELLE ASIMAKOPOULOU MEP**  
EPP  
Greece  
<https://twitter.com/Anna/>



**CAMILLA LAURETI MEP**  
S&D  
Italy  
[twitter.com/camillalauret](https://twitter.com/camillalauret)



**JORDI CAÑAS MEP**  
Renew Europe  
Spain  
[https://twitter.com/jordi\\_c](https://twitter.com/jordi_c)

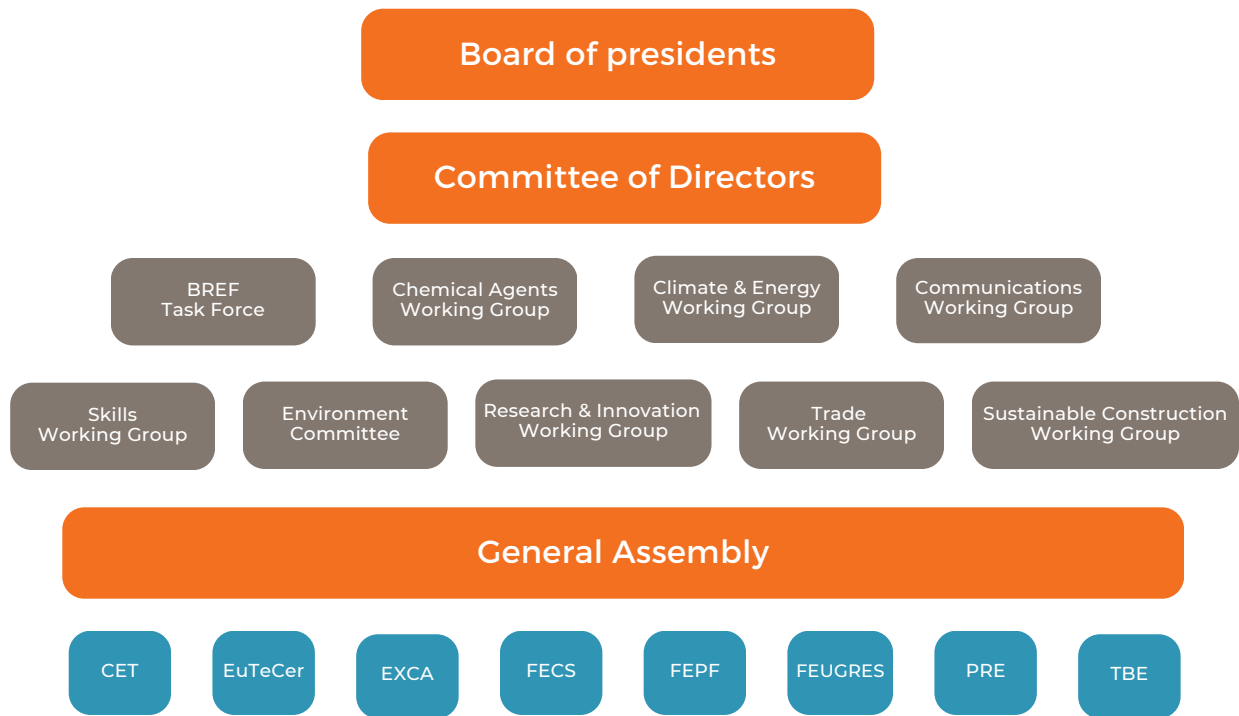


**MASSIMILIANO SALINI MEP**  
EPP  
Italy  
<https://twitter.com/MaxS>



**CARLOS ZORRINHO, MEP**  
S&D  
Portugal  
[www.carlos.zorrinho.eu](http://www.carlos.zorrinho.eu)

# CERAME-UNIE STRUCTURE



## PRESIDENTS



**Alain Delcourt**  
CU President



**Ulrich Bohle**  
FEUGRES President  
Clay Pipes  
Steinzeug-Keramo GmbH



**Jurgen Tuffner** EXCA  
President  
Expanded Clay  
Liapor



**Carsten Russner**  
EuTeCer President  
Technical Ceramics  
KYOCERA Fineceramics.



**Alfonzo Panzani**  
CU Vice - President  
Settecento -  
Manifattura Ceramica



**Miquel Angel Munar**  
FECS President  
Sanitaryware  
Roca Sanitario SA



**Christian Meyre**  
PRE President  
Refractories  
Refratechnik Cement GmbH



**Mirosław Jaroszewicz**  
TBE President  
Bricks & Roof Tiles  
Wienerberger Ceramika  
Budowlana Sp. z o.o.



**Heimo Scheuch**  
CU Vice - President  
Wienerberger AG



**Roman Blažiček**  
CET President  
Wall & Floor Tiles  
Lasselsberger s.r.o.



**Marcelo Franco de Sousa**  
FEPF President  
Table & Ornamentalware  
Matceramica

CERAME-UNIE STAFF



**Renaud Batier**  
Director General



**Magdalena Vallebona**  
Climate & Energy  
Policy Director



**Daniela Vigilante**  
Environment & Innovation  
Director



**Anne-Claire Bruant**  
Construction &  
Sustainability  
Senior Manager



**Leonardo Mosca**  
Trade Policy Manager



**Aurore De Schrevel**  
Office Manager



**Inês Ferrão**  
Projects, Communication &  
Events Manager



**Wiktoria Cacace**  
Communication & Events  
Officer



**Greta di Mattia**  
EU Affairs Trainee |  
Climate, Energy & Trade



**Sarah Moutard**  
EU Affairs Trainee |  
Environment, Health &  
Safety



**Cecilia Piqué de Moura**  
Events, Communication  
& Administrative Trainee



**Sahaja Balla**  
Communication and  
Project Manager | WRA

# MEMBERS

Cerame-Unie members include national association and companies from 30 European countries including 26 EU member states.



## EU PLATFORM/ EXPERT GROUPS

**CCEG**—Climate Change Expert Group (DG CLIMA)

**EPCF**—European Parliament Ceramics Forum

**High Level Construction Forum** (DG GROW)

**High Level Expert Group on Energy Intensive Industry** (DG GROW)

**MAAC**—Market Access Advisory Committee (DG Trade)

**New European Bauhaus**

**Raw Materials Supply Group** (DG GROW)

**TCG**—Trade Contact Group (DG Taxaud)

# PARTNERSHIPS

**Cerame-Unie works closely with a number of stakeholders on relevant policies.**

**AEGIS Europe**—Industry alliance for fair and free trade

**AEII**—Alliance of Energy-Intensive Industries

**Alliance on industrial emissions**

**Alliance on origin marking**

**Alliance on REACH**—Registration, Evaluation, Authorisation and Restriction of Chemical substances

**A.SPIRE**—Association for Sustainable Process Industry through Resource and Energy Efficiency

**BUSINESSEUROPE**

**CEN**—European Committee for Standardization

**CheMI**—Platform for Downstream Users of Chemicals in the Manufacturing Industry

**Construcion 2050 Alliance**

**CPE**—Construction Products Europe

**ECO Platform**

**ENZA**—European Net Zero Alliance

**Eurometaux**

**European Drinking Water Initiative**

**European Masonry Alliance**

**FAIB**—Federation of European and International Associations

**I4E**—Industry 4 Europe

**NEEIP**—Non-Energy Extractive Industry Panel

**NEPSI**—European network for silica

**WCTF**—World Ceramic Tiles Forum

**WRA**—World Refractories Association

# MEMBERSHIP

## Membership Benefits

### FULL

- 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 fields 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.

### ASSOCIATE

- Access to up-to-date and efficient monitoring of European issues already covered by Cerame-Unie.
- Access to statistical information on the ceramic industry as a whole.
- Invitations to participate in expert meetings organised by Cerame-Unie or European institutions, the Cerame-Unie General Assembly and the European Parliament Ceramics Forum.

### FULL

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."

### ASSOCIATE

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."

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

## How to Become a Member

