



2020 - 2021

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 €26 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.

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FOREWORD

A Message From the President and Director General of Cerame-Unie

Over the last two years, the European ceramic industry has faced major disruptions which led to significant reductions in production in 2020, disruptions of trade, growing trends in trade barriers on export markets, abnormally high freight costs and skyrocketing carbon and energy prices. All this happened at a time when the ceramic industry needed more than ever greater stability in order to secure investments required to tackle the existential challenges linked the European Green Deal and the FitFor55 Package published on 14 July 2021.

Once more, the European Ceramic industry, relying on its numerous global leaders, dynamic SMEs and more than 200.000 direct employees, demonstrated its great resilience and continued to invest in innovation so as to address the growing needs of our society in ceramic solutions.

These short-term fundamental challenges did not prevent the Ceramic Industry from updating and publishing at the end of 2021 its New Ceramic Roadmap to 2050, a vision document illustrating why ceramic sectors are essential to so many value chains and will play a fundamental role in the delivery of the objectives of the European Green Deal. This publication also shows what carbon neutrality means for ceramics in terms of energy resources and technology and how our sectors will contribute to decarbonisation, biodiversity, circular economy, the renovation wave, smart mobility, etc. As Cerame-Unie President, I am proud to be representing with the support of the Board of Presidents and all Cerame-Unie members such a strategic sector, so genuinely dedicated to Europe and sustainability.



Alain Delcourt
Cerame-Unie President

In the context of the European Green Deal, the last two years have been particularly dense in policy and regulatory initiatives launched at EU level. I am very grateful for the guidance and support from the Cerame-Unie Board and proactive contributions of all Cerame-Unie members which have made it possible for the European ceramic industry to be engaged in so many strategic topics from energy & climate policy (CEEAG and ETS State Aid Guidelines, ETS Review, Hydrogen strategy, Carbon Border Adjustment Mechanism) to circular economy, sustainable finance, a fair level playing field for intermediate substances under REACH, consumer protection (food contact), sustainable construction, fair and free trade (market access and trade defence) or the preparation and kick-off of the review of the Ceramic "BREF", the EU's Best available technologies Reference document for ceramics.

The first half of this 2019-2024 EU legislature also showed a growing activity for the European Parliament Ceramics Forum (EPCF) under the leadership of EPCF Chair MEP Inmaculada Rodríguez-Piñero, notably with the launch in October 2021 of the new EP Ceramics Forum Committee on International Trade.

The European Ceramic Industry is fully committed to contributing constructively with the EU institutions throughout the 2nd half of this legislature in support of the EU's strategic autonomy and as a key enabler for the well-being of a resilient European society in 2050.



Renaud Batier
Cerame-Unie Director General

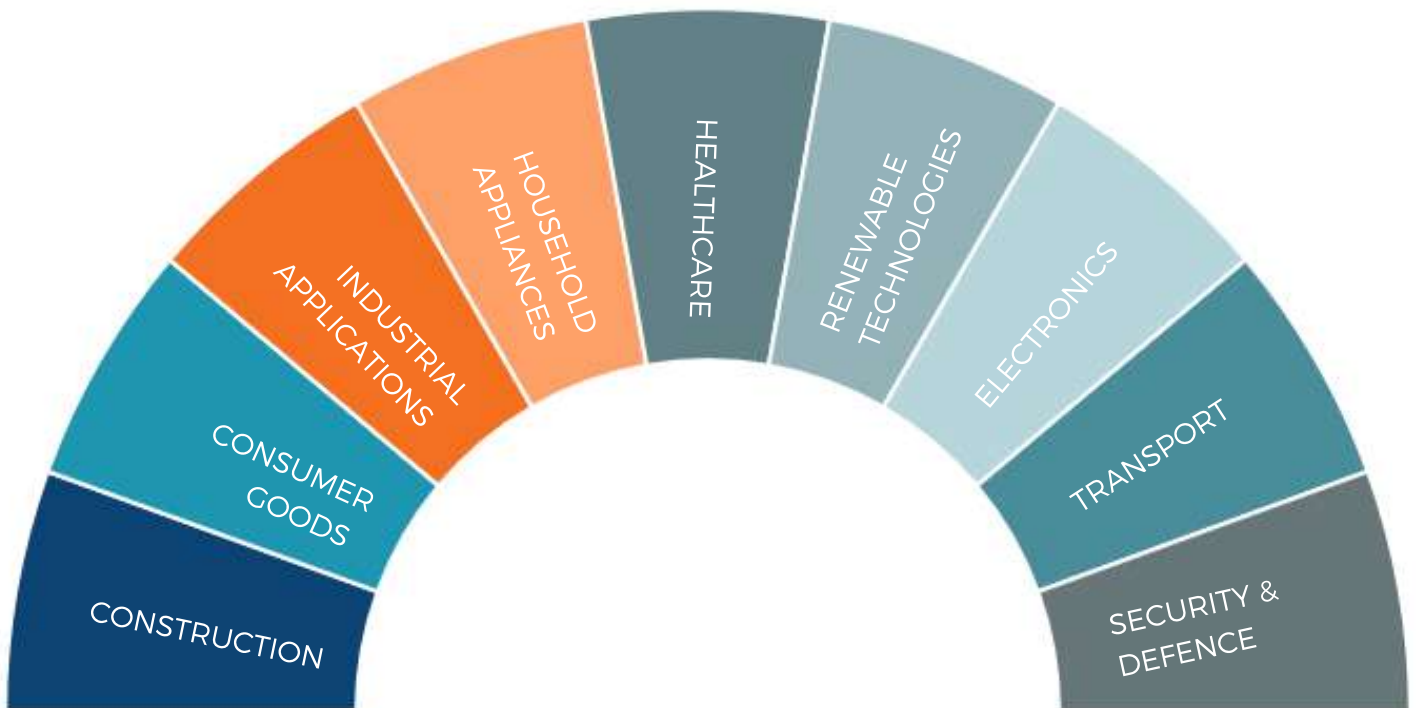
EUROPEAN CERAMIC INDUSTRY



The European ceramics 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



€5.1bn

Positive trade balance



200K

Direct jobs



80%

SMEs Local Jobs

€26bn

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 & Sustainability



Climate & Energy



Trade & Internal Market



Environment, Health & Safety



Research & Innovation



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



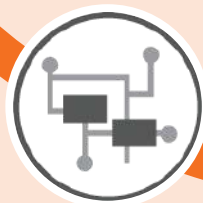
Flowerpots



Table & Ornamentalware



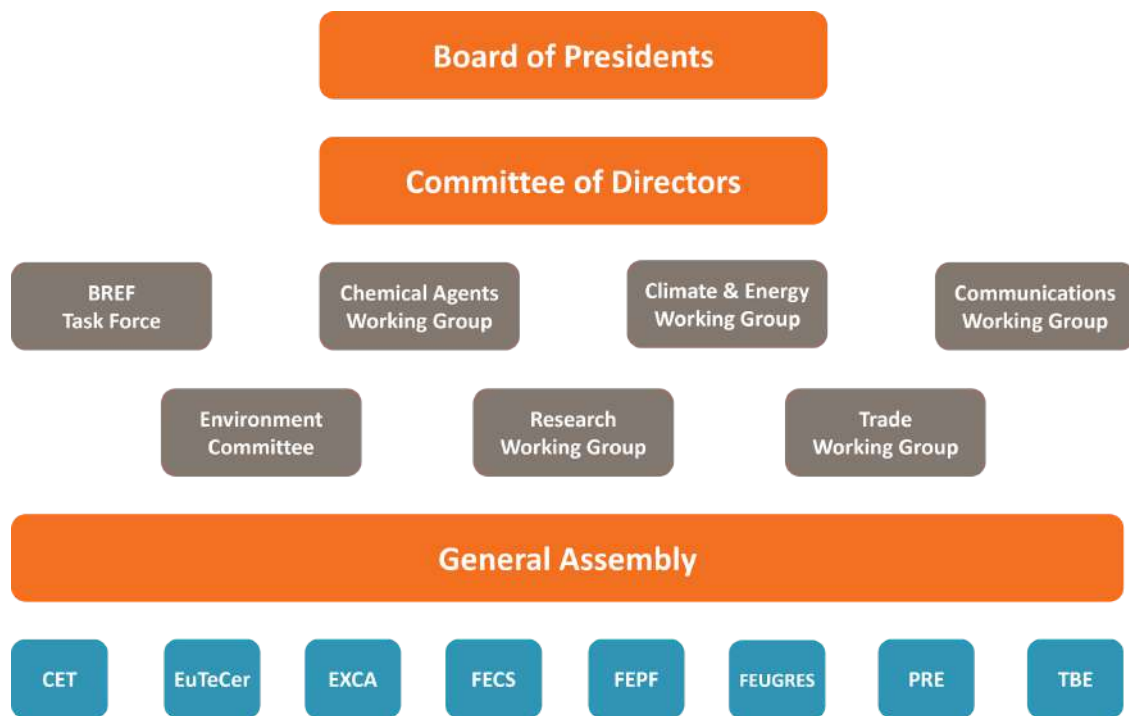
Technical Ceramics



Sanitaryware



STRUCTURE



PRESIDENTS



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CU President
Agrob Buchtal GmbH



Bernd Ebbers
FEUGRES President
Clay Pipes
Steinzeug-Keramo GmbH



Jurgen Tuffner EXCA
President
Expanded Clay
Liapor



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Technical Ceramics
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CU Vice - President
Cermiche Ricchetti SpA



Miguel Angel Munar
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Sanitaryware
Roca Sanitario SA



Mirosław Jaroszewicz
TBE President
Bricks & Roof Tiles
Wieneberger AG



Patrick Bikard
PRE President
Refractories
Vesuvius



Heimo Scheuch
CU Vice - President
Wienerberger AG



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



Dr. Tillmann Blaschke
FEPF President
Table & Ornamentalware
Staatliche Porzellan-
Manufaktur Meissen

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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. More on the EPCF at <http://www.epcf.eu/>.



MEMBERS

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



PARTNERSHIPS

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

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

Alliance on Trade Defence Instruments

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

CPE—Construction Products Europe

ECO Platform

EPCF—European Parliament Ceramics Forum

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

COMMUNICATION

6 webinars & 1 hybrid event organized

around 7 strands of topics: Trade, Decarbonisation, Sustainable Construction, European Green Deal, Refractories, Circular Economy and Sustainable Finance

With more than 400 participants in attendance



Representing more than 20 countries

7 Publications



6
Social Media campaigns

ON



Circular Economy



Sanitaryware



Ceramic Tiles



Technical Ceramics



Ornamental and Tableware



EU Green Week



2,445 followers on Social Media



Website

414.4 K Impressions

9232 Engagements

41 619 Users

38 728

2

Promotional videos produced



78 newsletters sent to Cerame-Unie members



EVENTS

Due to the exceptional circumstances related to COVID-19 and in order to comply with the social distancing recommendations and guidelines, all Cerame-Unie Meetings were held remotely during 2020.



March & October 2020 & 2021



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



June, September & October 2020



Attended by an average of 150 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.

The Kick-Off webinar = overview of the ceramic industry's contribution to circular economy.



2 sectoral webinars = sustainable construction through circular economy and the contribution of refractories to circular economy



In March 2020, the European Commission launched its Circular Economy Action Plan, one of the major elements of the European Green Deal, the growth strategy of the European Union. The European Ceramic Industry plays an active role in this transition with sustainable products and has developed numerous solutions to minimize the consumption of raw materials and the waste generated during the production process, as well as to increase the rate of reuse and recycling of its products.

In this context, Cerame-Unie organized a series of public webinars on the contribution of the ceramic industry to circular economy.

30 June 2020



Attended by more than 120 participants.



"Decarbonisation pathways related to indirect emissions in the Ceramic industry, under the Green Deal"

EPCF & Cerame-Unie Webinar

Cerame-Unie is currently updating the Ceramics Roadmap towards 2050. In that context, the Webinars aimed to give an overview of where the Ceramic Industry stands in terms of decarbonisation pathways and how research & innovation, emerging technologies, more particularly those implying further electrification, can support and fuel this transformation. In addition to showcasing three ongoing research projects relying on electricity, the webinars also addressed economic conditions related to the transition towards decarbonisation in the context of the ETS State Aid Guidelines, reviewed in 2020.



16-18 November 2020



Attended by an average of 150 participants.



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



The EPCF Webinars were also integrated in the European SME Week, as part of a pan-European campaign to support SMEs and promote entrepreneurship.

EUROPEAN CERAMIC DAYS 2021

2021
European
Ceramics Days
& European
Parliament
Ceramics Forum

15-16-17 NOVEMBER
BRUSSELS, BELGIUM

Cerame-
Unie The European Ceramic
Industry Association



Attended by an average of 130 participants both in-person and remotely



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

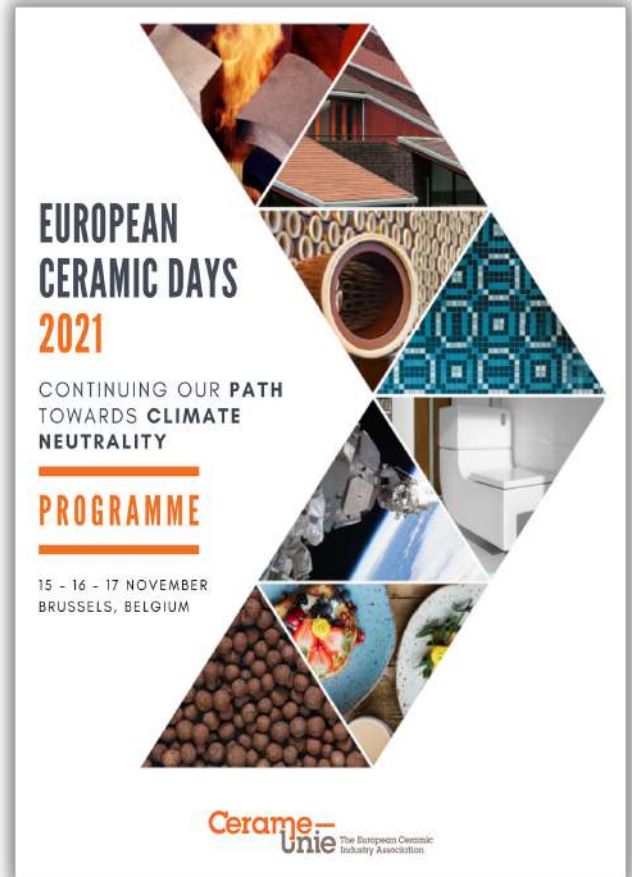
EPCF:

- Panel 1- Fit for 55: How Can it Support the Decarbonisation efforts of the Industry
- Panel 2- Sustainable Finance: Opportunities and Challenges



Public Conference | Launch of the Ceramic Roadmap to 2050:

- Panel 1: How can Ceramics Contribute to the Well Being of a Resilient Carbon Neutral Europe in 2050?
- Panel 2: Why Ceramics are Essential to Deliver on the Green Deal and a Carbon Neutral Europe?



Full Programme: [HERE](#)

For the first time the 2021 European Ceramic Days was held in a Hybrid format where participants could join either in-person or remotely through live stream. Please click on the corresponding links to re-watch the sessions.



EPCF TRADE COMMITTEE

THURSDAY 28 OCTOBER 2021
11:00-12:30 | ONLINE (TEAMS)



Attended by 30 participants



Bringing together industry experts, Members of the European Parliament and Permanent representations to the EU

The event consisted of two panels:



- Trade and Sustainability
- Trade Aspects of the New Industrial Strategy

Each panel was led by speakers from the EU Commission, the EU Parliament and the Industry.



DELVAUX Leon (TRADE)



Manuela Ripa (Guest) (Guest)

Renaud Batier

In light of the new global challenges affecting international trade, the EPCF Trade Committee aimed to provide a platform to explore elements of the EU trade policy currently under discussion at institutional level.

PROGRAMME

Opening Remarks - MEP Inmaculada Rodríguez-Piñero

Keynote speech by EU Commission - Mr Leon Delvaux, Principal Adviser - DG Trade

Panel 1 – Trade and sustainability – TSDs chapters and GSP revision

EU Commission | Ulrich Weigl (DG TRADE Unit C.3)

EU Parliament | MEP Manuela Ripa

Industry | Filippo Manuzzi (Ceramica Sant'Agostino SpA)

Q&A

Panel 2 – Trade Aspects of New Industrial Strategy

EU Commission | Román Arjona Gracia (DG GROW Unit A.1)

EU Parliament | MEP Anna-Michelle Asimakopoulou

Industry | Roman Stiftner (Austrian Mining and Steel Association - WKO)

Q&A

Closing remarks

SECTORAL EVENTS



3 December 2020
2 December 2021



Attended by more than 50 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.



Following the decision taken in coordination with ASAKI to postpone the WCTF-World Ceramic Tiles Forum and the ISO TC 189 Meetings the in person meetings, due to the exceptional circumstances surrounding the COVID-19 outbreak, the WCTF Secretariat hosted the annual 2020 and 2021 WCTF Meeting online to discuss current topics and issues of common interest to all ceramic tiles producers worldwide.

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**](#).



During the WRA Board meetings of last year, the direction of the WRA activities were discussed and recommendations were made. The various Committees Chair presented the work done by each group. Furthermore industry statistics on production and safety were presented.

At the General Assembly the reporting of the decisions from the Board took place and participants were updated on the future direction of the WRA and its Committees.

This year the first WRA Safety Awards ceremony took place, awarding the prize to the following plants:

- JSW - Vesuvius
- Pune - Vesuvius
- Radenthein- RHI Magnesita

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.

Board Meeting

-  24 March 2020
- 22 October 2020
- 16 March 2021
- 25 October 2021



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



General Assembly

-  22 October 2020
- 25 October 2021

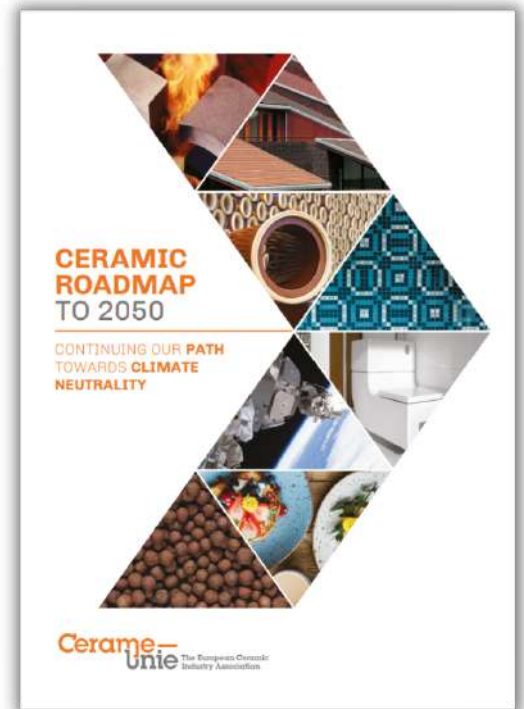


All WRA Members

CERAMIC ROADMAP TO 2050: CONTINUING OUR PATH TO CLIMATE NEUTRALITY

In the light of the EU's objective to achieve climate neutrality by 2050, this continuation of the first Ceramic Roadmap published in 2012 showcases what climate neutrality means for ceramics. This is shown through the presentation of a **decarbonisation model and pathway, technologies and decarbonised energy required, CO2 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](#)



CLIMATE & ENERGY

TOPICS COVERED

EU ETS Phase 4
Implementation

Revision of the EC
Guidelines on State Aid
for Environment and
Energy

European Green Deal

Launch of the 'Fit For 55'
package


SUPPORTING ACTIVITIES

7 

Position papers
published

9 

Response to public
consultations

2 

Joint Letters

6 

Press releases

EU ETS PHASE 4 IMPLEMENTATION: BENCHMARKING REGULATION

In 2020 the European Commission (DG Clima) was in the process of preparing legislation to implement the EU ETS phase 4, which started with the beginning of 2021. Among others, DG Clima worked on the analysis of the NIMs (National Implementing Measures) submissions and to propose the Benchmarking Regulation.

Cerame-Unie conducted its own data collection mirroring the NIMs submission to be able to assess what would be the foreseen benchmarking revision for the ceramic sectors. On 30 June 2020 the European Commission, at the meeting of the Climate Change Expert Group, presented their calculation forecasts and unfortunately they informed that the ceramic industry would have to face the maximum benchmark update rates of up to -24% in the first five years of the ETS phase 4 for most of the ceramic benchmarks. It was also the case of most product benchmarks in general.

DG Clima admitted that the reason for such a deep cut, at least for the fallback benchmark, is mostly the fact that many installations use biomass.

According to the Cerame-Unie position the installations using the

biomass should not be included in the benchmarking exercise as they are not representative and should be excluded from the benchmark curve. Our position mentions also the following limitations to use the biomass:

- Lack of availability as biomass is not equally available in all EU countries
- Biomass for combustion purpose is legally not allowed in all EU countries /regions
- There are many substantial trade-offs associated with the use of biomass regarding its impact on other EU policies (such as air quality, biodiversity strategy, afforestation strategy, etc.).

The Cerame-Unie position paper on this topic was shared with the EU and national stakeholders such as: climate attachés in the Permanent Representation, Commissioner Cabinets' Members, selected MEPs and national ministries.

A study was also made by the Centre for European Policy Studies (CEPS) to underline the different trade-offs in the use of the biomass.

The European Commission ultimately published the updated Benchmarking Regulation on 12 March 2021 and it is accessible [here](#).

EUROPEAN GREEN DEAL: EUROPEAN COMMISSION PRIORITY

On 11 December 2019 the President elect of the European Commission Ursula Von der Leyen has presented a “European Green Deal” as one of her main policy priorities. She has also promised to present the proper legislation in the first hundred days in-office. She said: “I want Europe to strive for more by being the first climate-neutral continent”.



One of the first concrete laws to realize the Green Deal was published by the European Commission on 4 March 2020—the European Climate Law. The aim of the Regulation on the European Climate Law is to enshrine the 2050 climate-neutrality objective into EU law. The next element of the implementation of the Green Deal is a EC proposal to increase the GHG target 2030 to 55%. The proposal was announced in the State of the Union Speech of President Von der Leyen on 16 September 2020.

Another element which is a part of the Presidents' promise is the introduction of the Carbon Border Adjustment Mechanism. DG Clima published a Roadmap at the beginning of 2020, which indicates their workplan on the topic. Cerame-Unie has given its feedback on the file, underlining that “Carbon Border Adjustments should be designed to strengthen carbon leakage protection in the long term”. The EC has opened a public consultation, which Cerame-Unie also responded to. The adoption of the Proposal by the EC on the Carbon Border Adjustment Mechanism, as well as other key legislative proposals of the Green Deal was planned and published in the so called “Fit for 55 package” in Summer 2021 and is further described below.

REVISION OF THE EC GUIDELINES ON STATE AID FOR ENVIRONMENT AND ENERGY

On 21 December 2021 the European Commission published a final document revising the Guidelines on State Aid for Environmental Protection and Energy (EEAG), which now with an expanded scope is brought in line with the European Green Deal and given a new name: **Climate, Energy and Environmental State Aid Guidelines (CEEAG)**.

The final document defines a new methodology for the inclusion on the eligibility list for the reduction of the electricity levies, which is relevant for the ceramic industry. It proposes two categories of sectors:

(a) **sectors at significant risk of relocation**, for which the multiplication of their trade intensity and electro-intensity at Union level reaches at least 2% and whose trade intensity and electro-intensity at Union level is at least 5% for each indicator, and

(b) **sectors at risk of relocation**, for which the multiplication of their trade intensity and electro-intensity at Union level reaches at least 0,6% and whose trade intensity and electro-intensity at Union level is at least 4% and 5% respectively.”

The sectors in group (a) would be eligible to 85% of compensation, while sectors in group (b) – to 75%. The ceramic sectors at significant risk relocation, as listed in Annex 1 are the following: refractories, ceramic wall and floor tiles, sanitaryware, ceramic insulators, technical ceramics and expanded clay. The ceramic sector at a risk relocation (group b) is the bricks and roof tiles sector.

The final version of the EC Guidelines is a large improvement comparing to the initial draft presented by the European Commission at the beginning of June, in which many ceramic sectors were excluded from the eligibility list.

The final document can be found on the EC, DG Comp website [here](#) and more information is available [here](#).

Fit for 55 Package:

On July 14, The European Commission tabled an extensive review of the EU's energy and climate laws to bring the legislation in line with the aim to cut carbon emissions by 55% before the end of the decade



[Press release on 'Fit For 55 Package'](#)

The Cerame-Unie will follow the legislative process of the “Fit for 55” package proposals and will take active part engaging with all relevant stakeholders with regards to the key issues of importance for the ceramic industry.

THE EUROPEAN EMISSIONS TRADING SYSTEM (ETS) DIRECTIVE

At the centre of the reform is a **review of ETS Directive**. To reach the more ambitious goal of 55% emissions reductions by 2030, the Commission proposes a steeper annual reduction target of 4.2% (up from 2.2% currently) and a one-off reduction of the overall emissions cap by 117 million allowances. At the centre of the reform is a review of ETS Directive. To reach the more ambitious goal of 55% emissions reductions by 2030,

the Commission proposes a steeper annual reduction target of 4.2% (up from 2.2% currently) and a one-off reduction of the overall emissions cap by 117 million allowances. This would correspond to a reduction of emissions from current ETS sectors by 61% by 2030 (compared to 2005), which is a drastic increase compared to the current target of -43%. At the same time, the proposal also extends the scope of the ETS. The maritime sector would be included in the scheme while a new separate ETS would be established for emissions from transport and heating fuels. With regards to the allocation of free emission allowances, the Commission proposes 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 by 50% in 2026 instead of 32% under the current ETS Directive. Cerame-Unie replied to public consultations on this topic and published a position paper on the EU ETS review, which can be found [here](#).

CARBON BORDER ADJUSTMENT MECHANISM (CBAM)

To mitigate the risk of carbon leakage, the Commission proposes to set up a Carbon Border Adjustment Mechanism (CBAM). From 2026 onwards, a CBAM will be introduced for goods from the Aluminium, Cement, Electricity, Fertilizers, and Iron & Steel sectors. Importers of these goods will have to surrender CBAM certificates, the price of which will be determined based on the prices of ETS allowances. For the sectors covered by the mechanism, free allocation will be reduced by 10% annually until 2035. An export rebate is not foreseen. Even though CBAM is not foreseen for any ceramic industry sector, this might change at a later point. The Commission has announced a review of the measure already in 2025 to possibly extend its scope. Cerame-Unie replied to public consultation on this dossier. The reply can be found [here](#).

RENEWABLE ENERGY DIRECTIVE

The review of the Renewable Energy Directive increases the 2030 target for the Union's gross final consumption of renewable energy to 40% (from 32% currently). It also contains a new article to promote the mainstreaming of renewable energy in industry. Among the measures proposed in this article is the binding target that 50% of hydrogen used in industry by 2030 should be green hydrogen. Furthermore, all biomass-based heat and power installations will have to comply with minimum greenhouse gas saving thresholds (so far this only applies to new installations) and the EU sustainability criteria for biomass will now apply to heat and power installations equal or above 5 MW, replacing the current threshold of 20 MW.

ENERGY EFFICIENCY DIRECTIVE

The review of the Energy Efficiency Directive foresees a strengthening of the annual energy saving requirements for MS to 1.5%. The review also introduces an "energy efficiency first" principle: Member States are obliged to consider energy efficiency solutions in energy systems related policy and investment decisions but also other sectors (e.g. social housing). Of importance for industry is that the requirement to implement energy management systems (EMS) or to undergo energy audits are now based on company-specific energy consumption instead of the general exemptions for SMEs which are currently in place.

ENERGY TAXATION DIRECTIVE

The review of the Energy Taxation Directive introduces a new structure of tax rates based on the energy content and environmental performance of the fuels and electricity. Energy products will be grouped and ranked in different categories to ensure that the most polluting fuels are taxed the highest. 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, mineralogical processes or kerosene used in commercial flights). Cerame-Unie replied to public consultations on this topic. The reply can be found on our website [here](#).



CONSTRUCTION & SUSTAINABILITY

TOPICS COVERED

Revision of the Construction Products Regulation (CPR)

Circular Economy

Renovation Wave Strategy

New European Bauhaus

Smart CE Marking

Unified Water Label Association

Sustainable Finance

SUPPORTING ACTIVITIES

5 

Position papers published

2 

Press release

2 

Response to public consultations

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, with the Declaration of Performance and CE marking. In 2020/2021, Cerame-Unie (CU) continued to closely follow the developments regarding the future of the CPR.

APR. 2020 - DG GROW outlined 5 options for the future of the CPR.

AUG. 2020 - Cerame-Unie provided a feedback on the five indicative options highlighting the need to keep changes in the CPR as moderate as possible for manufacturers, in order to avoid confusion on the market and additional costs.

SEPT. 2020 - technical stakeholder workshop organized by the European Commission

NOV. 2020 - CPR Conference organized by the German Presidency of the EU

OCT. 2020 - Cerame-Unie members contributed to the survey addressing manufacturers views

DEC. 2020 - Cerame-Unie replied to the public consultation launched by the European Commission

APR. 2021 - Cerame-Unie also contributed to the development of an alternative option developed by the construction industry. In parallel, Cerame-Unie follows closely the revision process of the CPR Acquis and participated in the stakeholder meeting organized by DG GROW

CIRCULAR ECONOMY

In the Circular Economy Action Plan published in March 2020, the European Commission introduces legislative and non-legislative measures as well as targets areas where action at the EU level brings added value. It focuses on a wide range of topics from sustainable products through high-quality secondary raw materials, chemicals policy, requirements for high impact sectors such as construction, waste and R&I. In this context, Cerame-Unie submitted a [reply](#) to the public consultation on Waste Shipment Regulation revision (July 2020) as well as a [reply](#) to the Sustainable Products policy initiative public consultation (June 2021).

The European Ceramic Industry plays an active role in the transition to a circular economy with sustainable products and has developed numerous solutions to minimize the consumption of raw materials and the waste generated during the production process, as well as to increase the rate of reuse and recycling of its products. To communicate on the contribution of the ceramic industry to circular economy, Cerame-Unie published a position paper and a brochure on best practices in the ceramic industry (June 2020), supported by a Twitter communication campaign. Between June and October 2020, Cerame-Unie launched a series of public webinars on circular economy in the ceramics industry. The webinars were moderated by Kathryn Sheridan (CEO & Founder, Sustainability Consult) and gathered stakeholders from various backgrounds: 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.



[Position Paper on Circular Economy](#)



[Brochure on Circular Economy Best Practices](#)



[Report on Circular Economy Webinars](#)

NEW EUROPEAN BAUHAUS

Launched end of 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 will organise several activities to communicate on the contribution of ceramic construction products to an aesthetic, sustainable and inclusive built environment.



New European Bauhaus
beautiful | sustainable | together

SMART CE MARKING

The main goal of the Smart CE marking is to develop a description of the Declaration of Performance (DoP) content in an open computer format. Smart CE marking is a voluntary tool for the industry and will be available to all manufacturers through CEN. Since March 2020, experts from the roof tiles and bricks sector engaged in the Smart CE marking application consortium with other industry associations from the construction sector. The goal of this project is to develop a web-based and modular application for Smart CE marking.

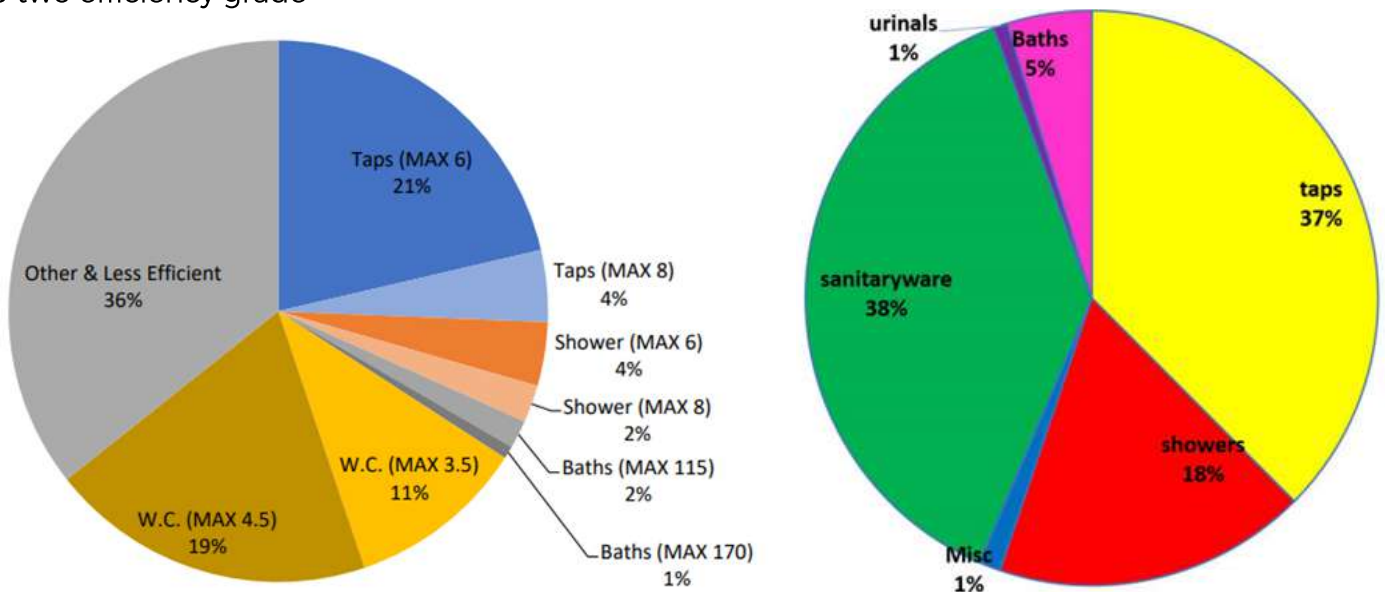
UNIFIED WATER LABEL ASSOCIATION

In February 2020, FECS (the European Sanitaryware Producers Federation) hosted the European Bathroom Forum (EBF) meeting in Brussels. A voluntary and flexible scheme to measure the water and energy consumption of bathroom products, the Unified Water Label (UWL) brings together four certification schemes to help consumers decide on the most water and energy efficient product.

In December 2020, a new association, the Unified Water Label Association, (UWLA) was formed to drive forward the implementation of the Unified Water Label across Europe, and replaces the former governing body, the European Bathroom Forum (EBF). The decision was ratified at the EBF/ UWLA open forum meeting. Stakeholders and manufacturers from the sanitaryware and bathroom industry are involved in the UWLA. As a founding member, FECS is part of the UWLA Board.

SCHEME % SPLIT

Top two efficiency grade



Market Transformation driven by new product design and innovation 55% - registered products fall within Tap and Shower categories

Source: UWLA

RENOVATION WAVE STRATEGY

In October 2020, the European Commission launched the Renovation Wave, a key pillar of the EU Green Deal. With this initiative, the European Commission aims to at least double energy renovation rates by 2030 and make sure renovations of buildings lead to higher energy and resource efficiency. Cerame-Unie published a [position paper](#) with its views on the Renovation Wave (July 2020), promoting a holistic and integrated approach to building renovation and supporting measures such as financial incentives.

The Renovation Wave strategy includes some specific lead actions, such as the revision of the Energy Performance Buildings Directive—Cerame-Unie published a [position paper](#) and replied to the public consultation in June 2021—, accessible and more targeted funding for renovation programmes and the creation of a New European Bauhaus.

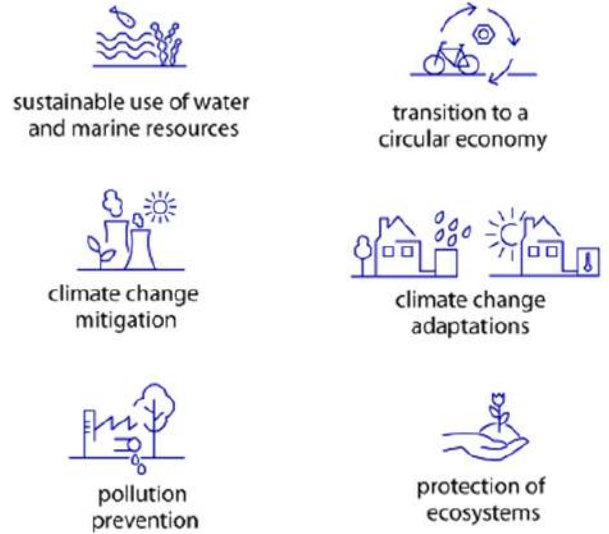
SUSTAINABLE FINANCE

Sustainable Finance 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 Commission's Regulation (EU) 2020/852 "Taxonomy Regulation", hence, aims to provide harmonised criteria for investors in the EU on what is considered sustainable from an environmental and climatic point of view.

The ceramic industry has not directly been included in the Taxonomy regulation yet as a substantial contributor for the environmental objectives. However, some of our sectors are mentioned as enabling* activities, more particularly under the technical screening criteria for manufacture of energy efficiency equipment for buildings. It is key for the ceramic industry to ensure full access to sustainable finance to its companies, including SMEs, in the process of transitioning towards more circularity, higher environmental protection, energy efficiency, decarbonisation, etc.

*An economic activity in this category is an enabling activity in accordance with Article 10(1), point (i), of Regulation (EU) 2020/852 where it complies with the technical screening criteria set out in this Section".

The six environmental objectives of the Taxonomy Regulation



The main steps to be taken by the Cerame-Unie Secretariat:

Winter 2021

• *Creation of a Cerame-Unie Sustainable Finance WG, dedicated to structure CU's common response to Sustainable Finance.*



ENVIRONMENT & HEALTH

TOPICS COVERED

Revision of EU rules on food contact materials (FCMs)

European Network for Silica (NEPSi)

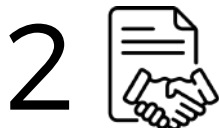
Registration, evaluation, authorisation and restriction of chemicals (REACH)

Hazard classification, labelling and packaging of chemicals (CLP) legislation Revision

Industrial Emission Directive Revision (IED)

Revision of the Ceramic Best Available Technique Reference Document (BREF)

SUPPORTING ACTIVITIES



Joint industry statement



Response to public consultations

REVISION OF EU RULES ON FOOD CONTACT MATERIALS (FCMS)

The European Commission intends to review the EU measures on food contact materials 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, where it has provided an answer to the Inception Impact Assessments published by the Commission.

In this context, the tableware and ornamental ware sector, FEFP had an interview with a consultant for the DG SANTE Study on raising migration limits of certain metals in ceramic and vitreous food contact materials (FCM), where it has provided a common position on behalf of the sector.

Lastly, on the 1st June 2021, the Commission organized the webinar “Focus Group Session Industry” for targeted stakeholders. A FEFP delegation was present and reiterated our messages and concerns.



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 2018 and 2019 took place in 2020. 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; 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. Therefore, it has launched the REACH and CLP Inception Impact Assessments intending to inform citizens and stakeholders about this initiative, and to gather their views on the proposed action.

Cerame-Unie will continue its active monitoring on the topic and ensure that our position is shared once the respective impact assessments start.



INDUSTRIAL EMISSION DIRECTIVE REVISION (IED)

The European Commission intends 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. To do so, the European Commission has undertaken an impact assessment to table a proposal for its revision in early 2022.

Additionally, it has launched an Open Public Consultation and a Targeted Stakeholder Survey (TSS) to gather views from the public and stakeholders on the proposed action. Cerame-Unie has provided a common answer to the consultation as well as to the survey.



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, was published in 2007.

The official revision process of the Ceramic BREF has started in 2019 within the Technical Working Group (TWG) creation. The TWG consists of the European Commission and the European Integrated Pollution Prevention and Control Bureau (EIPPCB), and by representatives of industry, Member States and NGOs with a total of around 150 participants. The TWG 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.

The kick-off meeting (KoM), originally scheduled for May 2020 in Seville, was cancelled due to the COVID-19 pandemics; it was postponed to February 2021 in a digital format. The internal preparation at Cerame-Unie level continued with regular meetings for reading and discussion of the scripts detailing the argumentation on the several pollutants for analyses.

Furthermore, the Bureau hosted meetings with the TWG sub-group on Data Collection and Questionnaire Development to present and gather feedback on the draft questionnaire to collect data.

At Cerame-Unie level, a dedicated task force is reviewing the draft questionnaires and working to ensure that the requested Confidential Business Information status will be taken into account.

Lastly, the Bureau also hosted a meeting with the sub-group on Decarbonisation and Circular Economy, where it presented the mandate of the sub-group and invited the participants to provide input on decarbonisation and circular economy issues. Two dedicated sub-groups, one on decarbonisation and one circular economy, have been created within the BREF TF to draft the statements and providing the necessary input for both topics.

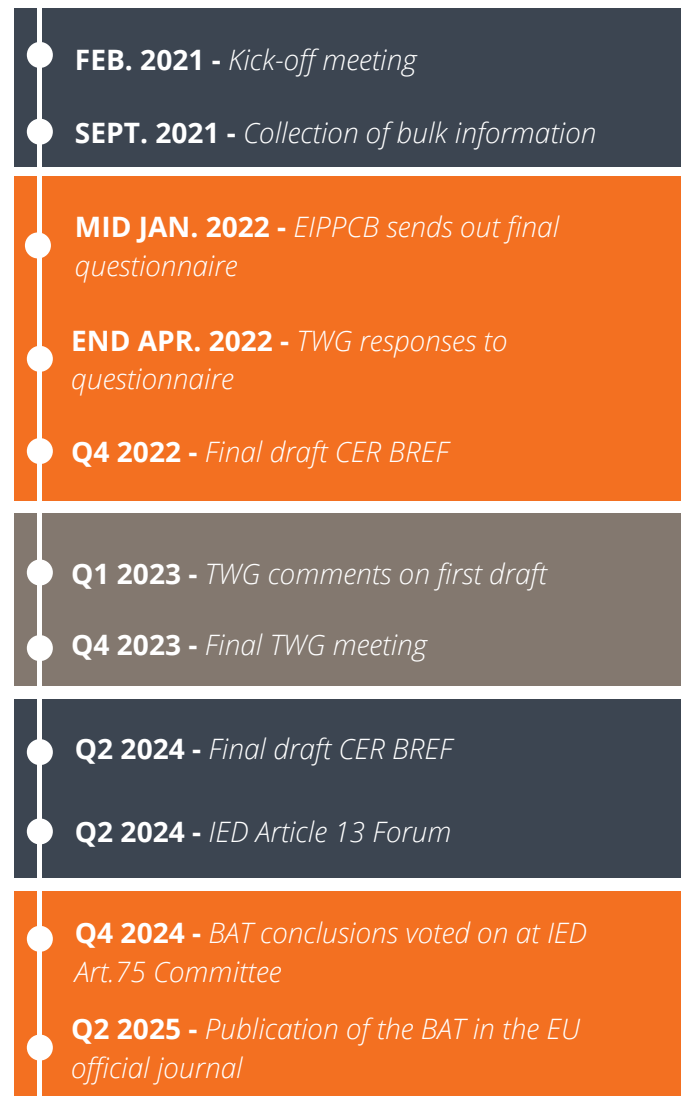


Figure 1: Estimated timeline for the Ceramic BREF Process

TRADE & INTERNAL MARKET

TOPICS COVERED

Market Access
Trade Defence

SUPPORTING ACTIVITIES



Joint Industry
Statements



Press Releases



Responses to public
consultations

Free and fair trade is essential for the European ceramic industry. European ceramics are internationally renowned and appreciated as high-quality products; this makes the industry very export-oriented, with 37% of EU production destined to exports and a positive trade balance of EUR 5.1bn in 2020. Protection from unfair trade is equally important for the competitiveness of our sectors, both in third countries and on the EU single market. At present, EU trade defence measures are countering dumping and duty circumvention from China in the ceramic tiles and the tableware sectors.

In light of the international outlook of our industry, Cerame-Unie works in close contact with DG Trade to ensure fair access to third markets and effective enforcement of trade defence instruments.

As an active user of market access and trade defence tools, Cerame-Unie has participated in several public consultations in 2020 and 2021, including the major review of the Trade Policy of the European Union.

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. Likewise, Cerame-Unie is 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 2021, Cerame-Unie was admitted to the additional committee 'Trade Contact Group', a platform administered by DG Taxud dealing with customs issues.


Cerame-Unie is also advocating for free and fair trade through the industry coalition **AEGIS Europe**, an alliance of 23 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, and so on.



To comply with the sanitary measures implemented in the past year, the public outreach of Cerame-Unie has taken a “virtual” turn since the outbreak of the Covid-19 pandemic. The major public event on trade was organised during the Ceramic Days 2020, when high-level panellists engaged in a discussion on the future of the EU Trade Policy and the road to Open Strategy Autonomy.



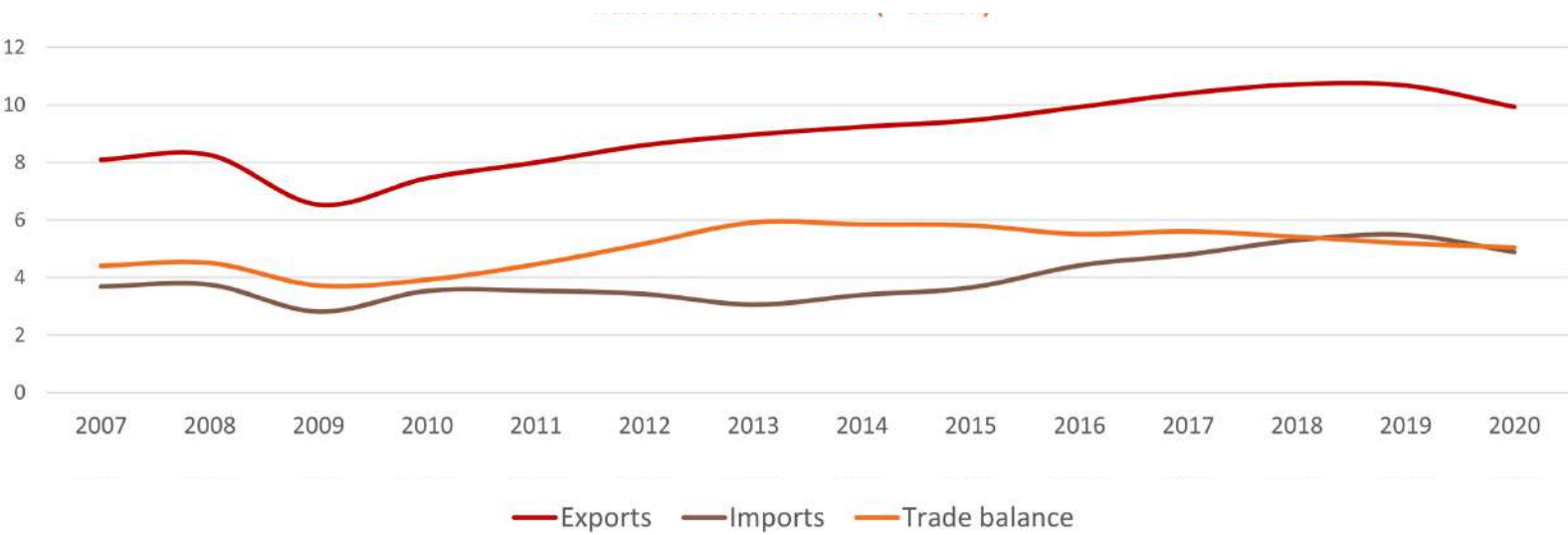
The panel included the newly appointed DG Trade Chief Trade Enforcement Officer Denis Redonnet, Members of the European Parliament’s International Trade Committee such as INTA Chair Bernd Lange, INTA Vice-chair Marie-Pierre Vedrenne and the EPCF Chair Inmaculada Rodríguez-Piñero, as well as Paolo Mularoni, former chair of the International Trade Working Group of Confindustria Ceramica.

 [Watch Recap Here](#)

MARKET ACCESS

The economic recession following the global pandemic seems to have exacerbated the protectionist trends already evident in certain countries, with an increasing number of trade barriers affecting EU ceramic exporters. Among these, the **Saudi Quality Mark** (SQM) has been one of the most severe for the industry and a key priority for Cerame-Unie. In April 2020, the industry filed a Trade Barrier Regulation complaint triggering an investigation by DG Trade. The **final report** supported the industry’s claims and confirmed that multiple elements of the SQM are in breach of WTO law. Besides, Cerame-Unie has been an active user of the new Single Entry Point set up by DG Trade to report market access barriers in third countries, which the industry has used to file complaints against new measures in **Egypt** and the **Philippines**.

TRADE BALANCE OF CERAMICS (€5.1BN)



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 (AD) measures against imports of ceramic tiles and imports of table- and ornamental ware from China. Moreover, on 13 December 2021 the European Commission initiated an anti-dumping investigation on imports of ceramic tiles originating in India and Turkey, following the complaint lodged by CET/Cerame-Unie in the previous month. The Union industry provided prima facie evidence of dumping and injury: these allegation will be investigated by DG Trade for the period covering 1 July 2020 – 30 June 2021. The full press release by Cerame-Unie is available [here](#).

CERAMICS EXPORT IN 2020

- **37%** of EU ceramic production
- **41%** of EU wall & floor tiles production
- **41%** of EU refractories production



RESEARCH & INNOVATION

TOPICS COVERED

A.SPIRE &
Processes4Planet
Partnership

Horizon Europe calls |
Surveys | Sector-wide
collaborations

SUPPORTING ACTIVITIES



Inventories/ Guide
documents

A.SPIRE & PROCESS4PLANET PARTNERSHIP

As the Horizon Europe kicks-off, A.SPIRE is ready to play its key role in addressing the ambitious challenges through the new Processes4Planet Partnership.

The Processes4Planet Partnership has the potential to develop the solutions to transform the European Process Industries and the goal is to support them in becoming frontrunners in the transition to climate neutrality and circularity in alignment with the EU Green Deal goals and ambitions.

It will pursue the goal of a fair and inclusive transition that guarantees competitiveness for businesses, new skills for employees, ensuring a gender balance perspective.

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.



HORIZON EUROPE CALLS | SURVEYS | SECTOR-WIDE COLLABORATIONS

During 2021, Cerame-Unie has prepared 2 Surveys to assess the interest of all sub-sectors of the Ceramic Industry in forming collaborations to respond to Horizon Europe calls, in particular to Cluster 4 - WP7 DIGITAL, INDUSTRY AND SPACE and Cluster 5 - WP8 CLIMATE, ENERGY AND MOBILITY.

The objective of this exercise is to support and foment sector-wide partnerships that can result in successful applications to EU funding and new Research & Innovation Projects of value and interest, that can contribute to the decarbonisation and competitiveness of the European Ceramic Industry.

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;



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.



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 & 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. For that purpose, a new **CU Skills WG** has been created to gather information & take stock of skills challenges/gaps in our industry, share best practices on skills & training, and act as a mirror group to the **SPiRE-SAIS**.

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.**

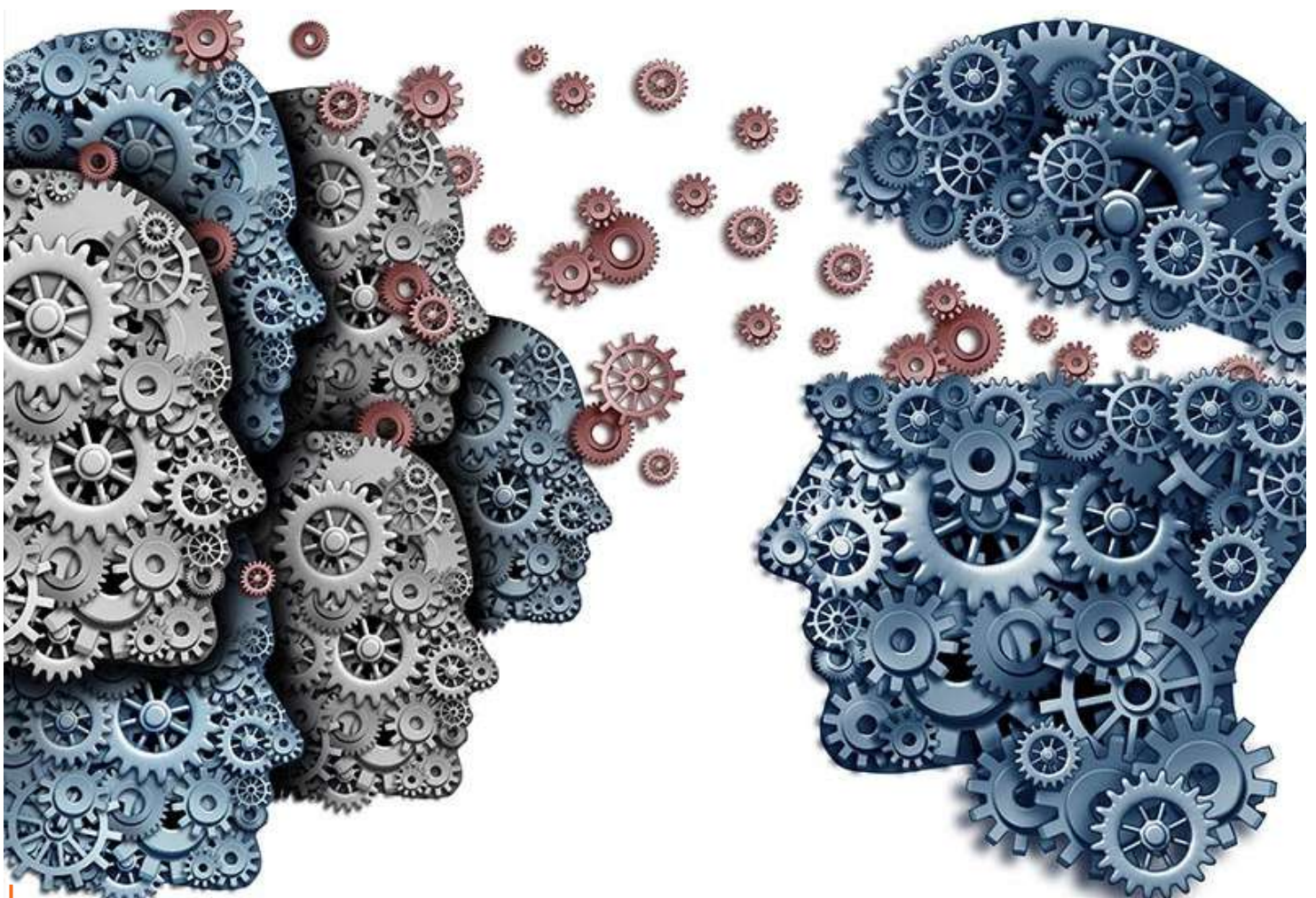
The new skills developed will help unfold the potential of digital transformation within SPIRE companies and beyond. The project will build on the existing coordination, projects, and activities of SPIRE in a truly cross-sectoral approach.

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](#)**.



MEMBERSHIP

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.

