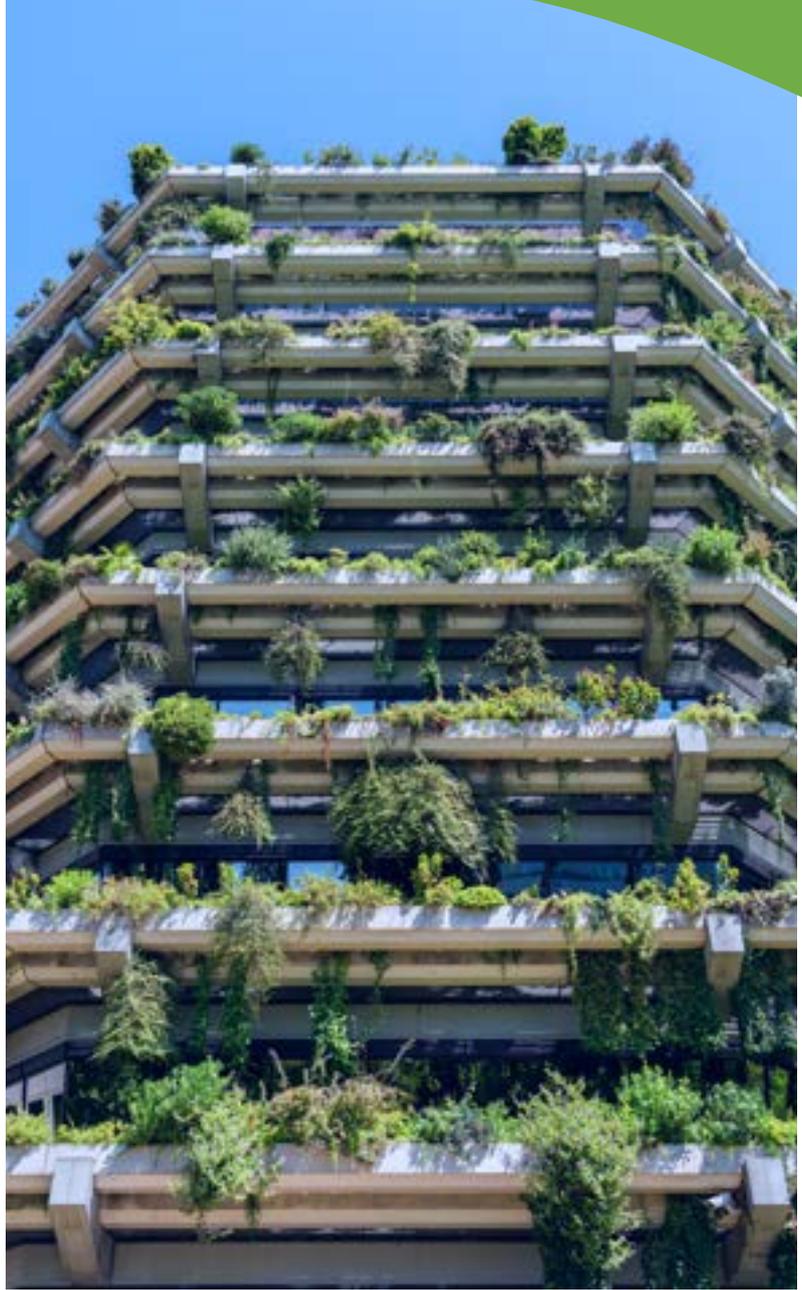




# 2021 **ACTIVITY REPORT**

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# CEMENT & CONCRETE IN EUROPE

## OUR VALUE CHAIN

Cement plays a key, but often unnoticed, role in our lives. Whilst everyone knows the word cement, it is often confused with concrete or mortar. **Cement** is a key ingredient in both **concrete** and mortar, and it is always mixed with other materials before use:

- Cement mixed with water, sand and gravel forms **concrete**, which is what the vast majority of cement is used for.
- Cement mixed with water, lime and sand forms **mortar**.

Cement and concrete have been used to build durable structures for quite some time. Thanks to the special binding properties of cement, concrete is a very resilient, durable material that can bear heavy loads and resist environmental extremes. It is the basic material for all types of **construction**, including housing, roads, schools, hospitals, dams and ports, as well as for decorative applications (for patios, floors, staircases, driveways, pool decks) and items like tables, sculptures or bookcases.

## KEY FACTS & FIGURES

### Cement sector employees

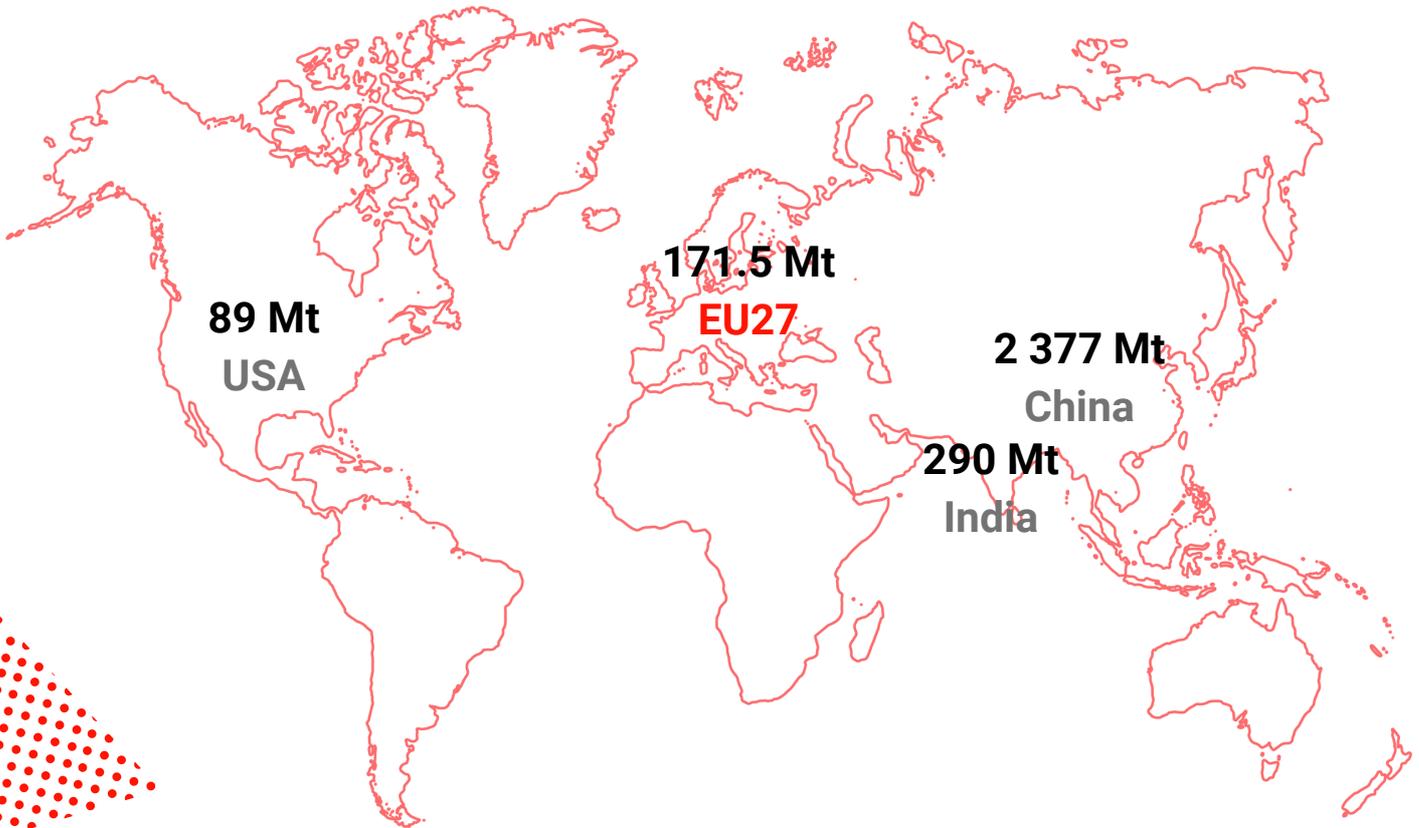


**46 835 (2020)**  
CEMBUREAU

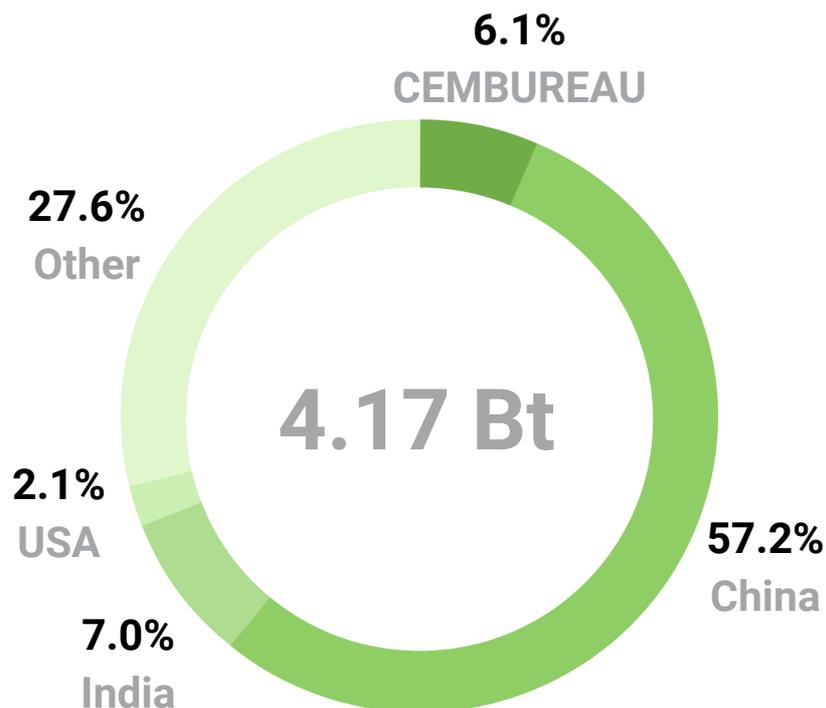


**35 176 (2020)**  
EU28

## Main world producers in 2020



## World cement production in 2020

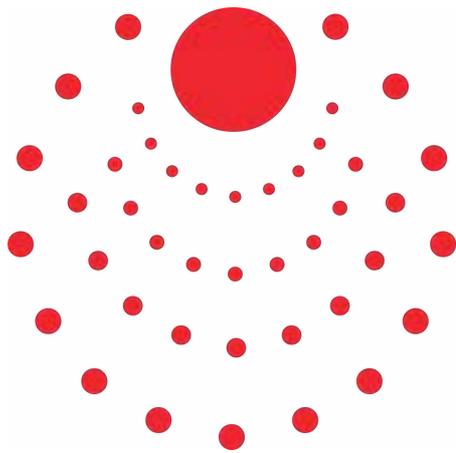




# **OUR PATH TO NET ZERO BY 2050**

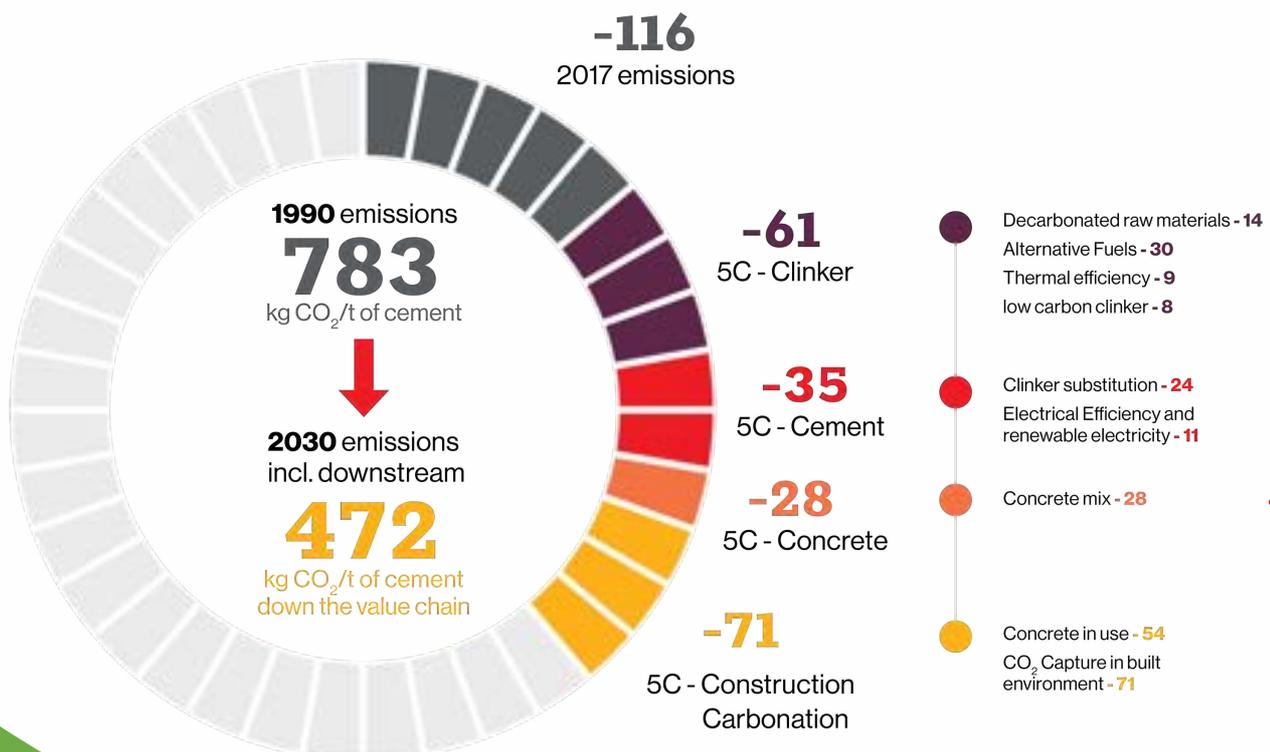
Our Carbon Neutrality Roadmap aims for carbon neutrality **along the cement and concrete value chain by 2050** and this will already require deep CO<sub>2</sub> cuts between now and 2030.

The publication of the roadmap followed several months of relentless work by experts from the European cement industry to identify CO<sub>2</sub> reduction potential across the cement and concrete value chain. Its core conclusion is that CO<sub>2</sub> emissions can be reduced by acting at each stage of the value chain – **clinker, cement, concrete, construction and (re)carbonation** – to achieve zero net emissions by 2050.

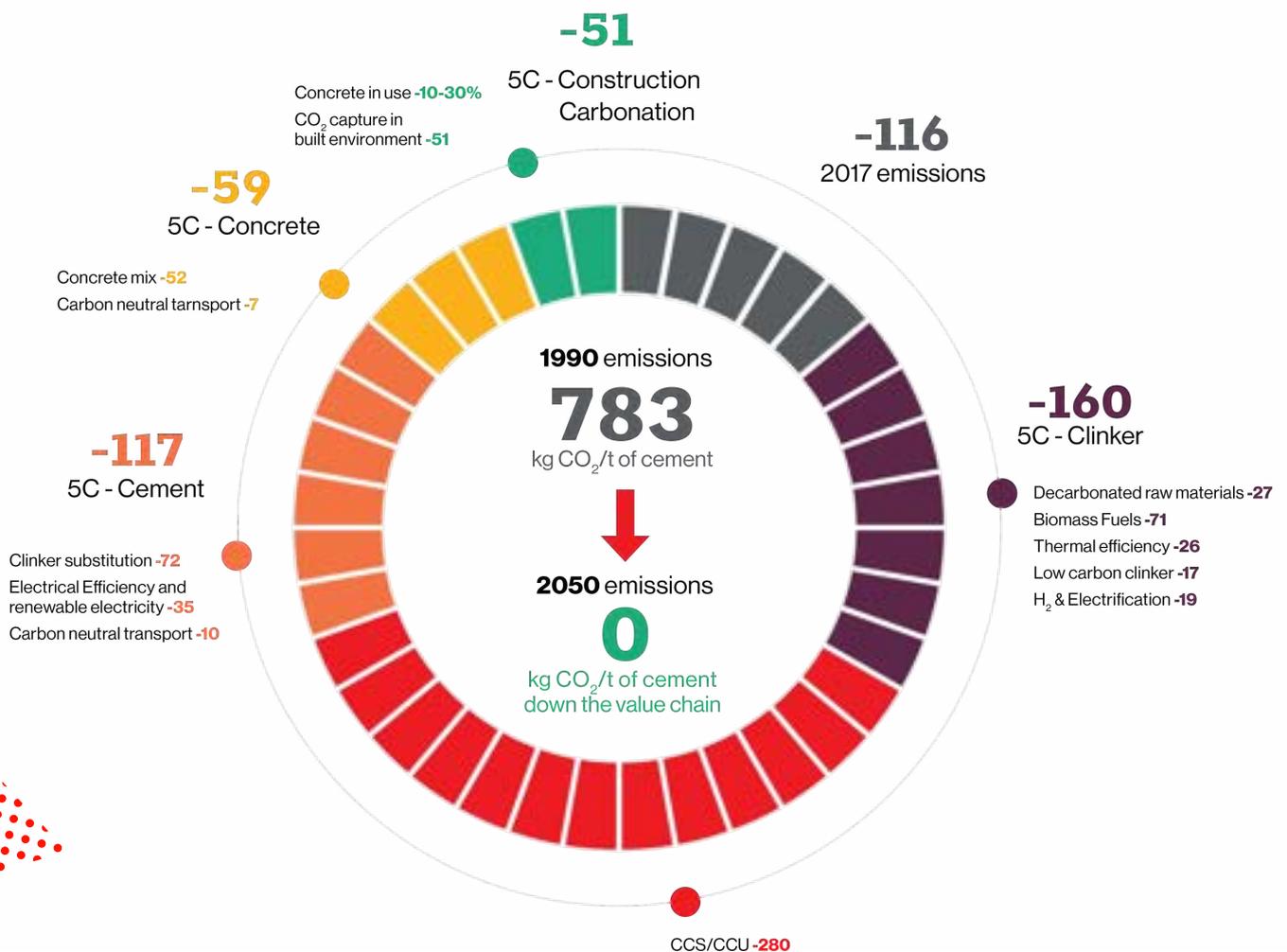


# CLINKER CEMENT CONCRETE CONSTRUCTION CARBONATION

## 2030 ROADMAP



# 2050 ROADMAP



Some of these emission cuts will be achieved through the implementation of **breakthrough technologies**, but, crucially, CO<sub>2</sub> savings can also be attained with limited technological investments. In fact, a set of technologies, policies and production changes will be needed along the life cycle, from the production of clinker up until the recarbonation and recycling of concrete. These include for instance the use of **non-recyclable and biomass waste to replace fossil fuels**; more **energy-efficient kilns**; the development of **innovative low-clinker cements**; the deployment of breakthrough **carbon capture and storage/use technologies (CCUS)**; **optimised concrete mixes** and **building techniques** and the potential for concrete to **re carbonate** up to 23% of the CO<sub>2</sub> process emissions.

CEMBUREAU's roadmap also includes an intermediary objective of **reducing CO<sub>2</sub> emissions by 30% for cement and 40% down the value chain**, in line with the Paris Agreement's two degrees scenario.

**Policy measures will be critical to support the sector's carbon neutrality ambitions.**

Based on this strong technical analysis, the roadmap also looks at how EU and national policies can support decarbonisation in the cement industry.

In particular, it identifies four key areas where policymakers can make a difference:



**The development of a pan-European CO2 transportation and storage network.** A large number of Carbon Capture, Use and Storage Technologies (CCUS) pilot projects connected to cement plants is being developed across Europe. Alongside continued support for CCUS, EU and national policymakers should urgently look at developing a pan-European CO2 infrastructure network to allow for the transport, storing and/or re-use of the CO2 captured in cement plants.



**Decisive action on circular economy to support the use of non-recyclable waste and biomass waste in cement production.** Today, the European cement industry substitutes 48% of its fossil fuels by non-recyclable waste and biomass waste. This allows significant CO2 savings in our emissions process, and also bring wider benefits through the circular use of these wastes that would otherwise be incinerated or landfill. Policies should facilitate waste shipment between EU countries, discourage landfill and minimise exports of waste outside of the EU, and support the use of non-recyclable wastes in the EU industry.



**Ambitious policies to reduce European building's CO2 footprint, based on a life-cycle approach, which incentivise the market uptake of low-carbon cements.** The EU cement industry is taking an active role in the debate on a carbon neutral built environment and low-carbon construction products. Green Public Procurement, the timely publication of low-carbon cements standards, and the upcoming Sustainable Product Policy and the review of the Construction Products Regulation (CPR) will be key opportunities to support the rapid take-up of these products.



**A level playing field on carbon, regulatory certainty and an ambitious industrial transformation agenda.** A level playing field is indispensable to stimulate low-carbon investments and support carbon emission reductions worldwide, and the upcoming Commission proposals on Carbon Border Mechanisms will be key in this respect.

CEMBUREAU is proud of its 2050 Carbon Neutrality Roadmap setting out the EU cement industry's decarbonisation pathways. Our roadmap also shows the sector's commitments – from engineers to senior managers and factory workers –

to embed sustainability in our processes and have a strong positive impact on the climate. We stand ready to continue discussing it widely with stakeholders while we walk our decarbonisation path.

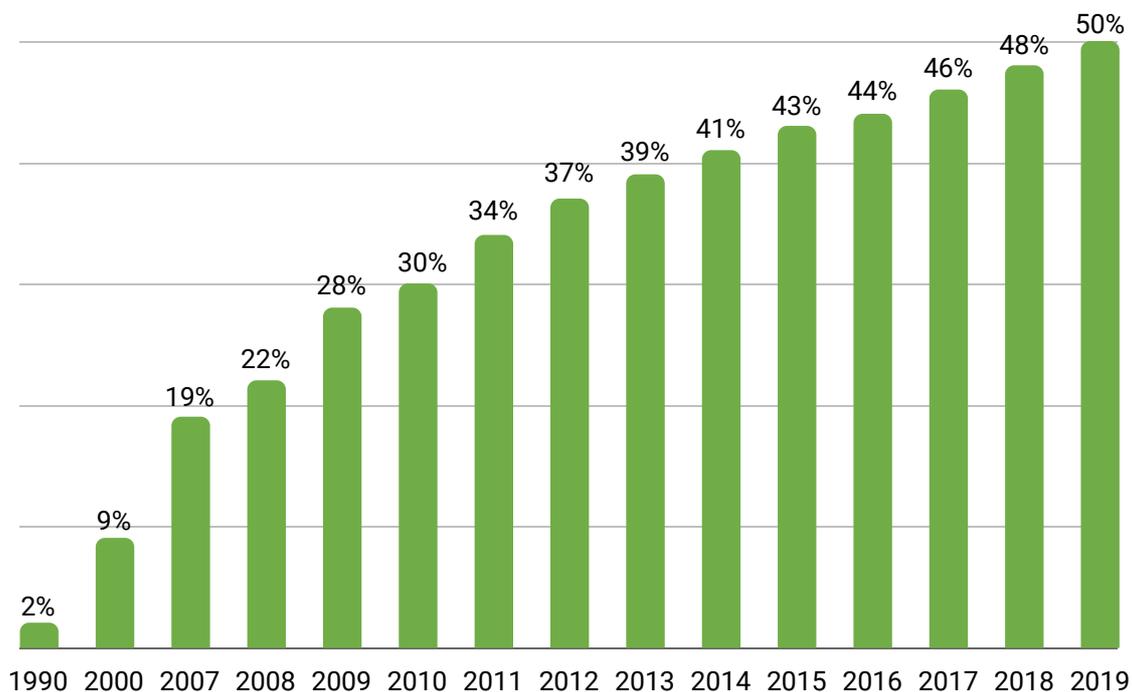


# ALTERNATIVE FUEL USE

Alternative fuel use has reached 50% of the cement industry's total thermal energy needs in 2019, saving 22.7 million tonnes of CO2 on an annual basis. The industry is well on track to achieve its 60% alternative fuel use target by 2030 and 90% by 2050. The recourse to alternative fuels frames in an increasing self-sufficiency of the cement sector in terms of thermal energy supply and responds into the key objective set forth by the European Commission which seeks to reduce energy dependency from third countries.

Crucial for the uptake of alternative fuels is access to waste streams that are used as input and CEMBUREAU is actively engaged in the policy debate on the revision of the waste shipment Regulation to ensure that exports of waste outside the EU are minimized as is the landfilling of waste within the EU.

## % of Thermal energy from alternative fuels in the cement sector in the EU 28





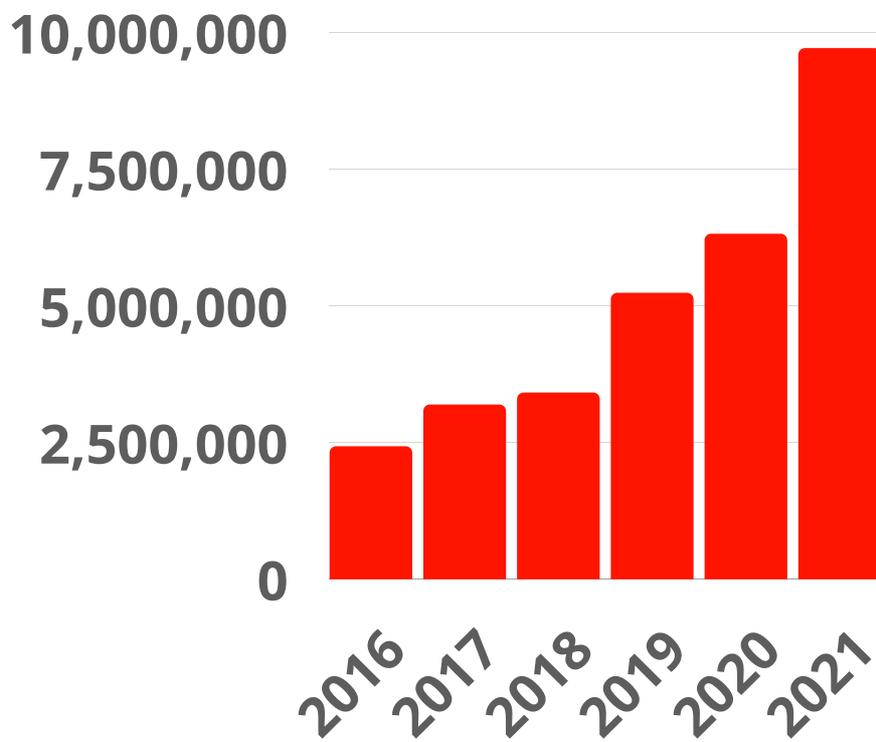
# TRADE

Eurostat data shows a significant recent increase of EU imports of cement from non-European countries.

In 2020, EU cement imports rose by 25%, whilst in 2021, imports further rose by 54%, building on a 160% increase in five years (2016-2020).

## Cement imports to European Union

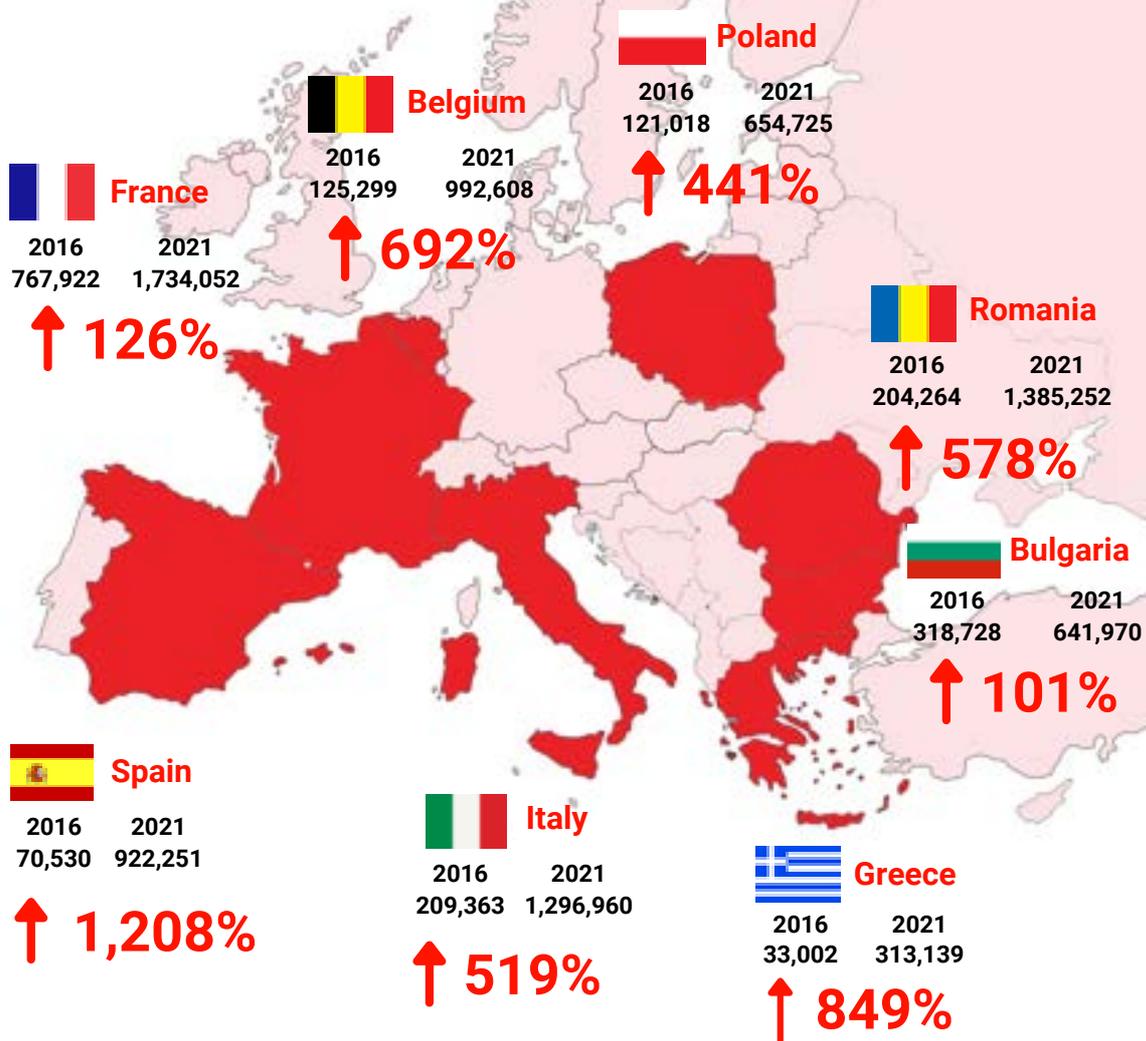
*Tonnes*



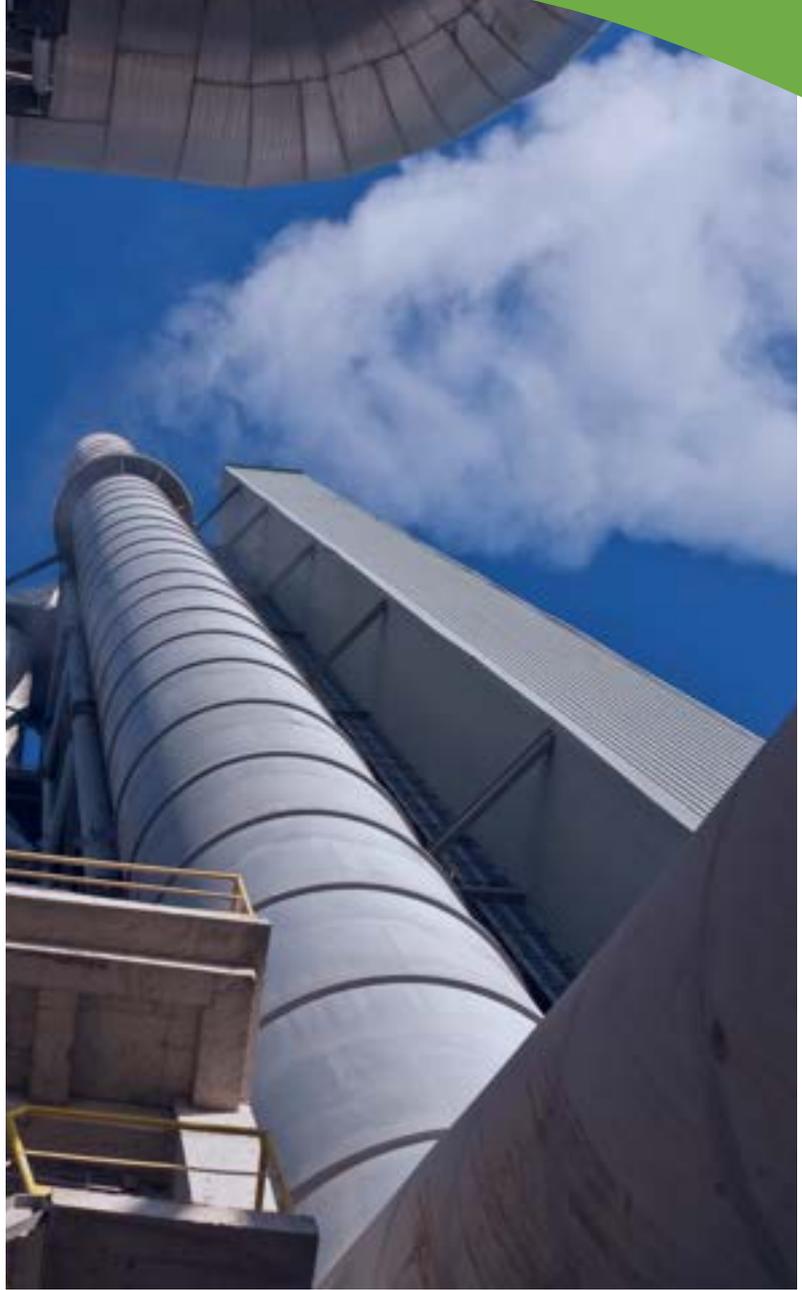
Source: Eurostat

## Focus on selected EU countries' cement imports

Data in tonnes



Source: Eurostat



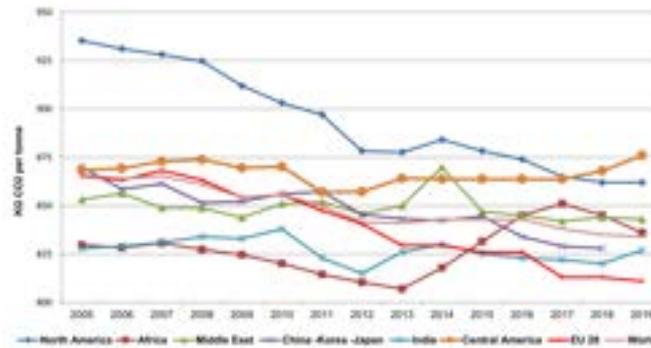
# **EMISSIONS REPORTING**

According to the latest data available, the European cement industry continued to reduce its emissions per tonne of product in 2019. This data, published by the GNR project, shows that between 1990 and 2019, the EU28 cement industry has reduced its:

- Gross CO2 emissions per tonne grey clinker by **-11%** (last year -10.5%)
- Net CO2 emissions per tonne grey clinker by **-21.2%** (last year -20.2%)
- Gross CO2 emissions per tonne cementitious (all) by **-13.3%** (last year -12.6%)
- Net CO2 per tonne cementitious by **-23.2%** (last year -22.1%)

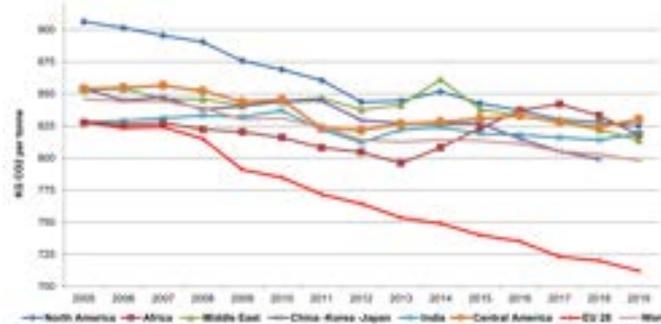
### Gross emissions Grey clinker

Source: GCCA GNR 2021



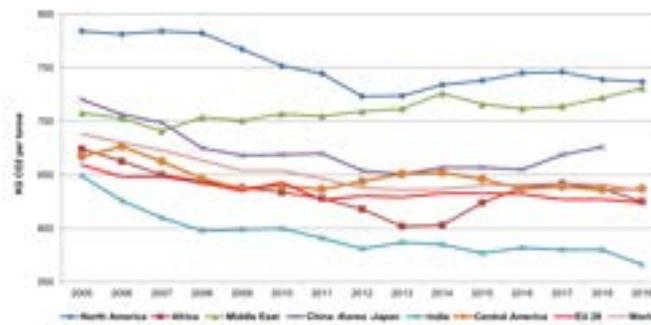
### Net emissions Grey clinker

Source: GCCA GNR 2021



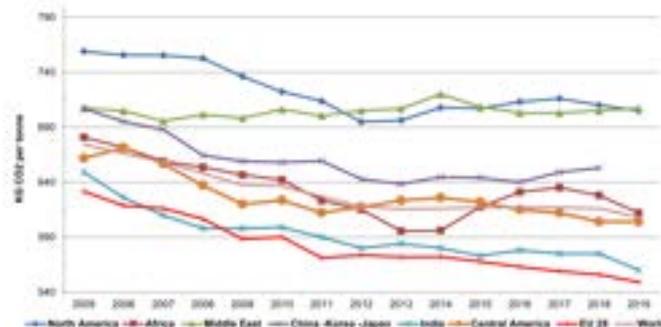
### Gross emissions cementitious products (grey & white)

Source: GCCA GNR 2021



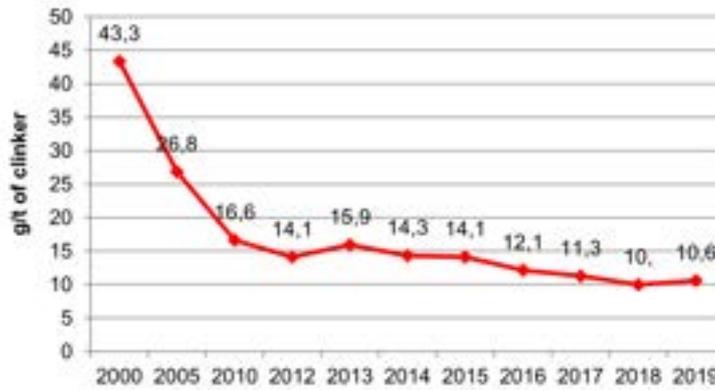
### Net emissions cementitious products (grey & white)

Source: GCCA GNR 2021

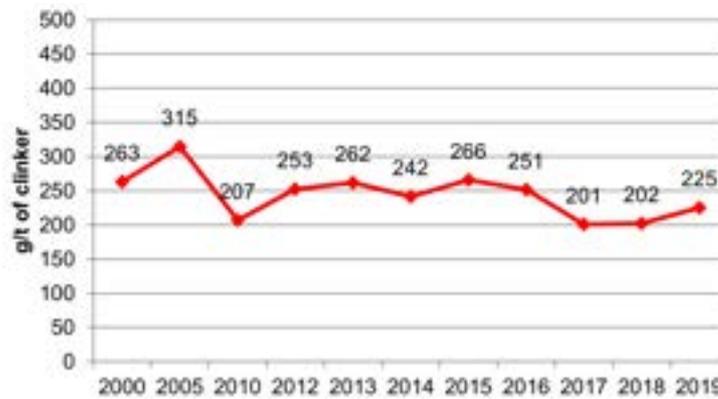


As this data shows, the European cement industry is amongst the world's best performing regions with its emissions output on a continuous downward trend. In this respect, it is important to note that whilst the data for the EU covers close to 100% of plants, this is not the case for other areas, in which it is typically the best performing plants who are included in the GNR data collection.

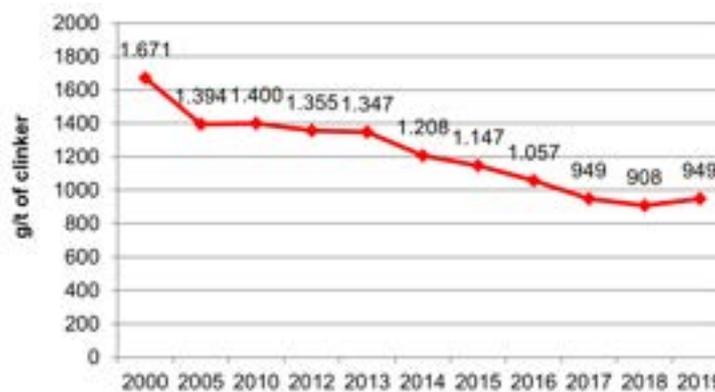
### DUST emission / clinker production



### SO2 emission / clinker production



### NOx emission / clinker production



Source: CEMBUREAU



# **2021: A YEAR IN REVIEW**

# FOREWORD PRESIDENT



**Isidoro  
MIRANDA FERNANDEZ**

**CEMBUREAU  
PRESIDENT**

On 14th July 2021 the European Commission released the “Fit for 55” package. Since then, CEMBUREAU and its Members turned their focus on it. With its raft of legislative proposals touching a wide variety of areas, this package is a game-changer not only for our industry but for society as a whole. Decarbonation is the objective!

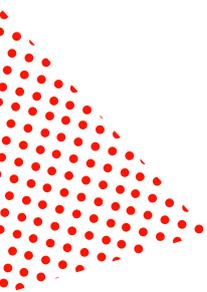
This objective and the legislative package did not come as a surprise. It is the execution of the Commission’s Green Deal for Europe: carbon neutrality by 2050 and an intermediate point with 55% reduction of greenhouse gas emissions by 2030.

As a cement industry, we took a major step in preparing for the transition to carbon neutrality through the adoption of our Decarbonisation Roadmap in May 2020. Thanks to the work of our Members, Working Groups and CEMBUREAU team, under the leadership of Raoul de Parisot, my predecessor, we anticipated the European Commission requests and set out the pathways to reach the objective for each of the “5 C’s” (Clinker, Cement, Concrete, Construction and (re)Carbonation) in our value chain.

As a demonstration of our industry commitment, we have recently published on our website a list of innovation projects across Europe that are the technology and innovation tools to achieve our decarbonation targets. And “Circular Economy” is the new way of working for our industry in the new European society.

CEMBUREAU assessed the legislative proposals under the “Fit for 55” package and what was needed for cement companies to innovate and make progress towards decarbonation. The message is loud and clear: companies and their shareholders need a regulatory framework that allows for a sound business case and decarbonisation investments with healthy returns. It is this proactive approach which has driven our interactions and exchanges with policymakers and underpinned CEMBUREAU’s positions.

In “Fit for 55”, the European Union acknowledges that climate change is a global challenge where every single jurisdiction and every country in the world needs to take its responsibility and fight against climate change. In a context of surging imports in the past six years, CEMBUREAU has welcomed the European Commission’s proposal to address the import of carbon intensive products from outside the European Union through the Carbon Border Adjustment Mechanism (CBAM). The proposal tackles the need for third countries to engage in carbon mitigation measures and encourages them to develop a carbon pricing scheme for sectors that are CO<sub>2</sub> and energy intensive. CEMBUREAU has been clear throughout that the CBAM should aim for a CO<sub>2</sub> cost equalisation. We also request that, as long as no watertight conditions for achieving this objective are in place, free allowances need to be maintained, both for imports as for exports.



Innovation and technology are spearheading the decarbonation process. A variety of technologies will be needed to achieve the emission reduction objectives but, with two thirds of the cement industry's emissions being process related, carbon capture is an indispensable technology.

Demonstrators and pilots are in development, but these are capital-intensive projects that carry a significant financial and technological risk. The availability of public funding and most notably the increase of the innovation fund are much needed accompanying measures. It will be important to ensure that these funds are frontloaded for projects that are in the pipeline now. The combination with other funding tools and programs such as the contracts for difference, the Horizon Europe funding and state aid as well as a proper coordination of these financing instruments along the TRL levels will be essential.

Once captured, CO<sub>2</sub> can be permanently stored underground but there is an increased focus on carbon use applications. CEMBUREAU has drawn the attention of policymakers to the need for a clear and predictable accounting of CO<sub>2</sub> to ensure a sound business case whilst allowing to meet the CO<sub>2</sub> emission reduction targets set forth by the industry in the wake of the Green Deal.

The offer of low CO<sub>2</sub> cements is today a reality. We also work with the ready-mix (European Ready Mixed Concrete Organisation - ERMCO) and precast (European Federation for Precast Concrete - BIBM) concrete associations to promote the development of low CO<sub>2</sub> solutions for construction in Europe. We welcome policy initiatives, such as in the area of public procurement that promote these low carbon solutions.

The issues mentioned above are not specific to the EU only. CEMBUREAU has been working closely together with the Global Cement and Concrete Association (GCCA) in the elaboration of its decarbonisation roadmap. Through GCCA, we get an overview of Roadmaps developed by our sister associations in other parts of the world. It is encouraging to see that all adopt a full value chain approach and emphasize the same levers, both in terms of technological innovation as in terms of policy requirements. The cement industry was also firmly put on the map of global policymakers through GCCAs presence at COP26, where also regional cement associations were invited.

As President, I truly believe that our industry is today a trusted partner in policy discussions. We embrace the objectives of the Green Deal. And we want cement to be part of the solution to decarbonize Europe. We have a long way to go but initial steps are encouraging. CEMBUREAU will continue to put at the service of our members the best experts in our Working Groups and Task Forces. We will liaise with our national associations for expertise and outreach and rely on our Board for guidance and strategic input.

# FOREWORD CHIEF EXECUTIVE



**Koen  
COPPENHOLLE**

**CEMBUREAU  
CHIEF EXECUTIVE**

The “Fit for 55” package is certainly a game changer for our industry and society at large, as the President emphasises in his foreword. Achieving climate targets also requires a strong focus on material efficiency and a circular economy business model. In taking a full supply chain approach to decarbonisation of the cement sector, CEMBUREAU advances concrete as a sustainable contributor to the built environment of tomorrow.

The challenge is significant as shown by some basic figures: 85% of Europe’s building stock predates 2001 and 9 out of 10 buildings will still be there in 2050. As most of these buildings are not energy-efficient nor do they comply with climate change objectives, achieving the ambitious targets set out in these two areas will require 35 million building units to be renovated by 2030, or 10,000 renovations per day starting now across the EU.

While some key legislative proposals were delivered through the “Fit for 55” package in July 2021, the past year was also a period of consultation and exchange on the future of the construction sector. The result of that reflection will be consolidated in the Commission’s upcoming Sustainable Product Policy, a revised circular economy plan and accompanying revisions of the Energy Performance in Buildings Directive (EPBD) and the Construction Products Regulation.

Throughout this reflection process, CEMBUREAU has drawn the attention to the changing role of the built environment in the overall energy and climate setting. Buildings will increasingly be considered as micro-energy hubs whereby they do not only consume energy but are also able to store and subsequently supply it. In this context exploring and activating the thermal inertia potential of buildings – whereby materials such as concrete can be used to pre-heat or pre-cool the building – is essential and should be addressed as part of the discussion on the EPBD review. In designing such active demand response strategy, proper attention needs to go to energy performance calculation models, interoperability between the building and their heating/cooling systems and the energy market and proper energy-storage incentives for the end-consumer.

CEMBUREAU has further emphasised the importance of the notion “design for deconstruction” which refers a full life cycle approach to the built environment. Such approach allows for factoring in at the design phase the end-of-life treatment of building materials, thus allowing for a proper and safe sorting of the different construction materials. It will contribute to an increased uptake of concrete from construction and demolition waste with a view to its recycling in aggregates for new concrete. Integrating the afterlife into the assessment will also allow to explore the full potential of carbonation of concrete whereby CO<sub>2</sub> gets reabsorbed during the lifetime but also and foremost upon exposure of concrete to the air. We have been very pleased to see that the concept of carbonation has been recognized in the Sixth Assessment Report of the Intergovernmental Panel on Climate Change (IPCC) in the summer of 2021, thus paving the way for an uptake in international CO<sub>2</sub> accounting.

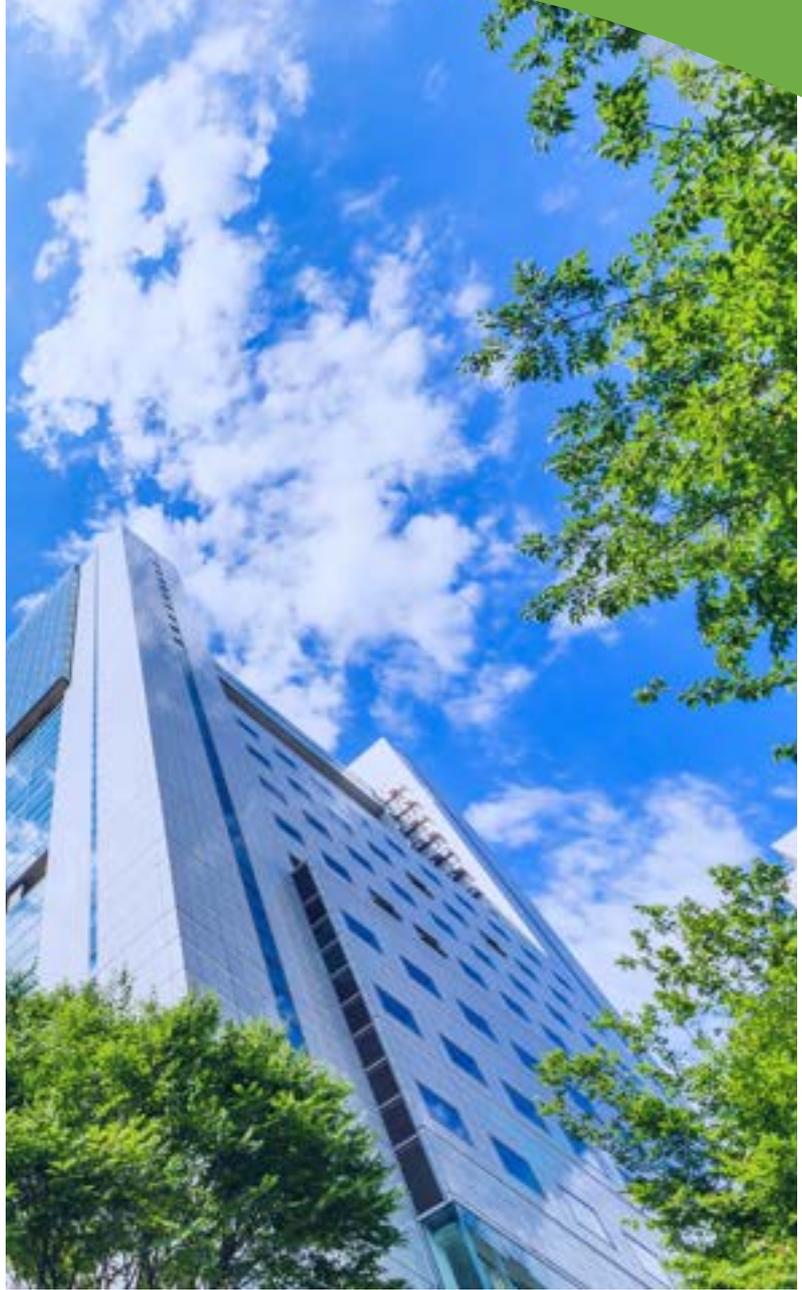
Through the ARUP study, CEMBUREAU further assessed the potential reduction of carbon using embodied carbon estimates.

In all of these policy initiatives, CEMBUREAU has stressed the importance of a material neutral approach to policy and the essential facilitating role of technical standards. It is essential that the EU standardisation process features clear roles and responsibilities. Whilst the European Commission plays a leading role in providing mandate for standards and checking their legality, the standardization body CEN should remain firmly at the heart of the standards elaboration process.

Cooperation along the supply chain has been the mantra for many of CEMBUREAU's positions, with the establishment of closer ties with the ready-mix concrete and precast concrete associations within the European Concrete Platform (ECP). ECP has, on its turn, joined forces with GCCA, the European Mortar Association, the European Ceramics Association, the European Autoclaved Aerated Concrete Association and the European Calcium Silicate Unit Producers Association, in engaging external consultants to carry out a study aimed at reviewing the CO2 neutrality principle and analysis of its applicability in the current forestry model, quantifying missing GWP emissions from existing LCA datasets or EPDs and critically assess the scientific bases behind the temporary carbon storage principle.

The Concrete Initiative (TCI), which still serves as a collective public policy outreach platform for the cement and concrete associations, has been accepted as an Official Partner of the New European Bauhaus. In its Manifesto, TCI sets out ten principles for the built environment that will contribute to the aesthetics of cities, their liveability and the quality of life of their inhabitants. The Manifesto also highlights a series of policy recommendations to make them happen.

The seeds for CEMBUREAU's participation in the upcoming legislative initiatives have been planted thanks to the technical and policy input from our members and colleagues in the team and a more focused cooperation with the concrete associations, facilitated by both ERMCO and BIBM sharing offices with CEMBUREAU in the latter's premises. We look forward to further intensify the cooperation going forward.



# HIGHLIGHTS

# CEMENTING EUROPE'S FUTURE: FROM WORDS TO ACTION

Building on the success of our 2020 summit, we staged our large scale-event *Cementing Europe's Future: Action Through Policy* on 12th October. The event brought together an impressive list of top-line speakers and was attended by over 300 online guests. The moderator, David Rose, managed a lively and interactive debate, which touched upon some core points of the EU agenda on climate change and sustainable construction.

After some introductory words by CEMBUREAU's President Isidoro Miranda, the first panel session was dedicated to the 'Fit for 55 package' issued by the European Commission over summer, and the cement industry's contribution to it. The panellists for the session included Gerasimos Thomas, Director General, DG Taxud, European Commission; Mette Quinn, Head of Unit, DG Climate Action, European Commission; Maria Spyraiki MEP; Tomas Wyns, Project Researcher Environment & Sustainable Development, VUB and Jon Morrish, CEO, Western and Southern Europe, HeidelbergCement.

The second panel was dedicated to the sustainable built environment, following the launch of the New European Bauhaus and the upcoming EU proposals to decarbonise European buildings. The panellists for the session included Florika Fink-Hooijer, Director General, DG Environment; Pernille Weiss MEP; Domenico Campogrande, Director General, European Construction Industry Federation (FIEC), and Onne Van der Weijde, President Europe & Asia, CRH.

We look forward to our continuous exchange with EU stakeholders during our future events.





# IMPACTFUL EVENTS

On 17 March, CEMBUREAU and its concrete partners of the Precast Industry (BIBM), Ready-mix (ERMCO), additives (EFCA) and aggregates (UEPG), organised the Concrete Dialogue, hosted by Sandro Gozi MEP, shadow rapporteur on the implementation of the Construction Products Regulation revision. During the Concrete Dialogue two social housing projects from Denmark and Austria showcasing the use of recycled construction materials and activated thermal mass in the built environment.

The event presented an opportunity for Ciaran Cuffe MEP, rapporteur of the European Parliament opinion on Maximising the energy efficiency potential of the EU building stock, and Josefina Lindblom, Sustainable Buildings Policy Officer, DG Environment, and Sorcha Edwards, Secretary General of Housing Europe, to discuss the Sustainable Built Environment from a Societal Perspective.



**17 MARCH**  
12:00-13:30 CET

**CONCRETE DIALOGUE 2021**  
**The Sustainable Built Environment from a Societal Perspective**

**Ciarán Cuffe**  
Member of the European Parliament (IE, Greens/EFA)

**Josefina Lindblom**  
Sustainable Production, Products and Consumption, DG ENVI

**Sorcha Edwards**  
Secretary General, Housing Europe

**Thomas Kreitmayer**  
Green Building Expert, City of Vienna (Austria)

**Finn Passov**  
Technical Manager, Spæncom (Denmark)

**Hosted by Sandro Gozi MEP**  
Member of the European Parliament (FR, RE)

**Moderated by Jackie Davis**  
Experienced commentator and analyst on European Union affairs

To register your attendance please contact [events@theparliamentmagazine.eu](mailto:events@theparliamentmagazine.eu)

THE CONCRETE INITIATIVE

The poster features a grid of six video call participants: Ciarán Cuffe, Josefina Lindblom, Sorcha Edwards, Thomas Kreitmayer, Finn Passov, and Jackie Davis.

In May, CEMBUREAU organised a webinar on co-processing, which led to fruitful discussions and exchanges on our industry's contribution to circular economy.

The graphic features a central theme of circular economy and carbon neutrality. It includes a large red curved arrow pointing downwards, overlaid with a green recycling symbol. Below the arrow is a white staircase leading upwards. The CEMBUREAU logo is in the top right corner. The main title is in large green letters, and the subtitle is in black. A red-bordered box contains the date and time. A hashtag is located below the box. The bottom section is titled 'Our moderator and speakers' and features five circular portraits of the participants, each with their name and affiliation. A small video feed of a speaker is visible in the top right of this section.

**A CIRCULAR & CARBON NEUTRAL EUROPE:**  
The Role of Co-Processing

**18**  
MAY  
2021

**11:00-12:30 (CET)**

JOIN US **ONLINE**

#COPROCESSING4EUROPE

**Our moderator and speakers**

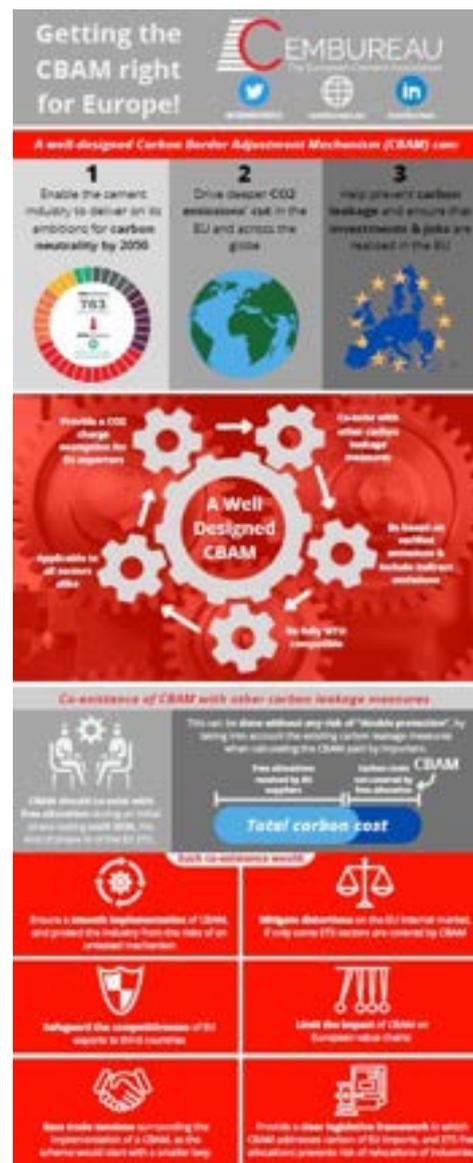
- Koen Coppens**  
CEMBUREAU  
Chief Executive  
@KoenCoppens
- Peter Weismant**  
Legal Officer  
DG Environment
- Suzanne Pasch**  
Senior Alternative  
Fuels Manager  
Helmholtz Center
- Dr. Patrick Sam**  
University  
of Lough
- Sigrid Heine**  
Association for the Secondary  
Fuels and recycled wood  
(ASR), Germany

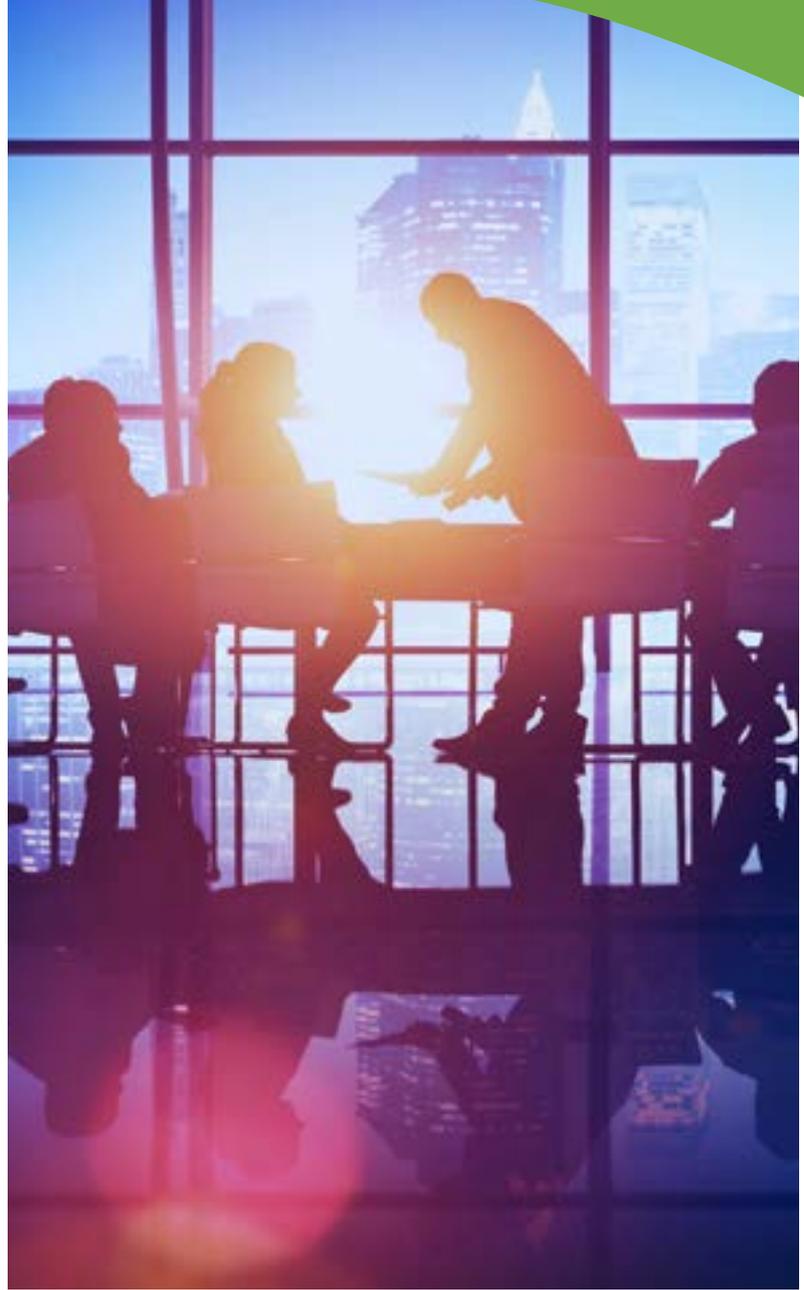


The debate on the sustainable use of biomass was one of the highlights of this year, CEMBUREAU published a [brochure on the role of biomass waste](#) in reaching our sector's climate ambitions.



Furthermore, CEMBUREAU also published a series of infographics on the EU Carbon Border Adjustment Mechanism (CBAM).





# WORKING GROUPS

# WG A - "CLIMATE CHANGE & ENERGY"

After the launch of the CEMBUREAU 2050 carbon neutrality roadmap in 2020, the year 2021 was marked by the release of a wide range of legislative proposals as part of the "Fit for 55% Package". The package, which was released on 14th July 2021, aims to achieve a 55% CO2 emission reduction by 2030. It will go through the EU legislative process in the European Parliament and the Council in the course of 2022. Working Group A discussed the implications of the package for the cement industry in 4 regular and 4 extra sessions organised throughout the year.

Already before the launch of the "Fit for 55% Package", Working Group A discussed some broader CO2 related questions with a view of setting out a long-term strategy. In brief:

1. An increasing CO2 price under EU Emissions Trading Scheme (ETS) affects the competitiveness of cement and concrete constructions in comparison to other construction materials such as timber. Given the current high CO2 costs, the pass through capacity of CO2 costs for all energy intensive products will be crucial and, if such pass through is possible, it will drive the incentive for decarbonation.
2. The combined criteria for carbon leakage protection (1. Trade intensity and 2. Carbon emissions intensity) are correct to assess the vulnerability of the cement sector and other energy intensive industries. Singling out one of the criteria assumes that the other is not relevant for that vulnerability, while current limited level of free allocations compared to actual performance already indicates the risks.

3. In light of the current carbon prices, it is essential to secure a fair level playing field on direct emissions for EU27 produced cement, imports, and exports.

4. Furthermore, it is also critical that future CCUS installations do not lead to reduction of the benchmarks for other installations. Furthermore, capture of CO2 in cement installations is to be recognized as emissions reductions of these installations under the EU ETS, also when emissions from biomass materials are captured.

All of these crucial points have found their way in discussions on the "Fit for 55" legislative proposals throughout 2021.

The proposed Carbon Border Adjustment Mechanism (CBAM) suggests the introduction of such levy as from 2026 for a selected number of sectors (steel, cement, fertilizers, aluminium, electricity). A cross-reading with the EU ETS proposal learns that free allowances for CBAM sectors would be gradually phased out during a ten-years period but it is expected that the duration of such period will be heavily debated during the co-decision process with consequential impact for the production costs, an item that will be closely monitored by CEMBUREAU. CEMBUREAU broadly welcomes the design of the CBAM proposal but insists on its effectiveness depending on the degree of its watertightness. Working Group A has been supported in its reflections on the cost impact on cement operations for different CBAM scenarios by PwC.

The impact analysis carried out has shown that a watertight CBAM requires more work to be done on the assessment methodology of emissions in third countries, the inclusion of indirect emissions within the scope and a solution for exports in line with WTO law. CEMBUREAU has also called for an earlier introduction of CBAM as it considers its European operations vulnerable to carbon leakage in the period up to 2026 especially against the background of an increasing surge of imports over the past five years.

In addition to the proposed gradual phase-out of free allowances for CBAM sectors, the proposal for the revision of the EU ETS makes the granting of 25% of the free allowances conditional on the implementation of the recommendations of energy efficiency audits. Another major change relates to the accounting treatment for CO<sub>2</sub> captured whereby the proposal no longer requires an emission into the atmosphere to determine whether there is a CO<sub>2</sub> emission. As this has direct consequences on the accounting allocation of the CO<sub>2</sub>, CEMBUREAU's focus will be on the reintroduction of the notion "released into the atmosphere" acknowledging, however, that proper accounting should be done along the value chain.

A lot of uncertainty has arisen around the Commission's notion of "rebasement" suggesting that the Linear Reduction Factor for 2021 (and beyond) would be adapted to reach the new target of 61% emission reduction by 2030 for the EU ETS sectors. During 2021, the European Commission clarified that the rebasement will not have consequences for the free allocations level and it further released its decision that the Cross Sectoral Correction factor would be set at 100% for the 2021-2025 period.

The focus on the "Fit for 55" package should not obliterate the fact that, in the first half of 2021 and after intense discussions between CEMBUREAU and the European Commission, the benchmarks for grey and white clinker have been fixed at 693 respectively 957kg CO<sub>2</sub> per tonne clinker.

In addition to the "Fit for 55" package, the year 2021 has also been marked by intense work on the Delegated Acts under the Taxonomy Regulation and on the input provided by the experts in the Sustainable Finance Platform. Finally, the assessment of an activity as eligible under the EU taxonomy rules will be based on a clinker benchmark (based on the EU ETS) and a very challenging clinker to cement ratio taken from global sources (IEA). For the cement industry, it is further worth noting that, after intense lobbying, the use of Refuse Derived Fuel (RDF) as alternative fuels is not considered as "causing substantial harm" and can therefore be eligible under taxonomy. Going forward, very substantial questions, more relating to governance and reporting requirements under taxonomy will need to be addressed.

## WG B - "CIRCULAR ECONOMY & PROCESSES"

In 2021, the European cement industry has reached the milestone of 50% thermal substitution rate of its fossil with alternative fuels and stays committed to its targets set in the Carbon Neutrality Roadmap: 60% thermal substitution rate by 2030 and 90% by 2050.

During "co-processing" - the simultaneous material recycling and energy recovery of waste streams in an industrial process – the use of secondary materials and fuels allows to phase out of fossil fuels and avoids methane and CO2 emissions. Furthermore, it provides a service to society by playing a key role in the management of waste and in the circular economy.

On 19th November 2021, CEMBUREAU organised a session with 18 young professionals in the cement industry to discuss their main drivers to work for the cement industry, the current priorities for the industry, how they look at co-processing and how to improve communication on this topic. The discussion was rich with a strong degree of interaction while the focus on sustainability was at the core of the discussions in addition to the need for credibility and transparency of the sector.

CEMBUREAU was also active on the biodiversity front. Together with Birdlife Europe, HeidelbergCement, Eurogypsum, UEPG (the European Aggregates Association) and with the support of the European Commission, we launched in October 2021 the "[Extractive Sector Species Protection Code of Conduct](#)" - a framework for the management of "temporary habitats" linked to the extractive sector.

The Code of Conduct builds on the provisions of the EU's Birds and Habitats Directives, suggesting a manageable approach for the extraction sector to protect species and fully respecting the Birds and Habitats Directives by conserving nature through the implementation and management of temporary habitats. It is an excellent example of how nature conservation organisations and the business community can collaborate to produce lasting solutions to meet the needs of biodiversity and people – ultimately helping to create a nature positive future.

During 2021, CEMBUREAU has actively contributed in the Industrial Emissions Directive (IED) revision process, participated in the respective EC workshops, focus groups discussions, public consultations, targeted surveys and ensured a continuous dialogue with the DG ENVI Commission policy officials. Among others, CEMBUREAU highlighted that the Greenhouse Gas (GHG) emissions should not be included in the scope of the revised IED and that the next Best Available Techniques Reference Document (BREF) revision cycle shall not be initiated until the IED revision has been finalised, as in this way the confusion of which rules to follow for both operators and authorities will be avoided.

In November 2021, the European Commission published its proposal for the Waste Shipment Regulation revision. During the past year CEMBUREAU has pro-actively engaged with DG ENVI in the European Commission to discuss and clarify issues in relation to the quantities of alternative fuels imported by the cement industry and notification requirements (green list procedure). Further discussions will follow, in view of the Regulation revision process.

CEMBUREAU continued to stay highly involved in two projects at international level:

- work under the ISO/Technical Committee 300 "Solid Recovered Fuel (SRF)", where the project "Recycling Index determination" will help the recognition of the recycling contribution of co-processing, by a commonly accepted calculation methodology.
- the revision of the Annex IV of the Basel Convention, where CEMBUREAU advocates for the inclusion of a new operation "R15 co-processing". The next Conference of the Parties (COP) plenary meeting is scheduled for July 2022, but it remains to be seen whether will be organized in a physical form and what type of decisions will be taken.

## WG C - "HEALTH & SAFETY"

The [H&S Strategic Framework 2021-2027](#) was published by the European Commission in June with positive highlights, such as a "vision zero" on accident prevention, promotion of good practices and consistency with other EU policies which echo [CEMBUREAU's response into the consultation](#).

CEMBUREAU carried out frequent exchanges with its members on the COVID-19 crisis, gathering information on the state-of-play at national level, sharing industry' best practices and available EU guidance for a safe workplace.

As a result of the publication of the [Chemicals Strategy for Sustainability](#) (CSS) in 2020 as part of the Green Deal, initiatives for a revision of the CLP and REACH legislation have been launched through targeted studies and public consultations in 2021. A Task Force on Chemicals was set up under the WG C with the objective of working out common positions on the CSS that will touch on aspects of climate change, innovative products development and environmental and health protection. In the same context, CEMBUREAU has been monitoring closely the latest development of the CSS by joining specific EC workshops and CARACAL meetings, responding to EU consultations, and interacting with other related industries.

Following the revision of Annex II of REACH on Safety Data Sheets (SDS), CEMBUREAU updated its SDS for cement in 2020 and for clinker and flue dust in 2021 with strong support from the Members. As a Member of the ECHA Expert groups on Annex VIII of CLP ([EU 2020/1677](#)), CEMBUREAU kept notifying its members on new changes in the IUCLID format, to ECHA Poison Centre Notification (PCN) platform, and the state-of-play of implementation in the Member States.

In 2022 updates of Standard Formulas might be part of the EU agenda, to which the industry shall contribute.

The European Network for Silica ([NEPSI](#)) 2021 was dedicated to promoting the [new common tools](#). These comprised a revision of [NEPSI guidance in line with the CMD](#), a user friendly [website](#), a [SMEs toolkit](#), a new [workers' training pack](#), an [e-learning platform for new workers](#), and a NEPSI RCS monitoring protocol. CEMBUREAU organized in October a successful webinar, with a high interest from its members, to inform them and, assist them in the preparation of the 2022 NEPSI KPIs' Reporting. In addition, CEMBUREAU held training and guidance to present the NEPSI e-learning platform.

In 2021, the European Parliament voted on the revised Carcinogens and Mutagens Directive (CMD) 4th wave which included a review of the Binding Occupational Exposure Limit Value (BOELV) for Respirable Crystalline Silica (RCS) generated by a work process. NEPSI Signatories, including CEMBUREAU, informed the Parliament and the Council that this proposal was against the current procedure of evaluation. In December, the final text, resulting from the interinstitutional negotiation did not include this proposal. The European Commission is planning an evaluation under the current procedure in 2022. The WG C set up a Task Force on Respirable Crystalline Materials to follow up on this matter. The question of sharing good practices to DIY on '[safe dust](#)' was raised and for now a website was communicated.

CEMBUREAU became an official partner of the [EU-OSHA 'Healthy Workplaces Lighten the Load' Campaign on work-related musculoskeletal disorders](#) (MSDs) in 2021. The objective was to inform members and disseminate towards companies and stakeholders, data, publications, good practices, and case studies on the MSDs at the workplace. CEMBUREAU also called upon members to share good practices. A wrap up webinar on the campaign is foreseen for the end of 2022.

Finally, the change in industries from process to products in the frame of climate change is also calling for new skills, upskilling, reskilling and recruitment of new talents and leaders. Throughout 2021, CEMBUREAU monitored the EC proposals on those issues and shared them with its members, responded to consultations on transition pathways, and suggested possible actions for 2022.

OSHA  
OCCUPATIONAL  
SAFETY & HEALTH  
ACT

## WG D - "MARKETS & PRODUCTS"

A number of crucial files for the cement and concrete industry such as the proposed revision of the Energy Performance of Buildings Directive (EPBD) and the Construction Products Regulation (CPR), the Sustainable Products Initiative, the EU Taxonomy, and the proposed inclusion of buildings in the revised Emissions Trading System have either been the object of extensive consultations by the European Commission or are already part of legislative proposals under the "Fit for 55" package.

On all files, CEMBUREAU has conducted extensive work, took clear stance in its position papers and met with a large number of EU policy makers and stakeholders from the construction value chain. While we still face a lack of understanding on the specificities of cement, its relation to concrete and its essential role for a sustainable built environment, we are encouraged by the endorsement of our messages as valuable input to some of the key files mentioned above. A clear signal showing that we have been heard and taken seriously were the positive messages from the European Commission about our industry and products, shared at the CEMBUREAU event "Cementing Europe's Future: Action Through Policy". The event included a dedicated panel on sustainable construction.

In the context of the discussions on embodied carbon, which are centre-stage when it comes to sustainable construction, CEMBUREAU continued to emphasise the need for a whole life cycle assessment including end of life of products in measuring the impact of construction materials on climate change.

The Commission Level(s) framework for the assessment of sustainability at the building level is the reference from which the methodology for "whole life carbon" will be developed. The WG D participated in the piloting of the Level(s) initiative and worked on concrete structures design and methodologies for measuring CO2 intensity in construction. CEMBUREAU has also become ambassador of the World Green Building Council's #BuildingLife project that calls on policies to tackle the total carbon and resource impact of the construction sector. The cement and concrete sector will thus be in a position to follow up and provide input for the upcoming policy debates.

In 2021, we finally noted the publication of standard EN-197-5 which will allow the cement industry to put lower embodied carbon cements on the market. By sharing experiences at national level, WG D Members have also contributed to the work of the national standardisation bodies on the application rules for these new cements. The learning from the activities carried out in 2021 is that the non-harmonised European Standard route is feasible to bring innovation to the cement products. Work on a new, non-harmonised European Standard has just started at CEN/TC 51 for the use of Recycled Concrete Fines (RCF) as main constituent of cement. Future standards development should remain flexible to allow for an extension to additional recycled building materials in the future and thereby contribute to the circular economy while, at the same time, providing a solution to the forecasted shortage of traditional cementitious materials like fly ash and ground granulated blast-furnace slag.

CEMBUREAU also remains committed to the concept of harmonized European standards and will actively engage on the upcoming review of the Construction Products Regulation as well as on the standardisation strategy and the revision of the Harmonised European Standard System.

In the decarbonisation of cement, the use of Ground Granulated Blast Furnace Slag (GGBS) remains a key lever in the short- and mid-term. However, while it is well-known that LCA methods must reflect the purpose of processes, the steel sector has challenged the established economic allocation of CO<sub>2</sub> to slag in EPDs even if the price of the co-product is low and the selling of the slag is not the main purpose of the steel-making process. WGD worked hard throughout the year on building up its arguments in favour of economic allocation and the outcome at CEN/TC 350 was positive. Notwithstanding CEN/TC 350 recommendation however, the draft PCR for steel still favoured physical partitioning, so the issue is not yet closed and will be further discussed in 2022.

In the summer of 2021, the Intergovernmental Panel on Climate Change (IPCC) released its 6th assessment report. CEMBUREAU has welcomed IPCC's recognition of recarbonation and, therefore, of concrete as a carbon sink. This provides an opportunity to introduce the methodology developed by the Swedish Environmental Research Institute (IVL) in the IPCC Emission Factors Database. At the EU level, however, the publication of the IPCC report was not followed by an automatic acknowledgement of recarbonation by policymakers in the European Commission's communication on sustainable carbon cycles and this will need to be taken up in 2022.

As an overarching principle in its messaging on sustainable construction, CEMBUREAU has strongly endorsed the need for material neutrality in policies. Evaluating the environmental effects of construction materials and products in an objective way is one of the preconditions for taking the right measures and decisions to mitigate climate change in the construction ecosystem.

While we observe a positive evolution in policymakers' approach, the concept of material-neutrality is often paid no more than lip-service. A lot of effort was spent in 2021 in trying to halt a French Regulation that put timber in a better position compared to other construction products under reference of a "dynamic" LCA approach based on the concept of temporary carbon storage. This same concept also appeared at the EU level, even if an EC study has concluded that *"carbon saving levels are not of enough significance to prompt a major market signal to increase the uptake of wood-based construction products."*

Under impulse of its members in WGD, CEMBUREAU engaged in a coordination effort within the European Concrete Platform, its members at national level and GCCA to elaborate, in a consortium with other mineral product associations, a study that critically assesses the claims of the timber industry on its Global Warming Potential and on the scientific basis of the temporary carbon storage concept and to proactively communicate on misperceptions regarding the use of timber for sustainable construction.

The Concrete Initiative has continued to play a key role in promoting concrete. In 2021 TCI published a Manifesto with ten principles for the built environment to be considered in the *New European Bauhaus* to contribute to the aesthetics of cities, their liveability, and the quality of life of their inhabitants.



# THE ECONOMY

# THE ECONOMY: GLOBAL PICTURE

The following statistics are based on data and forecasts from the International Monetary Fund (IMF), the European Commission, Euroconstruct and the Eastern European Construction Forecasting Association (EECFA).

Looking ahead, risks include a possible emergence of new COVID-related variants leading to longer lasting economic impact with supply chain disruptions, upside inflation evolution and geopolitical tensions at Europe's eastern borders.

After a strong contraction in 2020 due to COVID-19, global recovery for 2021 is estimated at +5.9% and at +5.3% in the EU 27. For 2022 and 2023, a rebound of the economy is expected with forecasts at 4.4% and 3.8% respectively at global level, and 4.0% and 2.8% respectively in the EU27.

An impulse to the economic activity has certainly been given through the EU's Recovery and Resilience Facility (RRF), a temporary financial instrument put in place by the European Commission to mitigate the economic and social impact of the pandemic, making available €723.8Bn.

In order to cope with the pandemic, national governments have put in place restrictions that were often not coordinated at European level. This resulted in a disruption of logistic and supply chains with a consequential impact on production for many sectors (the construction sector has been impacted less compared to other sectors). The increasing energy and non-energy commodity prices and supply disruptions have resulted in higher and more broad-based inflation than anticipated.

When turning the focus to other regions, the IMF reported a +5.6% growth in 2021 in the US in 2020 compared to a -3.4% contraction in 2020 with growth projections for 2022 and 2023 at 4.0% and 2.6%, respectively. The Chinese economy continues growing with 8.1% growth realised in 2021, and 4.8% and 5.2% growth projected respectively for 2022 and 2023. India's economy grew by +9% in 2021 and is forecasted to grow by 8.7% in 2022 and 6.6% in 2023.

## Global Cement production

**Main world producers - The G-20 Group**  
Cement production (Million tonnes)

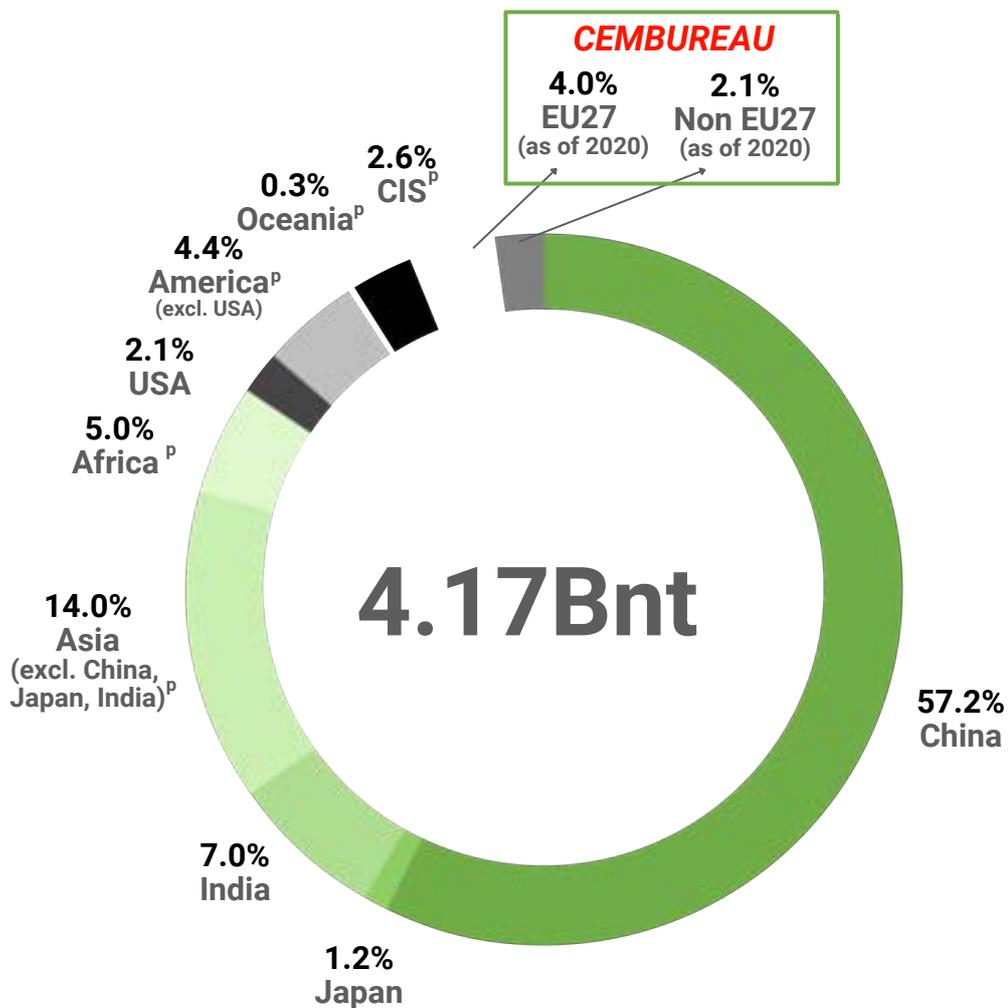
Country	2001	2005	2010	2015	2016	2017	2018	2019	2020
China	661.0	1 079.6	1 681.9	2 350.0	2 403.0	2 316.3	2 176.7	2 300.0	2 376.9
India	102.9	146.8	220.0	270.0	289.3	285.0	327.7	320.0	290.0
EU28*	225.6	251.1	192.1	167.2	169.1	175.1	179.8	182.1	171.5
USA	85.9	99.4	85.2	83.4	84.7	88.1	87.8	88.6	89.0
Brazil	39.4	39.2	59.1	72.0	57.8	54.0	53.5	53.4	60.6
Turkey	30.0	45.6	62.7	71.4	75.4	80.8	72.5	57.0	72.3
Russian Federation	28.7	49.5	50.4	69.0	55.0	54.7	53.7	54.1	56.9
Indonesia	31.1	36.1	39.5	65.0	61.3	68.0	70.8	64.2	64.8
South Korea	52.0	49.1	47.4	63.0	56.7	57.9	55.0	56.4	48.9
Japan	79.5	72.7	56.6	55.0	53.4	55.5	55.3	55.2	52.1
Saudi Arabia	20.0	26.1	42.5	55.0	55.9	47.1	42.2	42.2	53.4
Mexico	33.2	38.1	34.5	39.8	42.4	42.8	42.8	47.5	41.9
Germany	32.1	31.9	29.9	31.1	32.7	34.0	33.7	34.2	35.5
Italy	39.6	46.4	34.4	20.8	19.3	19.3	19.3	19.2	18.1
France	19.1	21.7	18.0	15.6	15.9	16.9	16.5	16.5	16.7
South Africa	8.4	12.1	10.9	14.0	13.6	13.2	12.5	12.4	13.2
Canada	12.1	13.5	12.4	12.5	11.9	12.7	13.3	13.4	13.0
Argentina	5.5	7.6	10.4	12.2	10.9	12.0	11.8	11.5	9.9
United Kingdom	11.9	11.6	7.9	9.6	9.4	9.4	9.2	9.1	8.0
Australia	6.8	9.1	8.3	9.3	10.0	10.0	9.8	10.0	9.6

\*EU27 data is compiled using latest available data - EU28 until 2019 / EU27 as of 2020 reporting year

Global cement production in 2020 is estimated at approximately 4.17 billion tonnes (Bnt), oscillating around the magic 4Bnt, mainly due to higher growth in China, while India saw a decrease, but uncertainty on volumes for these two major actors is high. China still produces roughly 57.2% of the world's cement, with the EU27 representing 4% and CEMBUREAU members representing 6.1% of the world's production.

Besides the G20 countries represented, five emerging countries on the Eurasian continent produce altogether almost 7% (6.8%) of global volume, which is more than EU27 and CEMBUREAU: Vietnam (77Mt) and Thailand (36Mt) in the Far East, and Iran (68Mt), Egypt (47Mt) and Pakistan (48Mt) in the Middle East. All five's production slightly decreased in 2020, except Iran's grew by 24% in one year.

## World cement production 2020, by region and main countries, % Estimations

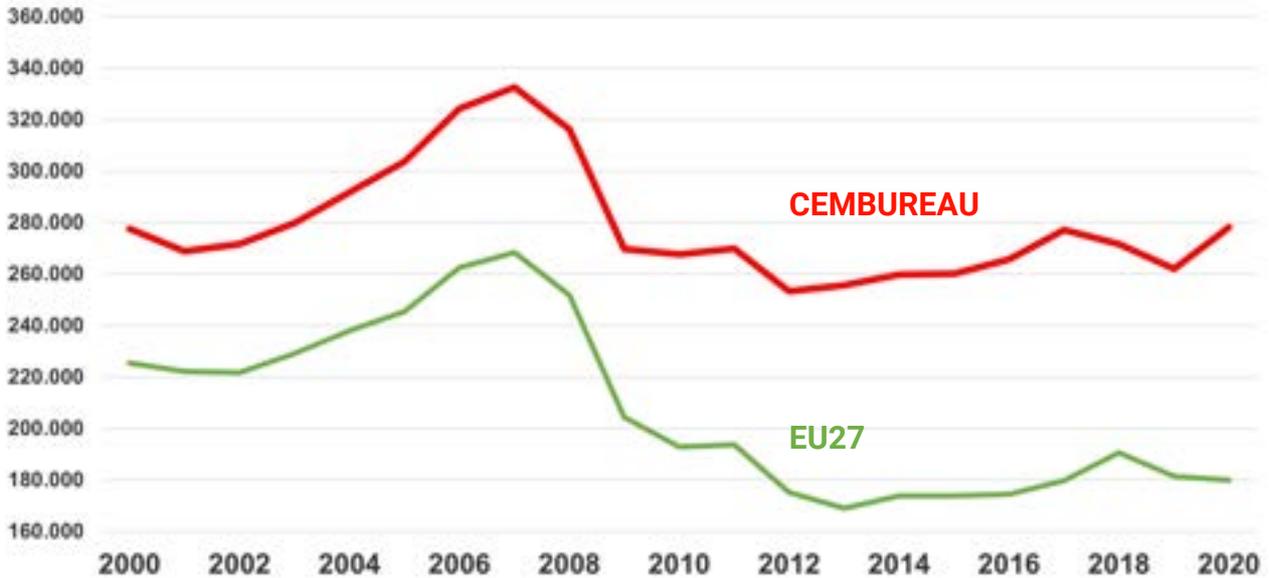


p = Preliminary  
Source: CEMBUREAU

Looking more in detail at the CEMBUREAU and EU27 cement production and consumption data from 2020, we observe the following trends:

## Cement production: EU27 & CEMBUREAU 2000-2020

### Cement production + clinker exports Ktonnes



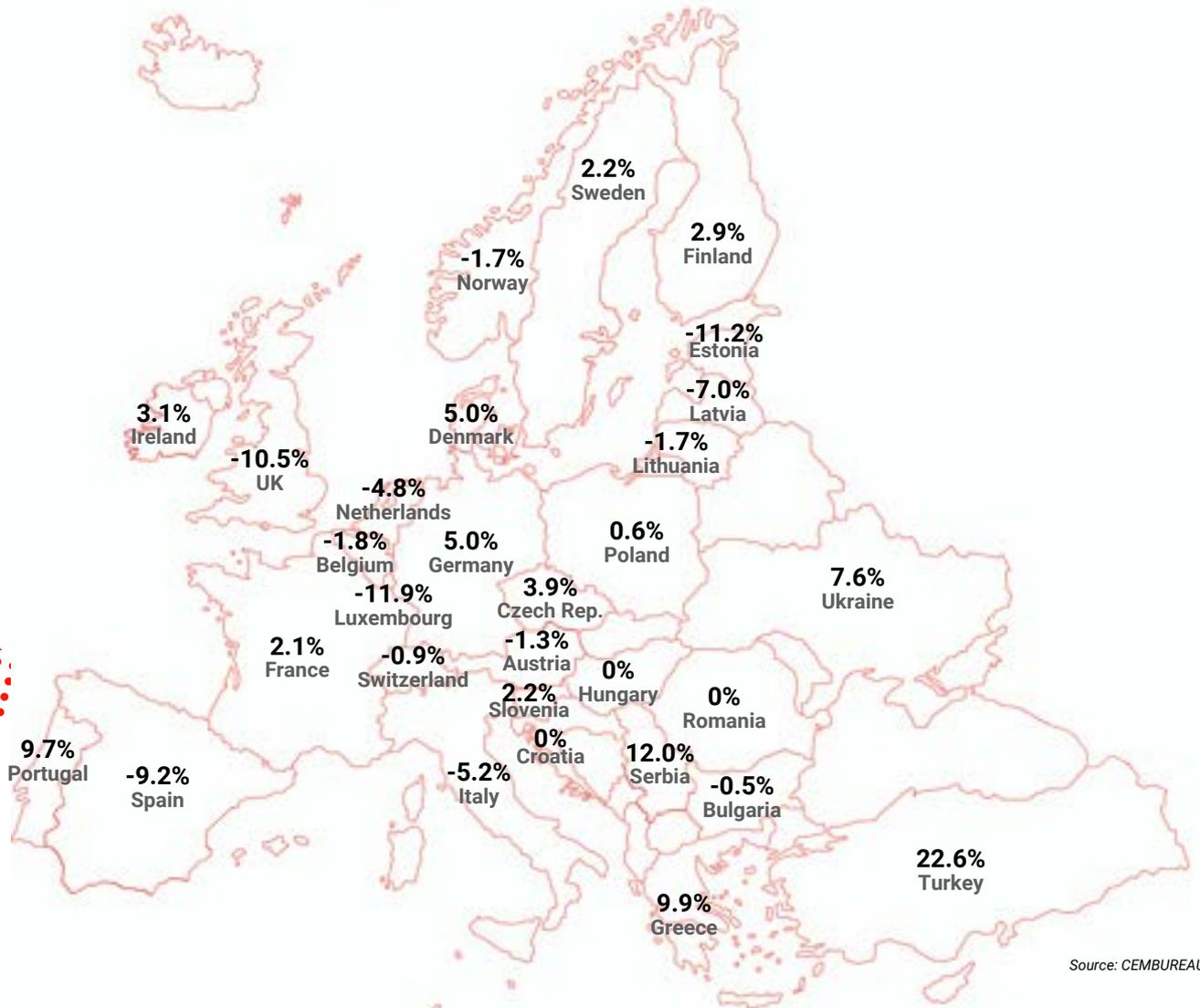
Source: CEMBUREAU

The production and clinker exports for the CEMBUREAU area as shown in the graph above, increased by 16.2Mt to 278.1Mt. This increase is due mainly to a rebound of the production in Turkey from a down-year in 2019. For the EU27, the drop of approximately 1% reflects a diversified picture whereby some countries were more heavily impacted by the health crisis than others.

The cement consumption increased for CEMBUREAU members from 219.4Mt in 2019 to 229.6Mt in 2020. The EU27 countries saw an increase of barely 1Mt to 158.5Mt. Individual CEMBUREAU members experienced wide differences in consumption evolution from 2019 to 2020, as the map below shows: three countries increased with almost 10% or more: Greece, Portugal and Serbia. Consumption decreased by approximately 10% in Estonia, Luxembourg, Spain and United Kingdom. Italy and Netherlands decreased by 5%.

# Evolution of cement consumption in CEMBUREAU countries

Variation 2020/2019 (%)



Looking at the consumption of cement reported by Euroconstruct, volumes dropped in 2020 down by -3,5%, significantly less than the forecasted figure of -11%. Moreover, this contraction was compensated in 2021 by a growth of 6.2%, with a forecast of 4.3% in 2022 and subsequently stabilising around 2% in 2023 and 2024.

## Construction Markets

The economic forecasts of the IMF and the European Commission are also reflected in the construction forecasts of Euroconstruct (19 countries), the member states of the Eastern European Construction Forecasting Association (EECF, which includes Bulgaria, Croatia, Romania, Serbia, Slovenia, Russia, Turkey, Ukraine).

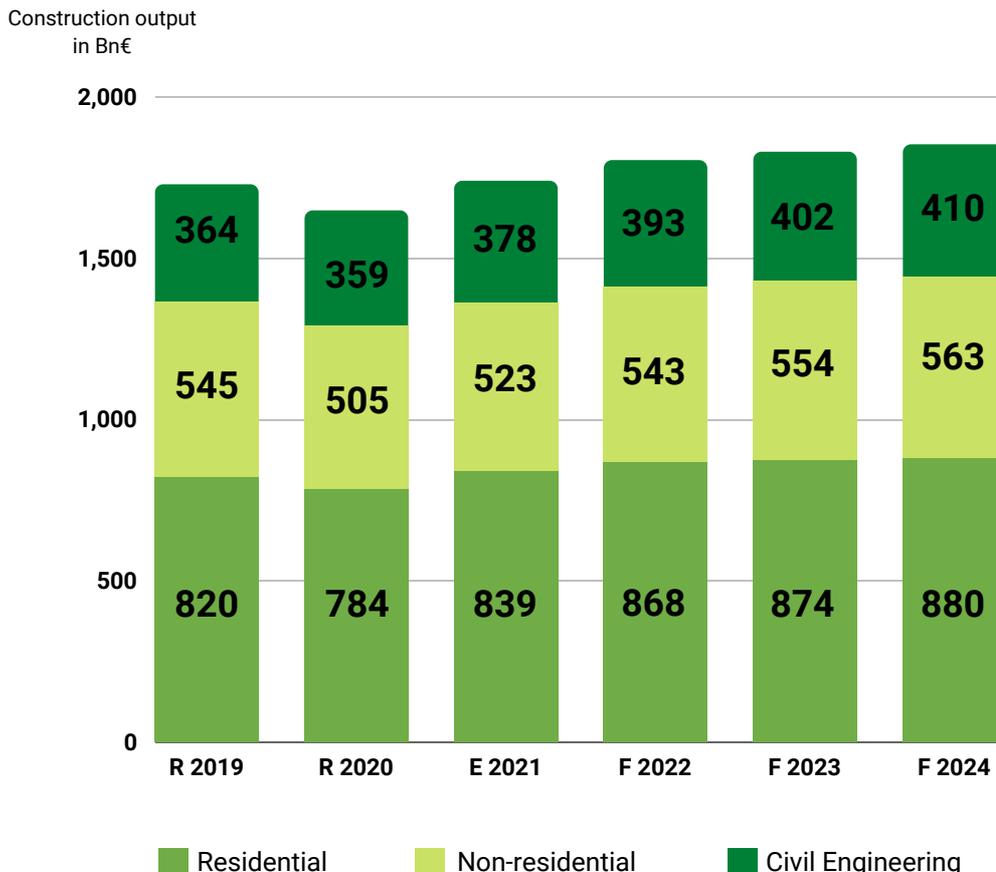
The construction volume in the Euroconstruct area decreased by 4.7% in 2020 and grew by 5.6% in 2021 (compared to a GDP contraction of -6.3% resp, 5.1%). EECFA countries noted a -3% dip in 2020 but a growth in the same order of magnitude in 2021.

As the crisis did not affect all countries to the same extent, also the recovery has been showing high volatility from one county to another, as far as speed, intensity and timing are concerned. Country zooms further in this report provide more information. The construction sector played a decisive role in the recovery of the overall economy.

Looking forward, in the Euroconstruct area, the construction volume is expected to recover to 3.6% in 2022, and the outlook remains positive also for 2023 (+1.5%) and 2024 (+1.2%). Commenting on the speed of recovery, already in 2021, total construction output in the Euroconstruct area reached €1.74 trillion, exceeding the pre-corona level of 2019 by 0.7%. This is forecasted to grow until 2024 to €1.84 trillion or a growth of 7% since 2019. In the EECFA area, evolution of the construction market is expected to grow by 2.8% in 2022 and 1.2% in 2023. Also, country-wise, most Euroconstruct and EECFA countries are forecasting positive growth for 2022 and 2023.

## Construction markets by segments

### Contribution of segments in market size and growth



R: realised - E: estimated - F: forecast

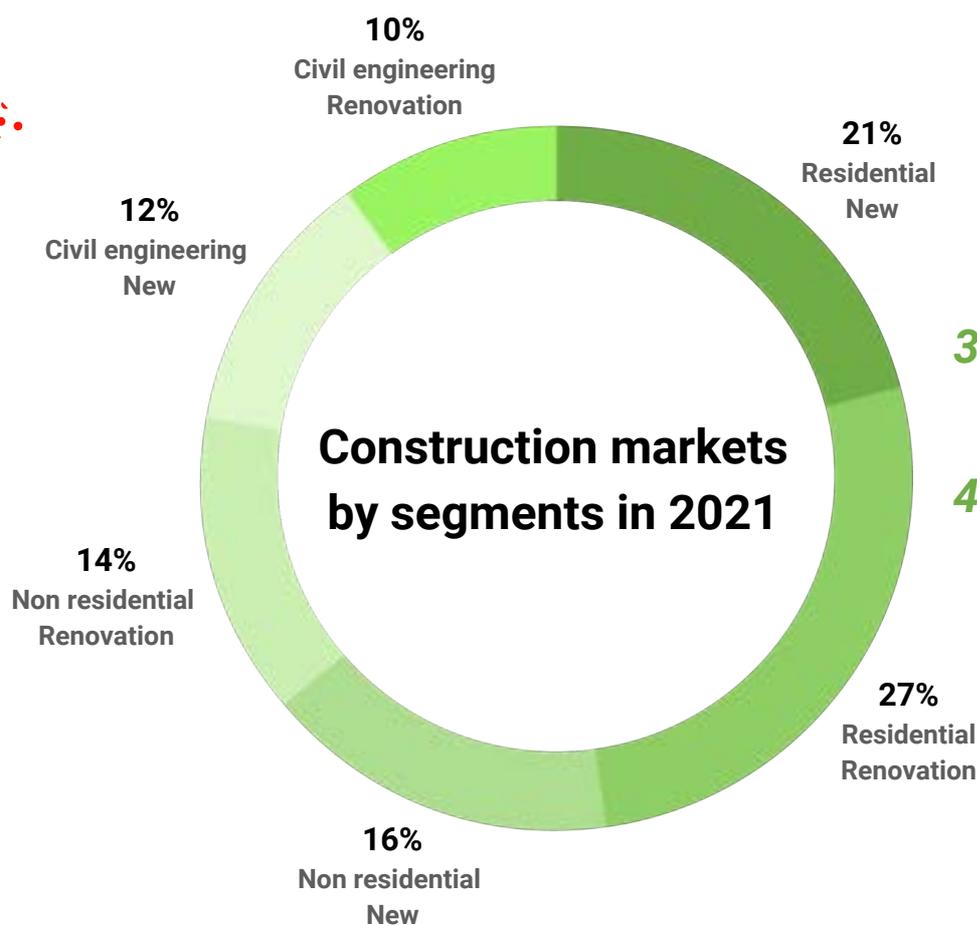
Source: Euroconstruct

Looking at construction market segments in 2021, public investments in infrastructure and government incentives for building renovation leading to growth of the residential sector, contributed highly to a record investment growth in construction, driving the recovery of the global economy.

Civil engineering showed the strongest resilience during the COVID-19 crisis with -1.3% in 2020, but in 2021, residential buildings became the best growing subsegment; in the forecasts for 2022, 2023 and 2024, civil engineering is taking the lead again with respectively +4%, +2.4% and +1.9% (see bar chart above).

In the Euroconstruct area, in 2021, GDP increased with 5.1%, construction output increased by 5.6% up to €1.74 trillion value, and compared to 2020, residential buildings saw a growth of +7.1%, non-residential buildings of +3.7% and civil engineering of +5.1%.

The split between segments is almost constant overtime, with 37% from new buildings and 41% building renovations, and 22% from civil engineering (see pie chart below).



**37% account for new buildings**  
**41% for building renovation**

Source: Euroconstruct

# ECONOMY PICTURE & OUTLOOK

## AUSTRIA



In Austria, cement consumption for the year 2021 is estimated to have risen by 5.6% compared to the previous year. This development has mainly been driven by the supporting initiatives from the state in the light of the economic crisis due to Covid-19. The main focus areas have been intensified investments into infrastructure projects (including civil engineering), investments in housing at continuously high level and investments in non-residential buildings thanks to the investment grants provided. For 2022 a small decline is expected as several projects originally planned for 2022 have already been initiated in 2021.

## BELGIUM



After a 1.8% decrease in cement sales in 2020 compared to 2019, consumption growth for 2021 is estimated at 5% at least.

Belgian construction output was up by an estimated 10.3%, more than offsetting the drop of 4.9% in 2020. All segments contributed to the growth including the new non-residential segment (heavily hit in 2020).

Long-term prospects are positive both for housing and infrastructure. However yearly figures may be uncertain due to different factors: execution of the recovery plan, reconstruction after the flooding of July 2021 and municipal elections in 2024. A major threat is the shortage in labour forces.

## BULGARIA



Based on NSI data the market decreased by ~8% in 2021. (The actual decrease of the market is probably smaller as certain imported quantities have been resold to other neighbouring countries. This reselling activity is higher in 2021 vs previous years.) In spite of a ca. 3% growth of Bulgaria's GDP, the construction market slowed down due to the political uncertainty of repeated elections and the pandemic. Public construction works have been delayed amid allegations of embezzled public funds by certain construction companies while certain construction sectors such as office and touristic buildings have not recovered to their pre-pandemic activity. The residential construction sector remains strong. Expectations for 2022 are that the construction sector has the potential to rebound showing moderate increase of 2%-4% supported by strong residential demand and the resumption of public infrastructure works, provided that escalating energy prices and inflationary pressures reside in the second semester of 2022.

## CZECH REPUBLIC



In 2021, the construction output increased by 1.4%, y-o-y, in real terms. The production in building construction increased by 1.5%, y-o-y and the production of civil engineering construction increased by 1.0%, y-o-y. The number of construction orders increased by 15.3%, y-o-y, the total value of the orders increased by 14.7%, y-o-y, and amounted to CZK 290.2 billion (€11.5bn).

The number of building permits granted increased by 5.8%, y-o-y, the approximate value of constructions permitted in 2021 was CZK 521.9 billion (€20.6bn) and increased by 33.9% compared to 2020. The number of dwellings started in 2021 increased by 28.3%, y-o-y, and amounted to 45,244 dwellings. The number of completed dwellings in 2021 increased by 0.7%, y-o-y, and reached 34,641 dwellings.

While the estimate of cement consumption in a situation of high variability of emission allowances and energy prices remains largely uncertain, cement consumption in 2022 is likely to be slightly higher than in 2021.

## DENMARK



Despite with the long period of Covid-19 restrictions in 2021 both cement production (+5%) and consumption (+6%) grew compared to 2020. For 2022, similar production and consumption levels are expected to be maintained.

Residential housing activity continued the upgoing trend from several years, but also the commercial building sector regained growth after a quieter 2020.

Publicly funded construction projects especially regarding infrastructure, energy supply and roads were on the same level as 2020. In 2022 the largest infrastructure project ever in Denmark – Fehmarn Belt Link – is expected to get started after several years of preparations.

Overall, the prospects for the construction sector are positive for 2022, although unprecedented rise in production costs, new national CO<sub>2</sub>-costs, lack of production materials and the difficult political climate across Europe are factors that can affect the situation in negative direction.

## ESTONIA



Cement consumption in 2021 grew ca 14% compared to 2020.

2021 was a very good year for the entire construction sector, compared to 2020. Construction volumes were high despite the rapid price increase and long delivery times of construction materials. Volumes were growing in all sectors (civil engineering, residential construction and non-residential construction).

The short-term outlook for the construction sector is that construction volumes will stay more or less at current volume level or grow slightly. In the residential construction sector growth continues as a result of high demand and lack of new apartments being available.

Non-residential construction sector is expected to continue on the same level. The best growth is expected in civil engineering sector as large-scale infrastructure projects will be launched (e.g. Rail-Baltica).

## FINLAND



In 2021 cement consumption is estimated to have grown 3%. New building and civil engineering grew both by 4%. The main driver in the new building cement consumption growth was the residential sector.

Forecast for 2022 cement consumption growth is 4%. New buildings are expected to increase by 6% and civil engineering by 2%. New building growth in 2022 will be mainly driven by the non-residential sector.

## FRANCE



Despite buildings fundamentals below 2019, a catch-up mechanism in the first half of 2021 seems to have stimulated construction and public works activity. The second half of 2021 is more in line with 2019. For these reasons, French cement consumption in 2021 has been estimated at 20 million tons, an increase of 3.5% compared to 2019 or 7.3% compared to 2020.

The French 2021 production of cement is estimated at 16.9Mt, a 3% increase compared to 2020 (and + 1% compared to 2019).

Macroeconomic imbalances (strong demand) and persistent uncertainty about the political situation make estimates for 2022 difficult. Rising costs (energy, electricity, CO<sub>2</sub>, etc.) could also penalize activity. Moreover, the reaction vis-à-vis the new environmental regulation (RE2020 - implementation 1st January 2021) for buildings could have consequences.

In 2022, the health context, the persistence of macroeconomic imbalances but also the fundamentals of construction, lead to an estimation of a drop in cement consumption back to the level of 2019.

## GERMANY



According to statistical data available to date, German cement consumption in 2021 decreased by roughly 3%. With around 29Mt, the volume remained, nevertheless, at a high level. Investment figures indicate that cement demand in commercial and municipal construction has declined. In addition, the construction industry was confronted with material and skilled workers shortages. As in the past years, positive impulses came from the demand for residential buildings. Construction investments in this segment increased by 1.2% in 2021.

While there is an increasing need for residential, office and administrative buildings, the demand for industrial buildings and civil engineering projects is declining. VDZ therefore expects cement consumption in 2022 to remain at an overall stable level.

## GREECE



After the impact of the COVID-19 pandemic, the Greek economy bounced back in 2021 by an estimated 8% (GDP) compared to 2020 and further growth is expected in 2022.

Operation of cement plants and related activities was not disrupted by COVID-19 effects in 2021. Domestic consumption of cement in 2020 improved by 10% compared to 2020.

Also, construction activities improved in 2021 with new permits for the building sector increasing by approximately 26% compared to 2020 (based on preliminary Statistical Authority data).

Prospects for 2022 are on the upside, subject to the continuation of the economic recovery in 2021.

## HUNGARY



Economic performance as measured by GDP grew by 7.2% in 4th quarter 2021 and by 7.1% in 2021 as a whole, compared to the decrease of -4.7% in 2020.

In 2021 construction output increased with 13.3% compared to 2020, recovering as such more than the loss of 9.7% in 2020 due to the COVID 19 crisis. Regarding construction segments, output was 17.1% higher in the construction of buildings and 9.1% higher in civil engineering compared to 2020.

The number of issued dwelling construction permits, a good indicator for future building activity, evolved on yearly basis from 22,556 in 2020 to 29,941 in 2021.

## IRELAND



Cement consumption has increased following the improved Covid operational environment, with many construction companies returning to site. However, the full benefit was only seen later in 2021 as there was a near-full restriction of construction until May 2021 seriously impacting on demand. Q3 of 2021 saw two key policy initiatives that will impact on the outlook of construction in Ireland. In September, Government published its latest housing plan, Housing for All. The plan has ambitious targets for housing completion of an average of 33,000 units per annum to 2030. Housing completions for 2021 was 20,433 homes completed – broadly in line with the 2020 completion of 20,526. The Government plan focuses on state-built housing in the earlier years and later on private delivery of housing. The second development is Government's review of the National Development Plan. While Government recommitted to the ambitious spending plan, a number of the projects have been delayed. Energy stability and securing of energy supply remains a concern for many industries, including the cement industry, going forward. Labour and talent remain a constraint on the Government's ambitions for construction.

## ITALY



In 2021, a growth in cement consumption of 15% compared to 2020 (20.4Mt) is estimated. All the construction sectors contributed substantially to the recovery in consumption, but the most important role was played by public work. The sector is currently fuelled by resources activated by the Public Administration from 2019. The positive outlook is also supported by new European funds allocated to finance the interventions included in the (PNRR) (National Recovery and Resilience Plan). In 2022, a consolidation of growth (+6.5%) with the consumption of 21.7Mt of cement is expected. Rising energy costs are a risk factor to be considered with a potentially strong negative impact on the business.

*\* Official data for 2021 will be available starting from July 2022*

## LATVIA



The cement market recovered at close to +10% y/y following a negative 2020 due to lower demand for construction. Rail Baltica works finally started, for now mainly at the Riga Central Station. Several road infrastructure projects in Riga are in progress. Quickly rising prices of wood products, rebar and other components, now due to high energy costs also cement, may limit further growth.

Cement production remained close to 2019-2020' levels at 1.2Mt. Imports continued their strong growth, at ~23% y/y; a strong inflow from Belarus prevails and is expected to continue until the Carbon Border Adjustment Mechanism comes into effect.

## LITHUANIA



Domestic demand for cement increased by 16.3% in 2021 compared to 2020, driven by the growth in construction in the industrial sector, with civil engineering and non-residential construction accounting for the largest share of construction works.

In 2021, the share of construction works in the country was 4.3% higher than in 2020. The share of non-residential construction works was 38.2%, or 14.8% higher than a year earlier. The share of residential construction works was 20.6%. The share of civil engineering construction works was 41.2% of the total national works. In 2021, the share of construction work abroad is 9.4% higher than in 2020.

It is forecasted that in 2022, due to the situation in Ukraine, cement sales and the volume of works carried out by construction companies in Lithuania on the domestic market may decrease by about 8-10%.

## LUXEMBOURG



After a difficult year 2020 due to Covid19 shutdowns in the construction sector, 2021 performed well again, on a comparable level to the pre-Covid-years (+21%). All sectors in the domestic market performed constantly and strongly with again a high performance in office buildings and much sustained by bigger infrastructure projects (tramway construction in Luxembourg City still ongoing). Exports remained at previous year level. For 2022 no major changes are expected on the different markets. Switches to low-carbon cements will be strongly in the focus.

## NETHERLANDS



The decline of cement consumption in 2020 was less severe than expected. In 2021 the market seemed to recover slightly by around 1% to reach 5Mt.

Regarding sectors, especially the residential and non-residential sectors showed higher production. The legislation on nitrogen was adapted to boost the production of new houses, exempting these emissions during the construction phase. The infrastructural sector showed a small decrease, since the nitrogen legislation still limits the depositions during the use phase after completion.

For the future, although effects of Covid-19 on the construction market have not entirely vanished, the outlook for all sectors looks promising. The expected growth of the construction market will be around 3.5%.

## NORWAY



2021 presented a strong market in both civil and infrastructure segments despite the pandemic. Infrastructure in particular showed strong figures with many large projects continued and initiated. The civil sector grew as well compared to previous year. The demand for low-emission products is increasing and the attention is increasing relating to the entire sustainability performance of the concrete sector, driven from both market and regulators perspective. Construction of the Brevik CCS was initiated and is well underway aiming at commissioning in 2024. Total market size at 2Mt cement.

## POLAND



In 2020, there was a 2.5% decrease in GDP related to the pandemic, but in 2021, the economy entered an upward trend and GDP growth exceeded 5%. A similar increase is expected in 2022. However, it is worth noting that a return to stable economic growth does not mean that the economic impact of the pandemic will no longer be felt. We will continue to observe the long-term effects of the pandemic and crisis in many industries.

The increase in investments in the economy will be supported by the public sector - a high level of expenditure in the area of road and railways is expected. Unfortunately, however, infrastructure investments are at the same time burdened with a high risk of limitations and delays related to funds for their financing (government conflict with the EU) and administrative delays related to tender procedures (especially in railways). According to the forecast, in Poland the increase in investment outlays will amount to approx. 8-9% in 2022.

A serious threat to stable economic growth, including for the construction and cement sectors, is high inflation (close to 10%) and a large increase in the costs of electricity, gas and CO2 emission prices.

## PORTUGAL



Cement consumption increased more than 5.0% in 2021.

Following a historical fall in 2020 (-8.4%), the Portuguese economy is expected to have recovered significantly in 2021 (+4.9%). GDP will probably return to pre-pandemic levels in the first half of 2022 (2022 GDP: +5.8%).

In 2021 and beyond, investment will benefit from EU fund inflows, prospects for a recovery in demand and favourable financing conditions. Construction sector growth estimate for 2021 is 4.3%. Civil Engineering segment was the most dynamic (+6.0%). The remaining subsectors performed as follows: Residential Buildings +4.5%; Non-Residential Buildings +0.9%.

For 2022, cement consumption is expected to increase by 5.6%, and construction activity is expected to grow by 5.5%. Civil Engineering sector will have the highest growth rate (+7.5%), but the other two sectors will also grow: Residential buildings (+5.5%) and Non-Residential buildings (+1.7%).

## ROMANIA



According to the provisional data of the National Institute of Statistics, the cement consumption in 2021 in comparison to 2020 increased by 0.6% and the cement import increased by ~27%.

In 2021, compared to 2020, the volume of overall construction works decreased by 0.6%. Split up by segments: maintenance and current repair work decreased by -7.9%, capital repairs decreased by -22.6% and an increase of +5.9% was noted for the new construction works.

The volume of non-residential buildings decreased by -11.4%, residential buildings increased by +28% and civil engineering works decreased by -6.2%.

Due to the overlap of the health crisis and the energy crisis, there has been a decrease in the volume of activity in the construction sector since the second half of 2021.

For 2022, the official data from the National Commission for Prognosis estimates an increase of 9.6% for the volume of construction works due to the effect caused by the slowdown in activity in the second half of 2021, but also an increase of engineering construction works is estimated, in accordance with the investments provided in the NRRP (National Recovery and Resilience Plan). This scenario did not take into account the Ukraine-Russia conflict.

## SERBIA



Cement production in 2021 increased by 10.4% and consumption increased by 11.8%, compared to 2020. Current forecasts show that the trend will continue during 2022, with a particularly strong performance of civil engineering. Major civil sub-segments will be roads and railways, but other transport infrastructure and energy are also likely to break new records in the coming period. We expect the residential segment to maintain its growth rates until 2023, while the non-residential one will probably return to growth in 2022.

## SLOVENIA



Since we have the data only for the first 11 months of 2021, we estimate, that production and consumption on the Slovenian market in 2021 will be 11% higher than in 2020.

The value of construction put in place in 2021 decreased by 5.8% compared to the previous year. Buildings went down by 23.6%, while civil engineering went up by 4.8%. The value of specialised construction activities went down by 1.2%. In 2021, 17% more building permits were issued than in 2020. The stock of contracts fluctuated on a monthly basis. It peaked in July, but after a sharp decline in August, it has risen again slightly in the next two months. Construction prices rose sharply last year under the pressure of rising commodity prices and labour shortages. Employment in construction rose by 4.4% on average. Confidence indicator in construction also improved significantly last year, reaching its highest level in 20 years.

OECD estimates that economic growth in Slovenia is projected to recover about 5.9% in 2021 and 5.4% in 2022, and moderate to a still robust 3.2% in 2023. Most indicators suggest that the relatively favourable trends in economic activity, which were seen at the end of last year, will continue.

## SPAIN



During 2021 Spanish cement consumption has gradually overcome the adverse effects of Covid-19, registering an increase of 11% and reaching approximately, 14.93Mt. Besides, 2021 figures exceed the ones reached in 2019, before the pandemic started.

Spanish exports reached 6.8Mt, cement 4.3Mt and clinker 2.5Mt. New built residential has increased by nearly 20%, while non-residential construction has increased by around 10%. Meanwhile, public investment in infrastructure appears to have grown moderately.

By 2022, cement consumption is expected to grow by around 5%, driven by the recovery of construction and higher levels of public investment.

## SWEDEN



2021 presented a strong and stable market in both civil and infrastructure segments despite the pandemic. Larger infrastructure projects were rolled out according to plan, with a strong demand from the construction of wind farms. The demand for low-emission products is increasing. Attention is increasing relating to the entire sustainability performance of the concrete sector, driven by both market and regulators. The launch of the world's first climate neutral cement plant by 2030 took place. The limestone quarry permit at the Slite plant expired in 2021. The new permit was unexpectedly rejected at a very late stage, generating an immediate uncertainty in the Swedish construction market due to a potential cement shortage. The Swedish government has approved a temporary quarry permit during 2022. Disruptions in production and deliveries have been avoided but the situation is still uncertain from a legal perspective. Total market size is stable at just under 3Mt cement.

## SWITZERLAND



The cement consumption in Switzerland remained stable with a slight increase of 0.6%. Shortages of other construction materials and bad weather conditions however resulted in an unstable development during the year. In total, 4.67Mt of cement were used in Switzerland in 2021, of which 85.3% are produced locally. All construction sectors recovered from the pandemic and will probably excel the pre pandemic year 2019, especially the building sector had a relatively strong increase. 2022 could continue with positive developments – however, the ongoing shortage of construction materials remains a risk factor.

## TURKEY



The Turkish economy grew by 11.0% in 2021. Unfortunately, the construction sector showed an 0.9% contraction which prolongs a recession of the construction sector ongoing for the last four years.

The Turkish cement industry realised 62.7Mt of domestic sales in 2021. Sales grew by 6%. At the end of 2021, 18.3Mt of cement and 12.5Mt of clinker were exported. The most important export markets were U.S.A., Ghana, Ivory Coast & Israel markets. In the near future, we expect that these export levels will be sustained.

With the installation of new capacities, there were around 95Mt of clinker production capacities by the end of 2021 with no significant increase expected in the coming years. Growth in the cement sector is projected to be around 5% by 2023.

Construction expenditures in 2020 were 627 billion TL (€38.9bn) at current prices in March 2021 and increased by 40% in 2021 to 875 billion TL (€54.3bn). In 2021, building permits by area increased by 32.3% compared to the previous year. Total housing sales in Turkey decreased by 0.5% compared to 2020. Unfortunately, the first sales, which provides more direct contribution to the economy, decreased by 1.7% on an annual basis.

## UKRAINE



In 2021 the cement market of Ukraine grew by 5.9% compared to 2020 to reach 10.4Mt.

Cement production by Members of the Ukrainian Cement Association (representing 94% of the market) amounted to 11.0Mt, a growth by 15.2% compared to 2020. Clinker production by the same Member companies increased by 9.4% in 2021 to reach a record 8.1Mt.

Cement exports in 2021 continued the positive upward trend of previous years. In total, 970.8Mt of cement were exported in 2021, an increase of +24.5% compared to 2020. Import of cement to Ukraine amounted to 545 thousand tonnes, with imports from Turkey decreasing due to anti-dumping measures but still accounting for 87% of imports.

The Ukrainian construction market grew in 2021 by +5.1% compared to the same period in 2020. The volume of construction works performed in January-December 2021 amounted to UAH 254 billion (€7.86bn), thanks to housing construction (+16.8%), non-residential construction (+3.2%) and infrastructure construction (+3.1%).

## UNITED KINGDOM



Cement consumption recovered in 2021 as shown by the evolution of ready mixed concrete (the major channel of sale for cement) where sales volumes advanced by 14.1% during 2021. This not only represented a buoyant recovery from the pandemic-induced slowdown a year earlier but highlighted resilient demand in the final quarter of the year, despite increased uncertainty caused by supply bottlenecks across the construction supply chain, sharp costs rises and the emergence of the COVID variant Omicron. Overall, construction has had a strong 2021 with total output growing by 12.7% compared with 2020, but the path of recovery shows infrastructure output in December some 45% above its pre-pandemic (Feb-20) level, whilst private commercial output remained 29% below. According to the Construction Products Association, output is forecast to rise by 4.3% in 2022 and 2.5% in 2023.



# ABOUT US

# MISSION

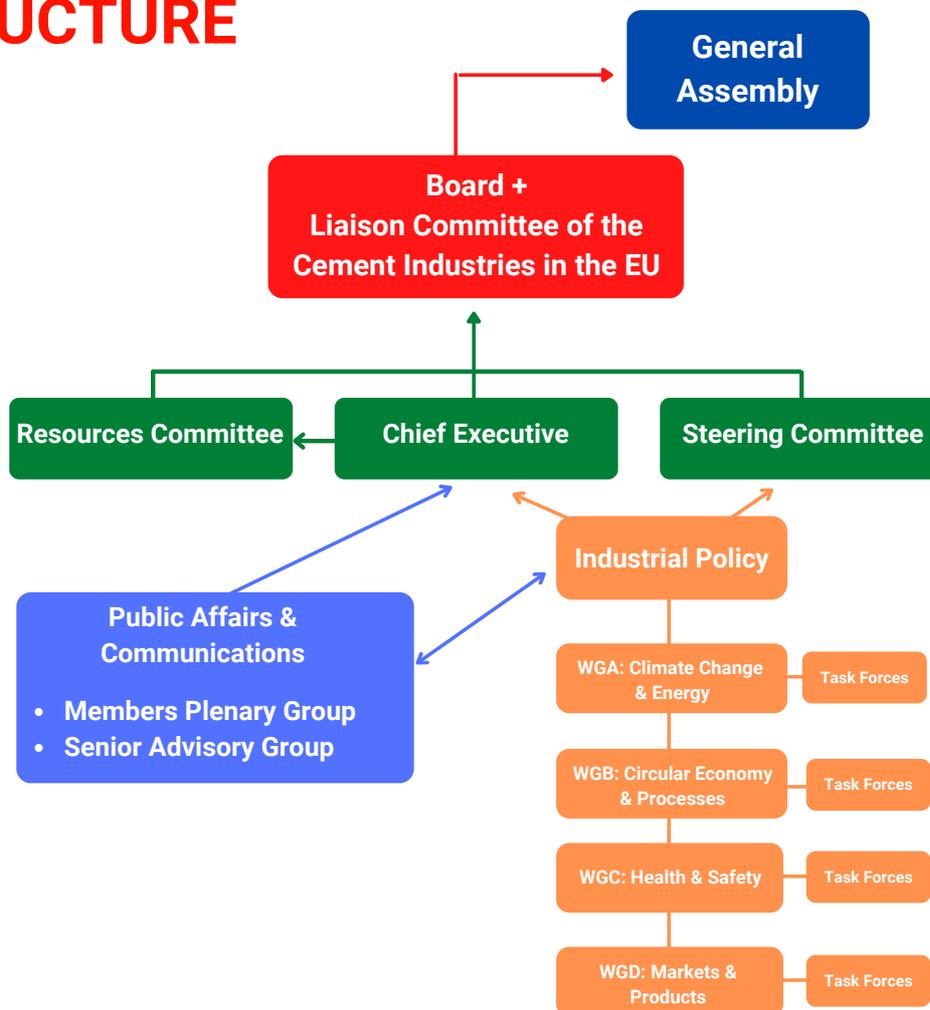
CEMBUREAU, the European Cement Association, is the representative organisation of the cement industry in Europe. It is the spokesperson for the cement industry before the EU institutions and other public authorities and communicates the industry's views on all issues and policy developments regarding technical, environmental, energy, employee health and safety, and sustainability issues.

In addition to the EU, permanent dialogue is maintained with other international organisations (e.g. OECD, IEA, UNEP), the Global Cement and Concrete Association (GCCA) and sister associations in other parts of the world.

Served by a multi-national staff based in Brussels and with input from Members via four Working Groups as well as several Task Forces set up on an ad hoc basis and directly reporting to the appropriate Working Group, CEMBUREAU acts in relation to all developments at European level affecting the cement industry.

CEMBUREAU plays a significant role in the world-wide sustainable development of cement and the ready-mixed and precast concrete industries in co-operation with its Member Associations and other relevant organisations. The Association regularly organises events on specific issues aimed at improving the market perception of the industry and promoting the use of generic cement and concrete products. In addition, the Association regularly commissions studies to evaluate specific issues of importance to the industry.

# STRUCTURE



# OUR TEAM

Situation on 8 April 2022

## CHIEF EXECUTIVE



**Koen Coppenholle**  
Chief Executive



**Cathy Roeland**  
Personal Assistant  
& HR Manager



**Nour-Eddine Chafki**  
Logistics, Real Estate  
& Finance Manager



**Latifa Ben Yamoun**  
IT Assistant

## INDUSTRIAL POLICY



**Rob van der Meer**  
Industrial Policy  
Director



**Marie-Hélène Troger**  
Personal Assistant



**Miette Dechelle**  
Health & Safety  
Manager



**Nikos Nikolakakos**  
Environment & Resources  
Manager



**Vagner Maringolo**  
Sustainable Construction  
Manager



**Sylvianne Liesen**  
Assistant



**Koen Van De Put**  
Economic Studies &  
Statistics Manager



**Patricia Moreaux**  
Graphic Design  
Manager (50%)

## ECONOMIC STUDIES & STATISTICS

## PUBLIC AFFAIRS & COMMUNICATIONS



**Emmanuel Brutin**  
Public Affairs  
Director



**Jean-Baptiste Gomes**  
Senior Public Affairs  
Manager



**Anam Iqbal**  
Monitoring & Research  
Analyst



**Patricia Moreaux**  
Graphic Design  
Manager (50%)

# OUR BOARD MEMBERS

Situation on 8 April 2022

President: **I. Miranda Fernandez**

Vice-President: **K. McKnight**

	<b>Full Members</b>	<b>Permanent Alternates</b>
<b>AUSTRIA</b>	<b>B. Kren</b>	
<b>BELGIUM</b>	<b>E. Fostier</b>	<b>M. Gutovic</b>
<b>BULGARIA</b>	<b>S. Thiede</b>	
<b>CZECH REPUBLIC</b>	<b>K. Chudej</b>	<b>P. Zelano, R. Michalcik</b>
<b>DENMARK</b>	<b>B. M. Hansen</b>	<b>P. Zugaro</b>
<b>ESTONIA</b>	<b>M. Einstein</b>	
<b>FINLAND</b>	<b>O. Van der Weijde</b>	<b>S. Schmidt</b>
<b>FRANCE</b>	<b>F. Petry</b>	<b>B. Pillon</b>
<b>GERMANY</b>	<b>C. Knell</b>	<b>T. Spannagl</b>
<b>GREECE</b>	<b>Y. Paniaras</b>	<b>D. Chanis</b>
<b>HUNGARY</b>	<b>J. Szarkándi</b>	
<b>IRELAND</b>	<b>O. Mahon</b>	<b>L. Callebat</b>
<b>ITALY</b>	<b>M. Buzzi</b>	
<b>LATVIA</b>	<b>R. Schneider</b>	
<b>LITHUANIA</b>	<b>J.A. Mituzas</b>	<b>A. Zaremba</b>
<b>LUXEMBOURG</b>	<b>D. Beese</b>	<b>C. Weiler</b>
<b>NETHERLANDS</b>	<b>J. Morrish</b>	<b>C. Streicher</b>
<b>NORWAY</b>	<b>G. K. Brantenberg</b>	<b>P. Brevik</b>
<b>POLAND</b>	<b>J. Miluch</b>	<b>X. Guesnu</b>
<b>PORTUGAL</b>	<b>L. Fernandes</b>	<b>O. Hubscher</b>
<b>ROMANIA</b>	<b>B. Dobre</b>	
<b>SLOVENIA</b>	<b>T. Vuk</b>	
<b>SPAIN</b>	<b>J. M. Cascajero</b>	<b>J. Ortiz Used</b>
<b>SWEDEN</b>	<b>J. Gånge</b>	<b>K. Comstedt Webb</b>
<b>SWITZERLAND</b>	<b>L. Epple</b>	<b>S. Kronenberg</b>
<b>TURKEY</b>	<b>F. Yücelik</b>	<b>K. G. Bozkurt</b>
<b>UNITED KINGDOM</b>	<b>A. Murphy</b>	<b>S. Curley</b>

## **Members Ex Officio**

CEMBUREAU K. Coppenholle

CEMBUREAU E. Brutin

CEMBUREAU R. van der Meer

# OUR LIAISON COMMITTEE MEMBERS

Situation on 8 April 2022

President: **S. Menéndez**

Vice-President: **R. Callieri**

	<b>Full Members</b>	<b>Permanent Alternates</b>
<b>AUSTRIA</b>	<b>B. Kren</b>	
<b>BELGIUM</b>	<b>E. Fostier</b>	<b>M. Gutovic</b>
<b>BULGARIA</b>	<b>R. Papazov</b>	
<b>CZECH REPUBLIC</b>	<b>K. Chudej</b>	<b>P. Zelano, R. Michalcik</b>
<b>DENMARK</b>	<b>B. Moltke Hansen</b>	<b>P. Zugaro</b>
<b>ESTONIA</b>	<b>M. Einstein</b>	
<b>FINLAND</b>	<b>O. Van der Weijde</b>	<b>S. Schmidt</b>
<b>FRANCE</b>	<b>B. Pillon</b>	<b>R. Huet</b>
<b>GERMANY</b>	<b>C. Knell</b>	<b>T. Spannagl</b>
<b>GREECE</b>	<b>Y. Paniaras</b>	<b>D. Chanis</b>
<b>HUNGARY</b>	<b>J. Szarkándi</b>	
<b>IRELAND</b>	<b>O. Mahon</b>	<b>L. Callebat</b>
<b>ITALY</b>	<b>M. Buzzi</b>	
<b>LATVIA</b>	<b>R. Schneider</b>	
<b>LITHUANIA</b>	<b>J.A. Mituzas</b>	<b>A. Zaremba</b>
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<b>POLAND</b>	<b>J. Miluch</b>	<b>X. Guesnu</b>
<b>PORTUGAL</b>	<b>O. Hubscher</b>	
<b>ROMANIA</b>	<b>M. Dracea</b>	
<b>SLOVENIA</b>	<b>T. Vuk</b>	
<b>SPAIN</b>	<b>J.M Cascajero</b>	<b>V. H. Garcia Brosa</b>
<b>SWEDEN</b>	<b>J. Gånge</b>	<b>K. Comstedt Webb</b>

## **Members Ex Officio**

CEMBUREAU K. Coppenholle

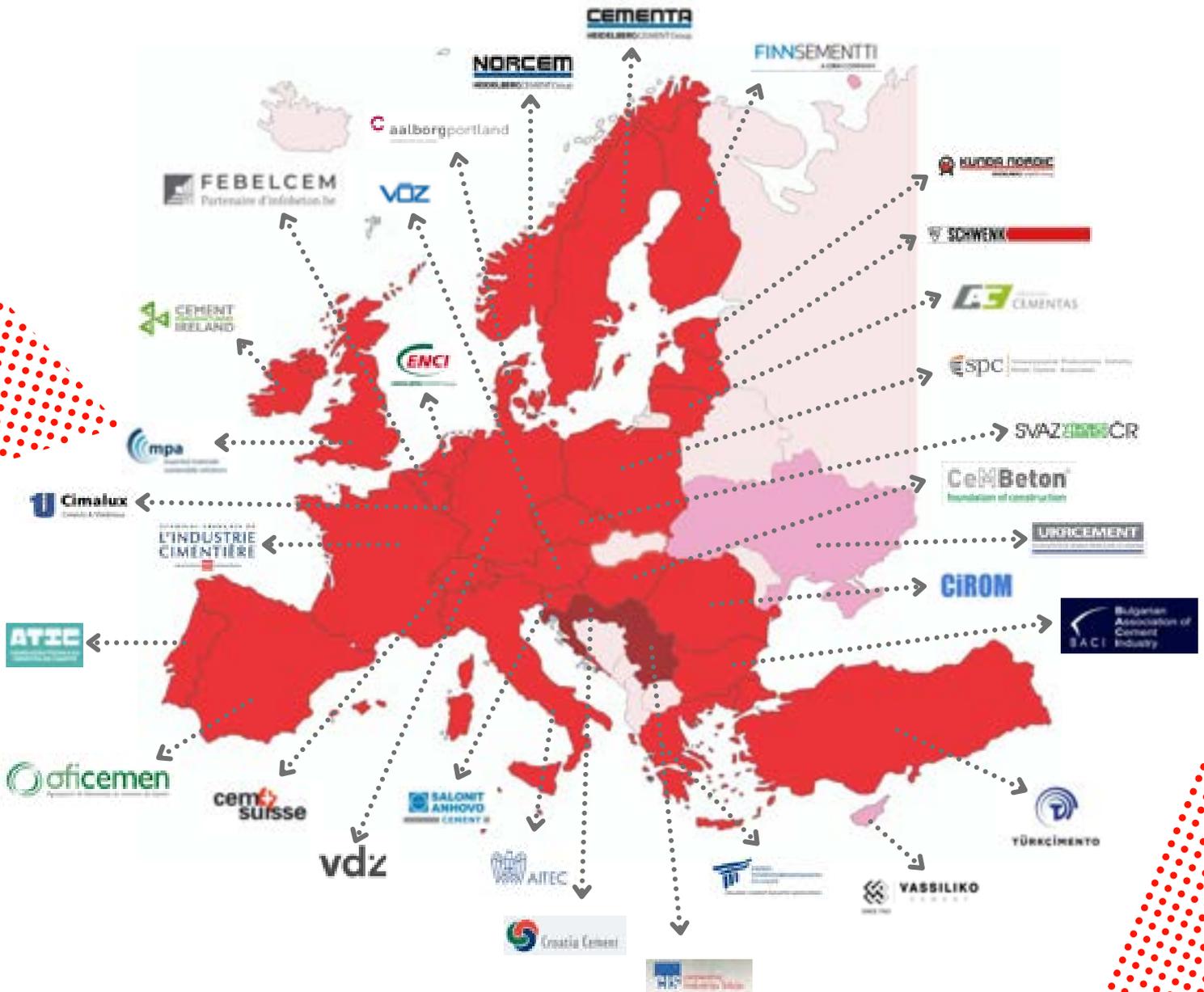
CEMBUREAU E. Brutin

CEMBUREAU R. van der Meer

# OUR MEMBERS

Situation on 8 April 2022

Currently, Full Members are the national cement industry associations and cement companies of the European Union (except for Malta and Slovakia) plus Norway, Switzerland, Turkey and the United Kingdom. Croatia and Serbia are Associate Members of CEMBUREAU. A cooperation agreement has been concluded with Vassiliko Cement in Cyprus and with the Cement Association of Ukraine.



- 27 Full Members
- 2 Associate Members
- 2 Cooperation Agreements

## FULL MEMBERS

### Austria



VÖZ – Vereinigung der Österreichischen Zementindustrie (Association of the Austrian Cement Industry)

### Belgium



Febelcem – Fédération de l'Industrie Cimentière Belge a.s.b.l. (Association of the Belgian Cement Industry)

### Bulgaria



BACI – Bulgarian Association of Cement Industry

### Czech Republic



Svaz výrobcu cementu CR (Czech Cement Association)

### Denmark



Aalborg Portland A/S

### Estonia



KNC - AS Kunda Nordic Tsement (Kunda Nordic Cement Corporation)

### Finland



Finnsementti Oy

### France



SFIC – Syndicat Français de l'Industrie Cimentière (Association of the French Cement Industry)

### Germany



VDZ – Verein Deutscher Zementwerke e.V. (German Cement Works Association)

### Greece



HCIA – Hellenic Cement Industry Association

### Hungary



MCSZ – Magyar Cement-, Beton- és Mészipari Szövetség (Hungarian Cement, Concrete and Lime Association)

### Ireland



CMI - Cement Manufacturers Ireland

### Italy



AITEC – Associazione Italiana Tecnico Economica Cemento (Italian Technical and Economic Association of Cement)

### Latvia



Schwenk Latvia

### Lithuania



Akmenės Cementas AB

### Luxembourg



CIMALUX s.a.

### Netherlands



ENCI BV - Eerste Nederlandse Cement Industry

### Norway



Norcem A.S.

### Poland



SPC – Stowarzyszenie Producentów Cementu (Polish Cement Association)

### Portugal



ATIC – Associação Técnica da Indústria do Cimento (Technical Association of the Cement Industry)

## ASSOCIATE MEMBERS

### Romania



CIROM – Employers' Organisation in Cement Industry and other Mineral Products for Construction in Romania

### Croatia



Croatia Cement, g.i.u.

### Slovenia



Salonit Anhovo

### Serbia



CIS - Cementna Industrija Srbije (Serbian Cement Industry Association)

### Spain



Oficemen – Agrupación de Fabricantes de Cemento de España (Association of Spanish Cement Producers)

## COOPERATION AGREEMENTS

### Sweden



Cementa AB

### Cyprus



Vassiliko Cementv

### Switzerland



cemsuisse - Verband der Schweizerischen Cementindustrie

### Ukraine



UKRCEMENT (Association of Cement Producers of Ukraine)

### Turkey



TÜRKÇİMENTO – Turkish Cement Manufacturers' Association

### United Kingdom



MPA – Minerals Products Association – Cement

# PARTNERSHIPS

## ALLIANCE FOR A COMPETITIVE EUROPEAN INDUSTRY



The [Alliance for a Competitive European Industry \(ACEI\)](#) was formed in 2004 by 11 major European industry sector associations and BUSINESSEUROPE. The common objective of its members is to promote the competitiveness of European industry on a global scale. The Alliance therefore encourages a policy and regulatory framework that supports that objective, reinforcing and complementing BUSINESSEUROPE's work in this respect by providing a sectoral perspective. The industry sectors concerned represent the interests at EU level of some 6 000 large companies and 1.7 million SMEs with a combined output of nearly 5 trillion euros turnover and 1.3 trillion euros added value. These companies directly employ about 23 million people in the EU.

## ALLIANCE OF ENERGY INTENSIVE INDUSTRIES



The [Alliance of Energy Intensive Industries](#) is made up of fourteen European associations representing energy-intensive industries with an aggregated turnover of more than 1000 billion Euros per year and directly employing over 3 million people. These industries are fundamental to Europe's entire economic fabric and support downstream processing and employment through the entire value chain. They also contribute to Europe's R&D, innovation and technical excellence, as well as to European balance of trade and through economic value added and taxes to the economies of its Member States.

## CONSTRUCTION PRODUCTS EUROPE



[Construction Products Europe](#) represents the interests of all European construction products manufacturers. Construction Products Europe was established in 1988 as an AISBL, a non-profit making organisation under Belgian law. More recently, the association changed its name from CEPMC to Construction Products Europe to better reflect its scope and expertise. As such, the new name creates a more accurate reflection of the association's activities and alongside the change of name Construction Products Europe has developed a new logo and website. Construction Products Europe has a rotating presidency and vice presidency, and their secretariat is based in Brussels.

## EUROPEAN CONCRETE PLATFORM



The [European Concrete Platform](#) (ECP), is a European association incorporated as a non-profit association under Belgian law. With its membership comprising BIBM (European Federation for Precast Concrete), CEMBUREAU, EFCA (European Federation of Concrete Admixtures Associations), and ERMCO (European Ready Mixed Concrete Organisation), the ECP covers concrete related issues at European level, including the energy performance of buildings, fire safety and Eurocodes. Its objective is to study and promote all the benefits of concrete for construction.

## GLOBAL CEMENT & CONCRETE ASSOCIATION



Launched in January 2018, the [Global Cement and Concrete Association \(GCCA\)](#) is the voice for the sector on the global stage, representing 32 member companies and 9 affiliate organisations, including CEMBUREAU. The GCCA aims to promote the benefits of cement & concrete for sustainable construction, highlighting the sector's innovation efforts and carbon neutrality ambitions. Headquartered in London, the GCCA complements and supports the work done by associations at national and regional level.

## NEPSI



[The European Network for Silica \(NEPSI\)](#) is the first European multi-sectoral social dialogue agreement of its kind, which gathers the undersigned signatories of the Social Dialogue "Agreement on Workers' Health Protection Through the Good Handling and Use of Crystalline Silica and Products Containing it".

Since 2006, the Agreement aims to protect the health of employees occupationally exposed to respirable crystalline silica generated by a work process in eighteen industry sectors, minimising such exposure by applying good practices (see [new guide and tools](#)) and reporting every two years. NEPSI is recognised in Recital 19 of Directive (EU) 2017/2398 as a *valuable instrument to complement regulatory measures*.

## REACH ALLIANCE



The REACH Alliance is an "association de fait" representing the Inorganic Industry and regrouping several sectors. The purpose of the Alliance is to represent the interests of the industrial sectors vis-à-vis the European Institutions and related Agencies (i.e. [ECHA](#)) and committees or groups (i.e. [CARACAL](#), and subgroups) in the context of the regulations [REACH](#) and the [CLP](#), its implementation and review, and upcoming implementation of the '[Chemicals Strategy for Sustainability](#)'. In addition, CEMBUREAU is a member observer of the [CIL - Cross-Industry Initiative for better regulation in chemicals management](#).



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