



LET'S CONTINUE BUILDING A CARBON-NEUTRAL EUROPE

CEMBUREAU, the European Cement Association, is the cement industry's voice in Europe and contributes to a range of policy debates centred on creating a competitive, carbon-neutral and circular European economy.

The European cement industry provides for the material needs of European citizens across all Member States. Cement, aggregates and water are combined to make concrete which is used in a variety of ways to construct sustainable buildings and infrastructure needed by society today.

The cement industry is an indispensable force in enabling the transition to a low-carbon economy. Concrete is a major component for sustainable housing, the foundations and structures of onshore and offshore wind turbines, and is the main material used to build hydroelectric dams and tunnels.

The cement industry is constantly innovating to help the EU achieve its emissions reduction targets and is willing and able to provide policy-makers with advice on how to develop and build a sustainable European society.

The cement industry had a turnover of €15.2 billion in 2016, added €4.6 billion of value for the European economy in 2016 and provided 47,000 direct jobs for people all across Europe.

The combined cement and concrete industry generates a total value added of €56bn in the EU28 and generates over 1.1 million jobs.

The sector is gradually recovering from the significant European economic downturn. With a steady increase in industrial activity, cement can provide more for the European economy at large.

In this year of political change, the European cement sector is eager to share its vision for a thriving industry and how best to continue building a carbon-neutral Europe together.



EU GOAL 1: Competitive & innovative European industry

Cement is an indispensable material for sustainable growth

The cement industry is a key component of Europe's economy. Studies show that for every €1 of added value generated in the EU cement and concrete sector, €2.8 is generated in the overall European economy. The sector offers direct employment to 47,000 people in the European Union, distributed through 226 installations. Its place as an anchor in the wider construction sector means it helps contribute to wider economic development and thousands more European jobs.

The cement industry will continue to invest in the transition to a low-carbon economy but, as an energy intensive industry committed to this eco-friendly transition, it is essential to maintain our competitiveness and ability to invest in Europe. Given our contribution to jobs, growth and innovation in Europe, our track record on energy and resource efficiency and emissions reductions achieved, it is of key importance that the sector have access to competitively priced, carbon-neutral energy on the road to a low carbon economy.

How can Europe deliver?

Provide a level playing field and affordable energy/electricity:

- Enhance the sector's growth and investment opportunities by creating globally equal market conditions.
- Ensure access to competitively-priced low-CO₂ electricity.



EU GOAL 2: Climate-neutral & circular European economy

The cement industry is innovating to reduce CO₂ emissions and to close the circular economy loop

Our roadmap foresees that by 2050, the European cement industry will reduce its emissions by 80% when compared to 1990 levels. The cement industry is making progress and is on track towards reaching this goal having reduced our emissions by close to 14% already.

However, in order to secure this target, it is essential that breakthrough technologies become widely available across Europe. Several breakthrough technologies such as carbon capture and storage, and reuse, are under development by the cement industry. A wide variety of capture technologies are being researched and tested with a few projects at the demonstration phase.

In addition, to reduce the CO₂ intensity of cement, the use of active elements other to clinker, innovative binders, is explored. More diversified, less carbon intensive raw material mixes in cement and clinker types are being developed, tested or are already in use today.

The cement industry is also supporting Europe in achieving its circular economy goals. Through a process called co-processing, the cement industry uses waste as an alternative fuel and secondary raw material, offering a more efficient waste management solution compared to landfill or incineration. Already, our sector in Europe is substituting 44% of all fossil fuels and the cement industry wants to grow this even further.

How can Europe deliver?

Foster innovation through effective funding programmes and supportive policymaking:

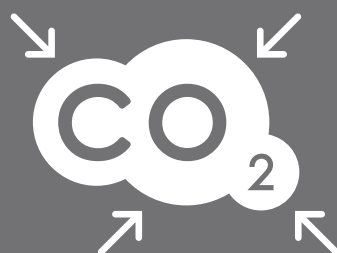
- Ensure strong financial support for industrially sized breakthrough projects like carbon capture utilisation and storage (CCU/CCS).
- Review state aid rules to better facilitate the decommissioning or upgrading of existing installations.
- Recognise the benefits of co-processing by integrating the sector's methodology for calculating co-processing's contribution to national municipal waste recycling targets.



THE CEMENT & CONCRETE
INDUSTRY GENERATES

1.1m+
JOBS

CONCRETE
ABSORBS





EU GOAL 3: Low-carbon construction for all

Cement is an enabler of a low-carbon transition

Transitioning to a low-carbon economy is a significant challenge for the EU and the cement sector. Concrete is one of the most long-lasting and durable materials on earth, and EU policies need to acknowledge its contribution to a low carbon transition through the entire life-cycle of buildings.

Today's concrete buildings can save up to two-thirds more energy than older structures. Thermally-activated concrete can ensure a better match between energy demand and supply from fluctuating energy sources. Concrete can naturally absorb CO₂ in a process called recarbonisation. Concrete could potentially offset a considerable proportion of production emissions over its life-cycle.

The low-carbon transition in the built environment will require a supply chain approach that allows for collaboration across the construction value chain. This can be achieved by focusing on a holistic implementation of material-neutral and life cycle performance, incentivising demand for low-carbon materials and solutions.

How can Europe deliver?

Embrace the whole life cycle approach for sustainable buildings:

- Ensure that a full life cycle and material-neutral approach is central to building regulations.
- Encourage the use of an EU-wide methodology to account for concrete's potential as a carbon sink during its entire life cycle.
- Incentivise the demand for carbon-efficient materials and solutions through innovative policies.

THE CEMENT
INDUSTRY
SUBSTITUTES



OF FOSSIL
FUELS

TODAY'S CONCRETE
BUILDINGS SAVE

66%
MORE
ENERGY

WHAT IS... CONCRETE?



AGGREGATES
65-75%



WATER 15-20%




CEMENT 10-15%


*concrete often contains small amounts of admixtures

The cement industry can help to reduce emissions by substituting fossil fuels with waste or biomass

Used tyres, wood, unrecyclable plastics, chemicals and other types of waste are co-combusted in cement kilns in plants across Europe, where




average conventional fossil fuel substitution rate



44% in the EU


In the cement industry,




44%

of thermal energy used to supply the clinker making process comes from


waste & biomass



The European cement industry has steadily increased its use of **alternative fuels** from







1 million tonne in 1990



...to more than **11 million tonnes in 2015**

Co-processing leads to four important outcomes:

- Reducing the CO₂ intensity of cement manufacturing 
- Reducing our dependence on virgin fossil fuels 
- Decreasing the amount of landfilled waste 
- Minimising public investment costs in new dedicated facilities 

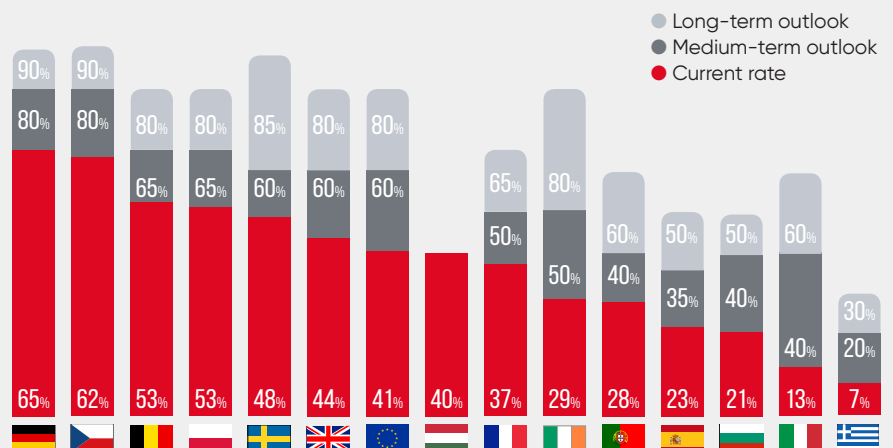
Co-processing is a more...

efficient waste management solution



than landfilling or incineration, and means the cement industry is a net consumer of waste and

at the heart of the circular economy



Status and prospects of co-processing of waste in EU cement plants (2017) Ecofys