

ACTIVITY REPORT 2003



CEMBUREAU

CEMBUREAU - The European Cement Association, based in Brussels, is the representative organisation of the cement industry in Europe. As of 1 May 2004, its Full Members are the national cement industry associations and cement companies of the European Union (minus Cyprus, Lithuania, Malta and Slovakia) plus Norway, Switzerland and Turkey. Estonia, Latvia, Romania and Slovenia are Associate Members of CEMBUREAU.

The Association acts as spokesman for the cement industry before the European Union institutions and other public authorities, and communicates the industry's views on all issues and policy developments with regard to technical, environmental, energy and promotional issues. Permanent dialogue is maintained with EU institutions, international authorities and other international associations.

Serviced by a multi-national staff in Brussels and with the help of Standing Committees and issue-related Project Groups established as required, **CEMBUREAU** takes action in relation to all developments at European level affecting the cement industry.

CEMBUREAU plays a significant role in the world-wide promotion of cement and the ready-mix and precast concrete industries in co-operation with Member Associations and other relevant organisations. The Association regularly co-hosts conferences on specific issues aimed at improving the market perception of the concrete industry and promoting the use of cement and concrete products.

Since its foundation in 1947, **CEMBUREAU** has developed into the major centre for the dissemination of data, statistics and general information on the cement industry world-wide. Its publications serve as the principal source of information on the cement industry throughout the world. It is the editor of the "*World Cement Directory*" providing data on cement companies and plants based in some 160 countries.



Rue d'Arlon 55 - BE-1040 Brussels — Tel.: + 32 2 234 10 11 - Fax: + 32 2 230 47 20
E-mail: secretariat@cembureau.be — Internet: www.cembureau.be

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This Activity Report is produced in-house to meet the requirements of Paragraph 6 of the CEMBUREAU Articles.

THE ECONOMY

THE WORLD

World Production and World Trends

In 2003 world cement production increased by about 6.5% compared to 2002 reaching 1.94 billion tonnes after an increase of about 7% in 2002.

Once more Asia was the driving force: South West Asia and South East Asia progressed by more than 3% only but, for two years in succession, East Asia leaped 11% with China increasing 15.5% after a jump of 12.3% in 2002.

China alone represents 42% of the world cement output. India is now the second world producer with an increase of nearly 25% since the year 2000.

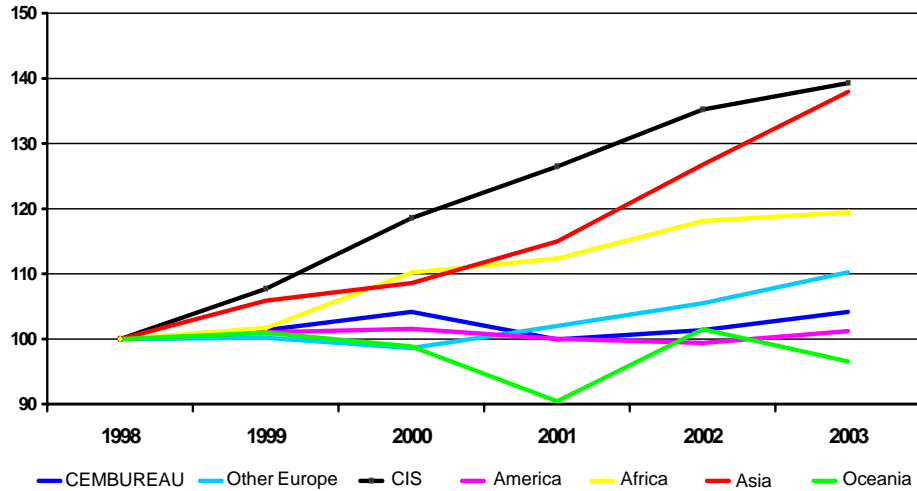
Europe as a whole accounted for less than 14.4% of world production in 2003 of which the 27 CEMBUREAU countries represent 13.9% and the

EU 10.3%. The EU enlarged to 25 Members states would have accounted for 12% in 2003.

US cement consumption increased by 3.7% in 2003 as a consequence of a significant growth in residential construction. At the end of the year, favourable weather factors also pushed the cement consumption upward.

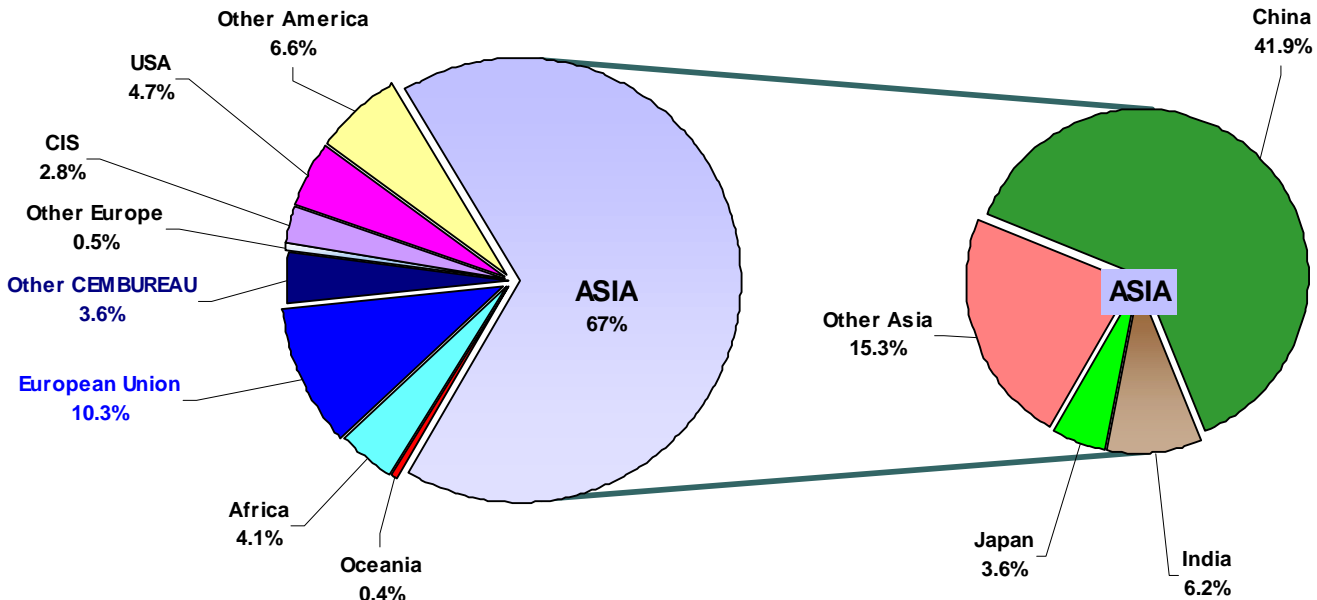
WORLD CEMENT PRODUCTION BY REGION
EVOLUTION 1998-2003

Index 1998 = 100

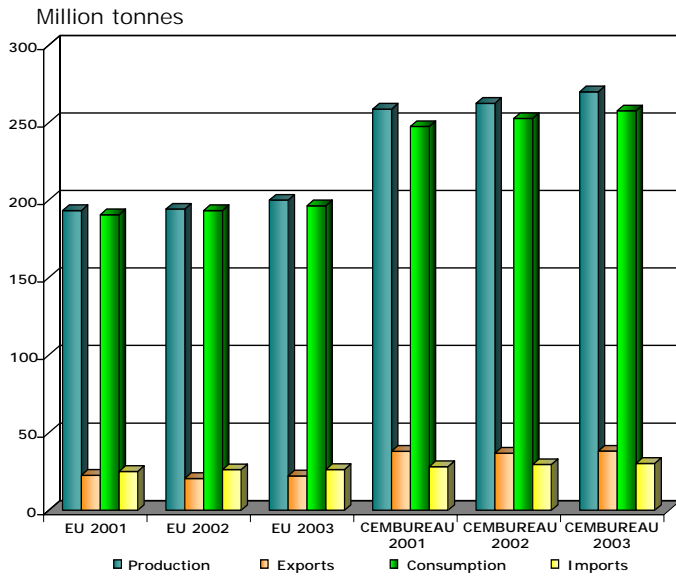


2003 WORLD CEMENT PRODUCTION BY REGION

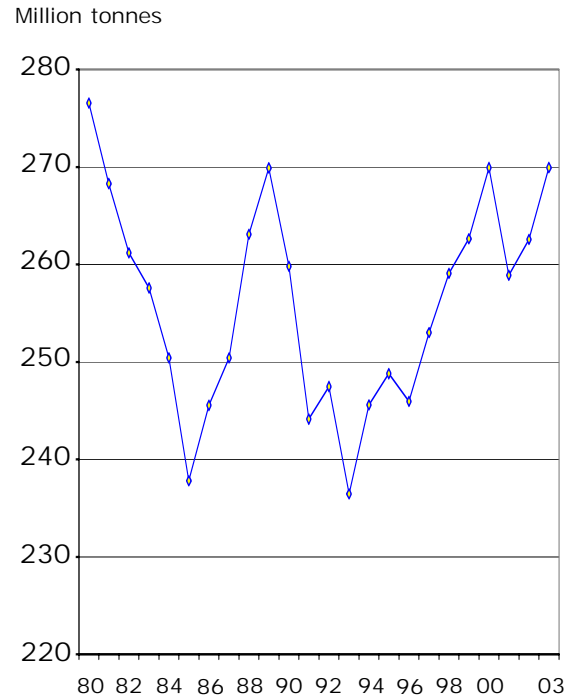
1.94 billion tonnes



CEMENT IN CEMBUREAU COUNTRIES



CEMBUREAU CEMENT PRODUCTION 1980-2003



EUROPE

Cement production increased by about 2.8%, from 263 to 270 million tonnes, in all CEMBUREAU countries in 2003. Production in the European Union achieved about 3% growth mostly attributable to very strong results from Italy and Spain. Consumption in CEMBUREAU and EU countries remained positive with growth of 2% and 1.6% respectively; consumption is forecast to stabilise in 2004.

Austria

Austria expects to register a moderate but steady rise in cement consumption in 2003 and 2004. Non-residential construction should remain relatively static while residential construction will recover albeit very slowly; there will be a moderate increase in the civil engineering sector comparable to recent years. The outlook for cement consumption depends mainly on investments relating to the expansion of the European Union and the development of Austria's federal budget.

Belgium

Total construction output in Belgium decreased 1% in 2003 but an improvement of 2.3% is anticipated in 2004 thanks to an expected recovery in the non-residential sector. Cement consumption stabilised in 2003, after a decline of 5% in 2002, and should remain at the same level in 2004.

Czech Republic

Construction output in the Czech Republic enjoyed 8.9% growth in 2003. Large civil engineering and building projects fuelled this growth. In addition, VAT on construction work (except housing) will increase from 5% to 19% in May 2004; this had a significant influence on the volume of construction work in the second half of 2003. Good deals on lending and favourable interest rates boosted housing construction. Nevertheless, cement consumption remained on a par with previous years.

Denmark

Housing starts and residential construction in Denmark will accelerate from 2003 onwards aided by low interest rates and policy change. The non-residential sector will decline in 2003-2004 caused by drop in office and commercial construction and a weakening trend in public sector construction. Civil engineering remained flat in 2003, while a slight increase in renovation is forecast for 2004.

Estonia (Associate Member)

Cement consumption in Estonia increased sharply by 15% in 2003 accompanied by a rise in total construction output. The construction sector will continue to grow until 2006 while the increase in cement consumption will probably slow to just 2% in 2004.

Finland

The Finnish market for cement is fairly stable, although, low activity in industrial and office construction led to a small decline in consumption in 2003. Consumption is expected to increase in 2004 with large infrastructure schemes including road, railway, harbour and nuclear power plant projects and an increase in residential construction activities.

France

Total construction activity in France declined a marginal 0.5% in 2003, a similar fall is forecast for 2004. The private non-residential sector declined 6% and the maintenance sector, which had a good year in 2002, fell 1%. Residential construction benefited from both low interest rates and the Government's renovation programme for disadvantaged suburbs, but a sector decline is possible if interest rates rise in 2004. Local authority financing boosted the civil engineering sector by 2%.

Germany

In Germany, the discussion concerning the abolition of tax privileges for single-family dwellings stimulated residential construction activity in 2003. However, the non-residential building and civil engineering sectors continued to decline. Cement consumption in 2003 amounted to 28.9 million tonnes, a slight increase of about 0.7% on the previous year. Consumption is expected to remain stable in 2004 or to decrease by 1%.

Greece

Cement consumption in Greece reached peak levels in 2003 due to construction activity ahead of the 2004 Olympic Games. Demand is expected to decline following the completion of these works. However, the industry is confident that per capita consumption, will remain at the traditionally high levels in Greece.

Hungary

Hungary's accession to the EU after May 2004 should facilitate accelerated investment in the coming years. According to some estimates, construction output will grow 5-7% in 2004. The civil engineering sector will be the driving force with increases of up to 12% forecast in 2004. Residential and non-residential construction may also increase but at a more modest rate. Cement consumption grew 4.4% in 2003 and will increase by 2-3% in 2004; the most notable increases will be in the civil engineering sector.

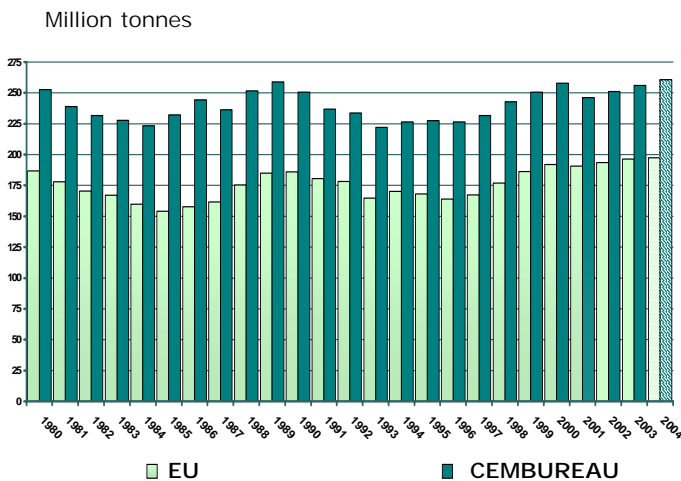
Iceland (Full Member up to 31 December 2003)

Iceland's construction sector felt the effect of global economic weakness in 2002 and cement consumption was down by about 25%. However, growth resumed in 2003 and consumption stabilised to about the same level as in 2002. Nevertheless, cement production declined 30% in 2003 while imports increased thus maintaining consumption at the 2002 level.

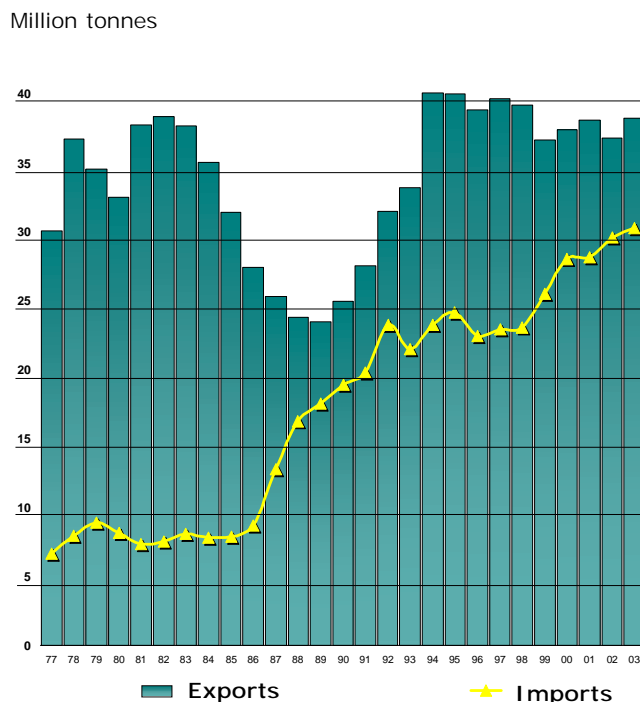
Ireland

Construction activity remained strong in Ireland in 2003 led by continued vibrant demand in the housing sector. A record number of houses were constructed and the sector accounted for over 55% of cement sales. The public capital programme also accounted for significant cement consumption in 2003 but the commercial sector remained relatively weak. Cement consumption grew by approximately 13%. A reduction in demand is expected in 2004 particularly in the second half due to a more cautious approach by developers in the housing sector.

CEMENT CONSUMPTION 1980-2004



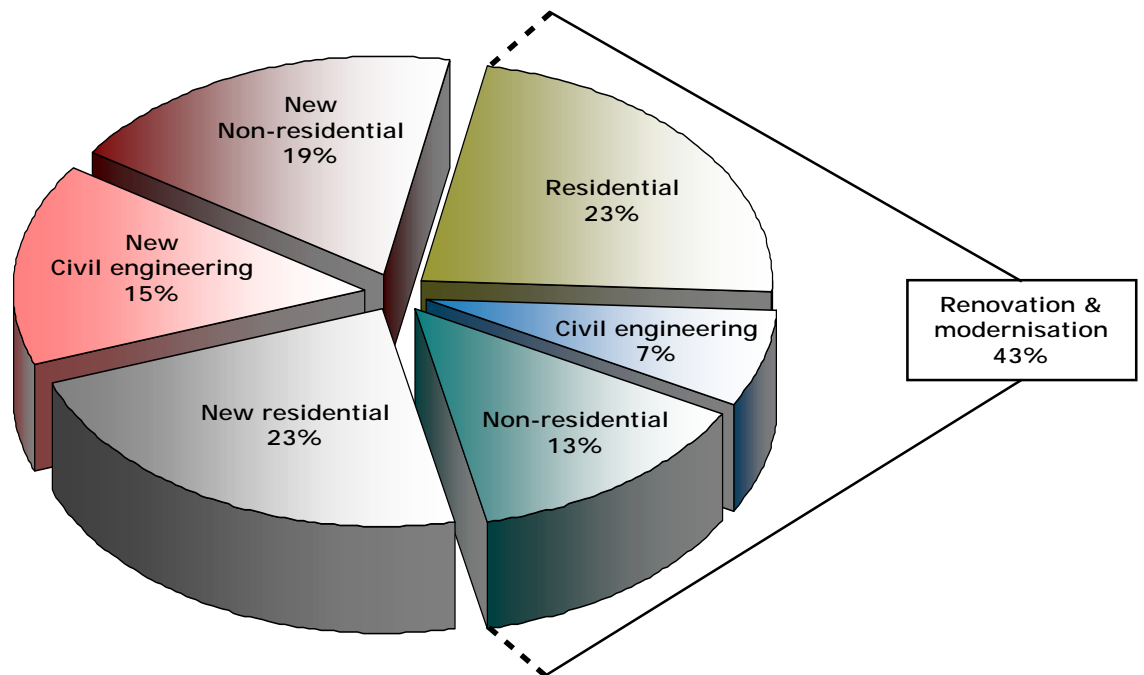
**CEMBUREAU TRADE
CEMENT & CLINKER 1977-2003**



2003 CONSTRUCTION BREAKDOWN PER SECTOR*

Billion EUR: 1 019

*European Union less Greece and Luxembourg, plus Switzerland, Norway, Czech & Slovak Rep., Hungary and Poland.



Italy

Cement consumption in Italy increased 5.3% in 2003. The upward trend will continue in 2004 but at a slower rate of 1.5%. Cement consumption will benefit in particular from public sector construction, which is forecast to increase by 3.5% in 2004. Residential and non-residential construction will each increase by 1%.

Latvia (Associate Member)

Total construction output in Latvia increased in 2003, primarily as a result of residential and non-residential construction and renovation projects. Cement consumption increased 16%. Civil engineering will account for a large portion of construction output in the near future, such as the Daugava River bridge or tunnel in Riga. Cement consumption in Latvia is expected to increase 10% annually up to 2007.

Luxembourg

Luxembourg just managed to avoid the recession in 2003 but the economic forecasts for 2004 seem rather optimistic. Activity will depend partly on economic recovery in the European Union; 2% growth in GDP is anticipated. Investment in the civil engineering sector will remain at a healthy level in 2004 owing to new motorways and other works while residential construction will stay at the same level as in 2003. Non-residential building activity is expected to stagnate in the years to come.

Netherlands

Total construction output is expected to stabilise in 2004 but forecasts anticipate 2% annual growth from 2005-2009. Cement consumption will grow approximately 2% in 2004 and 2005 after a drop of 11% in 2003 and 6% in 2002. In 2004, activity will be down by 9% in the non-residential sector and 5% in infrastructure works, while new residential construction will increase 3%. The repair and maintenance sector will also improve.

Norway

In Norway, total construction output remained stable in 2003 despite negative forecasts, little change is anticipated in 2004. Improvements in the renovation and civil engineering sectors and some major construction projects relating to the Norwegian oil and gas industry will result in increased cement consumption in 2004 and 2005. Norway consumed 1 290 million tonnes of cement in 2003, of which approximately 15% was imported.

Poland

Despite improvements in the economy, the Polish construction sector remained in recession for a third consecutive year in 2003 with output down by 5.9%. It is forecast to improve in 2004 but not above 1999 levels. Cement sales decreased by 23% in the first quarter of 2003 but improved from May onward resulting in an overall decline of 2% for the year. A moderate 2-3% increase in

cement consumption is anticipated in 2004. Accession to the EU in May 2004 will have a negative impact on construction growth due to an increase in VAT on building materials from 7% to 22%.

Portugal

The Portuguese construction sector slumped in 2003 with the reduction in total output estimated at 9.4%. The decline will slow down to around 5% or 6% in 2004. House building, the worst affected sector, fell 14.1% in 2003 and will fall a further 8% in 2004. Public construction was hit by a 10% fall in 2003, a 7% reduction is forecast in 2004. Consequently, cement consumption was down an estimated 14.4% in 2003 slowing to 4% in 2004.

Romania (Associate Member since 1 July 2003)

The cement industry, in line with other industrial sectors in Romania, measured a moderate increase in 2003 compared with 2002. Cement consumption increased in 2003 and will rise again in 2004 by about 3% as large civil engineering projects get underway. There was a huge increase of imported cement, mainly from the Ukraine, in 2003 (from approximately 20 000 tonnes in 2002 to almost 130 000 tonnes in 2003).

Slovakia (Full Member up to 1 July 2003)

After a dramatic decline in 1999 construction output grew 4.1% in 2002 and increased again in 2003 by an estimated 3.2%. Residential construction is estimated to have decreased by 2% while the increase in non-residential construction was marginal. Civil engineering was the most active sector, with an estimated growth of more than 5%. Cement consumption in 2003 was at a similar level to 2002.

Slovenia (Associate Member since 1 July 2003)

Slovenia enjoys a substantially higher GDP per capita relative to other Central European transition economies. Despite economic slowdown elsewhere in Europe in 2001- 2003, Slovenia maintained 3% growth. The strong economy has boosted construction and cement consumption is up 15% in 2003.

Spain

Construction activity in Spain remained high in 2003 and cement consumption increased 4.8%. Cement consumption is forecast to continue rising but at a slower rate in 2004. In 2003, new residential construction reached a historical high with new dwellings numbering 620 000 representing 19% growth. Meanwhile, the non-residential sector grew 11%. Publicly funded investments should guarantee a healthy level of activity in the civil engineering sector until 2007-2010.

Sweden

Total construction output in Sweden fell 2% in 2003. However, cement consumption increased 3% owing to a number of large-scale traffic infrastructure projects. New housing starts increased by about 1 000 to 20 000 while activity in the non-residential sector fell 10%. In 2004, cement consumption is expected to decline 4-6%. Civil engineering activity will remain high and the residential sector will probably increase a little but this will not be sufficient to compensate for the fall in the non-residential sector, particularly in new office construction.

Switzerland

Switzerland's depressed economy contributed towards a 2% decline in total construction output in 2003. Further declines of about 0.9% are forecast for 2004 and 1.1% for 2005. A moderate recovery is expected in 2006. Actual cement consumption will also decline slightly in 2004 and 2005. The level of construction activity in 2003 was split almost equally between civil engineering at 32%, residential construction at 31% and non-residential construction at 27%.

Turkey

The current government has had a positive and revitalising effect on the Turkish economy resulting in a 5% gain in GDP in 2003. Cement consumption also grew by about 5% and a similar increase is expected again in 2004. The outlook for total construction in 2004 is positive particularly in the residential sector.

United Kingdom

Having achieved a high growth rate of 8% in 2002, the UK construction industry continued to grow but at a more moderate rate of 4% in 2003 helped by Government spending in the areas of health, education, roads and a strong privately funded housing market. Cement consumption was up around 1% in 2003 and similar growth is expected in 2004 and 2005. Public spending is expected to continue to boost growth in the construction industry.

MAIN ISSUES

AN OVERALL VIEW

The Year 2003 was dominated by two issues of prime importance to the European cement industry: the reduction of CO₂, notably via **Emissions Trading**, and the proposed Regulation on the **Registration, Evaluation and Authorisation of CHemicals (REACH)** which, surprising as it may seem, may apply to cement and clinker.

During the year, certain issues reached a good conclusion. This was the case for the Directive on **Taxation of Energy Products** (2003/96/EC) approved on 27 October 2003 and published in the Official Journal on 31 October 2003. This Directive imposes minimum rates of taxation in respect of the use of all energy products. The use of energy products as fuels and the use of electricity in the cement industry have been definitely removed from the scope of the Directive as such energy effects a mineralogical transformation as opposed to the production of heat. This is a major victory for CEMBUREAU which has argued this point for seven years. It will save the European cement industry at least € 134 million each year.

On the negative side, the Directive¹ banning cement containing more than 2 ppm (0.0002%) **soluble chromium VI** from the European market was adopted further to a very tense debate in the European Parliament which has shown the importance of paying more attention, at CEMBUREAU level, to the health impact of cement. A divided cement industry was in no position to resist the proposed legislation on chromate in cement strongly supported by the Parliament and most Member States.

CEMBUREAU **Action Plan for the Use of Waste**, adopted by the Board in December 2001, continued to be developed in 2003 with the compilation of three key reports on waste streams, stack emissions and leaching which will provide elements for a future communication

policy. The context in which the European cement industry advocates the “valorisation of waste” as fuels and raw materials in the cement manufacturing process is improving although the industry continues to experience difficulties in gaining public acceptance due to a position of low trust which, as shown by various opinion surveys in 2003, characterises the perception of all industries by Europeans.

It was not, however, all good news in 2003 regarding the use of waste in cement kilns. The first reading in the European Parliament of the **Shipment of Waste Directive** [COM(2003)379] resulted in a partial victory on the criteria applicable to waste, which were mostly abandoned, and a partial defeat on the question of the waste shipped for pre-treatment. No doubt the second reading, to take place in 2004, will prove difficult to CEMBUREAU and the newly formed EUCOPRO (European Association for Co-Processing).

Another difficult issue is the proposed **Directive on Waste from Extractive Industries** [COM(2003)319]² which envisages to treat topsoil overburden as waste. If accepted in its initial form, that Directive would create serious administrative burdens and additional costs to the use of topsoil overburden within the quarries exploited by cement companies in Europe. The issue is being tackled by an alliance with other non-energy extractive industries (NEEIP)³ in which CEMBUREAU plays an active role.

Standardisation of special cements progressed well in 2003 opening up the prospect of having all cements standardised and bearing the CE mark in the short term. The remaining exception is sulphate-resisting cements in respect of which a suitable technical solution still needs to be found.

¹ Directive 2003/53/EC of the European Parliament and of the Council of 18 June 2003 amending for the 26th time Council Directive 76/769/EEC relating to restrictions on the marketing and use of certain dangerous substances and preparations (nonylphenol, nonylphenol ethoxylate and cement) published in OJ on 17 July 2003.

² Proposal for a Directive of the European Parliament and of the Council on the management of waste from the extractive industries – 2 June 2003.

³ NEEIP stands for Non-Energy Extractive Industries Panel.

NETWORKING WITH OTHER FEBIs

New alliances were forged in 2003.

Energy intensive industries (cement, lime, glass, pulp and paper, non-ferrous metals and steel industries) joined forces to argue their case in relation to the European Emissions Trading Directive and the **European Emissions Trading Scheme** due to start on 1 January 2005. This Alliance was broadened to cover other power intensive industries such as ceramic and chlorine producers. A vigorous action was started in 2003, to be continued in 2004, to denounce the unintended and unjustified impact of the Emissions Trading Directive on **electricity prices** due to the electricity price setting mechanism based on marginal cost that is induced by the Directive. CEMBUREAU and its colleagues within the Alliance will argue in favour of more transparency in the setting up of electricity prices and call for actual liberalisation of energy markets to ensure that electricity is available at competitive prices.

Industries which, like the cement industry, see their products directly subject to the **REACH** proposal [**R**egistration, **E**valuation and **A**uthorisation of **C**hemicals] on chemicals and not just as downstreamers of the chemical industry, decided to form an Alliance prompted by CEMBUREAU for the purpose of drawing the attention of UNICE (Union of Industrial and Employers' Confederations of Europe) and European Institutions to the specificity of their predicament in the context of REACH.

In 2003, the cooperation with FIEC (European Construction Industry Federation) and CEPMC (Council of European Producers of Materials for Construction) remained as good as in previous years and CEMBUREAU maintained its presence in the ECF (European Construction Forum), of which it is a founding member.

Work undertaken jointly with BIBM ("Bureau International du Béton Manufacturé") and ERMCO (European Ready-Mixed Concrete Organisation) was continued in 2003 in respect of the fire performance of concrete and the Eurocodes. The EcoConcrete software met only a limited success with seventy-nine licensed users in Europe. The decision to postpone the organisation of the Promotion Officers Meeting beyond 2003 and 2004 was regretted as it tolls the death of an initiative which had proved successful for some sixteen years, a set back from which it will be hard to recover.

CEMBUREAU MEMBERSHIP

On the Membership front, the accession of **Romania** and **Slovenia** as **Associate Members** was approved by the CEMBUREAU General Assembly in 2003. Slovenia, which will become a Member State of the EU on 1 May 2004 applied for Full CEMBUREAU Membership from that date in 2003, so did Estonia.

Two Members of CEMBUREAU decided to leave the Association in 2003: the **Slovakian Cement Association** and **Iceland Cement Limited**, the sole producer in Iceland. Whilst the latter had not been active in CEMBUREAU for many years, the former's decision, due to internal differences of opinion within the Slovakian Cement Association, was more surprising and problematical in the year preceding accession of the Slovak Republic to the EU.

CONTACTS WITH CEMBUREAU MEMBERS

Two meetings of CEMBUREAU Members and Associate Members took place in 2003 helping to establish even closer co-operation. The national associations and, when applicable, the sole producer play a key role in relaying CEMBUREAU's positions on EU issues to national Governments.

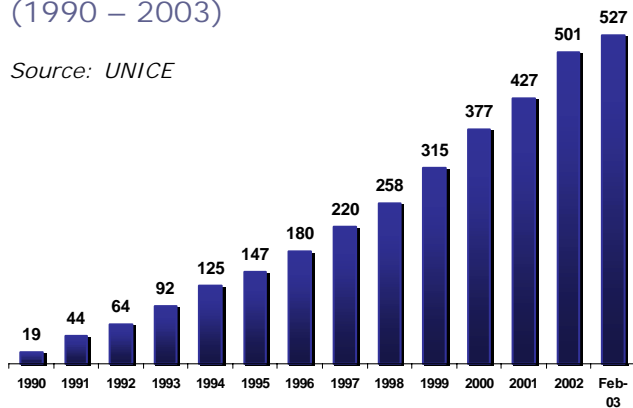
In order to improve communication with Members, a new **Communication Platform** was developed on *Cindi* (CEMBUREAU International Network for Documentation and Information). This tool will be further improved in 2004.

CONTACTS WITH EU INSTITUTIONS

As shown in the figure below, the pace of regulatory measures initiated by the European Commission in the field of environmental protection alone is accelerating at the incredible rate of 2 800% in February 2003 compared to 1990.

EU Environmental Regulations (1990 – 2003)

Source: UNICE



Much of this legislation is already either applicable or a source of inspiration for legislators in other CEMBUREAU countries. Applicant countries have to face the challenge of the “acquis communautaire”, EEA Members such as Norway are directly concerned and Turkey, which has had a Customs Union Agreement with the EU since 1995, must adopt many of EU measures. In Romania, the IPPC Directive (Integrated Pollution Prevention and Control) [96/61/EC]¹ is being introduced into national law, paving the way for accession in the future.

CEMBUREAU’s core business is undeniably to promote and defend the interests of the European cement industry at EU level. It is no surprise that, in the context of the galloping EU legislation, contacts with the European Institutions were intensified in 2003.

Work continued at Council level with the help of relevant cement associations and producers. Contact with the Greek Government at the end of 2002 proved very useful during the **Greek Presidency of the EU** (1st half of 2003) which was marked by excellent day to day contacts in

particular to secure a favourable political agreement on the Taxation of Energy Products Directive and to resist some unreasonable wording proposed in the European Parliament in respect of the Chromate Directive. A contact at top level between CEMBUREAU and the **Italian Presidency** took place as part of the “**Meet the Presidencies Programme**”, a CEMBUREAU programme that has been regularly pursued since its inception in 1999. In this context, a CEMBUREAU delegation also met the **Irish Permanent Representation** to prepare the forthcoming Irish Presidency in the first half of 2004.

Contacts with the **European Commission** are so numerous and frequent that they are quite impossible to summarise. A few 2003 highlights are to be retained. Very close contacts were maintained with DG Environment (DG ENV) regarding the Emissions Trading Directive in respect of which a common understanding was reached on key aspects especially the monitoring guidelines specific to the cement industry. DG ENV was represented at an information meeting organised by CEMBUREAU on Emissions Trading on 28 May 2003 where a frank exchange of views took place.

Regular contacts were maintained with DG Enterprise (DG ENTR) and DG Transport & Energy (DG TREN) with a special emphasis on electricity prices.

CEMBUREAU’s Chief Executive also met Enterprise Commissioner, Mr Liikanen in relation to the competitiveness issue and steps were taken to organise a contact in early 2004 between President Prodi and CEMBUREAU Vice President Alessandro Buzzi on competitiveness and electricity prices.

¹ Council Directive 96/61/EC of 24 September 1996 concerning integrated pollution prevention and control published in OJ on 10 October 1996.

MAIN ISSUES UNDER STANDING COMMITTEE 1 “INDUSTRY”

Climate Change and Reduction of CO₂ Emissions

The issue which consumed a lot of time and resources from CEMBUREAU in 2003 is no doubt the reduction of CO₂ emissions and, in this context, the measures preparing the **European Emissions Trading Scheme** (EETS) due to start on 1 January 2005.

CEMBUREAU's first mission was to influence the Emissions Trading Directive (ETD) itself as it went through Council and the European Parliament. The Directive finally adopted on 13 October (2003/87/EC) is acceptable to the European cement industry which is conscious of the efforts that will be required in the future.

While the Directive was debated, CEMBUREAU maintained close contacts with the European Commission's DG Environment (DG ENV) to explore how the various provisions of the Directive would be interpreted when it comes down to the cement industry and its preoccupations with CO₂ from process and alternative fuels. A common position was thus identified and communicated to CEMBUREAU Members as guidance for the negotiations on National Allocation Plans (NAPs) taking place at national level. On 28 May 2003, an information day was organised by CEMBUREAU with the participation of DG ENV, it was attended by some seventy participants coming from all EU Member States and other CEMBUREAU countries.

In that context, it became clear by the summer of 2003 that State aid rules (Article 87 of the Treaty) could potentially restrict the allowances to be allocated in the NAPs to the cement industry. In fact, the application of State aid rules to the EETS was far from clear and CEMBUREAU felt that it was urgent to give all its Members access to expert legal advice. A pro veritate legal opinion was obtained from Bonelli Erede Pappalardo which contributes to clarify the matter and shows that jumping to oversimplified conclusions would be very hazardous. Due to the complexity of this

matter, the very restrictive interpretation shown in a first draft was deleted in the final Guidance Communication issued by the European Commission on 7 January 2004 [COM(2003) 830 final].

The second mission of CEMBUREAU in the EETS context was to seek and obtain **sector specific monitoring and reporting guidelines**¹ which would be in line with the WBCSD-WRI GHG (World Business Council for Sustainable Development-World Resources Institute Greenhouse Gas) Protocol of 19 October 2001 which was adopted as a CEMBUREAU standard.

In order to succeed, a pre-condition had to be met: the GHG Protocol had to be revised so as to meet the boundaries set by the ETD. With the help of cement companies involved in the CSI² (Cement Sustainability Initiative) exercise, CEMBUREAU and the WBCSD established a revised version of the Protocol adapted to the ETD context in May 2003.

After a long debate through which CEMBUREAU secured a broad definition of biomass – essential to ensure that CO₂ from biomass could carry an emission factor of zero for all biomass waste used in the cement industry – the Decision adopted by the European Commission on 29 January 2004 reflects the GHG Protocol. A common understanding on some unclear parts was reached through an exchange of correspondence between CEMBUREAU and the European Commission in the very last days of 2003.

One point, however, still requires attention: the determination of the biomass fraction of waste. CEMBUREAU is involved in the development of such a method which will be standardised by CEN (CEN TC 343) (“Comité Européen de Normalisation”).

The third and last part of the CEMBUREAU mission was the adoption as soon as possible of the so-called “**Linking Directive**”.

¹ Commission Decision of 29 January 2004 [C(2004) 130] establishing guidelines for the monitoring and reporting of greenhouse gas emissions pursuant to Article 2003/87/EC of the European Parliament and of the Council which was published in the OJ/L59 of 26 February 2004.

² The Cement Sustainability Initiative (CSI) was initially developed by ten major international cement companies in 1999 working with the World Business Council for Sustainable Development (WBCSD) towards sustainable development. The CSI currently includes (in alphabetical order): CEMEX, Cimpor, Corporacion Uniland S.A., CRH, HeidelbergCement, Holcim, Italcementi, Lafarge, RMC, Siam Cement Group, Taiheiyo Cement, Titan and Votorantim.

The list of “Project Partners” and “Communications Partners” can be downloaded from the WBCSD website at www.wbcscement.org.

The purpose of this Directive [COM(2003)403]³ is to allow the conversion of credits from Clean Development Mechanisms (CDM) and Joint Implementation (JI) projects into allowances. Industry has always insisted that the mechanism for such conversion should be available at the same time as the ETD.

In June 2003, CEMBUREAU became aware of a draft proposal from the European Commission for such a Directive with a provision that would cap the conversion to 6% maximum of the total allowances allocated in each Member State. To CEMBUREAU such capping would constitute an undue interference with market forces which would be unacceptable as it would deter industry from ever investing in CDM or JI projects. Prompted by CEMBUREAU, CEOs of cement companies wrote a letter to most members of the European Commission to express opposition to the cap. They were soon followed by UNICE (Union of Industrial and Employers' Confederations of Europe). The result was a revised proposal adopted by the European Commission with no automatic cap. This is the basis for the discussions in the Council, which is divided on the cap question and the European Parliament where the cap was criticised. It is possible that, provided an agreement is reached in Council, the "Linking Directive" might become law in 2004, hopefully with no cap.

Use of Alternative Raw Materials and Fuels
CEMBUREAU **Action Plan for the Use of Waste** has substantially progressed. Three major activities have been completed:

- a detailed overview of waste streams (qualitative and quantitative),
- stack emission levels of kilns using traditional and alternative fuels,
- a comprehensive literature review of the leaching characteristics of concrete.

This work shows that the European cement industry saves more than 3 million tonnes of coal equivalent by using 4.4 million tonnes of alternative fuels in its installations. This corresponds to a substitution rate of fossil fuels of about 12%. In addition, in 2001, alternative materials used in both clinker and cement production allowed CEMBUREAU Members to make

a direct saving of 11.5% of natural mineral raw materials which is equivalent to almost 35 million tonnes.

It is also demonstrated that the use of these alternative raw materials and fuels does not have any significant influence on the environmental performance of both the process (emissions) and product (leaching).

The results of these studies will be translated into messages for communication with external stakeholders. A communication strategy is currently being developed. The cement industry's strategy concerning the substitution of natural resources by waste was presented at the international Energy Conference *CEM• PROSPECTS* organised by CEMBUREAU in Lyon (France) in September 2003.

CEMBUREAU has also positioned the concept of **Waste Recovery Operations** in the framework of recent strategic initiatives of the European Commission on the Prevention and Recycling of Waste. In this context, CEMBUREAU has joined CEN TC 343 ("Comité Européen de Normalisation") which is in charge of preparing European standards for so-called **Solid Recovered Fuels** (SRF). Main issues for the cement industry are the classification of SRF and the development of a method to identify the biomass fraction (that has a greenhouse gas emission factor of zero) of fuels (see "Climate Change and Reduction of CO₂ Emissions").

Health and Safety

The most significant issue concerning Health and Safety was the adoption of the European Directive⁴ on the restriction of the marketing and use of cement and cement preparations with more than 2 ppm (0.0002%) **soluble chromium VI**. CEMBUREAU and its Members defended the position to various stakeholders in the decision-making process that the approach chosen by the European Commission was an unreliable and, at best, a partial solution for the cement dermatitis problem. This was confirmed in an epidemiological desk study commissioned by CEMBUREAU. After a heated debate within the European Parliament, conciliation between Parliament and Council was reached and, on

³ *Proposal for a Directive of the European Parliament and of the Council amending the Directive establishing a scheme for greenhouse gas emission allowance trading within the Community, in respect of the Kyoto Protocol's project mechanisms – 23 July 2003.*

⁴ *Directive 2003/53/EC of the European Parliament and of the Council of 18 June 2003 amending for the 26th time Council Directive 76/769/EEC relating to restrictions on the marketing and use of certain dangerous substances and preparations (nonylphenol, nonylphenol ethoxylate and cement) published in OJ on 17 July 2003.*

17 July 2003, the Directive was adopted with a derogation clause for cement used in closed fully automated systems.

For the implementation phase of 18 months after adoption CEMBUREAU produced a communication tool kit and a joint position paper together with ERMCO (European Ready Mixed Concrete Association), BIBM ("Bureau International du Béton Manufacturé") and FIEC ("Fédération de l'Industrie Européenne de la Construction").

During the debate about chromium VI in the European Parliament, allegations were made about potential risks of cancer upon exposure to cement dust. In spite of the fact that no reliable evidence for such a statement exists, CEMBUREAU decided to undertake a comprehensive Health Risk Study in order to have all the data and knowledge available. As a first step, the design of this study was defined by an independent consultant. This project was subject to an approved supplementary budget. It has been redefined to update existing historical analysis (1994) by the UK Health & Safety Executive. In addition, an approach monitoring will be developed with the co-operation of medical experts from various European countries.

Another major issue in the Health and Safety area has been the launch of REACH, a proposal for a Regulation for the Registration, Evaluation and Authorisation of CHEMicals. This Regulation would replace a whole series of existing laws and would also cover substances and preparations like cement. CEMBUREAU has taken the lead with eleven other European federations to advocate an exemption of this type of mineral products that can hardly be considered as "chemicals". The final proposal by the European Commission has brought some relief in that Safety Data Sheets (SDS) have now been given a more prominent role for the various cement types being preparations. This leaves, however, the issue open for clinker. CEMBUREAU nevertheless continues to argue that cement and clinker are adequately covered by existing legislation and that the introduction of REACH would add an unnecessary financial burden on the cement industry. In the meantime, the CEMBUREAU Board unanimously decided in December 2003 that SDS should be urgently harmonised.

Still on the health front, the recommendation from the Scientific Committee on Occupational Exposure

Limits for a more stringent occupational exposure limit value for crystalline silica is being evaluated in close collaboration with some other industrial sectors.

Environmental Issues

Out of the incredibly high turnout of European Commission proposals in the environmental field, CEMBUREAU dealt with the following issues in 2003: revision of the BREF document in the context of the IPPC Directive (Integrated Pollution Prevention and Control), emission of Persistent Organic Pollutants (POPs), ambient air quality in particular fine dust and heavy metals, environmental liability and the Environmental Product Declaration (EPD).

Revision of BREF Document

Regarding the IPPC Directive⁵, the European Commission has decided to revise the BREF document (Reference Document on Best Available Techniques in the Cement and Lime Manufacturing Industries) notwithstanding the fact that this document is only three years old (December 2001). The main reasons are that there is a split view on BAT-levels for NO_x in the current BREF and that the use of alternative fuels is not properly taken into account. Despite the fact that the revision process has not started yet, CEMBUREAU is collecting the necessary data and information in order to be fully prepared when the process starts in 2004. The IPPC Directive itself is due to be revised to improve implementation in the Member States. A more restrictive regime is to be expected.

POPs

The emission of POPs is addressed by the United Nations under the so-called Stockholm Convention⁶ adopted in May 2001. Cement kilns burning hazardous waste have, among other processes, been identified as a potential source category. This decision is based on a false interpretation of data by the Environmental Protection Agency (EPA) in the United States, which has in the meantime been rectified.

CEMBUREAU represents the cement industry in close collaboration with the Cement Sustainability Initiative (CSI) (See "Climate Change and Reduction of CO₂ Emissions") by bringing forward various data of dioxin/furan emissions from cement kilns all over the world which show that,

⁵ Council Directive 96/61/EC of 24 September 1996 concerning integrated pollution prevention and control published in OJ on 10 October 1996.

⁶ The Stockholm Convention will become legally binding on 17 May 2004.

provided some basic primary measures are taken, the current emission limit values can in most cases be complied with. These findings will be the basis for BAT (Best Available Techniques) and BEP (Best Environmental Practices) guidelines to be developed by the UN POPs Expert Group.

Ambient Air Quality

Ambient Air Quality is dealt with under the so-called Clean Air For Europe (CAFE) programme. Currently, CEMBUREAU is evaluating the relevance of potential limit values for fine and ultrafine dust (PM 10 and PM 2.5) and some heavy metals, in particular mercury.

Environmental Liability

In 2003, the European Parliament and the Council continued to seek consensus on one of the most controversial issues in the history of the Parliament, the Directive⁷ on Environmental Damage [COM(2002)17]. The purpose of the Directive is to impose strict liability rules in relation to damage to biodiversity and clean up obligations in relation to contaminated land. In addition to strict liability, the Directive will provide that compliance with permit and state of art technology (in relation to development risks) are no defences. In the compromise hammered out by the Parliament, compliance with permit will be only a mitigating factor.

The liability scheme is one of public law where the prime responsibility lies with the Member States but there is, on the one hand, the possibility to recoup damages from the polluter and, on the other hand, a possibility of direct action by E-NGOs to prevent the occurrence of damage.

The main point still in debate at the end of the year 2003 was the issue of financial security and compulsory insurance. An agreement reached on 23 February 2004 postpones by six years the requirements of financial security. Eventually, the Directive is expected to become law in the second half of 2004.

EPD

Once every year, both Standing Committees of CEMBUREAU have a joint working session. In 2003, the environmental performance of the cement industry and its products was thoroughly

discussed on that occasion. One of the major items in this context is the creation of an Environmental Product Declaration (EPD) for cement for which a standard format is being developed. This EPD is based on the Life Cycle Inventory approach used earlier for the EcoConcrete LCA-tool. It is expected that, by the spring of 2004, this combined effort of both disciplines, technical (Standing Committee 1) and marketing (Standing Committee 2), will deliver a professional and useful tool for Business-to-Business communication.

Standardisation

The **standardisation process of most special cements** as well as cements with special properties is almost finalised by CEN TC 51. It will cover low heat cement, very low heat cement, low early strength cement and calcium-aluminate cement for which harmonised standards will be issued in the course of 2004. So far, no consensus could be reached, either via a performance or via a descriptive oriented approach, to issue a harmonised standard for sulphate resisting cement because of large differences in climatic conditions and degree of exposure in Europe. More research will be needed in order to solve this last hurdle on the way to a complete harmonisation of cement standards in Europe.

Other major issues in this context are the **standards for additions to concrete**, in particular **fly ash** and **ground slag**. CEN TC 104 (Concrete and Related Products) co-ordinates the revision of the fly ash standard EN 450 and the standardisation process for ground granulated blastfurnace slag that has been initiated recently.

Expertise in Cement Technology

In order to be able to react adequately and professionally to initiatives taken by authorities, it is of crucial importance that CEMBUREAU has an up-to-date knowledge of the technical state of the art of the industry. It was therefore decided to set up a new Project Group (1.8) called "**Technical Practices in Cement Manufacturing**". Project Group 1.8 will exchange data/information on new technologies and assist other Project Groups whenever technical questions arise.

⁷ Proposal for a Directive of the European Parliament and of the Council on environmental liability with regard to the prevention and remedying of environmental damage published in OJ on 25 June 2002.

MAIN ISSUES UNDER STANDING COMMITTEE 2 “PRODUCTS & MARKETING”

EcoConcrete

EcoConcrete, the tailor-made LCA software tool providing fully-fledged life cycle assessments of ten selected concrete applications (functional units) according to three different LCA methodologies, was disseminated in 2003 within the cement/concrete industry through a licensing system including a training programme (Multiplier System).

Twelve EcoConcrete Workshops, one-day seminars aimed at educating on life cycle thinking and the use of the LCA tool, were organised in 2003 by CEMBUREAU, BIBM (“Bureau International du Béton Manufacturé”) and ERMCO (European Ready Mixed Concrete Association). Despite these efforts, success was limited as only seventy-nine licensees were allowed to use the tool at the end of 2003.

UEPG, the European Aggregates Association, decided in November 2003 to definitively leave the Joint Project Group. Therefore, the remaining five co-owners of EcoConcrete are BIBM, CEMBUREAU, EFCA (European Federation of Concrete Admixtures), ERMCO and EUROFER (European Confederation of Iron and Steel Industries).

ECO-SERVE

The ECO-SERVE NETWORK “European Construction in Service of Society” was launched in December 2002 under the EU Commission Fifth Framework Programme GROWTH. The EU Commission appointed INTRON¹ as one of about forty co-contractors. The Member Associations involved in the Joint Project Group act as subcontractors.

The main objectives of the network are to identify, evaluate and disseminate technologies, which may improve the environmental impact of the European construction industry and ensure implementation of these technologies in the construction industry. The network aims at achieving these objectives through identifying and recommending Best Available Technologies (BAT) in cement production, aggregate production, concrete production and pavement production that will contribute to a reduction of CO₂ emissions,

consumption of hydrocarbons, transportation demand and waste generation.

Backing Group for LCA of Concrete

Within the framework of the co-operation with Project Group 1.5 “European Cement Standards”, Project Group 2.1 resumed its work in March 2003 to develop a common European Environmental Product Declaration (EPD) Format for Cements to be used by CEMBUREAU Members. The task of Project Group 2.1 will be to identify the targets groups and draft communication guidelines.

The CEMBUREAU EPD Format from quarry to gate should meet ISO requirements for EPD type III (i.e. a voluntary scheme with Business-to-Business as target) and should provide a unique procedure/method for the cement industry/companies based on the existing CEMBUREAU LCI Format for Cement (February 1999).

Fire Safety with Concrete

In 2003, CEMBUREAU Project Group 2.2, with the participation of BIBM and ERMCO, addressed a number of key issues.

Fire Safety in Tunnels

Project Group 2.2 circulated a CD-ROM including the two reports on asphalt combustion laboratory tests and the analysis of gas emissions by Prof. Albert Noumouwe, Cergy-Pontoise University, France, an independent study on the general behaviour (combustion) of asphalt as material in fire conditions. These two reports “*Characterisation of asphalt exposed to high temperature: Application to fire case of asphalt pavement*” and “*Analysis of the gas emitted during the combustion of the asphalt: Application to fire case of asphalt pavement*” can be downloaded both in English and French versions from Cindi (CEMBUREAU Extranet) under the menu “Concrete Issues”.

The two reports, which are indirectly linked to road fire safety in tunnels, should be used in arguing for the fire safety of concrete in general. A position

¹ INTRON is the consultant firm based in The Netherlands, which worked for CEMBUREAU on the EcoConcrete exercise.

sheet on fire safety in tunnels advocating concrete roads in tunnels will be available in the spring of 2004.

Performance of Self-Compacting Concrete

Further to some negative test results regarding the behaviour of Self-Compacting Concrete (SCC) under fire conditions, Project Group 2.2 organised a fruitful workshop on the "*Performance of Self-Compacting Concrete*" which gathered scientists from all over Europe to take stock of tests and studies currently carried out. This allowed to identify issues and will help define future work. Research funding should therefore focus on problems: explosive spalling of special SCC in special situations. The technical presentations can be downloaded from *Cindi* (CEMBUREAU Extranet) under the menu "Concrete issues".

End Uses of Cement

Standing Committee 2 proposed in 2003 to set up an Ad Hoc Group on End Uses of Cement. Its mission is to establish by the end of 2004 a simple and harmonised CEMBUREAU Format for the segmented information on End Uses of Cement to be filled in at national level by CEMBUREAU Members. If feasible, the European Harmonised Format should be purposed at improving marketing activities at national level, i.e., forecasting, benchmarking of results, identifying new markets, niches, opportunities and threats.

Eurocodes

In 2003, the initial task of Project Group 2.5, with the participation of BIBM and ERMCO, was achieved with the public dissemination of the Gulvanessian study "*An Independent Technical Expert Review of the SAKO Report*" regarding the structural Eurocode 0 (EN 1990 *Basis of structural design*). A package "*Structural Eurocode (EN 1990) – Safety of Structures*" can be downloaded from CEMBUREAU public website under the menu "Concrete Issues". This report represents a valuable contribution to the practical implementation of the Eurocodes and, in particular, in the process of making choices by national competent authorities between three load combination expressions for structures.

Project Group 2.5 new objectives and tasks aim at both facilitating the implementation of the Eurocodes through the development at European level of common design guidance and training as well as paving the way for a Revision of the Eurocodes.

Energy Performance of Concrete Buildings

The EU Directive on energy performance in buildings (2002/91/EC) is of strategic importance to the construction industry and represents an opportunity for the cement/concrete industry to promote the benefits of concrete regarding energy performance and thermal comfort in buildings. Energy efficiency in buildings represents a real potential to reach the EU commitments to reduce CO₂ emissions under the Kyoto Protocol.

Project Group 2.7 "Energy Performance of Concrete Buildings", with the participation of BIBM and ERMCO, was set up on 31 October 2003 to promote the advantages of concrete regarding energy efficiency in buildings, in particular, energy storage/release properties and indoor climate/thermal comfort of concrete in buildings/structures.

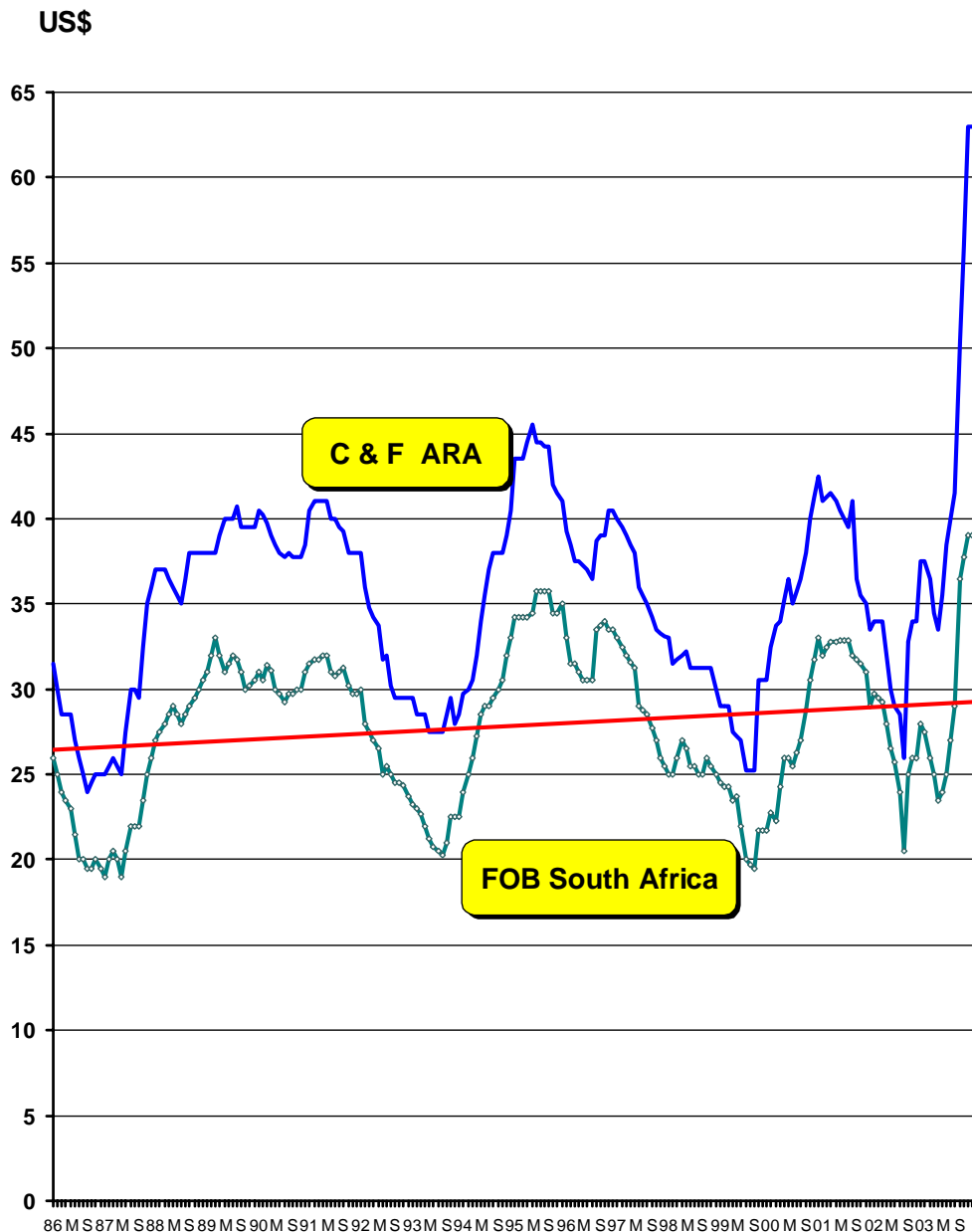
CEM• PROSPECTS

The CEMBUREAU Energy Market Prospects (CEM• PROSPECTS) Conference 2003 was held in Lyon in September attracting about one hundred and twenty participants. Cement companies were well represented alongside energy traders from all parts of the globe, in particular the USA.

Discussions concentrated on the analysis of the volatile markets for steam coal and petcoke in 2003-2004 (see figure below). Of particular interest and importance to the attendees was a presentation on the freight market and points of view from the Electricity Industry.

CEMBUREAU Project Group 1.7 "Solid Fuels" met immediately after the Conference closed. It was agreed that the 2004 Conference should take place during the first week of October in Lille (France). Alongside the usual subjects of debate, there should also be a follow-up on CO₂ emissions trading and more on the issue of fly ash from the burning of petcoke in power units.

**South African Steam Coal Price
January 1986 - Mid December 2003**



CEMBUREAU

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Project Group 1.6	"European Concrete Standard"
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Project Group 1.8	"Technical Practices in Cement Manufacturing"

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Project Group 2.2	"Fire Safety with Concrete"
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Project Group 2.7	"Energy Performance of Concrete Buildings"

CEMBUREAU MANAGEMENT

Chief Executive	J.-M. Chandelle
Technical Director	W. van Loo
Secretary General	A. Van der Vaet

¹ Participants: BIBM, CEMBUREAU, EFCA, ERMCO, EUROFER

MEMBERS



AUSTRIA

VÖZ – Vereinigung der Österreichischen Zementindustrie
Association of the Austrian Cement Industry
Reisnerstrasse 53
AT - 1030 Wien
Internet: www.zement.at

Tel.: +43 1 714 66 81 52
Fax: +43 1 714 66 81 66
E-mail: office@voezfl.at



BELGIUM

Febelcem – Fédération de l'Industrie Cimentière Belge a.s.b.l.
Association of the Belgian Cement Industry
rue Volta 8
BE - 1050 Bruxelles
Internet: www.febelcem.be

Tel.: +32 2 645 52 11
Fax: +32 2 640 06 70
E-mail: info@febelcem.be



CZECH REPUBLIC

Svaz výrobcu cementu CR
Czech Cement Association
K Cementárne 1261
CZ – 153 00 Praha 5 - Radotín
Internet: www.svcement.cz

Tel.: +420 2 57 81 17 97
Fax: +420 2 57 81 17 98
E-mail: svcement@iol.cz



DENMARK

Aalborg Portland A/S
Rørdalsvej 44
DK - 9100 Aalborg
Internet: www.aalborg-portland.dk

Tel.: +45 98 16 77 77
Fax: +45 98 10 11 86
E-mail: cement@aalborg-portland.dk



FINLAND

Finnsementti Oy
Skräbbölenie
FI - 21600 Parainen
Internet: www.finnsementti.fi

Tel.: +358 201 206 200
Fax: +358 201 206 311
E-mail: info@finnsementti.fi



FRANCE

SFIC – Syndicat Français de l'Industrie Cimentière
Association of the French Cement Industry
7, place de la Défense, La Défense 4
FR - 92974 Paris-La-Défense Cedex
Internet: www.infociments.fr

Tel.: +33 1 55 23 01 23
Fax: +33 1 55 23 01 24
E-mail: sfic@sfic.fr



GERMANY

BDZ – Bundesverband der Deutschen Zementindustrie e.V.
Association of the German Cement Industry
Pferdmengesstrasse 7
DE - 50968 Köln
Internet: www.bdzement.de

Tel.: +49 221 37 65 60
Fax: +49 221 37 65 686
E-mail: bdz@bdzement.de



GREECE

Hellenic Cement Industry Association
Stavrou P. Street 13
GR - 115 24 Athens
Internet: www.hcia.gr

Tel.: +30 210 691 18 86
Fax: +30 210 699 33 98
E-mail: hcia@otenet.gr



HUNGARY

MCSZ – Magyar Cementipari Szövetség
Hungarian Cement Association
Bécsi út 120-122
HU - 1034 Budapest
Internet: www.mcsz.hu

Tel.: +36 1 250 16 29
Fax: +36 1 368 76 28
E-mail: mcsz@mail.datanet.hu

**IRELAND**

Irish Cement Limited
Platin,
IE - Drogheda Co. Louth
Internet: www.irishcement.ie

Tel.: +353 41 987 60 00
Fax: +353 41 987 64 00
E-mail: info@irishcement.ie

**ITALY**

AITEC – Associazione Italiana Tecnico Economica del Cemento
Italian Technical and Economic Association of Cement
Piazza G. Marconi 25
IT - 00144 Roma
Internet: www.aitecweb.com

Tel.: +39 065 421 02 37
Fax: +39 065 91 54 08
E-mail: aitec@aitecweb.com

**LUXEMBOURG**

Ciments Luxembourgeois S.A.
Zone Industrielle, Um Monkeler
LU - 4222 Schifflange
Internet: www.gcl.lu

Tel.: +352 55 25 25 1
Fax: +352 55 70 61
E-mail: info@groupe-cl.com

**NETHERLANDS**

VNC – Vereniging Nederlandse Cementindustrie
Association of the Dutch Cement Industry
St. Teunislaan 1
NL - 5231 BS 's-Hertogenbosch
Internet: www.enci.nl

Tel.: +31 73 640 11 50
Fax: +31 73 640 12 84
E-mail: betoninfo@enci.nl

**NORWAY**

Norcem A.S.
Lilleakerveien 2 B
NO – 0283 Oslo
Internet: www.norcem.no

Tel.: +47 22 87 84 00
Fax: +47 22 87 84 01
E-mail: firmapost@norcem.no

**POLAND**

PCLA – Stowarzyszenie Producentów Cementu i Wapna
The Polish Cement and Lime Association
ul. Lubelska 29
PL - 30 003 Kraków
Internet: www.polskicement.com.pl

Tel.: +48 12 632 37 25
Fax: +48 12 632 37 22
E-mail: stow@polskicement.com.pl

**PORTUGAL**

ATIC – Associação Técnica da Indústria de Cimento
Technical Association of the Cement Industry
Avenida 5 de Outubro 54 - 2º Dto
PT - 1050-058 Lisboa

Tel.: +351 21 351 08 30
Fax: +351 21 351 08 38
E-mail: cimento.atıc@mail.telepac.pt

**SPAIN**

Oficemen – Agrupación de Fabricantes de Cemento de España
Association of Spanish Cement Producers
José Abascal 53 - 1º
ES - 28003 Madrid
Internet: www.oficemen.com

Tel.: +34 91 441 16 88
Fax: +34 91 442 38 17
E-mail: direccion@oficemen.com

**SWEDEN**

Cementa AB
Svärdvägen 11D
SE - 182 12 Danderyd
Internet: www.cementa.se

Tel.: +46 8 625 68 00
Fax: +46 8 625 68 98
E-mail: danderyd@cementa.se

**SWITZERLAND**

cemsuisse
Marktgasse 53
CH - 3011 Bern
Internet: www.cemsuisse.ch

Tel.: +41 31 327 97 97
Fax: +41 31 327 97 70
E-mail: info@cemsuisse.ch

**TURKEY**

TÇMB – Türkiye Çimento Müstahsilleri Birliği
TCMA – Turkish Cement Manufacturers' Association
Eskisehir Yolu 9 Km.
TR - 06530 Ankara
Internet: www.tcma.org.tr

Tel.: +90 312 287 32 50
Fax: +90 312 287 92 72
E-mail: info@tcma.org.tr

**UNITED
KINGDOM**

BCA – British Cement Association
Riverside House
4 Meadows Business Park
Station Approach, Blackwater
GB - Camberley, Surrey, GU17 9AB
Internet: www.cementindustry.co.uk

Tel.: +44 1276 60 87 00
Fax: +44 1276 60 87 01
E-mail: info@bca.org.uk

ASSOCIATE MEMBERS



ESTONIA

KNC – Kunda Nordic Cement Corporation
Petersburg Road 75
EE - 11415 Tallinn

Tel.: +372 6 20 96 50/
+372 3 22 99 00
Fax: +372 6 20 96 51
E-mail: knc@knc.ee

Internet: www.knc.ee



LATVIA

Broceni JSC
Liepnieku Str, 15
Saldus District
LV - 3851 Broceni
Internet:

Tel.: +371 7033 500
Fax: +371 7033 514
E-mail:
broceni@broceni-readymix.lv

www.readymix-zement.de/do/en/broceni.asp



ROMANIA

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

1-3 Valter Maracineanu St,
3rd floor, Room 250-252, Sector 1
RO - 77562 Bucharest

Tel.: +40 744 337 034
Fax: +40 21 313 20 10
E-mail: org_cirom@yahoo.com



SLOVENIA

INTERCEMENT upravljanje nalozb d.o.o
Slovenian Cement Producers Association
Dunajska 63
SI - 1000 Ljubljana

Tel.: +386 5 392 12 07
Fax: +386 5 305 10 27
E-mail: salonit@salonit.si

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The European Cement Association

Rue d'Arlon 55 - BE-1040 Brussels
Tel.: + 32 2 234 10 11
Fax: + 32 2 230 47 20
E-mail: secretariat@cembureau.be
Internet: www.cembureau.be

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