

ACTIVITY REPORT 2004



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 (with the exception of Cyprus, Latvia, Lithuania, Malta and Slovakia) plus Norway, Switzerland and Turkey. Latvia and Romania 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 five Working Groups as well as a number of Task Forces set up on an ad hoc basis and directly reporting to the appropriate Working Group, 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 about 170 countries.



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

2004 - AN EXCEPTIONAL YEAR FOR THE EU ... CONSEQUENCES FOR CEMBUREAU

2004 was an exceptional year for the European Union (EU) with the accession of 10 new Member States on 1 May bringing the membership from 15 to 25 Member States, the election of a new European Parliament further to the June election, the appointment of a new European Commission which took office on 22 November, the start of accession negotiations with Bulgaria and Romania and the discussions to start negotiations with Turkey and Croatia. Last but not least, an agreement was reached on the final Draft of an EU Constitution which, in most cases, will be submitted for popular approval in 2005. Closer to home, 2004 was also the year in which the EU broke new ground in setting up the first ever transnational CO₂ Emissions Trading Scheme in the world.

All those events and developments will affect the lives of those 450 million citizens who now live in the EU, of neighbouring countries, especially those forming part of the EEA (European Economic Area), and more generally the balance of power in the world. In this international context, the economy was characterised by a high euro versus a weak dollar, a situation that presents both threats and opportunities to Europe – it is clear that a proper equilibrium still needs to be found.

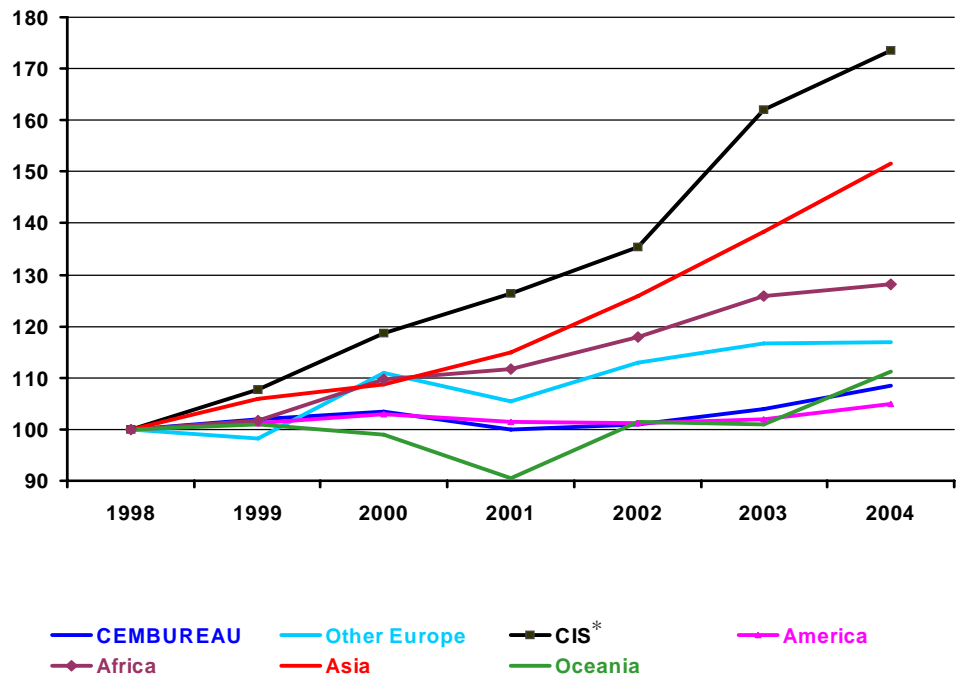
Those changes have had and will continue to have an impact on the cement industry and on the manner in which CEMBUREAU works. The enlargement of the EU to 25 Member

States presents a situation where, for the first time, all the EU Member States are not represented in CEMBUREAU. This is normal for Malta, where there is no cement industry, but the cement industries of Cyprus, Lithuania and Slovakia are not represented in CEMBUREAU. This could be a problem in areas such as taxation where a unanimous vote is required and where Member States have, each, one and the same vote. Short of membership, bridges have to be established with the cement industry in those countries to avoid CEMBUREAU's influence being diluted as a result of enlargement.

THE ECONOMY

WORLD CEMENT PRODUCTION BY REGION - EVOLUTION 1998-2004

Index 1998 = 100



CEMBUREAU EL - APRIL 2005

THE WORLD

World Production and World Trends

In 2004, world cement production reached record figures, an increase of more than 7% on 2003. Production figures rose to 2.1 billion tonnes, following the increase in 2003 of almost 8%. Overall, world production has doubled in less than 20 years.

Once again Asia was the driving force, with China accounting for 44% of total output, or approximately 930 million tonnes of cement. This was an increase of 15% on the previous year, which means that for the third year in succession output in East Asia rose by 11%. South West Asia also increased its production by more than 6%. India is now well-established as the world's second biggest producer with 128 million tonnes and the Indian market saw a growth of approximately 7% in 2004.

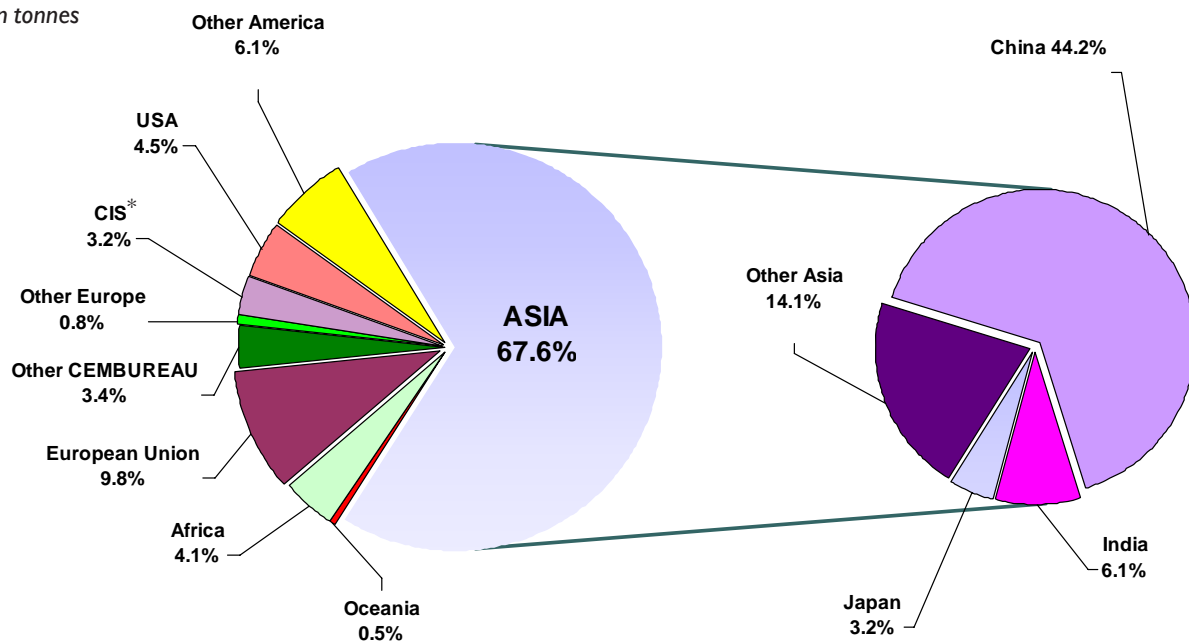
Europe as a whole (excluding the European CIS – Commonwealth of

Independent States) accounted for less than 14% of world production in 2004 with the 25 CEMBUREAU countries representing 13%. The enlarged EU of 25 Member States would have accounted for almost 11% of total world production in 2004, i.e. 233 million tonnes.

US cement consumption increased by 7% in 2004 due to a strong performance in the residential construction sector and the recovering non-residential and public sectors. This strong demand for cement is expected to continue throughout 2005.

2004 WORLD CEMENT PRODUCTION BY REGION

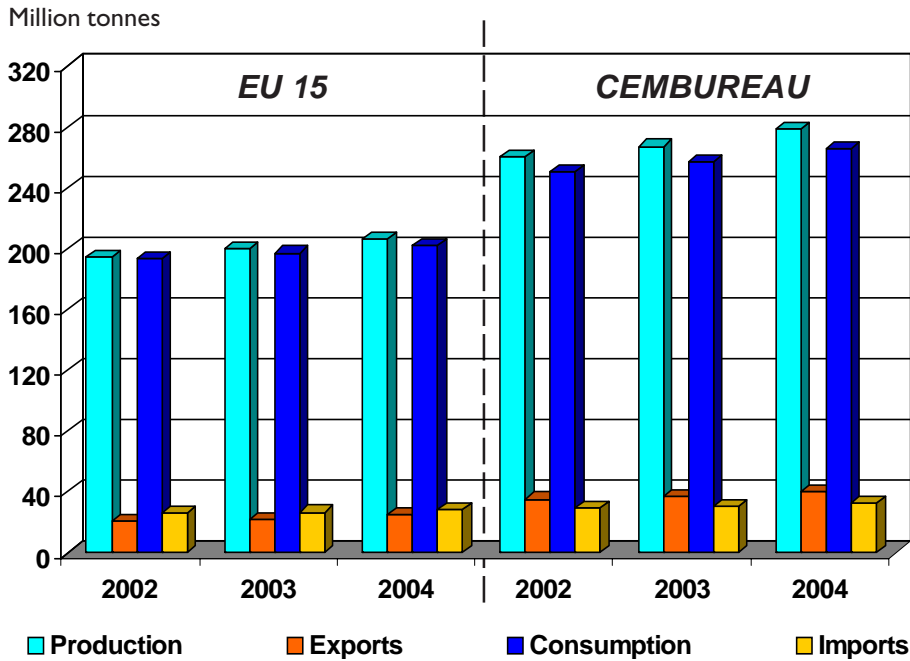
2.11 billion tonnes



CEMBUREAU EL - APRIL 2005

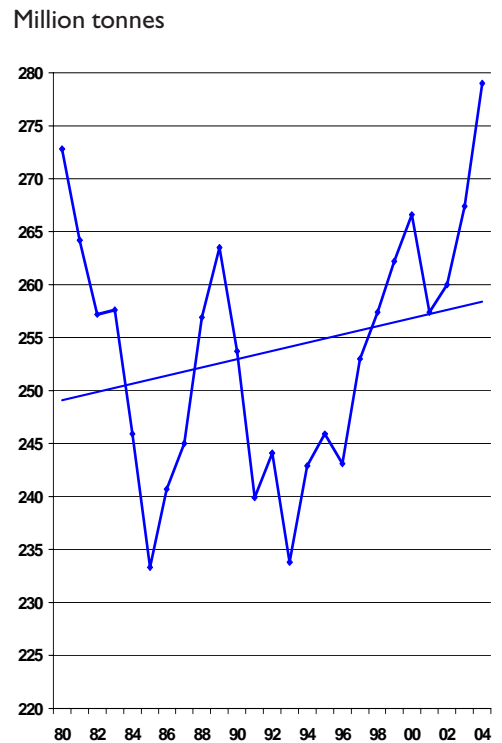
* CIS: Commonwealth of Independent States

CEMENT IN CEMBUREAU COUNTRIES



CEMBUREAU EL - APRIL 2005

CEMBUREAU CEMENT PRODUCTION 1980-2004



CEMBUREAU EL - APRIL 2005

EUROPE

In 2004 cement production increased by approximately 4% from 267 to 280 million tonnes in CEMBUREAU countries. Production in the 15 countries of the European Union (membership until 30 April 2004) saw a growth of 3.5% - this was due to very strong results in Italy (+ 4.5%) and Spain (+ 4%). These two countries represented more than 40% of the EU-15 production. Production for the EU-25 was approximately 233 million tonnes - an increase of about 3.3%. Cement consumption in all CEMBUREAU countries also saw a positive growth of about 3.5%.

Austria

Austria expects to see a moderate but steady rise in cement consumption in 2005 after an increase of 1.9% in 2004. Non-residential construction will remain stable, while residential construction will make a slow recovery. There will be a moderate increase in civil engineering, comparable to the figures of the past few years. The progression of future cement consumption will mainly depend on investments in infrastructure related to the expansion

of the European Union and the development of Austria's federal budget.

Belgium

The level of activity in the residential building sector in 2004 was particularly strong, reaching a figure of some 44 000 new dwellings, an increase of 11% compared to 2003. Non-residential construction was also very active in 2004. This came after two difficult years in which the total surface area of building permits fell by 30% compared to 2001. Compared to 2003, the increase neared 8% in 2004. Post-election (June 2004) investments in civil engineering only changed by approximately 2%. Cement consumption, which reached approximately 5.7 million tonnes in 2004, showing a similar level to the 1990s average, saw an increase of 5.2% in comparison with 2003 levels - it should rise by approximately 2% in 2005.

Czech Republic

Cement consumption in the Czech Republic increased by 5.7% and domestic production by 10.7%. The

growth in the volume of construction was expected to be similar to the growth in the volume of building output seen in the previous year, but construction activity exceeded expected results, reaching 9%. Growth for 2005 is forecast at around 10% for both cement and construction output.

Denmark

Cement consumption in 2004 increased by 4.9% due to the growth in residential housing projects. Although the Danish cement market should see a decline in 2005 and 2006 compared to the figures seen in 2004, the market will show some growth. The decline will be due to the closure of production of a large industrial cement company in 2004. In 2005 both residential and non-residential projects should increase, and a modest growth of 2-3% in cement consumption is expected.

Estonia

Estonia currently receives funds from the European Commission to co-finance construction in the environment and transport sectors.

This investment, along with the need for new dwellings and non-residential buildings accounted for the increase of 12% in cement consumption in 2004. This trend is predicted to continue for the next few years.

Finland

Construction levels in Finland were high in 2004 and seem set to remain so in 2005. Cement consumption rose by 5.4% in 2004. The number of new dwellings being built should remain stable in 2005, whereas construction of office and industrial buildings should increase. New civil engineering works will remain at the same level as in 2004. It is estimated that the residential sector will make up 27% of total cement consumption, the non-residential sector 35%, the repair and maintenance sector 7% and civil engineering 31%.

France

The construction sector was very active in France in 2004 - it was one of the French economy's best performing sectors. The economy experienced problems in the summer and autumn of 2004. This was due to the high level of the Euro and high oil prices. The mild weather contributed to the strong performance of the construction industry particularly in the housing sector. The value of production in this sector was up by 3.5%, due to increased demand, governmental

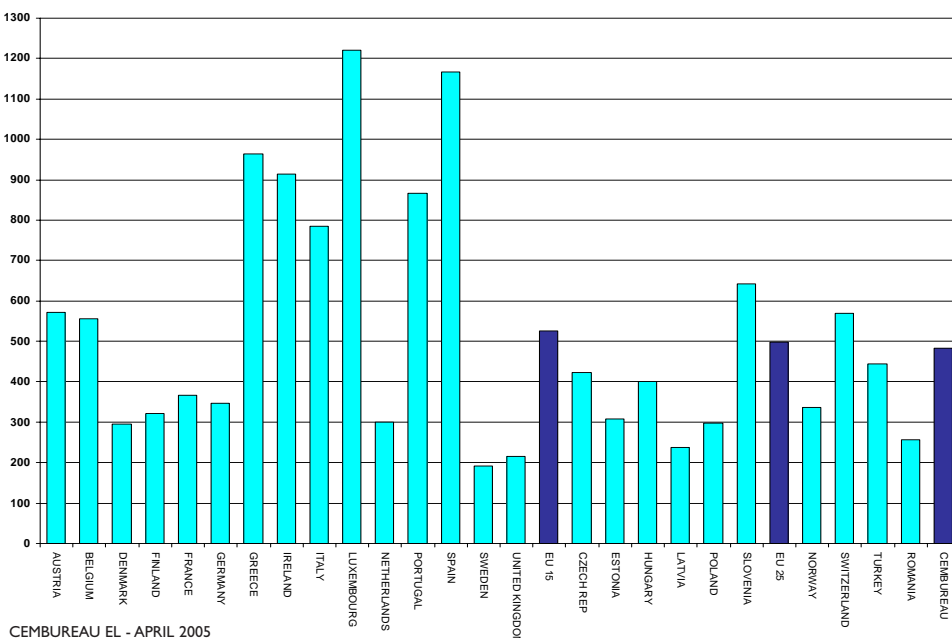
housing policy and low interest rates. The civil engineering sector also experienced a growth of 3% in 2004. This increase was a positive development for the cement market, which saw an unexpected rise of 6%. Predictions for 2005 are decidedly more conservative, although still positive.

Germany

Germany has been experiencing a recession in the construction industry

for the last ten years. During that period total construction investments have declined by about 20%. Although limited during that period there was a downturn of 2.6% in 2004. Cement consumption was also down by 3.6%. The residential building sector was the only area where construction activity increased slightly as a result of housing policies. The construction of non-residential buildings once again decreased, as did civil engineering. Forecasts predict that this trend will continue in 2005.

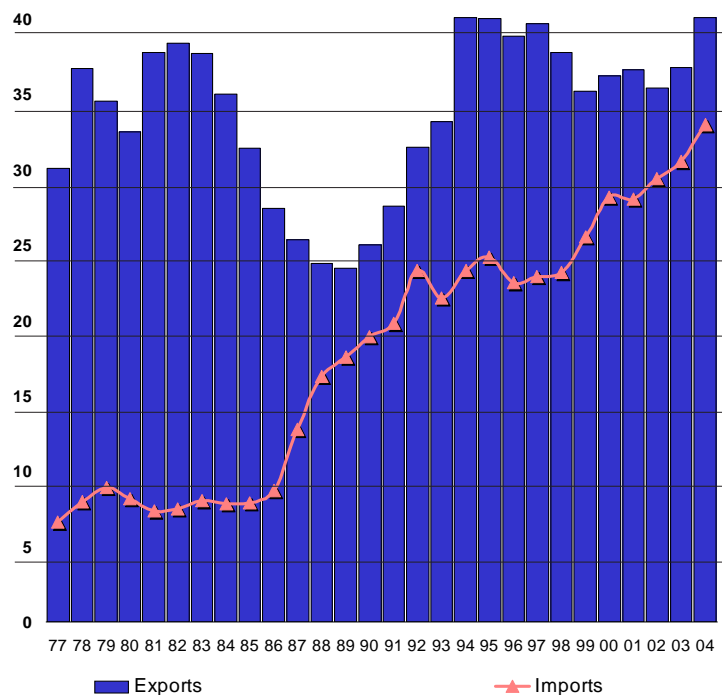
CEMENT CONSUMPTION 2004 - PER CAPITA / KG



CEMBUREAU EL - APRIL 2005

CEMBUREAU TRADE - CEMENT & CLINKER 1977-2004

Million tonnes

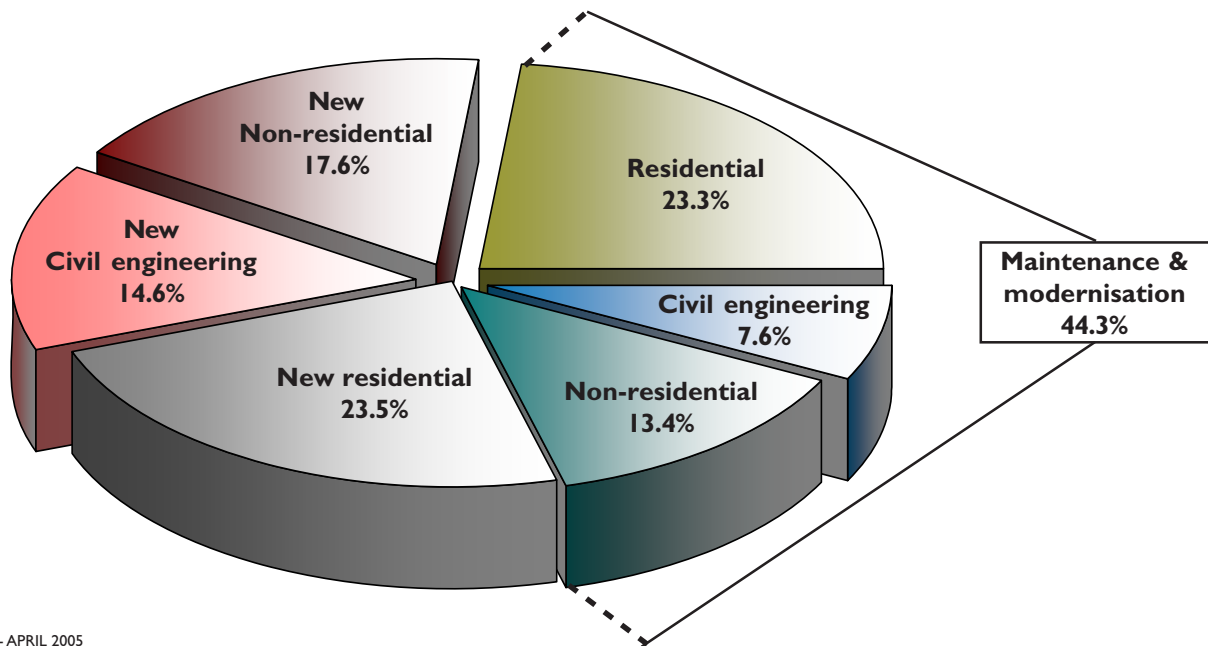


CEMBUREAU EL - APRIL 2005

2004 CONSTRUCTION VOLUME BREAKDOWN PER SECTOR*

Billion EUR: 1 157

* European Union less Cyprus, Greece, Luxembourg, Malta, plus Switzerland and Norway



CEMBUREAU EL - APRIL 2005

from 2005 onwards. Total construction output is predicted to grow by 6% in 2005. The civil engineering sector will be the driving force of the construction industry in the coming years – it saw a growth of 10% in 2004, a figure which may rise to 12% in 2005. Activity in other sectors such as residential and non-residential may increase by 3-4% in 2005; Hungarian cement consumption grew by 1.1% in 2004 compared with figures for the previous year. The annual growth of cement consumption is expected to be around 1-3% in 2005.

Ireland

Construction activity continued to increase in Ireland in 2004. This growth was dominated by the strong residential sector. House construction again reached record levels. The residential market accounted for over 55% of cement sales. The commercial and industrial sectors remained relatively weak in the early part of the year but there were signs of a strengthening in the commercial sector afterwards. Cement consumption grew approximately by 7.5%. A reduction in demand is

expected in 2005 due to a predicted weakening in demand for housing.

Italy

In 2004 Italian cement consumption increased by 5.3%. This performance was mostly due to output from the civil engineering sector (+ 4%). The upward trend in cement consumption is expected to continue in 2005 albeit at a lower rate of about 1%. Italian construction output forecast for 2005 shows a reduction of the rate of both residential construction and civil engineering and will only reach + 0.5% and + 3.6% respectively.

Non-residential construction in 2005 will continue its downward trend (- 0.8%).

Latvia

Construction is one of the most dynamic sectors of the Latvian national economy. Over the past five years the annual growth rate of construction was approximately 9% per year. The residential sector increased the most. This was followed by civil engineering (highways and roads) in the Riga Ventspils and Liepaja areas. Cement consumption subsequently increased

by nearly 19% in 2004, while a further 16% is predicted for 2005.

Luxembourg

Cement consumption increased by 1.5% in 2004. The same level of domestic cement deliveries is expected in 2005. This is due to the high number of civil engineering and non-residential building projects taking place in the country at the moment.

Netherlands

The Dutch construction market saw decreases of 2.2% in 2002, 3.8% in 2003 and 1% in 2004. In 2005 and 2006 the construction volume output is expected to reach modest positive growth rates: 2% in 2005 and 2.5% in 2006. New residential construction recovered in 2004 by 5% due to an increase of completions to 65 000. In the period 2005-2007 between 70 000 and 72 500 building permits are expected to be applied for. In the wake of modest economic recovery, new non-residential construction activity is likely to increase again slightly in 2005. Growth in the civil engineering sector is likely to once more increase steadily from 2005.

Norway

Following two years of decline, 2004 saw all sectors of the construction industry increase in volume and cement consumption rise by 19%. This growth is expected to accelerate as oil and gas investment is forecast to increase substantially. A sharp reduction in interest rates has been a major factor and has benefited residential construction.

Poland

In 2004, the growth of GDP was 5.4%, due to Poland's entry into the EU and investments in 2004 were approximately 5.1% higher than the previous year. In 2005 the growth rate of GDP is predicted to remain stable, while investments are set to increase by 10%. Recent economic difficulties in the construction sector should be overcome, and the market will experience a higher level of growth in 2005. The inflation rate will not exceed 3.5% and the job market is expected to improve slightly despite unemployment levels of 18% at the end of 2005. Foreign trade will remain stable in 2005 despite the appreciation of domestic currency. In 2004 cement consumption increased by 3% and, in 2005, that increase is set to rise to 5%. Improvement can be expected in the construction sector. This should formally influence the financial results of Polish cement companies.

Portugal

While the economy slowly recovered, the crisis in the construction sector continued in 2004. Total construction sector output is estimated to have fallen by 6%. This was due to a decrease in public investment, estimated at 15%, and a crisis in the housing sub-sector (- 8%).

Civil engineering output decreased by approximately 7% in 2004, residential construction by 8% and non-residential construction by 1%. Portuguese cement consumption in 2004 was estimated at 9.11 million tonnes - a fall of 1.5%. GDP is expected to increase by 1.6% in 2005, the construction sector by 4% and

cement consumption should rise by about 1.1%.

Romania

Romanian producers anticipate a growth of 4% in 2005 compared to 2004, an election year which saw consumption increase by 16.5%. Changes in the government as well as in local administration will lead to a slowdown in the construction market, compared to the activity seen in 2004. Ukrainian imports are also forecast to remain steady or increase slightly during the coming months.

Slovenia

Slovenia's economy was well positioned in 2004 with a GDP growth of 4.6%. This led to positive developments in construction. Total value of construction works completed was 11.2% higher in 2004 than in the previous year with increased growth in the residential sector. This trend will continue in 2005. Paradoxically, however, cement consumption appeared to be down by 4% in 2004 compared to 2003.

Spain

Cement consumption in Spain in 2004 once again reached a record high of 47.8 million tonnes, an increase of 3.9% on 2003. This is due to strength in the residential sector, which, with a total of approximately 675 000 new dwellings, has continued to exceed expectations. The increase in the construction of public buildings also remained stable. Cement consumption in Spain is predicted to fall, albeit slightly in 2005. This decline is due to the expected fall in the number of new dwellings, which will not be compensated by the increase in public buildings being constructed.

Sweden

Total investments in new construction increased by 4% in 2004. Cement consumption increased by 6.5%, a figure which exceeded all expectations due to a sharp increase in new dwellings, which reached 27 000 units. In addition, some important road infrastructure projects, such as

tunnels and bridges required large quantities of cement. Activity in the non-residential sector decreased by about 2%. Cement consumption is expected to increase by 2-4% in 2005 and activity in the civil engineering sector will remain high. The residential sector should also increase: new dwellings should reach 30 000 - the highest level for more than ten years in Sweden whereas the non-residential sector will experience a slight downturn.

Switzerland

In 2004, cement consumption increased by 5.8%; 30% of this being in the civil engineering sector, 37% in the residential sector, and 33% in the non-residential sector. There is a relatively positive economic outlook for 2005, although a downturn is forecast for 2006. While construction using cement was common on big railway and road projects in 2004, an increase in residential construction will be the source of the positive trend in 2005. Non-residential construction has decreased considerably since 2000 and is not expected to recover before 2006.

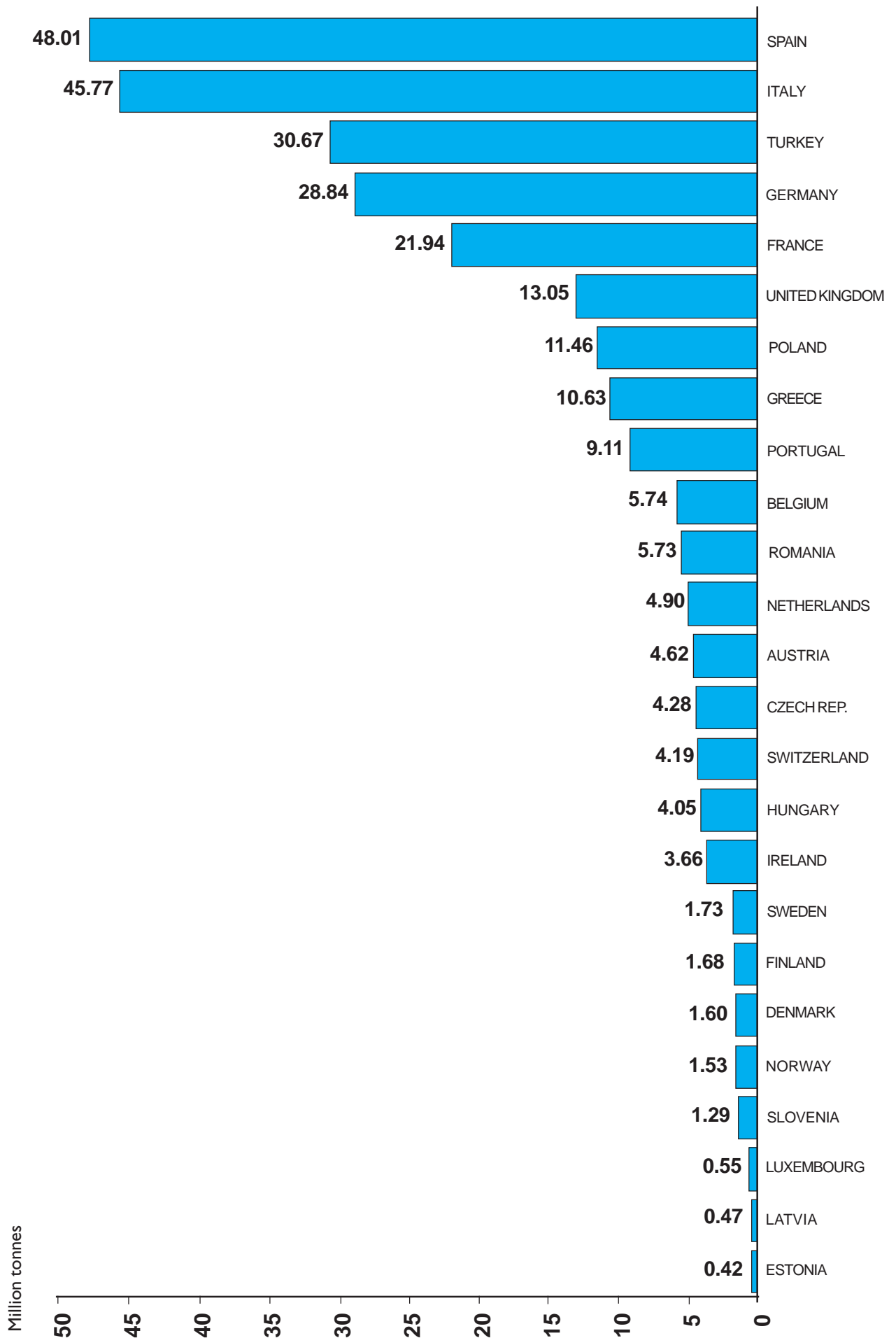
Turkey

Cement consumption in 2004 was estimated at 30.7 million tonnes, a 9.1% increase on the previous year. The continuing economic recovery resulted in a 9.7% growth in GDP, which positively influenced cement consumption. Following municipal elections at the beginning of 2004, domestic cement consumption grew by more than 9%. A growth of around 4-5% is expected in 2005.

United Kingdom

Cementitious materials increased by 1.1% in 2004, a growth which falls behind that of new construction which grew by 7%, following the trend seen over the last three years. The main increase in construction output has been in publicly funded infrastructure, such as roads, schools and hospitals. Concrete has made significant gains in the market share of high-rise residential accommodation.

CEMENT CONSUMPTION 2004



MAIN ISSUES – AN OVERALL VIEW

The year 2004 was dominated, as was already the case in 2003, by two issues of prime importance to the European cement industry: the reduction of CO₂ emissions, notably via Emissions Trading, and the proposed Regulation on the Registration, Evaluation, and Authorisation of CHemicals (REACH), both issues being very controversial.

During 2004, it became clear, as the months went by, that there would be some considerable delay, mainly at Member States level, in implementing the Directive on Emissions Trading¹ Directive 2003/87/EC of 13 October 2003 establishing a scheme for greenhouse gas emission allowance trading within the Community and amending Council Directive 96/61/EC. This delay is a source of concern as it creates a lot of uncertainty for all economic operators and for the cement industry: doubt about the allowances that will be allocated to individual installations, questions regarding the monitoring and reporting of CO₂ emissions ... most deadlines were not met, even by the European Commission itself. It also became clear in 2004 that, as new ground was broken, the work to set up in haste the European Emissions Trading Scheme (E-ETS) had not allowed a proper assessment of the impact of the new legislation upon business and that certain consequences had not been identified or expected, with potentially huge effects on industry.

A fierce controversy arose at the end of the year regarding the **accounting treatment of allowances** (the so called IFRIC-3 – Emissions Rights) (International Finance Reporting Interpretations Committee) as the standard (IAS38 – International Accounting Standard) and its interpretation by IFRIC would lead to

an artificial volatility in the accounts of listed companies whose installations are covered by the EU ETS. A satisfactory solution will hopefully be found – urgently – in 2005.

Another unexpected development is the **indirect impact of the EU ETS upon electricity prices**, an impact which will affect all electricity users whether they are covered by the EU ETS or not.

CEMBUREAU has been actively involved – even immersed – in dealing with those two important questions, in addition to those which cropped up day by day regarding concrete implementation of the EU ETS. In particular, CEMBUREAU has developed a **model for "CO₂ Emissions Monitoring and Reporting"**. In 2004, a concern also developed about the **"Post-Kyoto Era"**, i.e., the reduction of GHG (Greenhouse Gas) emissions after 2012. The European Commission launched a consultation process over the summer and CEMBUREAU contributed its own view of the matter in an official submission to the European Commission in October. CEMBUREAU's common sense views were generally well received.

CEMBUREAU via its Members also drew the attention of the Member States to a number of practical difficulties in the hope that these will be addressed in the EU ETS reviews due to take place in 2005 and in 2006 (respectively the Article 21 review which will take place annually starting in 2005 and the exceptional Article 30 review in 2006 in view of the 2nd period).

On REACH, some success was achieved regarding cement itself as the European Commission agreed that registration of preparations

(i.e. cement) is not needed when harmonised safety data sheets are in place to cover risk management aspects. Regarding cement, such harmonisation was decided unanimously by the CEMBUREAU Board in 2004. REACH continues, however, to raise problems for clinker - a substance under REACH - and for waste. CEMBUREAU, as part of an Alliance - the **"REACH Alliance"** - is struggling to draw the attention of both the Council and the European Parliament to the need to streamline the scope of REACH, including the annexes, the devil being always in the detail.

CEMBUREAU's Action Plan for the Use of Waste, adopted by the Board in December 2001, progressed even further in 2004 with the completion of three key reports (waste streams, stack emissions and leaching from concrete) which were discussed with stakeholders in November. Those reports constitute a first – major – step towards a knowledge-based dialogue but it is clear that the data available is far from representative at this stage and that more work will be needed on an on-going basis in order to expand the database, update it and improve the quality of the data. At this stage, the Reports are therefore intended for internal use only.

The **standardisation of special cements** progressed well in 2004, opening up the prospect of having all cements standardised and bearing the CE² mark in the very short term. Some difficulty is still being met for sulphate-resisting cements for which a solution was developed in 2004 which still requires discussion within the European Commission.

1. Directive 2003/87/EC of 13 October 2003 amending Council Directive 96/61/EC OJ L 275/32 - 25 October 2003

2. European Community conformity marking

NETWORKING WITH OTHER FEBIs

The need for the cement industry to form alliances with other industries in order to address issues of common interest was more than ever before obvious in 2004.

The alliances which had been formed in 2003 in relation to Emissions Trading, electricity prices and REACH (Registration, Evaluation, and Authorisation of CHemicals) remained very active throughout 2004.

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 (EU ETS) due to start on 1 January 2005. This Alliance was broadened to cover other **power intensive industries** such as ceramics and chlorine producers. A vigorous action which had started in 2003, was 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, are not just downstream users but which see their products directly subject to the REACH proposal¹ on chemicals decided to form an Alliance, the so called **REACH Alliance**, prompted by CEMBUREAU for the purpose of drawing the attention of UNICE (Union of Industrial and Employers' Confederations of Europe) and the European Institutions to the specificity of their predicament in the context of REACH.

In 2004, 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.

CEMBUREAU also joined on a trial basis **FOCOPE** (Forum in the European Parliament for Construction) – a horizontal group devoted to the construction industry in the European Parliament.

A new "**European Concrete Platform**" was set up in 2004 in respect of the work jointly undertaken by **BIBM** ("Bureau International du Béton Manufacturé"), **EFCA** (European Federation of Concrete Admixtures Associations) and **ERMCO** (European Ready-Mixed Concrete Organisation). This work concentrated on fire performance of concrete, the Eurocodes and energy efficiency in buildings.

An **Alliance for a Competitive European Industry** was also formed to fight for a strengthening of the industrial base in Europe (see "Contacts with EU Institutions").

¹ COM(2003) 644 final, 29 October 2003

Proposal for a Regulation of European Parliament and of the Council concerning the Registration, Evaluation, Authorisation and Restrictions of Chemicals (REACH), establishing a European Chemicals Agency and amending Directive 1999/45/EC and Regulation (EC) (on Persistent Organic Pollutants)

CEMBUREAU MEMBERSHIP

Ireland has been a Member of CEMBUREAU via CRH's Irish Cement since 1964. In 2004, with the presence of new cement producers in Ireland, an association, the "Cement Manufacturers Association of Ireland" was formed and the CEMBUREAU Board and the General Assembly unanimously welcomed the new association as the CEMBUREAU Member of Ireland.

CONTACTS WITH CEMBUREAU MEMBERS

Two meetings of CEMBUREAU Members and Associate Members took place in 2004. The national associations and, when applicable, the sole producer in the country play a key role in relaying CEMBUREAU positions on EU issues to national governments.

There was a growing recognition of the importance of the national relay

on European Affairs in 2004 especially in the difficult context of the **National Allocation Plans (NAPs)** to be developed under the EU ETS. The CEMBUREAU Board unanimously decided at its December Meeting that attendance at all the meetings of the newly created "Members Plenary Group" from 1 January 2005 should be compulsory.

Such regular attendance will reinforce the influence of CEMBUREAU and its Members. It will facilitate the setting up at national level of alliances mirroring those created at EU level.

Communication with the Members was facilitated by the further development and improvement of the *Cindi*¹ network on the internet.

1. CEMBUREAU International Network for Documentation and Information

CONTACTS WITH EU INSTITUTIONS

Even before the new European Commission took office CEMBUREAU and a few other key FEBIs (European Federations by Branch of Industry), working together with UNICE (Union of Industrial and Employers' Confederations of Europe), had decided to form an "Alliance for a Competitive European Industry". One of the first tasks of this Alliance was to ask the President of the Commission, Mr José Manuel Barroso, to identify a clear responsibility for competitiveness within the European Commission. That message was heeded and Mr Günter Verheugen, the Commissioner for Enterprise and Vice-President of the Commission, was given that task whilst Mr José Manuel Barroso himself kept an overall control on the "Lisbon Process". In 2004, the newly formed Alliance also carried out a critical analysis of the way in which the impact on business of new EU policies and regulations is assessed and made some recommendations on how this process could be significantly improved.

Contacts have also been made or, at least, attempted, with the new Members of the European Parliament not only from the former EU-15 but

also with the MEPs (Members of the European Parliament) from the accession countries. The pressure from hot issues and limited human resources have not allowed a systematic approach to all those new MEPs but CEMBUREAU has maintained its vigilance and developed contacts on issues before the European Parliament in close cooperation with its parliamentary advisers, Nicholas Phillips Associates.

When it comes to the Council of Ministers, CEMBUREAU's "Meet the Presidencies" Programme functioned well in 2004. Key meetings were organised with the Dutch Presidency of the EU (1st half of 2004) and with the Grand Duchy of Luxembourg (2nd half of 2004). The meeting with Grand Duchy of Luxembourg Minister of Economy, Mr Jeannot Krecké as President of the Competitiveness Council was devoted to the mounting concern over electricity prices. On this occasion, representatives from the steel industry (Arcelor) and the ceramics industry (Villeroy & Boch) were invited to join the cement industry delegation led by Mr Jean-Paul Proth, Managing Director of Ciments Luxembourgeois.

One of the changes brought by the enlargement does affect the way in which the Council operates: from 1 January 2005, the EU Presidency will be exercised by three Member States working together, each taking the Presidency for a six-month period. This "troika" now officially reflects a cooperation that already existed informally but will, from now on, always include a new Member State. CEMBUREAU welcomes this development and the "Meet the Presidencies" Programme will have to be adjusted accordingly.

The Council, with the European Parliament, is the key institution in the EU decision-making process. The efforts made by CEMBUREAU in its advocacy vis-à-vis the Council will have to be maintained and strengthened. Regular contacts with the Permanent Representations in Brussels do take place and they must be carried out by CEMBUREAU, hand in hand with its Members, at national level. The newly established responsibility for "Public Affairs" in CEMBUREAU (see "New CEMBUREAU Operational Structure") will certainly be useful in that respect.

MAIN ISSUES UNDER STANDING COMMITTEE I “INDUSTRY”

CLIMATE CHANGE AND REDUCTION OF CO₂ EMISSIONS

Emissions Trading and Power Prices

The European Emissions Trading Scheme started on 1 January 2005 without the approval of four National Allocation Plans (NAPs) – Czech Republic, Greece, Italy and Poland. CEMBUREAU has actually followed the allowances allocation process and prepared the first year of trading. The NAPs show how many allowances Member States will allocate but at the end of the year the prescribed allocation to industrial installations was still wanting. Those who need more allowances in order to emit higher levels of CO₂ will be able to buy allowances from installations with excess allocations.

In the meantime, CEMBUREAU has been very active within the Alliance of Power Intensive Industries¹ in denouncing the indirect effect of ETD (Emissions Trading Directive) on electricity prices generating windfall profits in the power sector. Even when they receive enough allowances to meet their CO₂ emissions, electricity producers consider that, they have lost the opportunity to sell the allowances they have thus used – this is the so-called “opportunity cost”. Whether they have to buy allowances or not, they will always add the value of allowances to their production cost regardless of actual CO₂ emissions. As a consequence, for any extra MW/h which may be required, the price of which will be based on the producers’ marginal cost, the virtual CO₂ price will become a key determinant whatever the source of the electricity and even when, as for nuclear based power, no CO₂ is emitted. The outcome:

unjustified windfall profits at the expense of power intensive industries.

Power Intensive Industries draw the attention of European and national decision-makers to the potentially very negative impact of higher power prices in particular as an indirect effect of the Emissions Trading Scheme (ETS). In March 2004, the Competitiveness Council recognised the problem and called for an extended impact assessment with a specific focus on the effect of the EU ETS (European Emissions Trading Scheme) on the competitiveness of European Industry having regard inter alia to possible effects on electricity prices. The problem is now broadly recognised.

As a result of the actions of the Alliance, the European Commission monitors electricity prices at appropriate regional, national and European levels in order to understand the factors which are influencing power prices. There remains to define appropriate mechanisms to be put in place so as to ensure that monitoring is turned into actions if necessary. Power Intensive Industries are convinced that all European stakeholders share a common interest in ensuring the reduction of CO₂ emissions whilst maintaining an industrial base in Europe.

CEMBUREAU actively contributed to the IEA (International Energy Agency) Report “Industrial Competitiveness under the European Union Emissions Trading Scheme” which devotes a full section to the implications of emissions trading for the cement sector itself. The Report assesses both the direct and the indirect impacts of ETD from the standpoint of international competitiveness, including cost

differential, losses of output and the possibility of leakage. The Report concludes that the cement industry faces a relatively high cost increase resulting from high CO₂ emission per unit of sales.

IEA also echoes CEMBUREAU’s view that performance based allocation combined with ex-post allocation rather than pure grandfathering would serve as a better instrument to encourage innovative efforts to reduce emissions and would prevent the so-called windfall profits.

Greenhouse Gas Emissions Monitoring and Reporting Guidelines

On 29 January 2004, the European Commission adopted a “**Decision establishing Guidelines for monitoring and reporting of greenhouse gas emissions** pursuant to Directive 2003/87/EC² of the European Parliament and of the Council” (hereinafter referring to as the “Guidelines”). These Guidelines contain specifications for the monitoring and the reporting of CO₂ emissions from the activities listed in Annex I to the ETD. These Guidelines are based on the principles set out in Annex IV to ETD and contain, on the one hand “General Guidelines for the monitoring and reporting of emissions” in Annex I to the Guidelines, as well as additional Guidelines on activity-specific emissions on the other hand. Beside the general Guidelines, Annex II on “Combustion emissions from activities as listed in Annex I to the Directive” and Annex VII on “Activity-specific Guidelines for Installations for the Production of Cement Clinker as listed in Annex I to the Directive” are applicable to the cement industry.

1. Member industries are cement, ceramics, chlorine, lime, glass, pulp and paper, non-ferrous metals and steel

2. Commission Decision of 29 January 2004 establishing guidelines for the monitoring and reporting of greenhouse gas emissions pursuant to Directive 2003/87/EC of the European Parliament and of the Council - OJ L 59/11 - 26 February 2004

The experience acquired by the European cement industry has shown that the monitoring and reporting principles defined in the Guidelines, are either technically not completely correct, or that their implementation would lead to unreasonably high costs. Based on the acquis of the cement industry and on established reporting methods, CEMBUREAU prepared a paper evaluating the Guidelines produced by the Commission and made some recommendations as to how they could be improved. The CEMBUREAU paper identifies the weak points of the Commission's Guidelines and comments on the technical and economic consequences of the methods prescribed by the Commission. It also outlines current monitoring plans used in the cement industry which should be incorporated into the Community reporting requirements.

Post-Kyoto Era

The European Commission also asked stakeholders, in September, to provide input into how medium to longer-term strategies for dealing with climate change might be shaped at EU level. CEMBUREAU submitted the views of the European Cement Industry to the Commission on the Post-Kyoto era. CEMBUREAU supports the EU in taking a leadership role in the reduction of CO₂ emissions. However, this must be done in a way that would combine three essential requirements: efficiency, equity and competitiveness. The key question is whether other countries which emit significant volumes of CO₂, in particular the USA and China will join the EU ETS. In this respect CEMBUREAU has sensibly pointed out that the EU will not be followed if it kills its industry in the process of trying to reduce GHG (Greenhouse Gas) emissions via emissions trading.

CEMBUREAU has in the meantime started to prepare and to work for the 2005-2006 Reviews of the ETS as foreseen under articles 21 and 30 of the ETD. Allowances allocation

principles may also have to be revised for the 2nd trading period 2008-2012 during the 2005-2006 Review.

Linking Directive

The "Linking Directive" [2004/101/EC]³ was published in the Official Journal on 13 November 2004 and Member States must transpose it into national law by 13 November 2005. The purpose of the so-called Linking Directive is to amend the Emissions Trading Directive so as 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.

Working hard with other energy intensive industries, CEMBUREAU obtained the one to one conversion which was the key objective as well as managed to avoid the cap envisaged by the European Commission in 2003 upon the conversion. There remains the risk that Member States might introduce such a limit at national level, a move which would jeopardise even further the already complicated instrument into CDM and JI.

HEALTH AND SAFETY

REACH

The proposed EU chemicals Regulation, REACH (Registration, Evaluation and Authorisation of CHemicals), was high on the agenda of the European Parliament and the Dutch Presidency in 2004. CEMBUREAU contributed to the debate together with the REACH Alliance. The REACH Alliance – under CEMBUREAU's lead - developed a set of amendments to be proposed in the course of the first reading.

CEMBUREAU also participated and contributed to different hearings:

- On behalf of the REACH Alliance at a seminar hosted on 4 March by the European Parliament's Christian

Democrat political group (European People's Party).

- In collaboration with CEMBUREAU, Dr Wolfgang Dienemann, Managing Director of HeidelbergCement Technology Center and Head of Research & Development, gave a presentation on "The Proposed Chemicals Legislation (REACH) and the Cement Industry" at a hearing on REACH organised by the Consultative Commission on Industrial Change (CCIC), which is made up of members of the European Economic and Social Committee (EESC). The main concerns of our industry in relation to REACH were outlined.

CEMBUREAU as a member of the REACH Alliance decided, in close co-operation with the European Commission, to participate in a **Complementary Business Impact Assessment Study**, together with UNICE (Union of Industrial and Employers' Confederations of Europe), CEFIC (European Chemical Industry Council) and other industry sectors. The study was launched in the summer of 2004 to look at the potential impacts of REACH throughout the supply chain if essential or very important substances, preparations, and raw materials were to be withdrawn from the market or were no longer available for economic reasons. Case studies were carried out with the aim to evaluate how the proposal would impact: 1) the accessibility and availability of raw materials, 2) the accessibility and availability of alternative raw materials and fuels, 3) production of substances with a wide range of uses that may be re-located outside Europe for commercial reasons related to REACH, and 4) the competitiveness of producers of (inorganic) materials for high volume downstream and end users.

The cement case study looks at the implications of including alternative

3. Directive 2004/101/EC of the European Parliament and of the Council of 27 October 2004 amending Dir 2003/87/EC establishing a scheme for greenhouse gas emission allowance trading within the Community, in respect of the Kyoto Protocol's project mechanisms - OJ L 338/18 - 13 November 2004

fuels and raw materials under the REACH procedure. CEMBUREAU is opposed to the inclusion of substances other than chemicals in particular waste which is already dealt with under international and European Community waste legislations and whose use in energy recovery and recycling contributes to Europe's sustainable development objectives.

Soluble Chromium VI

In view of the implementation at national level by the Member States on 17 January 2005 of the Directive 2003/53/EC⁴ on the restriction of the marketing and use of cement with more than 0.0002% water soluble chromate, CEMBUREAU visited the European Commission to explain the various difficulties the cement industry had to overcome before this Directive could be properly implemented. It could not be guaranteed that each and every manufacturing installation will be ready by that date for a variety of practical reasons, one of which being the non-availability of a test standard.

The European cement industry was heavily involved in the development of a Europe-wide test standard. To that end dedicated task forces under CEN TC51/WG15 and WG6 (European Committee for Standardisation) were engaged in defining and optimising the analytical test procedure and the evaluation of compliance to the requirement in the Directive. In record time this work resulted in a CEN pre-standard prEN 196-10 that was accepted for Technical Enquiry by CEN TC51 in October. In addition, this document was referred to by the European Commission in a Communication in its Official Journal as the method to be applied by Member States when implementing the Directive.

Comprehensive Health Risk Study

In order to define a well-balanced design for a comprehensive study on the potential Health Risks of Cement Dust Exposure an Expert Workshop

was organised including specialists in toxicology, epidemiology, occupational hygiene and diseases of the respiratory tract as well as various experts from the cement industry. An in-depth exchange of views and debate resulted in a fruitful outcome. It was concluded that basically three approaches are needed: one toxicological, one epidemiological and one clinical. In addition, strict protocols for the determination of dust exposure levels and the monitoring of the respiratory function must be established before any substantial research can start. These conclusions will be the basis for concrete activities to be defined by a dedicated CEMBUREAU Task Force in 2005.

USE OF ALTERNATIVE RAW MATERIALS AND FUELS

Action Plan for the Use of Waste

Three reports related to the Use of Waste in the European cement industry were finalised by CEMBUREAU in 2004 as part of a global Action Plan. The first report describes the **Waste Streams** used in the cement industry. The second gives a picture of **Stack Emissions** (excluding CO₂ emissions) and the last report, which was peer-reviewed, is devoted to a literature survey on **Leaching from Concrete**.

In November 2004, CEMBUREAU held a **stakeholders' consultation** with representatives from environmentalist NGOs, trade unions and academics for the purpose of discussing the contents and identifying the limitations of these reports. This stakeholders' consultation, to be followed by other such events in the future, has provided an interesting opportunity to dialogue and to identify points where the information has to be expanded and improved. At this stage, the reports are not intended for other forms of external communication.

Sustainable Use of Natural Resources

CEMBUREAU participated in the discussions between the European Commission and interested parties, especially via the NEEIP (Non-Energy Extractive Industries Panel), on the development of the Thematic Strategy on Sustainable Use of Natural Resources. CEMBUREAU contributed to the debate by highlighting the savings made through the use of alternative raw materials and fuels in both cement and clinker production.

Solid Recovered Fuels

CEMBUREAU closely followed and participated as an observer in the development of different technical specifications by CEN TC 343. Two technical specifications are of particular interest to CEMBUREAU Members: the technical specification related to the determination of the biomass fraction of solid recovered fuels (in particular in view of the CO₂ monitoring and reporting) and the technical specification related to the classification of SRF (Solid Recovered Fuels).

ENVIRONMENTAL ISSUES

Revision of the Cement BREF

Despite the fact that the revision process had not started yet, CEMBUREAU continued to prepare the revision of the Cement and Lime BREF⁵. In December, the European Commission's Information Exchange Forum (IEF) discussed the BREF revision process and confirmed that the first BREF to be revised is the Cement and Lime BREF. In relation to the revision process, the forum had an exchange of views on the way in which to proceed. Every review should **focus on the new information** which has become available since the finalisation of the earlier version. It will therefore be necessary to have a clear and universal input from stakeholders, ahead of the review, as to the extent of technical progress which has taken place since the BATs (Best Available

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) - OJ L178/24 - 17 July 2003

5. Reference document on Best Available Techniques

Techniques) were established in order to define the expected scope of the review.

The Cement and Lime BREF review is expected to start with a TWG (Technical Working Group) kick-off meeting in early 2006, which means that the relevant information will be collected during the year 2005.

CEMBUREAU also followed the development of the **Waste Incineration BREF** and the **Waste Treatment BREF**. The Waste Incineration BREF applies to dedicated waste incineration installations. It does not cover situations where waste is thermally treated, for example co-incineration processes used in the cement industry. However, the importance of a level playing field between incineration and co-incineration industries was stressed. Issues of relevance for the cement industry that were discussed include nitrogen oxide abatement, dioxins/furans abatement, combustion temperature and energy efficiency, and Flue Gas Treatment (FGT).

POPs

CEMBUREAU participated in the UN's Third Expert Group meeting on POPs (Persistent Organic Pollutants) in Japan in October 2004. As "Cement kilns firing Hazardous Waste" have been identified as a potential source category for the release of so-called Unintentionally formed Persistent Organic Pollutants (UPOPs), CEMBUREAU has, in close co-operation with the Cement Sustainability Initiative (CSI), been actively involved in the Expert Group mandated to develop Best Available Techniques (BAT) guidelines and Best Environmental Practices (BEP) guidance. These guidelines will be used to achieve the objectives of the UN's Stockholm Convention on POPs, which the European Union ratified on 16 November 2004.

The report from the Expert Group on the possible UPOPs source from "Cement kilns firing Hazardous

Waste" (and a series of other source categories) was finalised and has been sent to the UN Conference of Parties (COP-1) for consideration at a meeting in May 2005.

Mercury

In May 2004, CEMBUREAU participated in the stakeholders' consultation on the development of an EU Mercury Strategy and indicated to the European Commission that the latter's estimate of mercury emissions from the cement industry, as presented in the consultation document, was far too high. CEMBUREAU has calculated that mercury emissions in 2000 in the present-day EU-25 amounted to 7.8 tonnes per year.

Waste from Extractive Industries

In 2004, the European Commission's proposal for a Directive on the Management of Waste from the extractive industries (the so-called "Mining Waste Directive") [COM(2003) 319 final, 2 June 2003]⁶ went through its first reading. Echoing CEMBUREAU and other non-energy extractive industries working together in the NEEIP, topsoil and overburden – the cement industry's prime concerns – were excluded from the scope of the Directive as well as offshore extractive waste and re-injected pumped groundwater. Various possibilities of exemption have also been introduced giving authorities in the Member States more flexibility. Non-hazardous non-inert waste may also be exempt from permit requirements if it has been disposed of in a suitable waste facility.

Political agreement was reached in first reading on 14 October 2004 and the Common Position should be adopted in April 2005 leading to a second reading in the 2nd half of 2005.

STANDARDISATION

In 2004, several standards for special cements or cements with special properties were finalised by CEN TC51 (Cement & Building Lime) and

presented for formal vote. The only exception is cement with a high resistance against sulphatic attack (SRC–Sulphate Resisting Cement) for which a common approach, either performance or description-based, turned out not to be feasible as yet. Nevertheless, in order to fulfil the mandate given by the European Commission to CEN a new attempt was started, based on a CEMBUREAU survey of SRC across Europe. The objective of this approach is to find a common set of selected SRC for which a harmonised standard can be defined and thereby replace the corresponding national standards. This work will be undertaken by a dedicated Task Force under CEN TC51/WG6.

Upon the request of some CEN members, CEN TC51 also initiated the standardisation process of the so-called Super Sulphated Cement (basically a sulphate activated blastfurnace slag which can be used for special concrete applications).

At the end of the year, the European Commission issued a **new draft mandate** with the view to create a 6th type of common cement to allow the inclusion of "innovative products".

CEN TC104 (Concrete Standard) was involved in the standardisation of additions in concrete, more specific the revision of EN 450 (fly ash) and a new standard for ground blastfurnace slag. The regulatory process concerning the so-called Regulated Substances in Construction Products and Materials and Products in contact with Drinking Water was closely monitored throughout the year.

SHIPMENT OF WASTE

The political debate on the Shipment of Waste Regulation continued in 2004. In March the European Commission released its opinion on the EP position in first reading and a political agreement was reached in the Council in October. The debate on this issue will continue. The second reading is expected to take place in the 2nd half of 2005.

6. COM (2003) 319 final, 2 June 2003 - Proposal for a Directive of the European Parliament and of the Council on the management of waste from the extractive industries

MAIN ISSUES UNDER STANDING COMMITTEE 2 “PRODUCTS & MARKETING”

ECOCONCRETE

The EcoConcrete LCA tool was presented at the ECO-SERVE Workshop "Blending" in Brussels on 25 May 2004. There was a positive reaction from the participants and ten research institutes and companies throughout Europe, partners in the ECO-SERVE project, use the tool under the licence attributed to ECO-SERVE to carry out their respective work. A communication kit showing the benefits of the EcoConcrete tool is also being developed.

The ECO-SERVE NETWORK "European Construction in Service of Society" was launched in December 2002 under the EU Commission Fifth Framework Programme GROWTH.

BIBM ("Bureau International du Béton Manufacturé"), CEMBUREAU, EFCA ("European Federation of Concrete Admixtures"), EISA (now EUROFER—"European Confederation of Iron and Steel Industries") and ERMCO ("European Ready Mixed Concrete Association") participate in the EcoConcrete Group (new name for the former Joint Project Group) and ECO-SERVE. They will organise a symposium in 2006.

EUROPEAN CONCRETE PLATFORM

On 5 February 2004, BIBM, CEMBUREAU, EFCA and ERMCO decided the separate development of a distinct entity called "European Concrete Platform" concentrating on a broader range of issues of relevance to the concrete industry as such.

The mission of the Concrete Platform will be to think together on key European issues of common interest for the European cement/concrete industry in activities other than life cycle thinking.

EPD FORMAT FOR CEMENTS

In 2004, CEMBUREAU Project Group 2.1 "Backing Group for LCA of Concrete", and Project Group 1.5 "European Cement Standards" produced together a European Environmental Product Declaration (EPD) Format for Cements, which was approved by the Board on 12 December 2004.

Within the framework of the INTEND (see definition in next paragraph) Project under the EU-funded LIFE (Financial Instrument for the Environment) environment programme 2003, Buzzi Unicem, the "partner" to test the EPD system for cement and concrete products, produced an EPD for cements certified by a third party in October 2004.

The INTEND Project under the EU-funded LIFE environment programme 2003 is aimed at defining an EPD system according to ISO 14025, that can be applied at international level and test the defined system for numerous products in two pilot countries i.e. Italy and Sweden. Cement and concrete are tested in Italy (Buzzi Unicem) and not in Sweden.

CEMBUREAU and Buzzi Unicem are co-operating to reconcile the two EPDs for cements in order to produce, under the INTEND Project, a common European EPD system for cements.

FIRE SAFETY WITH CONCRETE

Project Group 2.2, which includes the participation of BIBM and ERMCO, achieved the following major developments in 2004:

Fire Safety in Tunnels

Project Group 2.2 released a Position Sheet on fire safety in tunnels "Improving fire safety in tunnels: The concrete pavement solution" enhancing positive arguments in favour of concrete pavements in tunnels derived from the two reports on asphalt combustion laboratory tests and the analysis of gas emissions drafted by Prof. Albert Noumouwe, Cergy Pontoise University, France. The Position Sheet was disseminated, in particular at the 9th International Symposium on Concrete Roads in Istanbul on 4-7 April 2004. The brochure is available on Cindi (CEMBUREAU Extranet) under "Concrete Issues" in English, French, German, Italian and Turkish to launch the discussion on fire safety in tunnels with authorities, decision-makers, specifiers, customers, etc.

Fire Safety Engineering (FSE)

Fire Safety Engineering is becoming a key issue for the competitiveness of concrete buildings. Therefore, Project Group 2.2 commissioned the first part of the N.P. Høj project on "Performance based design of concrete structures" i.e. a comparative study of the behaviour of a precast concrete structure and a steel equivalent using FSE. The second part of the project might cover the comparison of a ready-mixed concrete structure and an equivalent steel one.

END USES OF CEMENT

The mission of Project Group 2.3 Ad Hoc Group on End Uses of Cement is to develop a feasible and useful comprehensive European Format on the End Uses of Cement for marketing purposes at national level (benchmarking, finding niches and/or new markets, identifying threats and opportunities, forecasting, etc.).

In 2004, Project Group 2.3 Ad Hoc Group developed the basic comprehensive Format including the market segmentation and elements with logical aggregations, the definition of Marketing Promotion Units (MPUs) with logical links and aggregations, the selection of relevant parameters, etc.

In order to assess the feasibility and usefulness of the comprehensive Format, the Ad Hoc Group is testing a Pilot Format in six countries as a preliminary and simplified application/use. Results will be available in mid 2005.

Project Group 2.3 Ad Hoc Group also identified the requirements (data entry and reporting) for a comprehensive final software to use the Format.

Recommendations for the next steps, i.e. development of a user-friendly software tool to use the Format including external assistance and a dissemination plan for the End Uses of Cement Format and the promotion of its use will be available in 2005.

EUROCODES

Project Group 2.5 with the participation of BIM and ERMCO finalised in 2004 the Concrete Executive Summary to the Gulvanessian study, an independent technical expert review of partial factors for actions and load combinations in EN 1990 Basis of Structural Design. All those documents are gathered in a Package "Safety of structures (Structural Eurocode EN 1990)" which is available on the websites of the three Associations and on Cindi under "Concrete Issues". Technical papers were issued in the technical press in Belgium, Finland, The Netherlands and UK and actions were taken at national level. The aim is to advocate and encourage the adoption by national authorities of equations for load combination (6.10 a & b) for the

design of concrete structures during the establishment of National Annexes and National Determined Parameters (NDPs) to Eurocode 0 that will remove the bias in disfavour of concrete structures and ensure that the concrete economy in design is protected. This documentation is available to CEMBUREAU Members for the establishment of National Annexes and National Determined Parameters (NDPs) of Eurocode 0 (EN 1990) Basis of Structural Design.

Prof. Narayanan, Chairman of CEN TC 250/SC 2, recommended to develop at European level common technical and educational support materials (design guidance, software tools, etc.).

The CERIB ("Centre d'Études et de Recherches de l'Industrie du Béton") paper on **Safety load combination – Comments to Brozzetti, Sedlacek Report** was finalised in 2004 and made available on the BIM, CEMBUREAU and ERMCO websites.

ENERGY PERFORMANCE OF CONCRETE BUILDINGS

In 2004, Project Group 2.7, in which BIM and ERMCO participated, focused on the implementation of Energy Performance of Buildings Directive (EPBD)¹ to be enforced by Member States by 4 January 2006. The EPBD represents an opportunity for the concrete industry to promote the benefits of concrete regarding energy efficiency in buildings.

Energy Performance of Buildings Directive (EPBD) and CEN Work on Standardisation

The EU Commission gave a mandate to CEN (European Committee for Standardisation) to develop and adopt thirty-one European standards for calculating the energy performance of buildings and methods of assessment to certify buildings (energy performance certificate).

Project Group 2.7 appointed Prof. G. Jóhannesson from KTH, Royal Institute of Technology, Stockholm with the mission to follow up CEN standardisation work on the EPBD and have, as building technology expert, an active participation within CEN TC 89 to defend the interests of the cement/concrete industry.

As thermal mass is the key issue for concrete buildings, Standing Committee 2 Members were called to follow up carefully the EPBD standardisation work by CEN through their national CEN mirror groups in order to ensure that the advantages for concrete buildings are well taken into account.

Report on "Methodology Survey"

Project Group 2.7 Ad Hoc Group on "Methodology Survey" (including Germany, Sweden, BIM and ERMCO) started its work in January 2004 and developed a questionnaire aimed at carrying out a survey in CEMBUREAU countries which critically evaluates current practice in relation to calculation methods on energy performance in buildings.

The conclusions of the state-of-the-art report on methodology survey in thirteen countries showed that thermal capacity/mass is the key issue, which should be addressed in the national regulations/standards under development, in order to favour concrete buildings. Cooling energy and thermal comfort are also favourable to concrete buildings.

Tests on Calculation Models

Project Group 2.7 Ad Hoc Group on "Methodology Survey" also carried out tests on "real" buildings in Sweden (Stockholm, Malmö) and Germany (Würzburg) to establish whether existing calculation tools for energy performance in buildings reflect the benefits of concrete buildings and assess the actual energy performance of concrete.

1. Directive 2002/91/EC of the European Parliament and of the Council of 16 December 2002 on energy performance of buildings - OJ L31/65 - 4 January 2003

The test results are favourable to concrete buildings and show a 3% to 5% advantage in energy consumption for concrete buildings.

Project Group 2.7 runs additional tests for various building systems (dwellings and office buildings), which are representative for Europe and under nine different climate types in Europe from the Arctic Circle to Central Europe plus Mediterranean coasts.

The results showed up to 25% advantage in energy consumption for cooling in concrete office buildings. The savings for heating are between 2% and 9% for residential concrete buildings and larger for office concrete buildings.

Deliverables will be completed by the end of 2005. The aim is to produce communication materials showing the positive energy behaviour of concrete buildings in Europe and recommend a methodology taking thermal capacity into account, which is the key issue to show the benefits of concrete buildings.

Energy Performance of Concrete Buildings and CO₂ Emissions

The Board recommended that CEMBUREAU should join efforts with other associations like EuroACE (European Alliance of Companies for Energy Efficiency in Buildings) and the European Construction Forum (ECF)

to broaden the EPBD (2002/91/CE) application field to buildings with a surface lower than the current threshold of 1 000 m² in order to increase gains in CO₂ savings. This represents a tremendous opportunity for both meeting the Kyoto commitments and for promoting the advantages of the energy performance and thermal comfort of concrete buildings. Pro-active actions taken by the cement/concrete industry would be beneficial to both increase the use of concrete in buildings and reduce the pressure on cement industry production on the climate change front.

NEW CEMBUREAU OPERATIONAL STRUCTURE

For many years the interests of the cement industry were well looked after by two CEMBUREAU Standing Committees, Standing Committee 1 "Industry" and Standing Committee 2 "Products and Marketing" and the numerous "Project Groups" that have served under those Committees.

The CEMBUREAU Board recognises the quality of this work and expresses gratitude to all those who have served at CEMBUREAU over the years.

With the growing number of issues to be treated at EU level and their growing complexity, it was felt that a reorganisation was needed, on the one hand, to simplify, whenever possible, the functioning of CEMBUREAU and, on the other hand, to bridge the gap between the decision level – the Board – and the working level. A change was needed but, at the same time, there was a concern to keep up the expertise available in the CEMBUREAU network and, if possible, to improve CEMBUREAU's influence in Brussels and the follow-up of Board decisions at national level.

At its 43rd meeting in Dublin on 14 June 2004, the CEMBUREAU Board unanimously approved in outline a plan for the reorganisation of CEMBUREAU's structure. A more detailed proposal was approved on 22 September and, further to another decision of the Board on 12 December, a new structure was to be put in place by 1 January 2005.

A simplification was brought by **merging in one meeting the meetings of the Board and the Liaison Committee**. Starting in September 2004, one single meeting was held even though legally the identity of the Liaison Committee is maintained and a meeting of that body can still be convened if needed.

The other objective – bringing closer decision making and working levels – should be achieved by the setting up of a "**Steering Committee**".

A Steering Committee has been established. It is composed of six Members of the Board and the Co-Chairmen of the five different Working Groups elected by the Board. The President of the Board, the President of the Liaison Committee, the Chairman of the European Concrete Platform (provided that he or she is a representative of the cement industry), the Chief Executive and the Technical Director of CEMBUREAU are ex-officio Members together with the Vice-President of the Board who chairs the Steering Committee.

The Steering Committee reports to the Board and the Liaison Committee.

As part of its mission, the Steering Committee shall:

- coordinate the activities of the Working Groups and establish priorities;
- seek consensus on key issues emerging from the Working Groups and/or submitted by the Management;
- develop Position Papers and other key documents to be submitted to the Board and the Liaison Committee and prepare recommendations in this respect;
- update on a regular basis, upon the recommendation of the Management, the CEMBUREAU priority list of issues for submission to the Board and the Liaison Committee;

- identify items for discussion and items for decision prior to Board and Liaison Committee Meetings;
- implement the Board and the Liaison Committee decisions;
- act as a liaison between the Working Groups and the Board and the Liaison Committee to help the latter in respect of key CEMBUREAU issues and thus facilitate the decision making process.

Five permanent Working Groups were established with the following responsibilities:

- Working Group 1 - Climate Change and CO₂ Reduction
- Working Group 2 - Energy and Materials Resources
- Working Group 3 - State of the Art in Cement Manufacturing (including environmental performance)
- Working Group 4 - Health and Safety
- Working Group 5 - Markets and Products

An election took place in the last quarter of 2004 to appoint two Co-Chairmen to each Working Group. They were selected by the Board on the basis of competences and willingness to serve.

Why two Co-Chairmen?

The idea was to obtain the broadest possible range of competences and to seek inasmuch as possible to achieve a geographical balance.

The Working Groups received the power and the mission to set up Task Forces whenever needed with a clear remit. Those Task Forces will be established on an ad-hoc basis to be wound up when their mission has been fulfilled.

The General features of the reorganisation can be summarised as follows:

1. All the bodies below the Board – Liaison Committee are **open to all CEMBUREAU Members**, whether Full or Associate, subject only to qualitative criteria (area of competence and willingness to serve).
2. The Working Groups and their Task Forces **do cover all the issues on the list approved by the CEMBUREAU Board**.
3. **Working Groups are permanent**, Task Forces are not. Both are to be manned by experts.
4. The **Task Forces** to be set up on an ad hoc basis by the Working Groups will essentially perform a **fact finding** mission whereas **Working Groups** will **develop arguments** in respect of the issues they are dealing with. They will also **identify points of convergence and points of divergence**.

5. The **Steering Committee** will draft or propose the **strategy**, based on **consensus**, and make proposals to the Board in that respect while the **CEMBUREAU Management** and **Public Affairs** will look after **tactics and implementation**.

As part of the re-organisation a need was felt to develop a network of specialists from national associations and from companies under the leadership of the CEMBUREAU Chief Executive to assist the latter in his advocacy with the European Union.

The Board also felt it important to reorganise the role played at national level by the Members be they the respective national associations or, where there is only one producer, this national producer.

A **public affairs** responsibility was therefore introduced in the organisational chart of CEMBUREAU with two key missions:

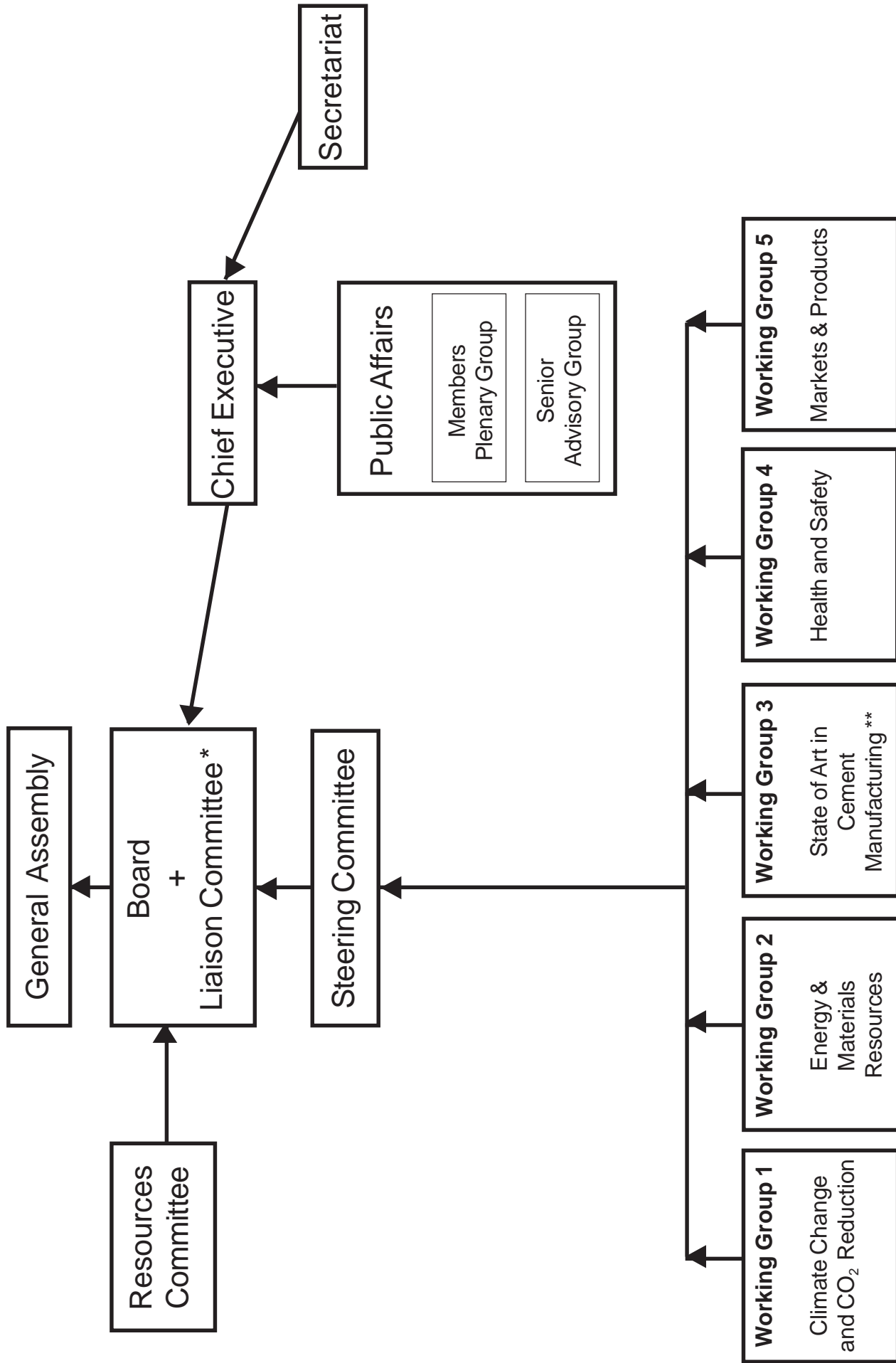
1. to advise the CEMBUREAU Chief Executive in respect of public affairs matters especially on tactics to be adopted;
2. to ensure that CEMBUREAU decisions are correctly and efficiently implemented at national level in co-operation with CEMBUREAU's own actions at European level.

In order to achieve these goals, that CEMBUREAU Public Affairs will be entrusted to two bodies:

1. A **Senior Advisory Group (SAG)** composed of EU affairs professionals from companies and associations.
2. A **Members Plenary Group (MPG)** where all CEMBUREAU Members must be represented at General Director level, meeting at least twice a year.

The SAG was activated before the end of 2004 in relation to advocacy required in relation to a new European Commission proposal for a Directive on Energy Efficiency and Energy Services. Although energy intensive industries such as the cement industry are clearly excluded from the scope of the proposed Directive, it is essential to ensure that no extra cost to be incurred as a result of this new legislation be passed on to the cement industry. The actions taken at short notice by the SAG are very encouraging and the new body has already demonstrated its worth.

The **Resources Committee** continues as before to scrutinise CEMBUREAU's budgetary procedures and accounts and to advise the Management in financial matters.



* of cement industries in the EU

** including environmental performance

CEMBUREAU PUBLIC WEBSITE & ITS EXTRANET *Cindi*

A new CEMBUREAU public website together with its extranet *Cindi* (CEMBUREAU International Network for Documentation and Information) was launched on 15 June 2004 on the occasion of the General Assembly in Dublin.

A complete revamping of the public website layout and access to information gives websurfers a more user-friendly, easier and direct access to clustered information.

The new extranet *Cindi* was designed to increase user-friendliness for all its users with four major improvements. At the same time, a complete decentralisation of web management within the Secretariat was made possible.

Cindi offers the following four new features:

- a search engine;
- the Members Directory which is now updated on a daily basis from the CEMBUREAU internal database "Contacts" allowing users to search for information through several entries;

- the Forum application and its alert system, for all CEMBUREAU operating bodies, which has proven a successful communication tool in short-notice actions;
- the possibility to change a password once logged in the system as many times as needed.

Last but not least, a new and more efficient monitoring system crawls every single day thousands of visible and invisible web pages virtually tracking any information relevant to the cement industry.

THE ENERGY MARKET 2004 - STEAM COAL AND PETCOKE

The energy market entered a new era at the end of 2003 with trends indicating much higher prices on average for combustibles during the coming decade than those seen during the preceding twenty - thirty years.

The steam coal market swung between lows of US\$20 and highs of US\$35 FOB (Free On Board) South Africa between 1985 and 2003. However, at the end of 2003 prices were on the rise, and in the spring of 2004 prices reached US\$65 FOB, approximately the double of previous prices.

The market has since seen a drop in prices to US\$45-50 FOB at the end of 2004 due to increased coal production brought on-stream, a trend likely to continue in 2005. However, it is likely that consumers will have to accept significantly higher prices for coal, gas and oil-related products during the next ten years than ever seen before.

Prices for high sulphur petcoke, a very important combustible for the world cement industry had increased in tandem with coal prices to US\$30 FOB US Gulf by the end of 2004. These

were among the highest prices seen in the last twenty-five years. With coal prices set to remain high, prices for petcoke will follow, and buyers will face rising petcoke prices in the coming years in the range of US\$ 25-40 FOB US Gulf.

This will mean significantly higher input costs for energy for the cement industry in coming years. The only way to counter this trend will be to increase the use of alternative fuels.

CEM • PROSPECTS

The CEMBUREAU Energy Market Prospects (*CEM • PROSPECTS*) Conference 2004 was held in Lille in the first week of October and it attracted around one hundred and thirty participants. Cement companies were well represented alongside energy traders from around the globe, and in particular the USA.

Discussions concentrated on the analysis of the volatile markets for steam coal and petcoke in 2004-2005 followed by presentations on the freight market, the Chinese market, alternative fuels and a presentation entitled Electricity Prices & Emissions Trading, all of which attendees found worthy of note.

CEMBUREAU Project Group 1.7 (which took the name of WG2 - TF Solid Fuels from 1 January 2005) met immediately after the Conference closed. A workshop on emissions trading was organised and followed by a fruitful discussion.

It was agreed that the 2005 Conference would take place during the first week of October in Paris where the same kind of issues as in previous years will be discussed.

CEMBUREAU

ORGANISATIONAL

STRUCTURE

AS OF

30 APRIL 2005

CEMBUREAU ORGANISATIONAL STRUCTURE

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Chief Executive

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Members Ex Officio

LIAISON COMMITTEE OF THE CEMENT INDUSTRIES IN THE EU

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Members Ex Officio

J.-M. Chandelle Chief Executive
 C. Loréa Technical Director

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France	B. Küng	Holcim (France-Benelux)
Germany	G. Hirth	SCHWENK Zement KG
Italy	G. Marazzi	Industria Cement G. Rossi SpA
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B. Küng

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B. Ghins

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President of the Liaison Committee

J.-P. Jacobs

Chairman of the European Concrete Platform

J.-M. Chandelle

Chief Executive

C. Loréa

Technical Director

Advisers until 1 October 2005

L. Hjorth

F. Winberg

WORKING GROUPS AND TASK FORCES

WORKING GROUP 1 “Climate Change and CO₂ Reduction”

Co-Chairmen	J.-P. Taillardat - B. Ghins
Task Forces	<ul style="list-style-type: none"> - CO₂ Monitoring, Reporting & Inventory - Allocation Methods & Benchmarks - ETS Review & Post-Kyoto - CDM / JI - Accounting Treatment of CO₂ Emission Rights

WORKING GROUP 2 “Energy and Materials Resources”

Co-Chairmen	D. Lawrence - W. van Loo
Task Forces	<ul style="list-style-type: none"> - Use of Waste - Availability / Use of natural resources * - Energy *

WORKING GROUP 3 “State of the Art in Cement Manufacturing”- (including environmental performance)

Co-Chairmen	G. Cinti - M. Schneider
Task Forces	<ul style="list-style-type: none"> - Revision of the BREF - Emissions Inventory with the exclusion of CO₂ in the framework of Clean Air For Europe (CAFE) / European Pollutant Emission Register (EPER) / Pollutant Release & Transfer Register (PRTR) / National Emissions Ceilings (NEC) / ...; - CAFE with a particular focus on particulate matter (PM)

WORKING GROUP 4 “Health and Safety”

Co-Chairmen	A. Capmas - S. Gardi
Task Forces	<ul style="list-style-type: none"> - REACH * - Comprehensive Health Risk Study - Chromates in cement - Crystalline Silica

WORKING GROUP 5 “Markets and Products”

Co-Chairmen	C. Bannon - J.C. López Agüí
Task Forces	<ul style="list-style-type: none"> - Environmental Product Declarations (EPDs) for Cements - Fire Safety with Concrete - End Uses of Cement - Energy Performance of Concrete Buildings - Eurocodes - Environmental Performance of Products - Sustainability

* advocacy at EU level via the SAG

CEMBUREAU MANAGEMENT

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Technical Director	C. Loréa
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