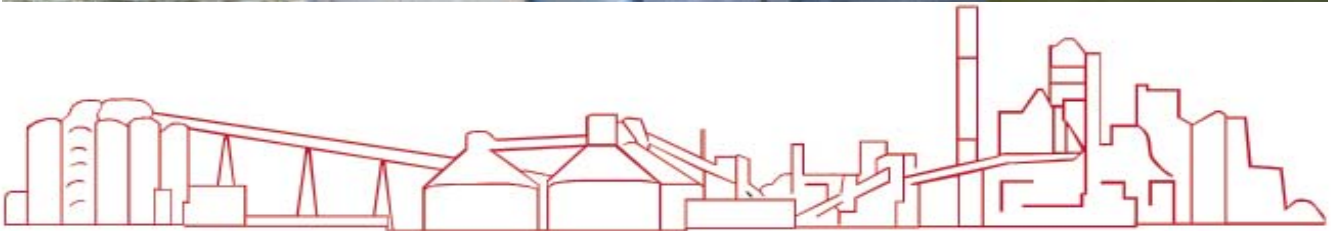


# ACTIVITY REPORT 2007



**CEMBUREAU** - The European Cement Association based in Brussels is the representative organisation of the cement industry in Europe. Currently, its Full Members are the national cement industry associations and cement companies of the European Union (with the exception of Cyprus, Lithuania, Malta and Slovakia) plus Norway, Switzerland and Turkey. Croatia is an Associate Member 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 generic cement and concrete products.



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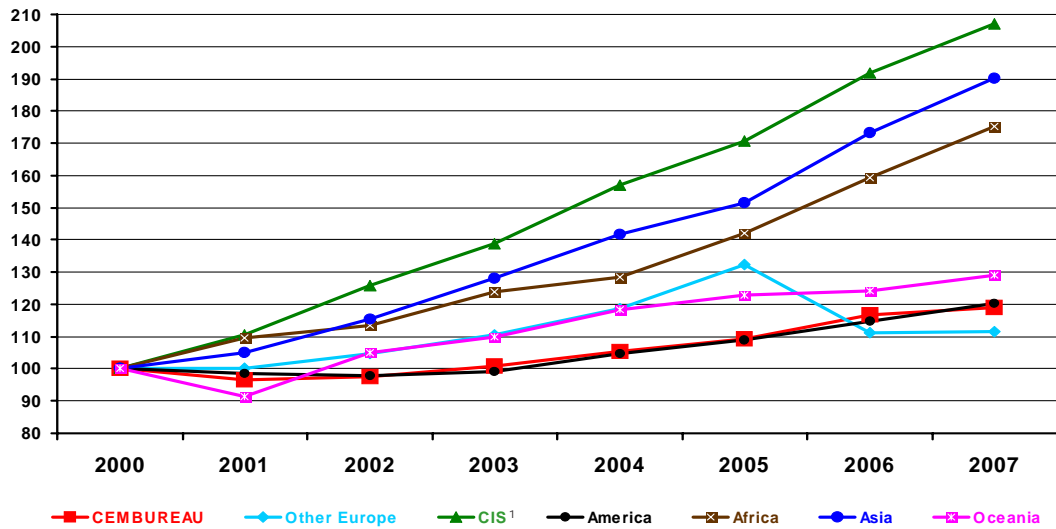
This Activity Report is produced in-house to meet the requirements of Paragraph 6 of the CEMBUREAU Articles.

# THE ECONOMY

(Source for all charts: CEMBUREAU)

## WORLD CEMENT PRODUCTION BY REGION - EVOLUTION 2000-2007

Index 2000 = 100



## THE WORLD

### World Production and World Trends

The world-wide cement boom continued in 2007, with cement production increasing by an estimated 8%. Production figures rose to 2.77 billion tonnes, following the 12% increase of 2006.

Once again, Asia was the most buoyant region, seeing a 10% increase in production, with Chinese production rising by 11% (to 1.35 Bt). India was the second largest producer, producing 172 million tonnes, with a growth of approximately 6.6%.

Europe, as a whole (excluding the European Commonwealth of Independent States – CIS - countries), accounted for nearly 12.1% of

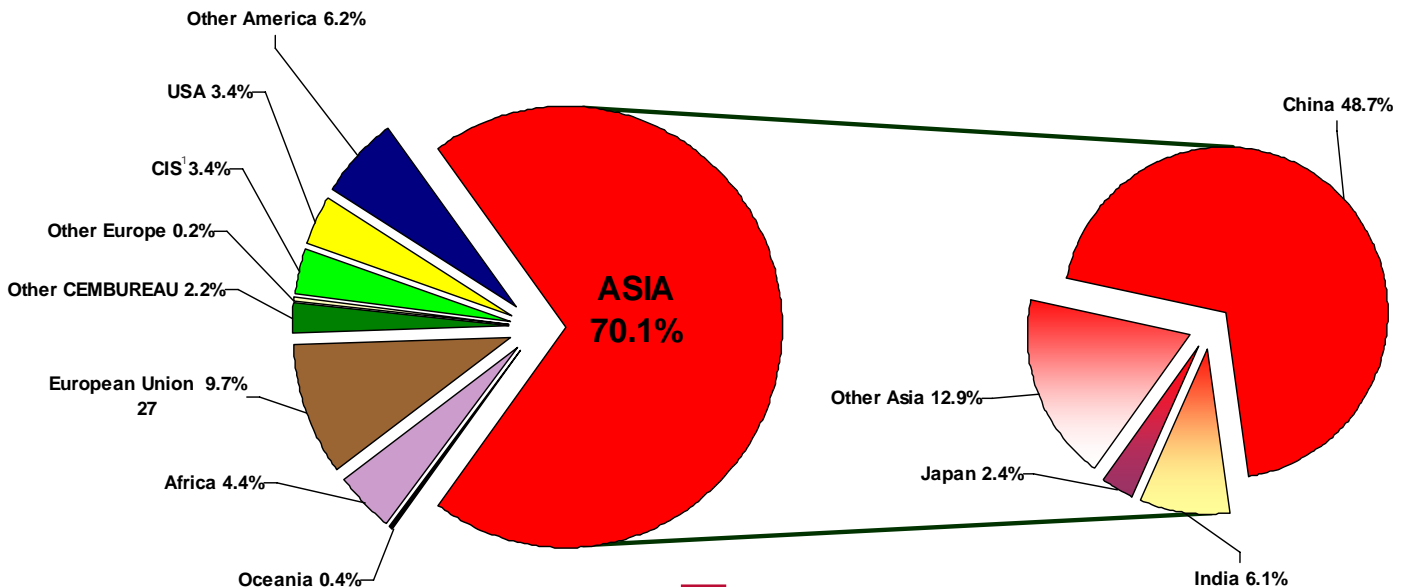
world production in 2007. Production increased by only 1.8% compared with the previous year.

The 27 European Union Member States now account for nearly 10% of world production.

Cement production in America was as dynamic in 2007 as in 2006, registering an increase of 4.9%, despite the fall in USA production. USA consumption decreased by more than 8% in 2007, due mainly to the residential sector which has been declining for months. The USA also saw an important decrease in cement and clinker imports, which amounted to more than 36%. With no expected recovery in the residential sector before late 2009, within the context of weakened construction, consumption will once again be affected.

## 2007 WORLD CEMENT PRODUCTION BY REGION

2.77 billion tonnes






¹ CIS: Commonwealth of Independent States





## EUROPE

In 2007, CEMBUREAU cement production increased by only 2%, from 317Mt to 323Mt. A very strong increase was registered in seven countries, with a growth of more than 10%. Four countries registered a growth of between 5 and 10%, seven countries

stagnated, whilst three showed a modest growth of below 3% and six decreased by between 2.5 and 8%. The five biggest countries continued to represent 65% of total production. In the 27 Member States of the European Union, production reached an estimated 270Mt, with a growth of less than 1.3%. Cement consumption in the CEMBUREAU countries levelled off.

### Country by country analysis (2007)

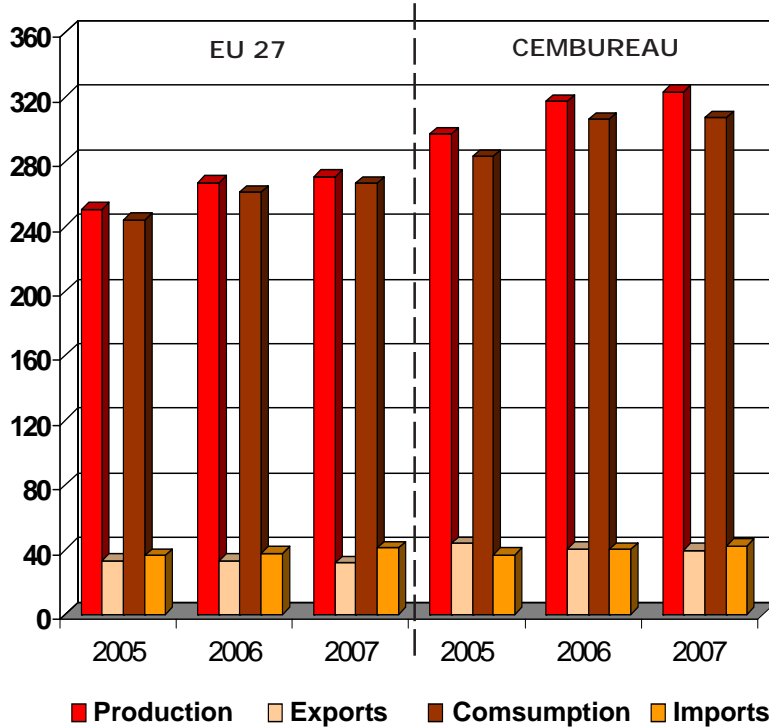
Country Cement consumption	
<p><b>Austria</b></p>  <p>2.8%</p>	<p><b>Sectors</b></p> <p>Increase in cement consumption sustained by growing levels of activity in all the main sectors: residential and non-residential construction (+3.9% and +8.6%, respectively), renovation (+1.4%), industrial construction and civil engineering (+22.1%), with the last one, in particular, profiting from increased and already budgeted national resources (about 11 billion € within the next four years) for investment in motorways and railways. In total, construction output achieved a value of 14.4 billion € (6.7 % growth). Real investments also boomed (2.9% average increase in 2005-2007).</p> <p><b>Prospects &amp; external factors</b></p> <p>Expected slowdown in investments in the construction industry over the 2008-2009 period resulting in a lower growth of the associated value added (2.5% compared to 5% in 2007) and moderate increase in cement consumption (about 2 to 3%). Among the sectors, both residential and non-residential construction activities are expected to slowdown while civil engineering will continue to grow at significant levels following public infrastructural plans. Building and civil engineering will steadily increase, but the dynamism will fall slightly in industrial and non-residential construction.</p>
<p><b>Belgium</b></p>  <p>1.4%</p>	<p><b>Sectors</b></p> <p>Buoyant growth in construction investment (+2.1) pushed by non-residential buildings destined mainly for industrial activity. Slower growth in residential building investment (+1.5%). Average 8% decrease in civil engineering investment (-7% in new and -10% in renovation &amp; modernisation activities), with a major decline in infrastructure (-14%) following the electoral period.</p> <p><b>Prospects &amp; external factors</b></p> <p>Continued growth in construction investment expected in 2008 (about 2%).</p>
<p><b>Bulgaria</b></p>  <p>16.5%</p>	<p><b>Sectors</b></p> <p>Continued growth in both cement production and consumption due to increases in investment in the following sectors: residential, industrial, tourism and roads. Growing importance of EU funded programmes.</p> <p><b>Prospects &amp; external factors</b></p> <p>Additional growth in cement consumption expected in 2008 (+15%). A 5% annual increase between 2008-2014 is expected due solely to the construction of the new Belene nuclear power plant. Other major projects also planned for 2008 (a new 670 MW lignite fired thermal power plant) and 2009 (two gas and one oil pipeline).</p> <p>2012 consumption per capita will attain approximately 970kg (similar to the figure for EU Mediterranean States).</p> <p>Potentially serious negative impact: European Commission decision (end 2007) to reduce CO<sub>2</sub> emissions allowances by 34.7% in the National Allocation Plan 2008-2012.</p>

Country Cement consumption		
<p><b>Croatia</b></p>  <p>11%</p>	<p><b>Sectors</b></p> <p><b>Prospects &amp; external factors</b></p>	<p>Buoyant level of activity both in the civil engineering and building sectors. Motorway construction programme progressing.</p> <p>Continued increase in investment in small and medium enterprises and industrial buildings. Launch of government projects to stimulate homogeneous regional development. Sharp increase in internal and external debt over the last ten years.</p>
<p><b>Czech Republic</b></p>  <p>7%</p>	<p><b>Sectors</b></p>	<p>6.7% growth in total construction output with only a slight decrease (0.9%) in the value of permitted dwellings. Continued growth in construction work abroad.</p> <p>3.1% average volume increase in new construction, reconstruction and modernisation activities as a result of sustained growth in civil engineering (15.9%) mainly due to the completion of motorway sections, and a decrease both in building construction (-2.6%) and renovation &amp; modernisation activities (-5.8%).</p> <p>Strong growth registered in terms of volumes in the residential sector thanks to expanding mortgage and building savings markets (+28% and +40% respectively) with a peak in the number of completed dwellings (+38%) since 1991.</p>
<p><b>Denmark</b></p>  <p>3.4%</p>	<p><b>Sectors</b></p> <p><b>Prospects &amp; external factors</b></p>	<p>17% decrease in the volume of new building construction activities, both residential (-21.8%) and non-residential (-13.8%). Estimated 2.3% increase in the production value of civil engineering.</p> <p>Expected fall in construction activities (mainly residential) in 2008 but from a historical high to normal levels. Estimated 22% decrease in the number of new buildings. The non-residential building sector is expected to remain stable, with an increase in civil engineering investments (+9%).</p> <p>High uncertainty over the evolution of the global economy due to a lack of manpower, which is dampening national growth.</p>
<p><b>Estonia</b></p>  <p>5.2%</p>	<p><b>Sectors</b></p> <p><b>Prospects &amp; external factors</b></p>	<p>Slight decrease both in volumes and prices in the residential construction sector due to an excess of supply and the worsening of loan conditions. Suspension or postponement of already planned residential construction projects, as well as a decrease in the number of new projects. Stable performance registered in the non-residential sector.</p> <p>Expected decrease in residential construction activity levels due to a predicted slowdown in economic growth. Partial compensation as a result of the increase in the infrastructure sector, sustained primarily by EU funding. Increase in prices and labour costs are expected to have a negative impact on the construction sector.</p>

**Country  
Cement  
consumption**

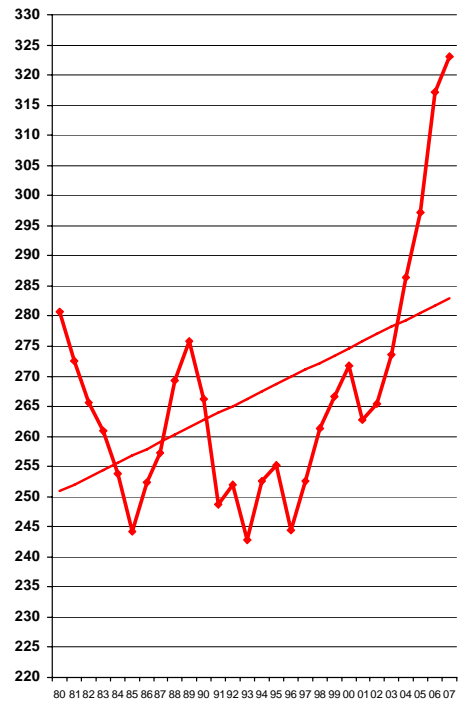
**CEMENT IN CEMBUREAU COUNTRIES**

Million tonnes



**CEMBUREAU CEMENT  
PRODUCTION 1980-2007**

Million tonnes



**Finland**



**Sectors**

Cement consumption in Finland increased notably (approximately 9.2 %) in 2007. Increase is due mainly to four bigger infrastructure projects: a new nuclear power plant near to Rauma, a new harbour in the Port of Helsinki, an E18 motorway between Lohja and Muurla, and the construction of new mine (Talvivaara). Residential construction activity has also been at a high level and is expected to stay so during 2008.

**Prospects & external factors**

Same level of consumption also expected for 2008.

**France**



**Sectors**





3.5% increase in the volume of building construction activity, both in the residential (the construction of more than 435 000 houses started in 2007) and non-residential sector. High levels of activity in the civil engineering sector: 15% increase in turnover and a 7.5% increase in volume.

**Prospects & external factors**

Slowdown in cement consumption growth in 2008 (0.5% increase forecast), as a result of softening (1%) in the civil engineering sector due to a new cycle of contracts, in the aftermath of municipal elections and tighter financing conditions.

Anticipated decline in residential construction due to mortgage tightening and high prices but limited by the Government's building plan targeting low income families and demand from first time buyers.

Stable performance of the non-residential sector.

Country Cement consumption		
<p><b>Germany</b></p>  <p>5.9%</p>	<p><b>Sectors</b></p> <p><b>Prospects &amp; external factors</b></p>	<p>Sharp decline (-30%) in housing demand due to the pull-in effect of announced changes in VAT and public subsidy regimes in 2007. Sustained increase (10%) of non-residential demand mainly for production halls, factories and storage. Positive growth (about 7%) in civil engineering pushed mainly by high tax revenues and public authority demands, but activity levels still remain very low.</p> <p>Expected increase in cement demand of about 3%, subject to the currently favourable macroeconomic growth.</p>
<p><b>Greece (% N.A.)</b></p>	<p><b>Sectors</b></p> <p><b>Prospects &amp; external factors</b></p>	<p>Substantial progressive decrease through 2007 in residential activity compared to 2006 (when it was unexpectedly high) as a consequence of the oversupply of houses, combined with the financial difficulties faced by prospective buyers. However, only a small decline was registered in the domestic market's consumption as public works and infrastructure activities were not really affected.</p> <p>Similar prospects (or slightly lower) for 2008, depending on the uncertainty of the local and European economy, among other things.</p>
<p><b>Hungary</b></p>  <p>6.7%</p>	<p><b>Sectors</b></p> <p><b>Prospects &amp; external factors</b></p>	<p>14.1% decrease in total construction volumes. Significant decrease (by 19.4%) in civil engineering (mainly road and motorway construction). 9.8% decrease in the building sector.</p> <p>Recovery in construction activity. A 2.5% growth in cement consumption is expected in 2008.</p>
<p><b>Ireland</b></p>  <p>2.3%</p>	<p><b>Sectors</b></p> <p><b>Prospects &amp; external factors</b></p>	<p>The Irish economy remained strong in 2007, however, growth in construction output slowed. Demand for cement remained strong with growth of over 2%. Activity in the residential sector, which continues to be the major market sector for cement, reduced considerably in the second half of the year. However, the reduction in demand for housing was compensated by increased activity in the infrastructure, commercial, agriculture and public sectors.</p> <p>Construction output is expected to slow in 2008 due to the continued reduction in residential activity with a resultant fall in cement demand of over 5%.</p>
<p><b>Italy</b></p>  <p>1.4%</p>	<p><b>Sectors</b></p> <p><b>Prospects &amp; external factors</b></p>	<p>1.4% decrease registered in cement consumption for 2007, as a result of stable activity levels in the residential construction sector, a decrease of about 3% in civil engineering work output and a positive increase of 1.9% registered in the non-residential construction sector.</p> <p>Continued slowdown of about 2% in cement consumption forecast for 2008.</p>

**Country  
Cement  
consumption**

**Latvia**



**12.7%**

**Sectors**

Growth registered both in the non-residential sector and precast production.

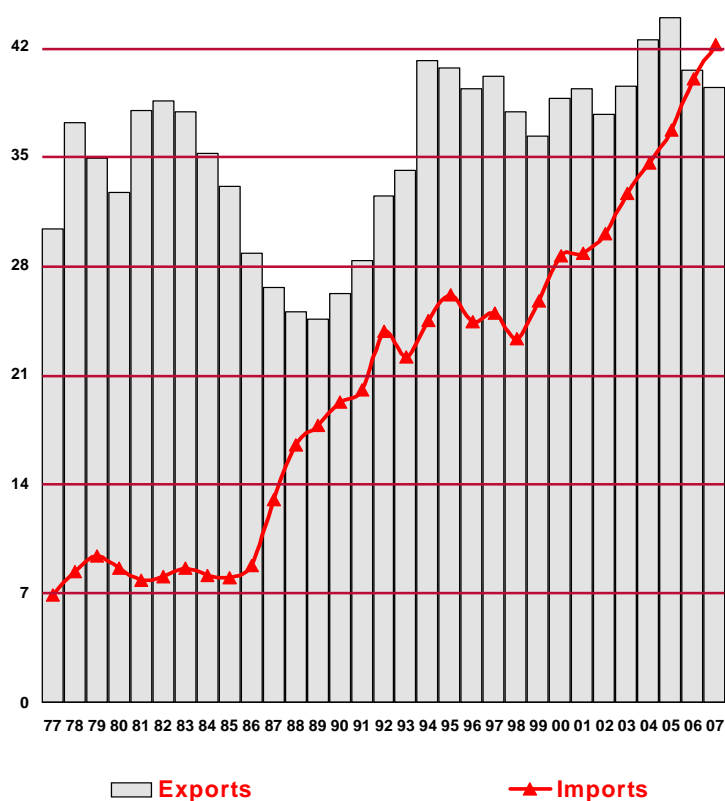
Continued strong growth in cement demand during the first half of the year.

Slowdown in cement demand during the second half of the year due to lower levels of economic activity and the implementation of anti-inflationary measures by the Government.

The reduced availability of mortgage loans is having an impact on construction activity in the residential sector.

**CEMBUREAU TRADE - Cement & Clinker 1977-2007**

Million tonnes



**Luxembourg**






**3.3%**

**Sectors**

Stable, but still high level of construction activity in 2007, leading to a 3.3% increase in cement consumption. Slowdown registered in the civil engineering sector (except for the construction activities surrounding the construction of one big tunnel). Residential and, in particular, non-residential construction activities performed to a high level.

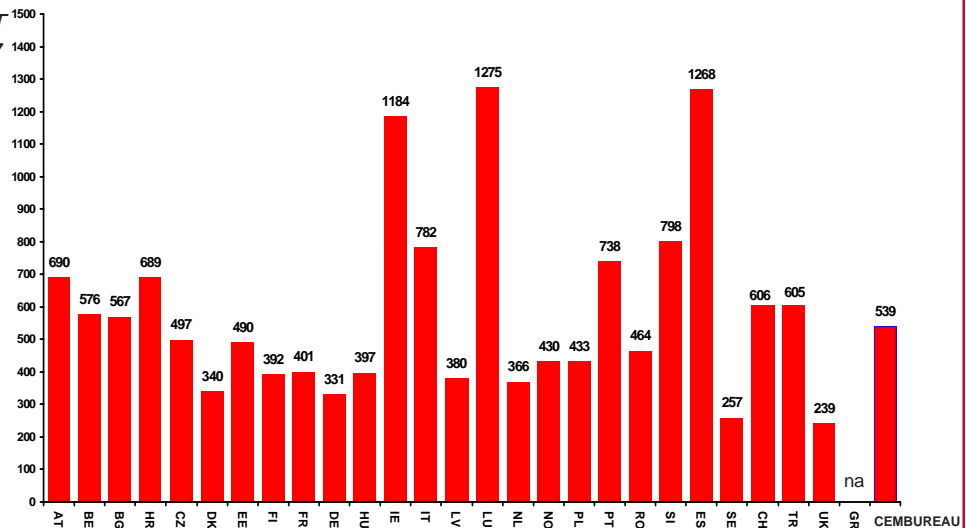
**Prospects & external factors**




Construction work carried out for almost the full 12 months in 2007 due to good weather conditions. Similar performance expected for 2008, subject to similar conditions. Civil engineering activities expected to remain at a poor level, but non-residential projects should compensate for this, and maybe even lead to a slight increase in cement consumption in 2008.





Country Cement consumption		
<p><b>Netherlands</b></p>  <p>3.8%</p>	<p><b>Sectors</b></p>	<p>6% growth in total construction sector output sustained both by new buildings and renovation and modernisation activities. 8% and 9% increase registered for new residential and non-residential buildings, respectively.</p> <p>More modest growth of about 5% registered in the civil engineering sector.</p> <p><b>Prospects &amp; external factors</b></p> <p>Still positive, but lower growth rates are expected in all sub sectors for 2008.</p> <p>Construction of new residential and non-residential buildings expected to increase by 4.5% and 2%, respectively, together with a 1% growth in infrastructure activities.</p> <p>Cement consumption in 2008 estimated to grow by 2.5% after taking into account the amount of building permits still in stock.</p>
<p><b>Norway</b></p>  <p>13.8%</p>	<p><b>Sectors</b></p>	<p>Historical highs registered in construction activity and cement consumption due to a strong economic cycle and consequently favourable economic climate. Increased investments in new building projects, mainly in the holiday home sector.</p> <p><b>Prospects &amp; external factors</b></p> <p>2008 cement consumption and market allocation is expected to remain the same as in 2007. Expected decrease in residential building activity only partially compensated by a higher number of industrial projects. In general, activity levels are not expected to increase further due to capacity constraints combined with high increase in costs over the last year in the buildings construction sector.</p>
<p><b>Poland</b></p>  <p>15.2%</p>	<p><b>Sectors</b></p>	<p>Continued increase in demand for building services to be met by both central and local authorities.</p> <p><b>Prospects &amp; external factors</b></p> <p>Lower, but still sustained, GDP growth (5%) forecast for 2008. Broad investment projects co-financed by EU investment funds mainly in road and motorway construction, railway modernisation and investment in environmental protection.</p> <p>Investment related to the forthcoming Euro 2012 Championship is also expected to boost sporting and tourism infrastructure.</p> <p>8% expected increase in cement consumption in 2008 as well as a 12% increase expected in construction for 2008 and 2009.</p>

**CEMBUREAU CEMENT CONSUMPTION 2007**

Per Capita - Kg



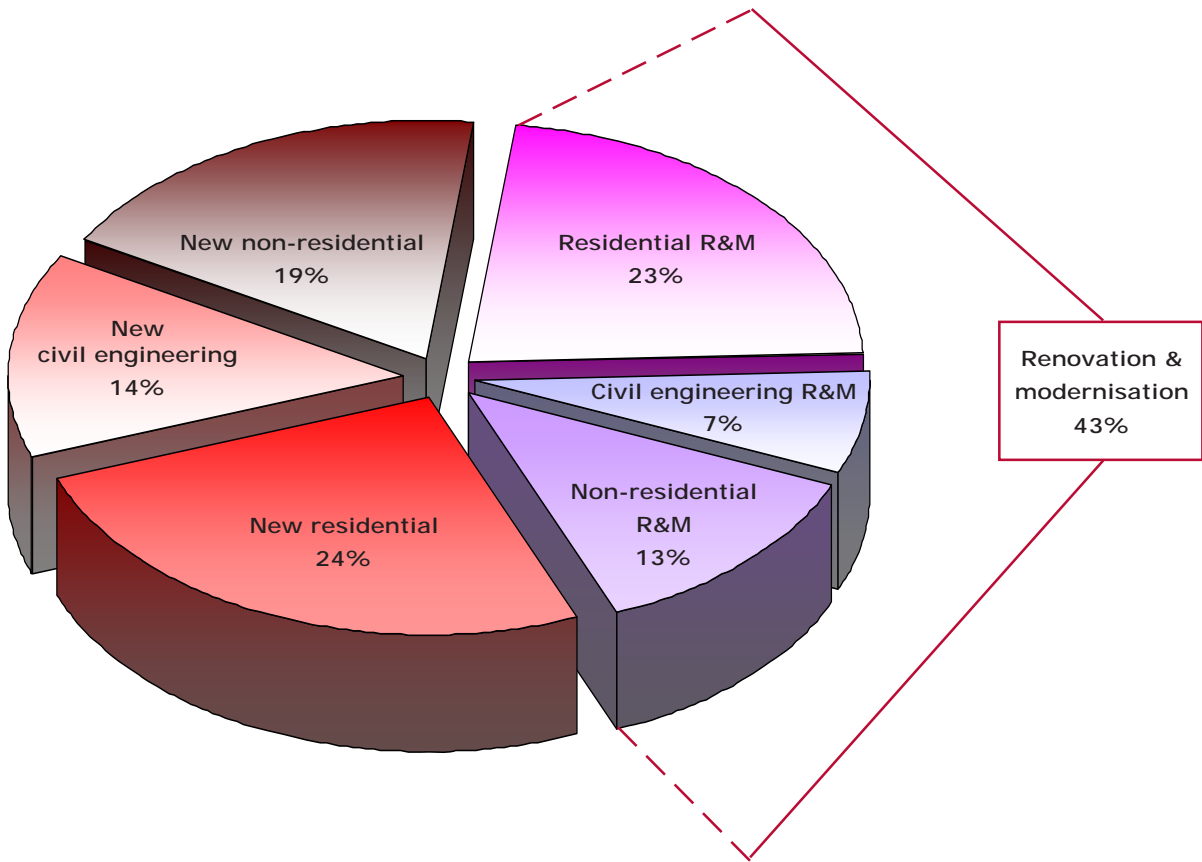
Country Cement consumption		
<p><b>Portugal</b></p>  <p>0.1%</p>	<p><b>Sectors</b></p> <p><b>Prospects &amp; external factors</b></p>	<p>2007 GDP is projected to grow by 1.9% in real terms helped by both domestic and external sectors. Investments will improve thanks to a less pronounced reduction in construction investment combined with an increase in equipment investment.</p> <p>0.5% decrease in construction sector activity, despite the recovery in economic activity. A decrease was noted in both the civil engineering and construction sectors, reflecting the considerable fall in the investment within the public sector (FEPICOP).</p> <p>GDP growth expected to edge up slightly throughout 2008 and 2009 (around 2% and 2.3%, respectively) with domestic demand posting a somewhat higher contribution mainly due to the expected recovery in investment (+3.1% in 2008).</p> <p>Positive prospects for civil engineering and private projects in the non-residential sector. This is related to the implementation in the next year of several Public Private Partnership projects for new infrastructure such as a new airport, the TGV, logistical platforms and hospitals.</p> <p>An increase in cement consumption is expected in 2008.</p>
<p><b>Romania</b></p>  <p>29%</p>	<p><b>Sectors</b></p> <p><b>Prospects &amp; external factors</b></p>	<p>Continued steady growth (already noted since 2003), following Romania's accession to the EU. 24% record growth in cement production. 27% growth registered in cement consumption, with consumption per capita totalling around 460 kg (double the amount in comparison to 2004).</p> <p>34% increase in value of construction works. The biggest growth was registered in the non-residential sector (36.6%), followed by the civil engineering sector (34%) and then by the residential sector (29.3%).</p> <p>Significant growth of over 15% per year expected for the cement industry over the coming years due to ambitious construction and infrastructural projects such as housing and schools, as well as for the renovation of national roads, country roads and main streets.</p>
<p><b>Slovenia</b></p>  <p>14.5%</p>	<p><b>Sectors</b></p> <p><b>Prospects &amp; external factors</b></p>	<p>Cement consumption reached a very high level in 2007, due to good weather and a prosperous economic situation in Slovenia. Total cement consumption attained 1.6Mt (798 kg per capita). Around 80% of cement is sold to construction companies and ready-mix concrete producers, 20% is sold to individual consumers and small construction companies through wholesalers and retailers.</p> <p>2008 prospects indicate a similar, or perhaps even higher level of consumption than in 2007.</p>

Country Cement consumption		
<p><b>Spain</b></p>  <p>0.4%</p>	<p><b>Sectors</b></p>	<p>The end of the residential construction activity boom and the downturn of the business cycle had an important impact on the cement industry. This situation will be a turning point for the cement sector, which has surpassed historical records of consumption and production over the last ten years. In addition, the cement sector has managed to lead the consumption list of EU countries since 2000.</p>
<p><b>Sweden</b></p>  <p>10.1%</p>	<p><b>Sectors</b></p>	<p>High increase in the building sector with construction volumes reaching a level 25-30 % higher compared with 2003, pushed up by both high economic growth and a low rate of inflation.</p> <p>Strong demand for new dwellings due to increased population and higher real income levels, but prices are rising following the decrease in the start of new residential buildings after the end of state subsidies in 2006.</p> <p>High level of construction activity within the industrial sector (mainly the mining industry).</p> <p>Resumption of construction activity in the public sector due to newly available financial resources.</p>
<p><b>Switzerland</b></p>  <p>0.2%</p>	<p><b>Sectors</b></p>	<p>Despite a slight decline compared to 2006, cement consumption maintained the second highest level over the last ten years, it was mainly driven by the construction of new residential and industrial buildings, whilst cement lost part of its market share in the infrastructure sector.</p>
<p><b>Turkey</b></p>  <p>2.5%</p>	<p><b>Sectors</b></p>	<p>Growth in cement demand during the first half of the year due to unpredicted growth in construction investments, followed by an unexpected slowdown as a result of the electoral period.</p> <p>Cement consumption registered still positive growth rates (2%) but was lower than expected and than experienced in the last four years. Continued positive developments in 2007 noted in the Turkish construction sector, despite an 11.4% decrease in the number of new buildings which was compensated by a 10% increase in value.</p>
	<p><b>Prospects &amp; external factors</b></p>	<p>2008 cement consumption is expected to decrease by 4-6% and will only be partially compensated by public projects in civil engineering and investment in non-residential construction (either public or private).</p> <p>4-5% growth in the construction market expected in 2008.</p> <p>High levels of activity expected for the renovation of road and railway networks and for big tunnel projects due to the approval of a 10-year infrastructural public programme.</p> <p>Further decline expected for 2008, due to a sensitive reduction in construction permits (since autumn 2007).</p> <p>2008 and 2009 GDP is expected to grow by 2%, however, the international decline of the financial markets may have more of a negative impact on Switzerland than other countries. Real estate investments are likely to decline by 5 to 7%.</p> <p>Due to uncertainties dominating the global economy, Turkey is expected to face slow growth and higher inflation rates (8% forecast for 2008) over the coming years.</p>

<b>Country Cement consumption</b>	
<b>United Kingdom</b>  	<p><b>Sectors</b> The overall output in construction during 2007 was 2.5% higher than during the whole of 2006. The largest growth was seen in public housing, commercial and infrastructure sectors with growth of 16%, 11% and 11% respectively.</p> <p><b>Prospects &amp; external factors</b> 2012 London Olympics will support growth in the construction sector. Increasing raw material and energy prices are likely to impact greatly upon manufacturers during a period of economic uncertainty, and when construction is forecast to experience relatively subdued growth in the short and medium term.</p>

**2007 CONSTRUCTION VOLUME - Breakdown\* by Sector**

Billion EUR: 1 442 +2.4% compared to 2006



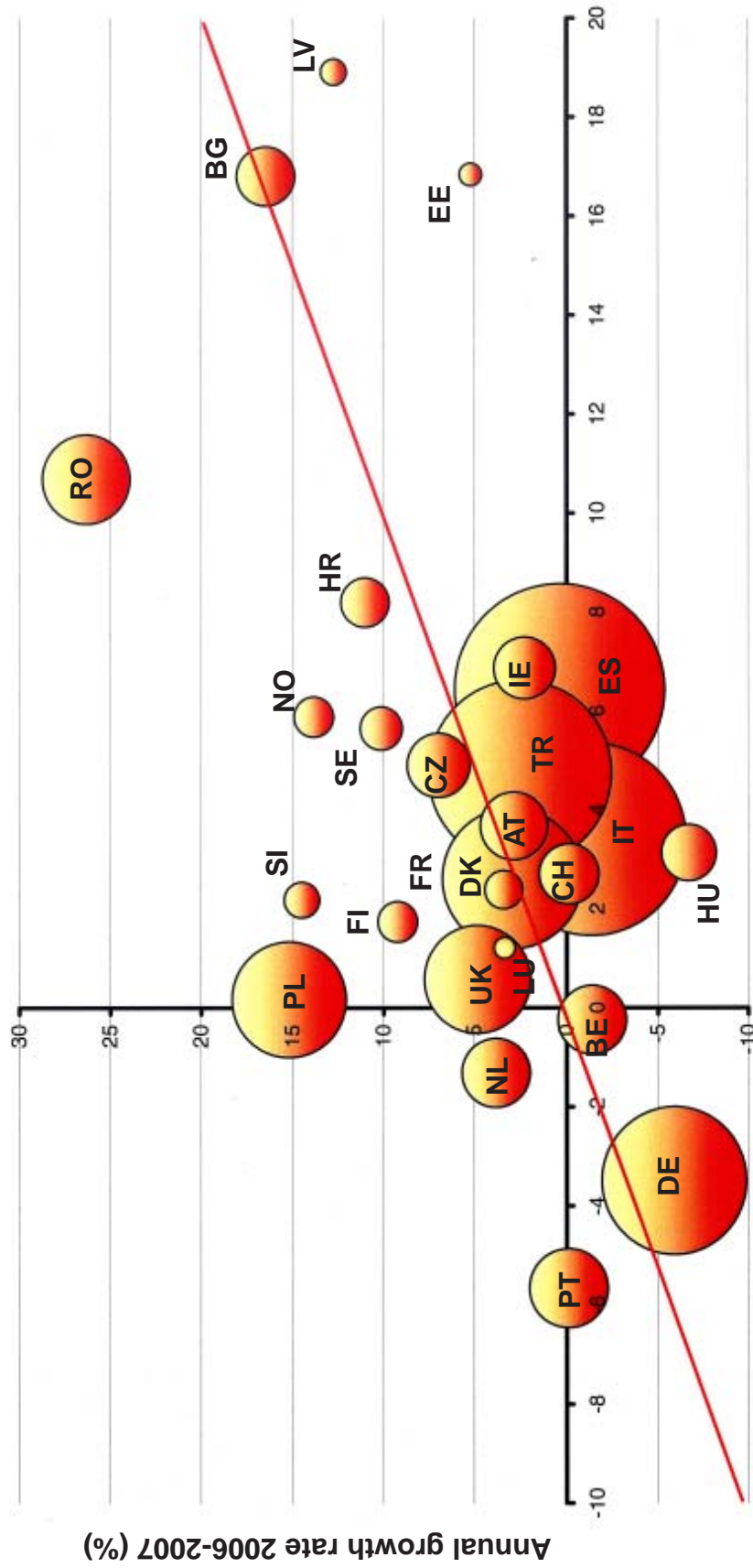
\*EU 25 minus the Baltic Countries, Cyprus, Greece, Luxembourg, Malta, Slovenia, plus Switzerland and Norway

Source: EUROCONSTRUCT and VTT

CEMBUREAU CEMENT CONSUMPTION

Quantities Kt	2007	07/06 %	2006	2005	2004	2003	2002	2001	2000	1999	1998	1997
Austria	5 741	2.8	5 583	5 324	4 620	4 536	4 634	4 434	4 495	4 674	4 842	4 946
Belgium	5 954	-1.4	6 039	5 795	5 741	5 458	5 515	5 725	6 125	5 969	5 500	5 732
Bulgaria	4 330	16.5	3 718	3 100	2 400	1 960	1 632	1 453	1 464	1 555	1 481	1 235
Czech Republic	5 147	7.0	4 812	4 417	4 518	4 047	3 686	3 614	3 610	3 729	3 911	4 182
Denmark	1 861	3.4	1 800	1 647	1 596	1 522	1 593	1 500	1 562	1 465	1 505	1 419
Estonia	659	5.2	626	510	420	375	325	263	246	190	240	201
Finland	2 064	9.2	1 890	1 712	1 667	1 595	1 557	1 608	1 704	1 570	1 484	1 331
France	24 803	3.0	24 092	22 515	21 936	20 678	20 727	20 661	20 633	20 211	18 983	18 729
Germany	27 208	-5.9	28 920	27 043	29 120	29 973	28 921	31 179	35 782	38 261	37 137	34 779
Greece	n.a.		11 626	10 090	10 631	11 154	10 642	9 535	9 073	8 704	8 229	7 746
Hungary	4 000	-6.7	4 288	4 152	4 014	4 004	3 836	3 525	3 562	3 141	3 070	2 982
Ireland	4 806	2.3	4 700	4 596	4 477	3 400	3 080	3 165	3 155	2 945	2 685	2 410
Italy	46 237	-1.4	46 880	46 052	46 358	43 482	41 269	39 469	38 338	36 147	34 686	33 768
Latvia	867	12.7	769	600	442	348	331	283	272	256	237	200
Luxembourg	591	17.0	572	538	553	544	552	541	532	500	499	455
Netherlands	5 995	3.8	5 775	5 376	5 230	5 160	5 400	5 750	6 250	6 040	5 750	5 444
Poland	16 710	15.2	14 507	12 156	11 479	11 130	11 332	11 483	14 360	14 130	12 917	12 473
Portugal	7 825	-0.1	7 835	8 735	9 200	9 250	10 800	11 330	11 110	10 575	10 070	9 525
Romania	10 000	26.3	7 916	6 304	5 726	4 926	4 780	4 319	4 304	3 848	3 940	3 533
Slovenia	1 612	14.5	1 408	1 351	1 260	1 339	1 160	1 177	1 237	1 194	1 037	1 070
Spain	56 081	0.4	55 881	51 510	48 003	46 223	44 120	42 051	38 439	34 627	30 990	26 795
Sweden	2 349	10.1	2 133	1 894	1 727	1 622	1 571	1 625	1 534	1 581	1 477	1 297
United Kingdom	14 502	4.8	13 833	13 711	13 400	12 818	13 080	11 800	13 360	12 885	13 113	12 965
<b>EU 15</b>	<b>n.a.</b>		<b>217 559</b>	<b>206 538</b>	<b>204 259</b>	<b>197 415</b>	<b>193 461</b>	<b>190 373</b>	<b>192 092</b>	<b>186 154</b>	<b>176 950</b>	<b>167 341</b>
Croatia	3 063	11.0	2 759	2 593	2 676	2 566	2 156	1 840	1 720	1 702	1 871	1 828
Norway	2 040	13.8	1 792	1 757	1 485	1 283	1 257	1 240	1 272	1 298	1 504	1 522
Switzerland	4 549	-0.2	4 556	4 563	4 187	3 958	4 013	4 173	3 881	3 699	3 675	3 750
Turkey	42 700	2.5	41 648	35 083	30 671	28 106	26 812	25 082	31 515	31 530	34 138	32 625
<b>CEMBUREAU</b>	<b>n.a.</b>		<b>306 358</b>	<b>283 124</b>	<b>273 537</b>	<b>261 457</b>	<b>254 781</b>	<b>248 825</b>	<b>259 535</b>	<b>252 426</b>	<b>244 971</b>	<b>232 942</b>
Cyprus	1 790	9.9	1 629	1 592	1 649	1 295	1 203	1 057	945	935	926	942
Lithuania	1 050	4.6	1 004	802	682	592	500	424	429	469	485	477
Malta	359	-8.7	393	334	280	273	276	261	252	224	248	236
Slovak Republic	2 559	10.3	2 320	2 335	1 945	1 818	1 760	1 682	1 684	1 660	1 751	1 724
<b>EU 27</b>	<b>n.a.</b>		<b>260 949</b>	<b>244 191</b>	<b>239 074</b>	<b>229 522</b>	<b>224 282</b>	<b>219 914</b>	<b>224 457</b>	<b>217 485</b>	<b>207 193</b>	<b>196 596</b>

DYNAMICS IN CEMBUREAU CEMENT CONSUMPTION



Average annual growth 2000-2006 (%)

- a) 2007 figures for Greece not available
- b) Size of bubbles displays the relative weight of countries out of total CEMBUREAU consumption

## 2007: AN OVERALL VIEW OF CEMBUREAU ISSUES

For the European cement industry, 2007 can be summarised in two key words: **implementation** and **preparation**.

A lot of work went into the implementation of existing legislation.

**REACH (Registration, Evaluation and Authorisation of Chemicals)** is a very pervasive Regulation. Even though the treatment of cement and clinker under REACH is clear and poses no great difficulty to the cement industry, there are many instances where the provisions of REACH in respect of other substances and preparations can make life difficult for the cement industry. Not only is this verifiable for substances going directly into cement and concrete, but it also applies to the main fuels, in particular petcoke, used by the cement industry. Furthermore, CEMBUREAU is particularly keen to see to it that the exemption of clinker from registration is maintained in the review of the scope (to be carried out through comitology), which is to be completed by June 2008.

On the IPPC (Integrated Pollution Prevention and Control) front, the painstaking task of completing the 2<sup>nd</sup> **BREF (Best Available Techniques Reference Document)** required the attention of CEMBUREAU and its Members in 2007, successfully paving the way to the last chapter – covering emission levels – to be written in 2008. The first four chapters, dealing with general information about the cement industry, applied processes and techniques in cement manufacturing, present consumption and emission levels, and techniques to consider in the determination of BAT (Best Available Techniques), have already been submitted to the TWG. The last chapter – on BAT – will be released for comments in mid-May 2008.

Many discussions in 2007 focussed on the **IPPC Review** (Directive 1996/61/EC) where the fundamentals of the Directive were being questioned. Throughout the year, CEMBUREAU and many other industries fought for keeping the present system and against the inclusion of a trading system for NO<sub>x</sub> and SO<sub>x</sub>. The legislative proposal that was published on 21 December 2007 is not entirely satisfactory, but does represent a substantial improvement compared to earlier versions. NO<sub>x</sub> and SO<sub>x</sub> trading is not featured in this proposal but might come back through other proposals in the future.

The **implementation of the ETS** (Emission Trading Scheme) for the 2<sup>nd</sup> phase – 2008-2012 – was also a main preoccupation, although more so for CEMBUREAU Members at national level than for the European Association itself. The development of the second generation of National Allocation Plans turned out to be very controversial, as gaining the European Commission's approval proved difficult in some cases, leading to several legal battles yet to be fought.


In the judgement of 7 November 2007 (T-374/04), the CFI (European Court of First Instance) ruled that **ex-post adjustment** was compatible with the ETD (Emission Trading Directive 2003/87/EC), a position which CEMBUREAU had upheld from the start.

The most significant development that occurred in 2007 in relation to the ETS was the attention given to **EIIs (Energy Intensive Industries) at the Spring European Council on 8-9 March 2007**. The Council called upon the European Commission to identify those EIIs that are open to international competition where, consequently, a risk of "carbon leakage"<sup>1</sup> exists. From then on, Europe became a battlefield for economists. Numerous studies were produced but, at the end of the year, no clear conclusion had truly emerged. Conclusions are to be drawn in 2008 and this will constitute the most formidable challenge for CEMBUREAU as well as for economists who have to project the issue into an economic context that will be fundamentally different from past and present experience.

The debate on many issues relating to IPPC and to climate change took a new form within the **HLG (High level Group on Competitiveness, Energy and the Environment)**. A good coordination between CEMBUREAU and the HLG proved an asset to the cement industry.

Cooperation between CEMBUREAU and the CSI (Cement Sustainability Initiative) continued in 2007 and led to CEMBUREAU's participation in the world-wide "**Getting the Numbers Right**" project. With the assistance of PricewaterhouseCoopers, CO<sub>2</sub> data from nearly all European plants will be collected in accordance with the WBCSD (World Business Council for Sustainable Development) Protocol (of world-wide application). This exercise will be an essential tool for CEMBUREAU in the attempt to develop a European benchmark for the cement industry within the context of the ETS for the post-2012 period.

<sup>1</sup> Relocation of greenhouse gas emitting activities from the EU to third countries and thereby increasing global emissions



2007 was also an important period of implementation for **health related issues**. In April a preliminary report was drafted and shared with the social partners regarding the steps taken to implement the **ESDA (European Social Dialogue Agreement) on Crystalline Silica**, concluded the previous year. A more comprehensive report, the first in a series of biannual reports, will follow during the first half of 2008. It should show more concretely the measures taken by the signatories in order to protect their workers. A good result is expected in the cement industry.

With regard to the **Waste Framework Directive**, CEMBUREAU remained actively involved during the first reading. The first reading report adopted by the European Parliament in February 2007 was acceptable to the cement industry.

The **CHRS (Comprehensive Health Risk Study)** is another example of the cement industry's commitment to workers health. The study, started in 2005, led to a first encouraging assessment in 2007 and it was, therefore, deemed worthwhile to invest in an additional set of toxicological tests to improve knowledge further.

As indicated in this report last year, health and safety will no doubt remain on CEMBUREAU's agenda as a priority in years to come.

With regard to **products and the market promotion** side, many developments took place in 2007. Deliverables took the form of brochures made available to CEMBUREAU Members on the **Energy Performance of Buildings** (a very relevant and much discussed topic in the climate change context especially when one bears in mind that the residential and tertiary sector, the major part of which is buildings, accounts for more than 40% of final energy consumption in the Community<sup>2</sup> and is expanding, a trend which is bound to increase its energy consumption and hence also its carbon dioxide emissions) and **Eurocodes**. Work on the **EPD (Environmental Product Declaration)** continued and was taken close to completion with the assistance of ecra (the European Cement Research Academy) acting as a CEMBUREAU coordinator. Further work was identified on the **fire safety performance of concrete structures**, whereby a consultancy arrangement was established between CEMBUREAU, on the one hand, and ecra and CERIB (Centre d'Etudes et de Recherches de l'Industrie du

Béton – the cement industries' study and research centre) on the other.

The **end uses of cement** project took more time than anticipated. The databank and software tool will be available in 2008.

Work also started in relation to new items. A long-term action plan and related road maps for **Sustainable Construction** were elaborated and approved by the CEMBUREAU Board in 2007. The aim is to highlight the positive contribution of cement to sustainable construction. This project will be administered through a contract with BCA (British Cement Association), a good example of CEMBUREAU using decentralised resources rather than building up its own!

CEMBUREAU continued to actively take part in the work of **CEN TC350 "Sustainable Construction"** through its Liaison Status.

The **ECP (European Concrete Platform)** was taken one step further with its incorporation as a non-profit organisation under Belgian law, a move that will improve its visibility and facilitate its administration. The brochures and other materials developed in CEMBUREAU's Working Group 5 "Markets and Products" are published under the umbrella of the ECP.

Following the successful 10<sup>th</sup> International Symposium on Concrete Roads held in Brussels in 2006, it was decided to set up and incorporate a new entity, **EUPAVE**, dedicated to concrete pavement at EU level. CEMBUREAU supported the idea and is a founding Member of the new association lodged with FEBELCEM (Association of the Belgian Cement Industry). CEMBUREAU has agreed to handover responsibility to EUPAVE for the organisation of the Symposium on concrete roads which takes place every 4 years, the next event of which will take place in 2010 in Spain. In addition to its financial contribution, CEMBUREAU will also provide the services of its Intelligence Unit to EUPAVE free of charge.

The implementation tasks and preparation work that took place in 2007 bring the final touches to some issues and prepare the way for the challenges ahead, the most significant of which is no doubt climate change, especially the ETS.

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<sup>2</sup> Directive 2002/91/EC of the European Parliament and of the Council of 16 December 2002 on the energy performance of buildings

## CONTACTS WITH EU INSTITUTIONS

In addition to the regular contacts as part of CEMBUREAU's advocacy activities, some special contacts took place in 2007 which deserve to be highlighted.

As part of CEMBUREAU's "**Meet the Presidencies**" programme, useful contacts were organised in 2007 with the Portuguese and the Slovenian Presidencies in order to establish a modus operandi to cooperate on key issues such as REACH (Registration, Evaluation and Authorisation of Chemicals), the revision of Annex V, the revision of the Waste Framework Directive, the IPPC (Integrated Pollution Prevention and Control) Review and on climate change, especially carbon leakage.

Many contacts took place with the European Commission's Directorate General Enterprise on the issue of competitiveness further to the call from the European Council in March 2007 to look into the impact of the ETS (Emission Trading Scheme) on the competitiveness of energy intensive industries. On this issue, communication was also maintained with DG Environment. As part of the Chief Executive's Chairmanship of ACEI (Alliance for a Competitive European Industry) contacts were also held with the Secretariat General of the Commission in order to discuss a better regulation and impact assessments. In addition, contacts were held with the Chairman and members of the Impact Assessment Board.

In the European Parliament, CEMBUREAU maintained its support to the **FOCOPE** initiative (the Forum in the European Parliament for Construction).



## WORKING WITH ALLIANCES

CEMBUREAU is a key player in the mostly Brussels based scene of European Trade Associations. CEMBUREAU interacts regularly with a number of these associations, often joining forces in order to achieve a common goal.

The **ECP (European Concrete Platform)** was incorporated as a non-profit organisation under Belgian law at the end of 2007. Founded by BIBM (European Federation for Precast Concrete), CEMBUREAU, EFCA (European Federation of Concrete Admixtures Associations) and ERMCO (European Ready Mixed Concrete Organisation), the ECP covers concrete related issues, including the energy performance of buildings, fire safety and Eurocodes. Activities in 2007 included the launch of the ECP website, the publication of two European brochures on fire safety and the energy performance of concrete buildings, the English version of the FEBELCEM European fire Design Guide "Fire Safety and concrete structures", work on the Concise Eurocode 2 and "how to" leaflets as well as the creation of a new task force working on human health and environmental issues common to all.

**BUSINESSEUROPE** is the Confederation of National Employers Federations throughout Europe. As in previous years, CEMBUREAU has been very active in the BUSINESSEUROPE Climate Change Working Group as well as in its Environment Working Group, Air Quality Working Group, IPPC Working Group, Waste Task Force, REACH Implementation Network and its new task force on sustainable consumption and production.

CEMBUREAU, BUSINESSEUROPE and some sectoral organisations form part of the **ACEI (Alliance for a Competitive European Industry)**. In 2006, the CEMBUREAU Chief Executive took over the Chairmanship of ACEI for a period of two years. ACEI work concentrates on the Impact Assessment of EU policies and regulations and, more broadly, on better regulation. Actions in these fields continued in 2007, with a special contact with the Secretariat General of the European Commission as well as with the Chairman and Members of the newly created Impact Assessment Board.

The **AEII (Alliance of Energy Intensive Industries)**, representing alloys, cement, ceramics, chlor alkali, expanded clay, glass, iron and steel, lime, non-ferrous metals, and paper industries remained very active in 2007. Its work on electricity prices and the functioning of the electricity market continued in close cooperation with **IFIEC (International Federation of Industrial Energy Consumers)**. The work of this Alliance led to the successful recognition by the Energy Council in March 2007 of the importance of energy intensive industries in Europe and their contribution to the European economy. The European Council called for special attention to be given to those industries in the context of measures addressing climate change. The Alliance is also looking at other matters such as energy efficiency and IPPC. In addition, it also contributed to the creation of an **ad-hoc NO<sub>x</sub> and SO<sub>x</sub> trading Alliance** (now the IPPC Alliance) which worked informally, but very well, throughout the year 2007.

CEMBUREAU's participation in the **NEEIP (Non-Energy Extractive Industry Panel)** was pursued in 2007 in the context of the sustainable use of natural resources. As in previous years, NEEIP papers have proved authoritative.

**Eucopro (the European Association for Co-processing)** is another CEMBUREAU partner on the European scene and cooperation has intensified, especially in relation to the work to be carried out on the revision of the Waste Framework Directive. CEMBUREAU Technical Director is an advisory Member of the Eucopro Board.

The **REACH Alliance**, which was formed in 2005 to address the formidable challenge of the REACH proposal, continued in 2007 in order to look into the not less formidable challenge of implementing REACH and the follow-up of the review of Annex V.

**CEMBUREAU is a Member of NEPSI**, the multi-sectoral negotiation platform on silica (European Network for Crystalline Silica) which is monitoring the application of the ESDA on Crystalline Silica. CEMBUREAU is represented on the NEPSI Council where employers and employees have equal representation.

Renewed contacts were held with **Eurosac (European Federation of Multiwall Paper Sack Manufacturers)** in order to discuss the potential implications for cement bags of the GHS Regulation launched in 2007, which will go through the legislative process in 2008.

In the construction industry, CEMBUREAU remained a faithful Member of the **ECF (European Construction Forum)**, where all the industries operating in the field of construction and the trade union representing workers in the construction sector get together. Energy efficiency in buildings remains an item of priority for the ECF.

The close cooperation with **CEPMC (Council of European Producers of Materials for Construction)** was maintained, especially in the context of contacts with the European Commission's

Directorate General Enterprise Construction Unit and in relation to the revision of the Construction Product Directive which will now be transformed into the "Construction Product Regulation". CEPMC and CEMBUREAU also continued their work together in relation to CEN/TC 350 Sustainable Construction.

Members of the CEMBUREAU staff directly engaged in advocacy with the European Institutions remain Members of **SEAP (Society of European Affairs Professionals)** and are bound by the SEAP Code which has contributed to the development of a draft European Code established by Commissioner Siim Kallas as part of his European Transparency Initiative. In this context, CEMBUREAU has maintained its cooperation with **FAIB (Federation of European and International Associations, established in Belgium)**, of which CEMBUREAU is a Member.



## CEMBUREAU MAIN ISSUES

### TECHNICAL & ENVIRONMENT

#### Climate Change

2007 was an important year in terms of activities in the climate change arena. Numerous actions were carried out both internally, through the CEMBUREAU working group and task forces, and via discussions with the European Commission and other European institutions.

The residential and tertiary sector, the major part of which is buildings, accounts for more than 40 % of final energy consumption in the Community and is expanding, a trend which is bound to increase its energy consumption and hence also its carbon dioxide emissions. The energy performance of buildings is, therefore, highly relevant as new, energy efficient buildings designed using the latest techniques available can help reduce this consumption. Demand for new and energy efficient buildings will require additional concrete and, therefore, more cement. However, this will not be achieved by domestic production in Europe if restrictive caps are rigidly placed on production in the EU. As a result, the additional cement required for the construction of energy efficient buildings could end up being imported from third countries, leading to an increase in emissions due to additional transport emissions (shipping), which would make no environmental sense.

In 2007 CEMBUREAU and the CSI (Cement Sustainability Initiative) joined forces to collect systematically data on CO<sub>2</sub> emissions, the so-called "Getting the numbers right" project. This exercise forms part of an ambitious, world-wide plan to proceed with data collection throughout the cement industry. CEMBUREAU will collect data for all of Europe and, in this regard, PricewaterhouseCoopers have been appointed by CEMBUREAU in order to collect data, carry out analyses, prepare reports and to ensure confidentiality and compliance with laws. Data mining took part during the last quarter of 2007, but this is an ongoing project which will continue for future years. With this pan-European data CEMBUREAU will be equipped to address the issue of CO<sub>2</sub> reduction in Europe and take part in a global sectoral approach in the cement sector.

Other notable CEMBUREAU actions include the Association's active participation in the European Commission consultation on the review of the EU Emission Trading Scheme and ECCP (European Climate Change Programme), both on its own and as a member of the AEII (Alliance for Energy Intensive Industries). CEMBUREAU also contributed

to studies to identify the potential impact of the EU Emission Trading Scheme on competitiveness.

Other issues tackled at European level included identifying how the Emission Trading Scheme could link in with other regulatory and national schemes, with the EU painstakingly trying to mediate with other significant CO<sub>2</sub> emitting countries (such as the US and China) with the aim of reaching an international agreement.

On 23 January 2008 the European Commission published its proposal to amend the EU Emission Trading Directive (2003/87/EC) as part of the legislative package entitled "20 20 by 2020, Europe's Climate Change opportunity". Although the proposal is not satisfactory, it does leave some doors open, including special measures for energy intensive industries. CEMBUREAU will continue to work at European level to ensure the voice of the cement industry is heard.

#### Crystalline Silica

The ESDA (European Social Dialogue Agreement) on crystalline silica, signed on 25 April 2006, went through its first phase of implementation in 2007.

In order to facilitate implementation, CEMBUREAU organised a workshop with all national coordinators on 13 December 2006 in the presence of the European Commission and the trade unions.

The first step, completed by April 2007, was to highlight, via a preliminary report, the steps taken to transform the agreement into national measures (usually collective conventions), as well as the dissemination of the ESDA throughout the cement industry and the training sessions organised covering the best practices prescribed by the ESDA.

The trade unions, the European Commission and some Member States are keeping an eye on, and giving their full attention to, this process as there are voices requesting mandatory measures on top of the ESDA.

As with all new things, the ESDA, the first of its kind ever concluded, must gain acceptance as a new and more effective way to ensure worker protection. We can only succeed if good progress can be shown at each and every stage of implementation.

As of April 2007, progress was well under way in the cement industry. The first full report will have to be completed by May 2008 via special software provided by NEPSI (European Network for Crystalline Silica).

## **Integrated Pollution Prevention and Control Directive**

In 2007 CEMBUREAU was actively involved in the revision of the IPPC (Integrated Pollution Prevention and Control Directive - 1996/61/EC), which regulates emissions to air, water and land from industrial operations. CEMBUREAU ensured that the voice of the cement industry was heard by taking part in the IPPC Advisory Group, holding meetings with the European Commission, and working together with alliances, such as the Alliance of Energy Intensive Industries and BUSINESSEUROPE. CEMBUREAU's key advocacy focus was on opposing NO<sub>x</sub> and SO<sub>x</sub> trading and defending the concept of emission limit values (ELV) based on Best Available Technique associated emission levels (BAT-AEL), as well as ensuring flexibility in implementation. CEMBUREAU also responded to a European Commission internet consultation, reiterating its view that Best Available Techniques (BAT) should remain the key instrument policy for regulating industrial emissions.

In December, the European Commission published its Proposal for a Directive on industrial emissions (integrated pollution prevention and control). CEMBUREAU was pleased to note that, at the time, there were no plans to include NO<sub>x</sub> and SO<sub>x</sub> trading. However, although the text introduces derogations to the general rule specifying that ELVs shall not exceed BAT-AELs, concerns remain following a reduction in flexibility in relation to BAT-levels.

## **Directive on the Incineration of Waste**

CEMBUREAU took part in the consultation on the review of the Directive on the Incineration of Waste (2000/76/EC), one of the seven existing Directives related to industrial emissions which the Commission aims to recast<sup>1</sup> under its Proposal for a Directive on industrial emissions. In addition to attending the stakeholder consultation held in March 2007, CEMBUREAU contributed to a study commissioned by the European Commission on the "Assessment of the application and possible development of community legislation for the control of waste incineration and co-incineration". Both the study and stakeholder consultation were carried out by Ökopol (Institute for Environmental Strategies). The Commission adopted its Proposal for a Directive on industrial emissions (integrated pollution prevention and control) in December 2007. So far, the proposal does not aim to modify the Directive on the Incineration of Waste substantially.

## **REACH**

2007 was a busy year in terms of REACH. With regard to the review of Annex V, CEMBUREAU endeavoured to ensure that cement clinker remained

exempt from registration. Actions at European level included regular contact with Commission representatives and members of the European Parliament, as well as working together with the REACH Alliance. CEMBUREAU Members also maintained close contact with the national authorities. The review of Annex V is expected to conclude mid-2008.

In addition, CEMBUREAU provided the cement industry with the necessary tools in order to prepare for the implementation of REACH, including a REACH **manual** on the "Implementation of REACH in the Cement Industry", drafted by CEMBUREAU and finalised at the beginning of 2007. This manual is a working document and the intention is to regularly update it with the latest information. The Association also met with CONCAWE (Conservation of Clean Air and Water in Europe - the European association of petroleum product manufacturers) to establish cooperation vis-à-vis the registration of petcoke under REACH. In addition, CEMBUREAU, together with the partners of the REACH Alliance and the technical support of ecra (the European Cement Research Academy), monitored the drafting of the REACH Technical Guidance Documents (RIPs – REACH implementation projects).

## **United Nations Globally Harmonised System of Classification and Labelling of Chemicals**

Together with experts from the cement industry, CEMBUREAU completed a number of actions following the proposal for a Regulation on the classification, labelling and packaging of chemical substances and mixtures, which would implement the GHS (United Nations Globally Harmonised System of Classification and Labelling of Chemicals) in Europe. These actions include the preparation of a proposal for the classification of cement under the GHS, as well as the assessment of the GHS proposal and the special packaging requirements that would require all cement sold to the general public to be packed in containers fitted with child-resistant fastenings and tactile warning labels. CEMBUREAU established contacts with Eurosac (European Federation of Multiwall Paper Sack Manufacturers) in order to identify how the child-resistant fastenings requirements could be complied with. CEMBUREAU also worked with Eurometaux (European Association of Metals) on certain aspects of the GHS proposal and on the follow-up of the Technical Guidance Document for GHS implementation which is being developed by the European Chemicals Bureau and the European Commission. CEMBUREAU also continues to monitor developments at European Council and Parliament level. Adoption of the proposal is expected in 2008.

<sup>1</sup> The recasting of legislation means the adoption, when an amendment is made to a basic instrument, of a new legal instrument which incorporates the said amendment into the basic instrument, but repeals and replaces the latter. Unlike formal consolidation, it involves changes of substance. It also gives a comprehensive overview of an area of legislation.

## **Waste Framework Directive**

Work continued at European Union level in relation to the revision of the Waste Framework Directive (2006/12/EC), which covers all aspects of waste management. Due to the importance of this issue, CEMBUREAU remained actively involved during the first reading, at the beginning of 2007, by suggesting amendment proposals, maintaining regular contact with members of the European Parliament and the Council, and liaising with other sectors, in particular Europro (European association for co-processing) and Eurofer (European Confederation of Iron and Steel Industries). The main issues tackled by CEMBUREAU within the framework of the revision include the definition of recovery, end-of-waste criteria, the definition of by-products and energy efficiency formula and thresholds for dedicated waste incinerators. The first reading report adopted by the Parliament in February 2007 was acceptable to the cement industry. The European Council's Common Position (issued in December 2007) provided, overall, a favourable outcome as well. The second reading started early 2008 and the revision could be concluded during the course of this year if the European Parliament and the Council reach an agreement on the prevention and recycling targets and, linked to this, the possibility to classify certain highly efficient dedicated waste incinerators as recovery plants.

## **Sectoral approach**

CEMBUREAU worked closely in 2007 with the CSI (Cement Sustainability Initiative, under the aegis of the World Business Council for Sustainable Development) on the development of a sectoral approach model, with the CSI being in the lead. In addition, CEMBUREAU is looking at conditions under which the EU ETS could be linked with other schemes via bilateral agreements or under an international agreement yet to be concluded. The Association also continued to maintain contacts with cement associations outside Europe, include CIF (Cement Industry Federation Australia), CCAA (Cement, Concrete & Aggregates Australia), JCA (Japan Cement Association), PCA (Portland Cement Association) and FICEM (Federación Interamericana del Cemento).

## **BREF revision**

Efforts continued in relation to the Cement & Lime BREF (Best Available Techniques Reference Document). CEMBUREAU attended the TWG (Technical Working Group) meeting in Seville at the beginning of 2007, the aim of which was to agree on what information and data should be used and which additional information should be added to the BREF. CEMBUREAU subsequently provided comments to the drafts of the first four chapters of the BREF, which cover general information about the cement industry, applied processes and techniques in cement manufacturing, present consumption and

emission levels and techniques to consider in the determination of BATs (Best Available Techniques), and is liaising with the EIPPC (European Integrated Pollution Prevention and Control Bureau). Chapter 5, which covers the definition of BAT-levels, is due in May 2008. The full document is due to be adopted in 2009.

## **Air Quality Framework Directive**

CEMBUREAU continued to monitor progress at EU level in relation to the AQFD (Air Quality Framework Directive). By the end of 2007, the EU institutions reached an agreement in second reading, including the first binding limit values for fine particulate matter of PM<sub>2.5</sub>, namely 25 micrograms per cubic metre (25µg/m<sup>3</sup>) by 2015 (or 2010, where possible).

## **Harmonised Safety Data Sheets and voluntary warning label for cement**

Recognising the importance of the correct comprehension of the dangerous properties of cement and clinker and providing customers with the correct information, CEMBUREAU worked on a Harmonised SDS (Safety Data Sheet) and the classification and labelling of cement and clinker. Following approval, the guidelines template for the cement SDS is gradually being implemented in CEMBUREAU member countries, whilst the template for the clinker SDS should be adopted in 2008. In addition, the Association commenced work on a voluntary label bearing a warning for both professional and non-professional users of the potential dangers when using cement and providing information on how to avoid accidents. The label was approved at the end of 2007.

## **Comprehensive Health Risk Study**

The CHRS (Comprehensive Health Risk Study), launched in 2005, continued in 2007. The updated survey of the literature on the question has been completed as has the exposure measurements in the construction industry element. Work on the toxicological study also progressed and will continue throughout 2008 with scientific reports potentially being published during the year. The European prospective lung function monitoring study also continued.

## **Product Standards**

CEMBUREAU product standards work continued throughout the year. The CEN Technical Committee for the Standardisation of Cement (CEN/TC51) Annual Meeting was held in October, with discussions centring on the revision of EN 197-1 and-2 (harmonised European Standard for Cement). The standardisation process for Super Sulphated Cement and Sulphate Resisting Cement, a proposal from IBN for the standardisation of a special cement, and dangerous substances (CEN/TC351) were also discussed.

### **Revision of the Construction Products Directive**

At the end of 2007, it was announced that the European Commission was expected to present its proposal to review the EU Construction Products Directive (89/106/EC) during the first quarter of 2008. The proposal involves replacing the Directive with a regulation, and could potentially have an important impact on a system proven to be effective for the cement industry. With this in mind, CEMBUREAU took part in several stakeholder meetings and related studies. The Association will continue to monitor developments in 2008.

### **Basel Convention**

Under the Basel Convention on the Transboundary Movements of Hazardous Wastes and their Disposal, CEMBUREAU contributed to two draft technical guidance documents, namely the Environmentally Sound Management of Mercury Waste and of Used Tyres. Comments were limited in the case of mercury waste. More work was, however, required for the used tyres technical guidance due to the negative stance taken by one party to the Convention on the co-processing of used tyres in the cement industry. CEMBUREAU therefore identified a representative to take part in the IWG (intersessional working group).

## **MARKETS & PRODUCTS**

### **Sustainable Construction**

2007 saw the launch of CEMBUREAU activities within the framework of sustainable construction, with the aim of highlighting the positive contribution of cement and concrete to this arena. With this in mind, CEMBUREAU organised a workshop for the purpose of exchanging views and experiences in order to identify a series of actions for the coming years in the following fields: climate change, resources efficiency, health & safety, communication, standards, codes and guides, all of which have been incorporated into the long-term Strategic Action Plan (Roadmap 2008-2010). As part of the short-term Implementation Plan for 2007-2008, CEMBUREAU contributed to the *BUSINESSEUROPE* brochure on "Energy efficiency: reconciling economic growth and climate protection". The Association also responded to the European Commission's Green Paper on "Adaptation to Climate Change" and plans to publish a brochure highlighting the benefits of cement and concrete in relation to this issue in 2008. CEMBUREAU is working closely with the European Concrete Platform on this topic.

### **Environmental Product Declaration for Cement in Europe**

CEMBUREAU, in collaboration with ecra (the European Cement Research Academy), completed a number of actions in relation to the EPD (Environmental Product Declaration) for cement in Europe, due in 2008.

Intended for B<sub>2</sub>B (Business-to-Business) use, the EPD aims to provide measurable and verifiable input for the environmental assessment of construction works. LCA (Life Cycle Analysis) data collection was carried out in 14 plants (from 10 representative countries), with the information incorporated into an LCA report produced by ecra. In October, CEMBUREAU also finalised a Producer's Guide (which contains guidelines for producing a cement EPD), followed in November by the Green Book 2007, incorporating a LCI (Life Cycle Inventory) format for cement. Future actions include CEMBUREAU's commitment to provide LCI cement data for the cement industry in Europe to the ELCD (European Reference Life Cycle Data System) of the European Commission European Platform on LCA.

### **Fire Safety with Concrete**

With the aim of promoting the fire resistant properties of concrete, as well as demonstrating its societal benefits including the protection of lives, property and the environment, CEMBUREAU identified and completed a number of actions in this field in 2007. Working together with the ECP (European Concrete Platform), one of the major achievements of 2007 was the publication of a European brochure entitled "Comprehensive fire protection and safety with concrete". This brochure, aimed, in particular, at specifiers, regulators and fire authorities, was also adapted for national use in numerous European countries. The other main deliverable, completed together with the ECP, was the English version of the FEBELCEM fire design guide "*Fire Safety and concrete structures*". Future joint actions include a fire safety project to defend concrete within the field of FSE (Fire Safety Engineering), in respect of which consultancy agreements have been established between the ECP (of which CEMBUREAU is a member) ecra and CERIB (Centre d'Études et de Recherches de l'Industrie du Béton), and to highlight the positive benefits of concrete regarding the fire structural Eurocodes.

### **End Uses of Cement**

Further to the go ahead received from the European Commission, CEMBUREAU commissioned in 2007 the development of a software system for a European model on the end uses of cement. This model, aimed at collecting harmonised information on the use of cement in concrete applications in the building and civil engineering sectors, will be used for marketing purposes at national level, and should be finalised in 2008.

### **Energy Performance of Buildings**

Another issue covered by CEMBUREAU in 2007 related to the benefits of the thermal mass of concrete buildings within the context of the Energy Performance of Buildings Directive (EPBD). Working together with the ECP, efforts led to the publication

of a European brochure entitled “Concrete for energy efficient buildings – the benefits of thermal mass” in April 2007. Work also progressed on the updating of a compilation of case studies on buildings using concrete as a thermal mass, as well as the drafting of best practice guidelines for the reduction of CO<sub>2</sub> in buildings and infrastructure (both due in 2008).

#### **Eurocodes**

With the aim of promoting the use of the structural Eurocodes in Europe, CEMBUREAU completed the European version of the Concise Eurocode 2 and the eight “How to” leaflets. The Concise Eurocode 2 covers 80% of usual building practices, whilst the leaflets offer the possibility of being easily adapted at national level with NDPs (Nationally Determined Parameters) and national construction practices. CEMBUREAU also worked on producing the Commentary to Eurocode 2 and related Worked Examples, due for publication in 2008.

#### **EcoConcrete Tool**

Under the EcoConcrete tool, two new licences were issued in 2007, namely for France and Romania, bringing the total to 123 licences, disseminated in 22 European countries.

#### **CEN TC 350 “Sustainable Construction”**

CEMBUREAU continued, through its Liaison Status, to actively participate in the work of CEN TC 350. Together with the ECP, CEPMC (Council of European Producers of Materials for Construction) and respective members at national level, CEMBUREAU succeeded in the rejection of the Framework Document (WI 350001) which was proposed for voting in April-June 2007 in CEN TC 350 national mirror groups. As a result, CEN agreed in November 2007 to enlarge the scope of the Framework Document to cover all three aspects of sustainable construction (Resolutions 60 to 68) and achieve the integrated assessment of buildings performance ensuring that the social and economic performances are also addressed within the appropriate time frame.

The “Main Issues” section covers just the key areas of CEMBUREAU’s work in 2007. The Association continued to work on many other issues throughout the year.

It should also be noted that the Members and company representatives active with the CEMBUREAU Working Groups play an invaluable role in ensuring the success of the Association and the best possible outcome, and it is to them that we extend our thanks.

For more information on specific issues dealt with by CEMBUREAU, please e-mail [aj.johnson@cembureau.eu](mailto:aj.johnson@cembureau.eu).



## CEMBUREAU INTELLIGENCE UNIT

One of the major achievements of CEMBUREAU's Intelligence Unit in 2007 was the revamping of CINDI (CEMBUREAU International Network for Documentation and Information), providing Members with a more user-friendly extranet. Based on the classical tree view of Windows Explorer, the system has been improved by including new features such as the Red Triangle, which clearly highlights updates and new information which has been posted on the extranet since the user's last visit. The search engine and PDF Converter also now indicate the word of a request within the text of a document. In

addition, users have the possibility to define notification settings on every single part of the Extranet which they are interested in and how often they wish to be notified.

The Intelligence Unit also continues to provide valuable support to CEMBUREAU by ensuring rapid access to key information and valuable analysis. By monitoring EU policy-making and the legislative process, the Intelligence Unit is able to provide the Association with the right information at the right time.



**CEM • PROSPECTS**

The 2007 edition of the Energy Market Prospects Conference was held in Lisbon on 1-2 October 2007. With 122 participants from 23 countries, the conference reviewed the recent evolution of the steam coal and petcoke markets, freight and alternative fuels.

In relation to steam coal, supplies were relatively balanced against demand from the European steam coal market, with a tight market in Asia. The petcoke market is proving more difficult to predict, with

C&F prices Mediterranean destinations virtually in line with coal prices. The delegates were also informed about the freight market for 2007. The market has reached historical record levels, however developments until 2010 (when more capes come out from world shipyards) will depend entirely on the development of Asian economies: mainly China, but also increasingly India.

More information on the energy market is contained in the following section.

**THE ENERGY MARKET 07-08**

The very sharp combustible price increases, including freights and electricity, have meant that, at the end of 2007, energy accounted for 80% of the variable costs for European cement plants. The outlook for the coming years remains unchanged, with very high prices for all types of combustibles.

The coal market broke out of its twenty year trading range of US\$36 FOB South Africa in September 2003, and attained a cycle high in July 2004 at US\$72 FOB. After three years in a new trading range of US\$36 to US\$72, coal prices broke the previous highs in October 2007 due to frenzied demand from Asia, and have since attained new highs of US\$120 FOB South Africa. With record freights, pushed up by Chinese demand for iron ore and coking coal, C&F prices Europe for coal attained US\$150 at the end of 2007, and even higher prices at the beginning of 2008.

Estimates of further increases in India coal imports, and the fact that China has become a net importer, will support coal prices in the coming years. Technical analysis indicates that FOB prices South Africa can rise to US\$144, meaning C&F prices of US\$200 Europe.

European power stations contend that coal can attain these levels and still remain competitive against natural gas prices, which are, in turn, correlated with crude oil prices.

The high sulphur petcoke market remained in line with coal prices during the first half of 2007, at around US\$60 FOB US Gulf for 4% sulphur petcoke.

However, petcoke prices have since firmed only slightly and, at the end of 2007, were significantly below coal prices, with C&F prices at US\$125 European ports, 35% below coal prices per calorific content. As a result, the cement plants which switched from petcoke to coal in 2007, switched back en masse to petcoke at the end of 2007, beginning of 2008.

The limited supplies of 4% sulphur petcoke are a major problem for the cement industry, while the 6.5% sulphur petcoke remains fairly balanced. The current output of 4% sulphur petcoke is not enough to cover demand for this type of petcoke. Furthermore, due to record prices for coking coal, the steel industry is expanding its use of 4% sulphur petcoke.

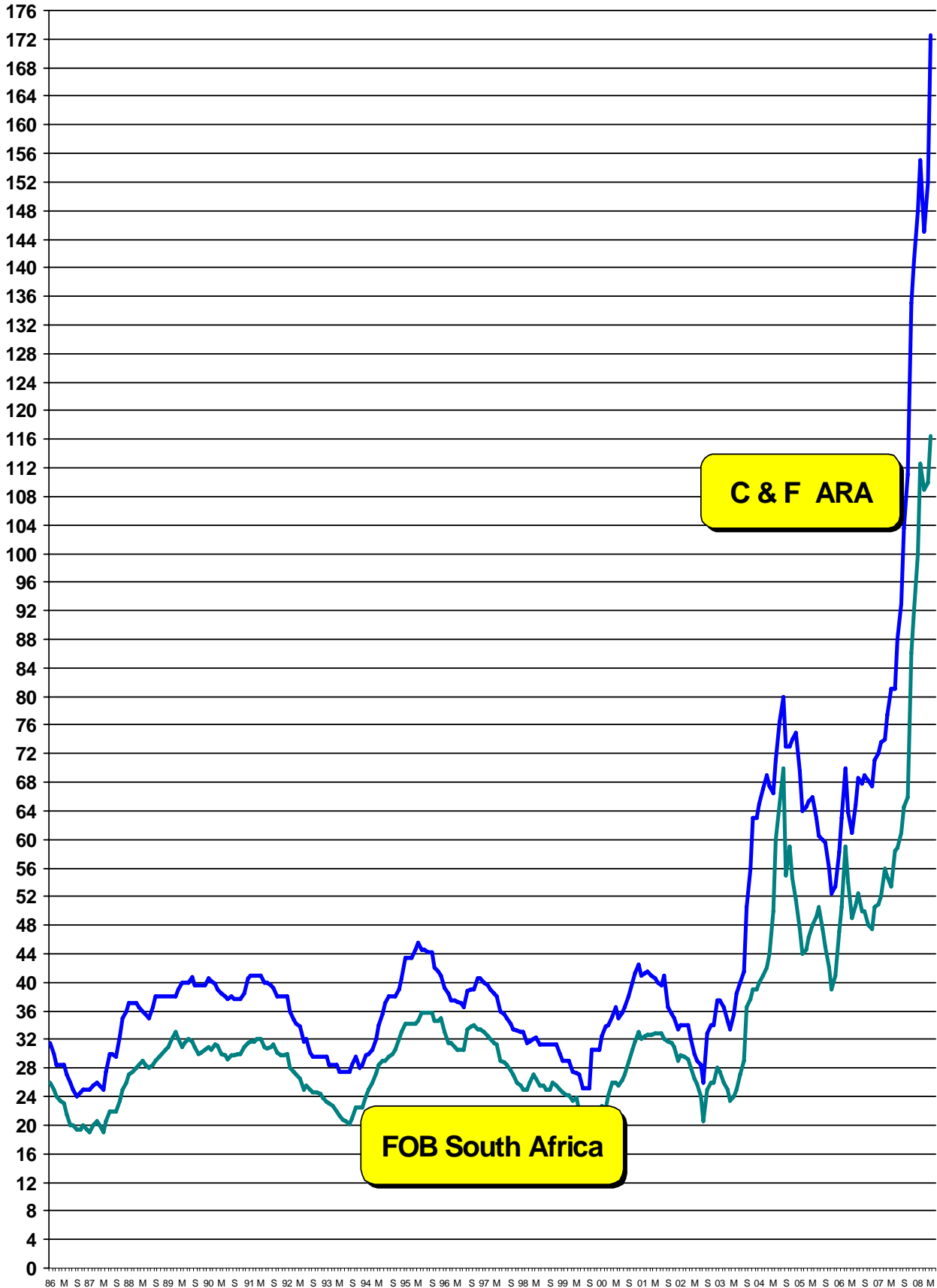
Another issue is the uncertainty in Venezuela, with a predicted fall in output over time, following a lack of maintenance.

Up until 2013, new petcoke cokers will virtually only produce high sulphur petcoke (6–7% sulphur petcoke). This poses a problem for all plants operating on 4% sulphur petcoke.

The record prices for all combustibles attained in 2007, with the outlook indicating unchanged high prices the coming years, means that increased use of alternative fuels in the cement industry is imperative.

# SOUTH AFRICAN STEAM COAL PRICE January 1986 - End May 2008

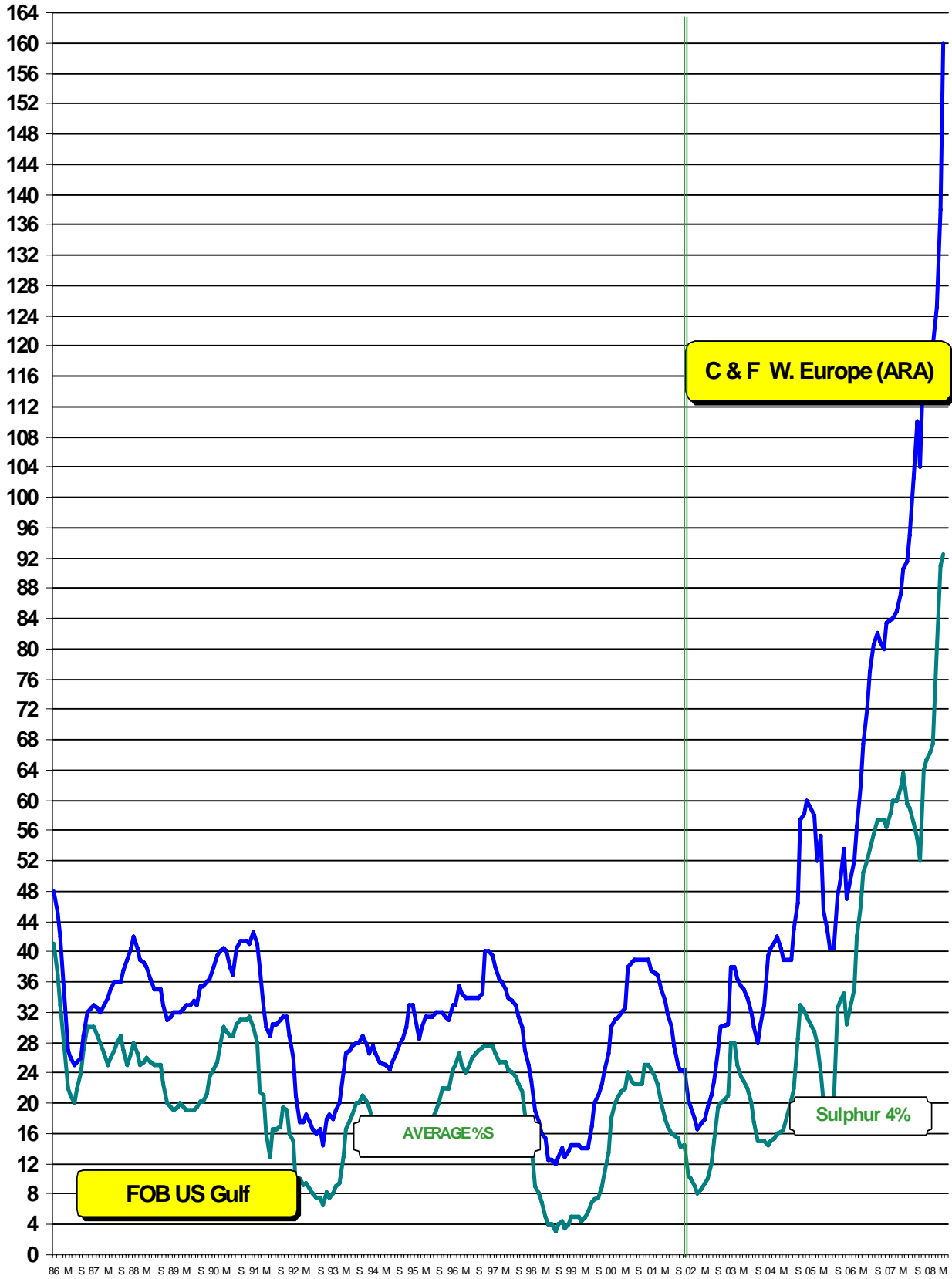
US\$/t



# PETCOKE PRICE

## January 1986 - End May 2008

US\$/t



## CORPORATE

The following section provides a brief overview of CEMBUREAU corporate activities in 2007.

### NEW MEMBERS

Having been an Associate Member of CEMBUREAU since 1 July 2003, **Romania**, represented by CIROM – the Employers' Organisation in Cement industry and other Mineral Products for Construction – was welcomed as a Full CEMBUREAU Member at the 2007 CEMBUREAU General Assembly.

On this occasion, **Bulgaria**, represented by BACI - The Bulgarian Association of Cement Industry - applied for CEMBUREAU Membership and, in accordance with CEMBUREAU Membership Rules, also became a Full CEMBUREAU Member in 2007.

In 2007 contact was initiated by Lithuania, which expressed an interest in becoming a CEMBUREAU Full Member.

### CONTACTS WITH MEMBERS

In 2007 **Poland** celebrated the **150<sup>th</sup> Anniversary of Portland cement production**. CEMBUREAU attended a seminar in Warsaw to celebrate the occasion. The 150 delegates included representatives from the Ministry of Environment, the Ministry of Economy, as well as local authorities.

**TÇMA** (the Turkish Cement Manufacturers' Association) also celebrated its **50<sup>th</sup> Anniversary** in 2007. CEMBUREAU was invited to speak during the 3<sup>rd</sup> International Symposium – Sustainability in Cement and Concrete – organised by TÇMA in May, and gave a presentation on "The Co-Processing of Waste in the Cement Industry".

### CEMBUREAU PUBLIC AFFAIRS

The two components of CEMBUREAU's Public Affairs organisation worked well throughout 2007. On many issues both the **MPG** (Members Plenary Group) and the **SAG** (Senior Advisory Group) provided a valuable contribution to CEMBUREAU's advocacy work and its implementation at national level.

In addition to regular contacts on specific issues, the MPG met twice in 2007. The first meeting (MPG Working Session) was held in Brussels in springtime, and their Annual Meeting took place in Istanbul in September. Once again, these Meetings are of utmost importance for co-ordinating and

implementing the actions of CEMBUREAU and its Members. Attendance at MPG meetings improved in 2007, albeit short of full attendance. There is still room for improvement.

The SAG, which is composed of public affairs professionals entirely dedicated to advocacy from associations and companies, mostly operated via conference calls and e-mails. In 2007, the SAG's mission was extended in the fields of external and internal communication.


### CONTACTS WITH OTHER CEMENT ASSOCIATIONS

In addition to its day-to-day contacts with Members and a **Presidential visit to BDZ/VDZ (Association of the German Cement Industry) in Berlin in December 2007**, CEMBUREAU has continued to develop a world-wide network of political influence in the cement industry through contacts with **CIF (Cement Industry Federation Australia)**, **CCAA (Cement, Concrete & Aggregates Australia)**, **JCA (Japan Cement Association)**, the **FICEM (Inter-American Cement Federation)**, **PCA (Portland Cement Association)** and **CAC (Cement Association of Canada)**.

CEMBUREAU participated in the Cement Associations forum organised in Montreal in July by the CAC. It was the first meeting of its kind to be held and was organised as a side event to the 12<sup>th</sup> International Congress on the Chemistry of Cement (ICCC 2007). It proved a useful exchange of experience and information, especially in relation to sustainable construction, health and safety.

As usual, CEMBUREAU participated in the General Assembly of **FICEM** which was held on 18 October 2007 in Brazil. On this occasion, a project was developed to collect significant information on CO<sub>2</sub> and climate change seen from the Latin American standpoint, producing a report which will be fed into the work of the CEMBUREAU Task Force working on linking<sup>1</sup>. The visit to **PCA** in October 2007 was the occasion to discuss carbon leakage with the PCA, on which it is essential to speak a common language to defend the cement industry position in the WTO (World Trade Organisation) context. Cooperation in relation to the UNEP (United Nations Environment Programme) Mercury Programme on mercury

<sup>1</sup> Linking: draft Directive to link the project-based mechanisms of the Kyoto Protocol, Joint Implementation (JI) and the Clean Development Mechanism (CDM), to the European Union emissions trading scheme (EU ETS), thereby enabling emission credits from the Kyoto mechanisms to be used by companies for compliance in the EU ETS



emissions was also discussed. This meeting was also the occasion to meet the new President and Chairman of PCA, Mr Brian McCarthy and Mr Charlie Sunderland.

It is with great sadness that CEMBUREAU learnt of the death of Mr John P. Gleason which, as President, led PCA for many years and became a very good friend of CEMBUREAU and its Members. Our thoughts go to his family in these very difficult circumstances. (14 January 2008)

The partnership between CEMBUREAU and the WBCSD-CSI (World Business Council for Sustainable Development's Cement Sustainability Initiative) continued in 2007 in different areas such as accident statistics, fuels and raw materials and, last but not least, climate change. A good division of labour was established with the CSI developing a sectoral approach in the cement industry world-wide whilst CEMBUREAU is addressing climate change on the European scene, the two joining efforts also on the collection of world-wide and European CO<sub>2</sub> data according to the WBCSD/CSI Protocol.

#### **CEMBUREAU: OPERATIONAL DEVELOPMENTS HUMAN RESOURCES**

2007 was an important year for the Secretariat due to an internal restructuring: the administration tasks were redistributed to existing CEMBUREAU staff members. Three positions, reporting directly to the Chief Executive, were therefore created: Corporate & Human Resources Manager, Finance Manager and Office & Property Manager.

Due to the wide range of issues dealt with by CEMBUREAU, it is important that the Secretariat has all the necessary resources at its disposal. Subsequent to the restructuring, the following Departments were strengthened to meet the needs of the Association: communications, statistics & industrial data and technical with the arrival of a "Communications Officer", an "Economist" and a "Secretary to the Technical Department". The latter Department also appointed a new "Issues Manager" in early 2008.

In early 2008 the Economist became the Head of Economics and Statistics.

Readers are invited to refer to the "CEMBUREAU Secretariat" chart on page 30.

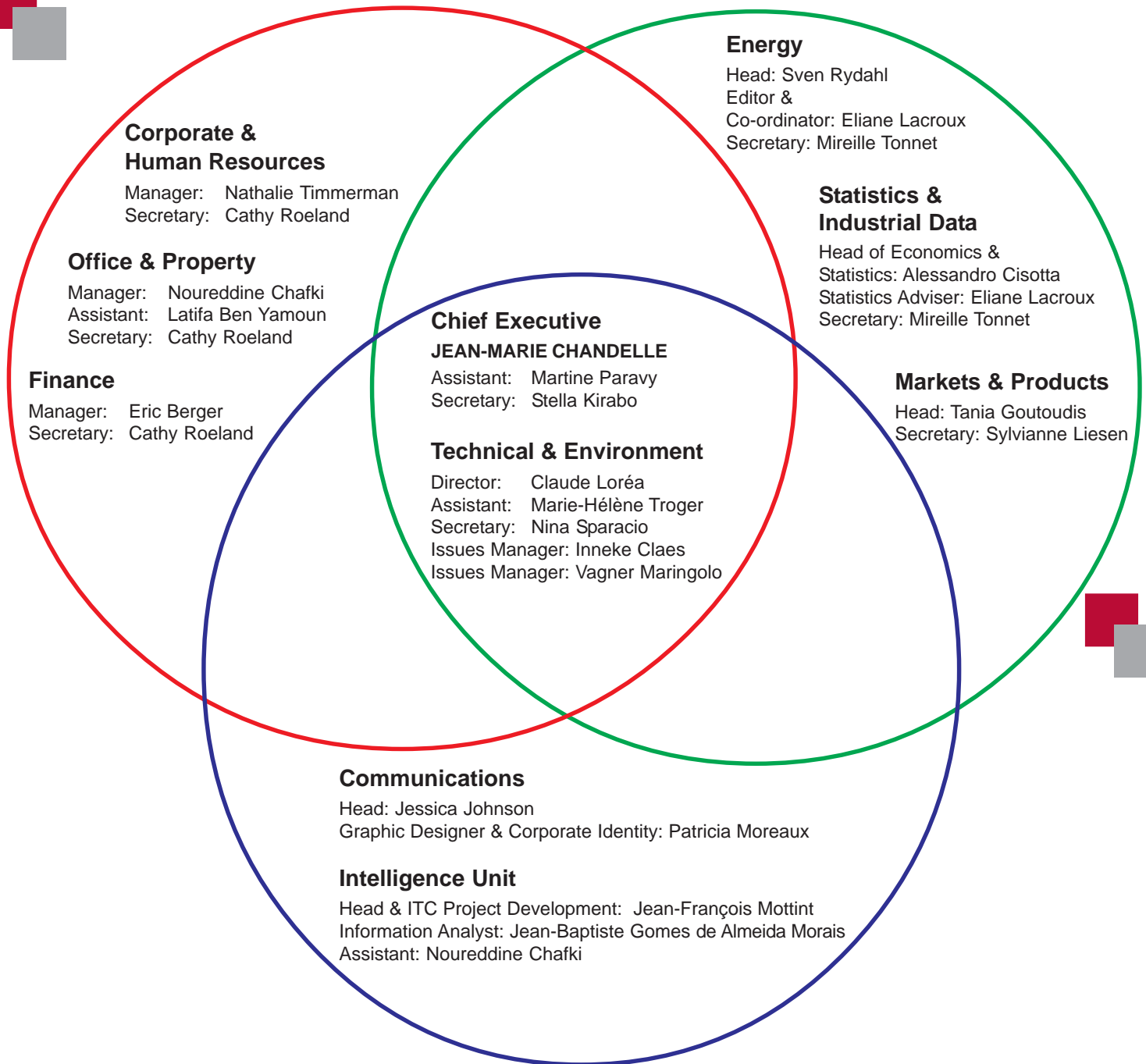
#### **BUILDING**

CEMBUREAU offices underwent a transformation, with the final works completed during the first quarter of 2008. Funded via the CEMBUREAU Finance Fund, the reasoning was two-fold: to maintain the value of the building and increase the Members' share.

The whole exercise is being carried out in strict accordance with the budget and the extra works on the welcome desk, which had not been foreseen in the original budget, will be accommodated within the budget with no overrun.

Upon completion of the works the value of the building will be reassessed. Measures aimed at improving energy efficiency have been taken whenever feasible.

## CEMBUREAU SECRETARIAT





CEMBUREAU



ORGANISATIONAL

STRUCTURE

ON

30 APRIL 2008

# CEMBUREAU ORGANISATIONAL STRUCTURE

## BOARD

<b>President</b>	P. Vanfrachem	
<b>Vice-President</b>	J.-P. Méric	
	<b>Full Members</b>	<b>Permanent Alternates</b>
<b>Austria</b>	T. Spannagl	
<b>Belgium</b>	B.-H. Koch	A. Jacquemart
<b>Bulgaria</b>	A. Chakmakov	T. Kostov
<b>Czech Republic</b>	J. Hrozek	J. Chmela
<b>Denmark</b>	M. Ciliberto	J. Norup
<b>Estonia</b>	T. Aura	
<b>Finland</b>	E. Laatio	K.-E. Nyman
<b>France</b>	B. Carré	B. Küng
<b>Germany</b>	A. Kern	G. Hirth
<b>Greece</b>	E.J. Paniaras	J.-C. Blatz
<b>Hungary</b>	R. Skene	J. Szarkándi
<b>Ireland</b>	A. Manifold	H. Morris
<b>Italy</b>	A. Zillo Monte Xillo	G. Ghinaglia
<b>Latvia</b>	I. Madridejos	R. Kuhn
<b>Luxembourg</b>	J.-P. Proth	W. Bauer
<b>Netherlands</b>	D. Gauthier	
<b>Norway</b>	G. Syvertsen	P. Brevik
<b>Poland</b>	A. Balcerek	L. Callebat
<b>Portugal</b>	C. Coelho Alves	L.F. Sequeira Martins
<b>Romania</b>	M. Rohan	P. Questiaux
<b>Slovenia</b>	J. Funda	A. Peternel
<b>Spain</b>	M. Melgar y Oliver	J. Martin-Saint-Léon
<b>Sweden</b>	F. Winberg	J. Gånge
<b>Switzerland</b>	U. Sandmeier	K. Wenger
<b>Turkey</b>	A. Ignebekçili	M. Güclü
<b>United Kingdom</b>	E. Pekenç	G. Galindo
<b>Members Ex Officio</b>	L.F. Sequeira Martins J.-M. Chandelle C. Loréa	President of Liaison Committee Chief Executive Technical Director

## LIAISON COMMITTEE OF THE CEMENT INDUSTRIES IN THE EU

<b>President</b>	L.F. Sequeira Martins	
<b>Vice-President</b>	A.M. O’Loghlen	
	<b>Full Members</b>	<b>Permanent Alternates</b>
<b>Austria</b>	T. Spannagl	
<b>Belgium</b>	B.-H. Koch	A. Jacquemart
<b>Czech Republic</b>	J. Hrozek	J. Chmela
<b>Denmark</b>	M. Ciliberto	J. Norup
<b>Estonia</b>	T. Aura	
<b>Finland</b>	E. Laatio	K.-E. Nyman
<b>France</b>	B. Küng	B. Carré
<b>Germany</b>	G. Hirth	A. Kern
<b>Greece</b>	E.J. Paniaras	J.-C. Blatz
<b>Hungary</b>	R. Skene	J. Szarkándi
<b>Ireland</b>	H. Morris	A. Manifold
<b>Italy</b>	M. Buzzi	
<b>Latvia</b>	I. Madrideojos	R. Kuhn
<b>Luxembourg</b>	J.-P. Proth	W. Bauer
<b>Netherlands</b>	D. Gauthier	
<b>Poland</b>	A. Balcerek	L. Callebat
<b>Portugal</b>	L.F. Sequeira Martins	C. Coelho Alves
<b>Romania</b>	M. Rohan	P. Questiaux
<b>Slovenia</b>	J. Funda	A. Peternel
<b>Spain</b>	J. Martin-Saint-Léon	M. Melgar y Oliver
<b>Sweden</b>	F. Winberg	J. Gånge
<b>United Kingdom</b>	E. Pekenç	G. Galindo
<b>Members Ex Officio</b>	J.-M. Chandelle C. Loréa	Chief Executive Technical Director

## RESOURCES COMMITTEE

	P. Vanfrachem	CEMBUREAU President
<b>France</b>	B. Küng	Holcim Ltd
<b>Germany</b>	G. Hirth	Schwenk Zement KG
<b>Latvia</b>	I. Madrideojos	Cemex Trading Europe
<b>Members Ex Officio</b>	J.-M. Chandelle E. Berger	Chief Executive Finance Manager

## STEERING COMMITTEE

<b>Chairman</b> J.-P. Méric CEMBUREAU Vice-President		
	<b>Full Members</b>	
<b>Belgium</b>	B.-H. Koch W. van Loo	
<b>France</b>	A. Capmas B. Küng V. Mages	
<b>Germany</b>	G. Hirth M. Schneider	
<b>Ireland</b>	C. A. Bannon	
<b>Italy</b>	G. Cinti S. Gardi	
<b>Netherlands</b>	D. Gauthier	
<b>Portugal</b>	C. Coelho Alves	
<b>Spain</b>	A. Josa J.C. López Agüí I. Madrideojos	
<b>Sweden</b>	R. van der Meer	
<b>Turkey</b>	A. Ignebekçili	
<b>Members Ex Officio</b>	P. Vanfrachem	CEMBUREAU President
	L.F. Sequeira Martins	President of the Liaison Committee
	J.-P. Jacobs	European Concrete Platform
	O. Luneau	Cement Sustainability Initiative - <i>Observer</i>
	J.-M. Chandelle C. Loréa	Chief Executive Technical Director

**MEMBERS PLENARY GROUP**

<b>Austria</b>	F. Friembichler
<b>Belgium</b>	J.-P. Jacobs
<b>Bulgaria</b>	V.B. Stariradev
<b>Croatia</b>	S. Zupanic
<b>Czech Republic</b>	J. Gemrich
<b>Denmark</b>	M. Ciliberto
<b>Estonia</b>	T. Aura
<b>Finland</b>	E. Laatio
<b>France</b>	A. Bernard-Gély
<b>Germany</b>	M. Schneider
<b>Greece</b>	N. Kotitsas
<b>Hungary</b>	T. Pálvölgyi
<b>Ireland</b>	J.B. Nolan
<b>Italy</b>	F. Curcio
<b>Latvia</b>	L.M. Cantú Pinto
<b>Luxembourg</b>	J.-P. Proth
<b>Netherlands</b>	A. Burger
<b>Norway</b>	G. Syvertsen
<b>Poland</b>	J. Deja
<b>Portugal</b>	M.J. Azancot
<b>Romania</b>	M. Dracea
<b>Slovenia</b>	J. Funda
<b>Spain</b>	A. Zaragoza Ramírez
<b>Sweden</b>	F. Winberg
<b>Switzerland</b>	G. Spicher
<b>Turkey</b>	O. Tezmen
<b>United Kingdom</b>	P. Chana

## SENIOR ADVISORY GROUP

<i>Associations</i>		
<b>AITEC</b>	I. Sacerdote	
<b>ATIC</b>	M.J. Azancot	
<b>BCA</b>	D. Pocklington	
<b>BDZ</b>	M. Basten	
<b>FEBELCEM</b>	M. Calozet	
<b>OFICEMEN</b>	E. Alonso Pelgrín	
<b>SFIC</b>	A. Bernard-Gély	
<b>VDZ</b>	M. Schneider	
<i>Companies</i>		
<b>Aalborg</b>	M. Ciliberto	
<b>CEMEX</b>	M. Casey	
<b>CRH</b>	C. Bannon	
<b>HeidelbergCement</b>	R. van der Meer	
<b>Holcim</b>	R-J. Meijer	
<b>Italcementi</b>	S. Gardi	
<b>Lafarge</b>	O. Luneau Alt. A-B. Spitzbarth	
<b>Members Ex Officio</b>	J.-M. Chandelle	CEMBUREAU
	C. Loréa	CEMBUREAU
	I. Claes	CEMBUREAU

## WORKING GROUPS AND TASK FORCES

### WORKING GROUP 1 “Climate Change and CO<sub>2</sub> Reduction”

<b>Co-Chairmen</b>	V. Mages - R. van der Meer
<b>Task Forces</b>	<ul style="list-style-type: none"><li>- Monitoring &amp; Reporting / GNR</li><li>- Global Post-Kyoto *</li><li>- Accounting Treatment of CO<sub>2</sub> Emission Rights</li><li>- EU ETS Post 2012 Allocation Method</li></ul>

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### WORKING GROUP 2 “Energy and Materials Resources”

<b>Co-Chairmen</b>	A. Josa - W. van Loo
<b>Task Forces</b>	<ul style="list-style-type: none"><li>- Use of Waste</li><li>- Electricity</li><li>- Solid Fuels</li></ul>

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

<b>Co-Chairmen</b>	G. Cinti - M. Schneider
<b>Task Force</b>	<ul style="list-style-type: none"><li>- Revision of the BREF *</li></ul>

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### WORKING GROUP 4 “Health and Safety”

<b>Co-Chairmen</b>	A. Capmas - S. Gardi
<b>Task Forces</b>	<ul style="list-style-type: none"><li>- REACH (including SDS and C&amp;L)</li><li>- Comprehensive Health Risk Study</li><li>- Crystalline Silica</li></ul>

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### WORKING GROUP 5 “Markets and Products”

<b>Co-Chairmen</b>	C.A. Bannon - J.C. López Agüí
<b>Task Forces</b>	<ul style="list-style-type: none"><li>- Environmental Product Declarations (EPDs) for Cements</li><li>- End Uses of Cement</li><li>- Energy Performance of Concrete Buildings</li><li>- Eurocodes</li><li>- Product Standards and Regulations</li><li>- Sustainability</li></ul>

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\* Advocacy at EU level via the SAG

#### CEMBUREAU MANAGEMENT

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



**MEMBERS**

**&**

**ASSOCIATE  
MEMBER**

# MEMBERS



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## ABBREVIATIONS GLOSSARY

ACEI	(Alliance for a Competitive European Industry)
AEII	(Alliance of Energy Intensive Industries)
AQFD	(Air Quality Framework Directive)
BAT	(Best Available Techniques)
B <sub>2</sub> B	(Business-to-Business)
BCA	(British Cement Association)
BDZ/VDZ	(Association of the German Cement Industry)
BIBM	(European Federation for Precast Concrete)
BREF	(Best Available Techniques Reference Document)
BUSINESSEUROPE	(Confederation of National Employers Federations throughout Europe)
CCAA	(Cement, Concrete & Aggregates Australia)
CEPMC	(Council of European Producers of Materials for Construction)
CERIB	(Centre d'Études et de Recherches de l'Industrie du Béton – the cement industries' study and research centre)
CFI	(European Court of First Instance)
CHRS	(Comprehensive Health Risk Study)
CIF	(Cement Industry Federation Australia)
CINDI	(CEMBUREAU International Network for Documentation and Information)
CONCAWE	(Conservation of Clean Air and Water in Europe - the European association of petroleum product manufacturers)
CSI	(Cement Sustainability Initiative, part of World Business Council for Sustainable Development)
ECF	(European Construction Forum)
ecra	(the European Cement Research Academy)
ECP	(European Concrete Platform)
EFCA	(European Federation of Concrete Admixtures Associations)
EIIs	(Energy Intensive Industries)
EIPPC	(European Integrated Pollution Prevention and Control Bureau)
ELCD	(European Reference Life Cycle Data System)
EPD	(Environmental Product Declaration)
ERMCO	(European Ready Mixed Concrete Organisation)
ESDA	(European Social Dialogue Agreement)
ETD	(Emission Trading Directive 2003/87/EC)
ETS	(Emission Trading Scheme)



Eucopro	(the European Association for Co-processing)
Eurofer	(European Confederation of Iron and Steel Industries)
Eurometaux	(European Association of Metals)
EUROSAC	(European Federation of Multiwall Paper Sack Manufacturers)
FAIB	(Federation of European and International Associations)
FEBELCEM	(Association of the Belgian Cement Industry)
FICEM	(Federación Interamericana del Cemento)
FOCOPE	(the Forum in the European Parliament for Construction)
FSE	(Fire Safety Engineering)
GHS	(United Nations Globally Harmonised System of Classification and Labelling of Chemicals)
HLG	(High level Group on Competitiveness, Energy and the Environment)
IFIEC	(International Federation of Industrial Energy Consumers)
IPPC	(Integrated Pollution Prevention and Control)
IPPC Review	(Integrated Pollution Prevention and Control Directive - 1996/61/EC)
IWG	(intersessional working group)
JCA	(Japan Cement Association)
LCA	(Life cycle analysis)
LCI	(Life cycle inventory)
MPG	(Members Plenary Group)
NDPs	(nationally determined parameters)
NEEIP	(Non-Energy Extractive Industry Panel)
NEPSI	(European Network for Crystalline Silica)
PCA	(Portland Cement Association)
REACH	(Registration, Evaluation and Authorisation of Chemicals)
RIPs	(REACH implementation projects)
SAG	(Senior Advisory Group)
SDS	(Safety Data Sheet)
SEAP	(Society of European Affairs Professionals)
TÇMA	(the Turkish Manufacturers' Association)
UNEP	(United Nations Environment Programme)
WBCSD	(World Business Council for Sustainable Development)
WBCSD-CSI	(World Business Council for Sustainable Development's - Cement Sustainability Initiative)



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