

Ceramics  
When tradition builds a future



Roof Tiles & Bricks

Wall & Floor Tiles



Refractories



Abrasives



Substrates



Wall & Floor Tiles



Floor Tiles & Grout

## EFFECTIVE & RESPONSIBLE TRADE POLICY

Alain Delcourt

President Cerame-Unie

Managing Director, Agrob Buchtal GmbH

18 December 2015

**Cerame-  
Unie** The European Ceramic  
Industry Association

# 1. Key facts

30

Member countries of Cerase-Unie



200,000

Direct jobs



80%

SMEs



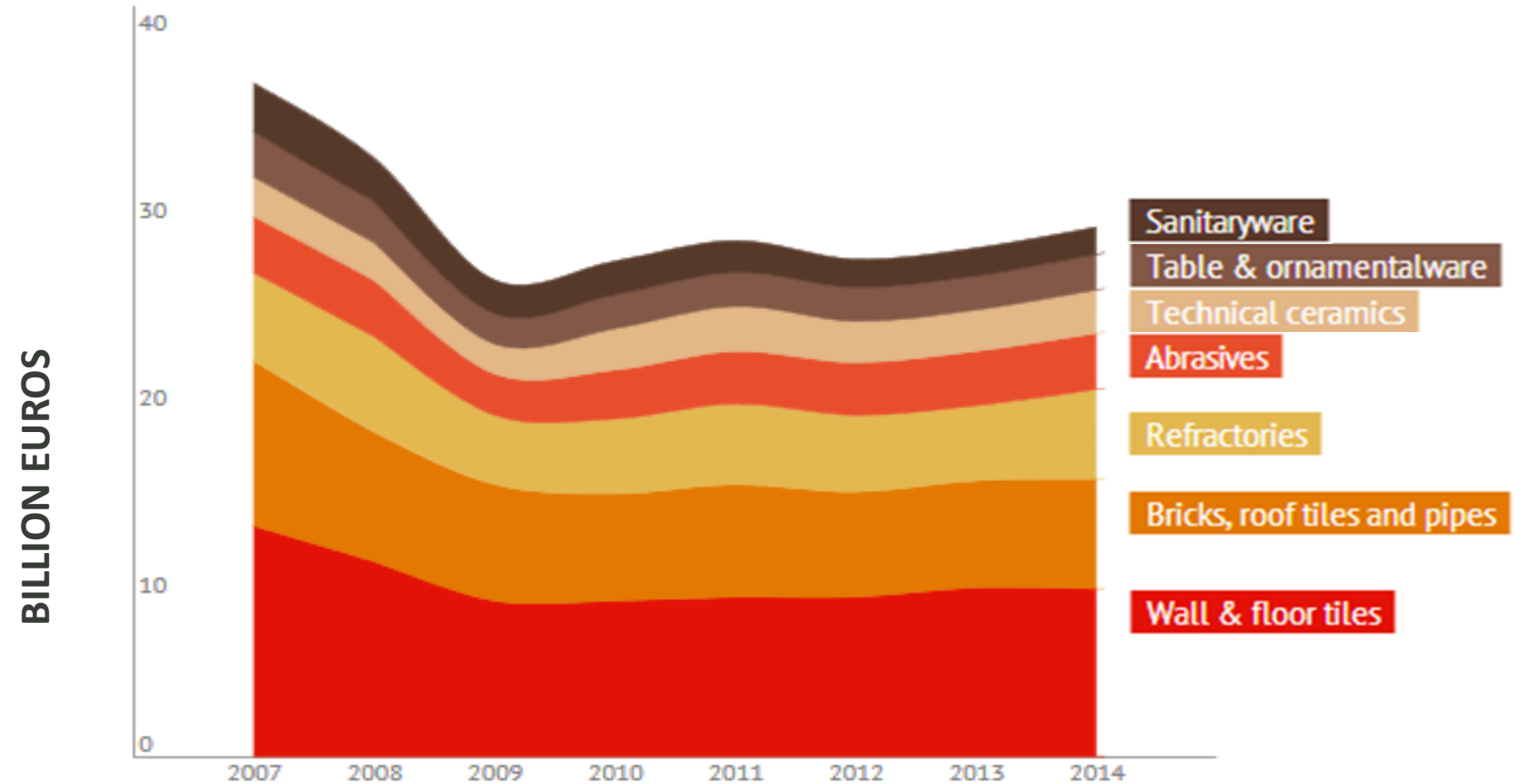
€28 bn

Production value (2014)



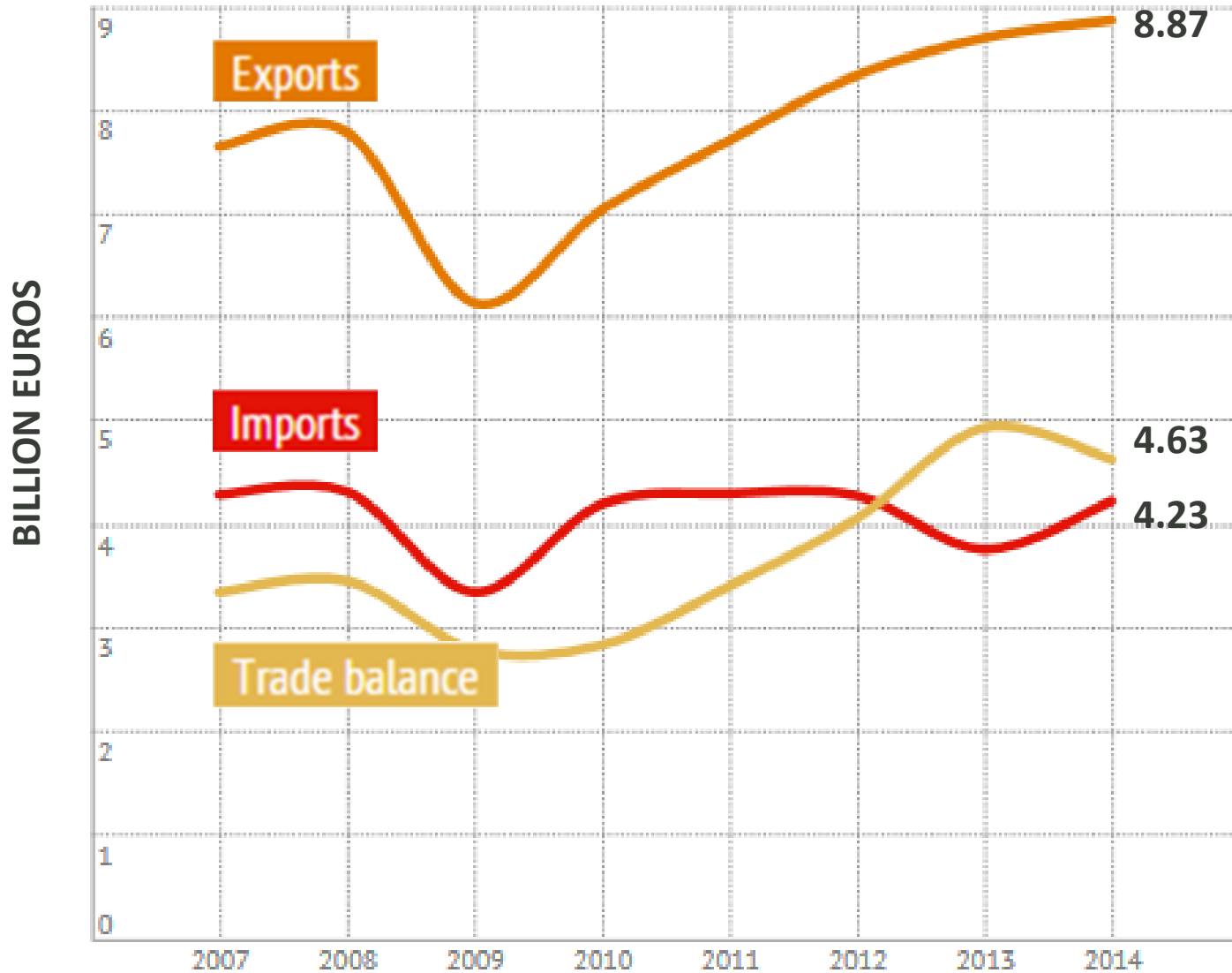
€4.6 bn

Positive trade balance (2014)



Source: Eurostat 2015

## 2. Trade overview



● €4.6 bn  
Positive trade balance (2014)

### Ceramic exports:

🍷 25%  
of EU ceramic production

🍷 30%  
of EU wall & floor tiles production

🍷 40%  
of EU refractories production

Source: Eurostat 2015, Cerame-Unie data

# 3. Key trade issues

- **Over 100 of tariffs & NTBs in 40 countries:** despite a number of FTAs in the pipeline, EU companies need faster remedies to trade barriers
- Support **EU free trade agreements** and hopes for a swift Trade Facilitation Agreement
- **TTIP** to remove **26-28 % peak tariffs in ceramic tableware** and up to **10% on ceramic tiles** to 0%
- Trade strategy should be effectively **implemented**
- **Enforcement and efficient TDIs** are key to SMEs
- Market economy status China needs to be **assessed** responsibly
- Premature and unilateral grant should be avoided, need **coordinate internationally**

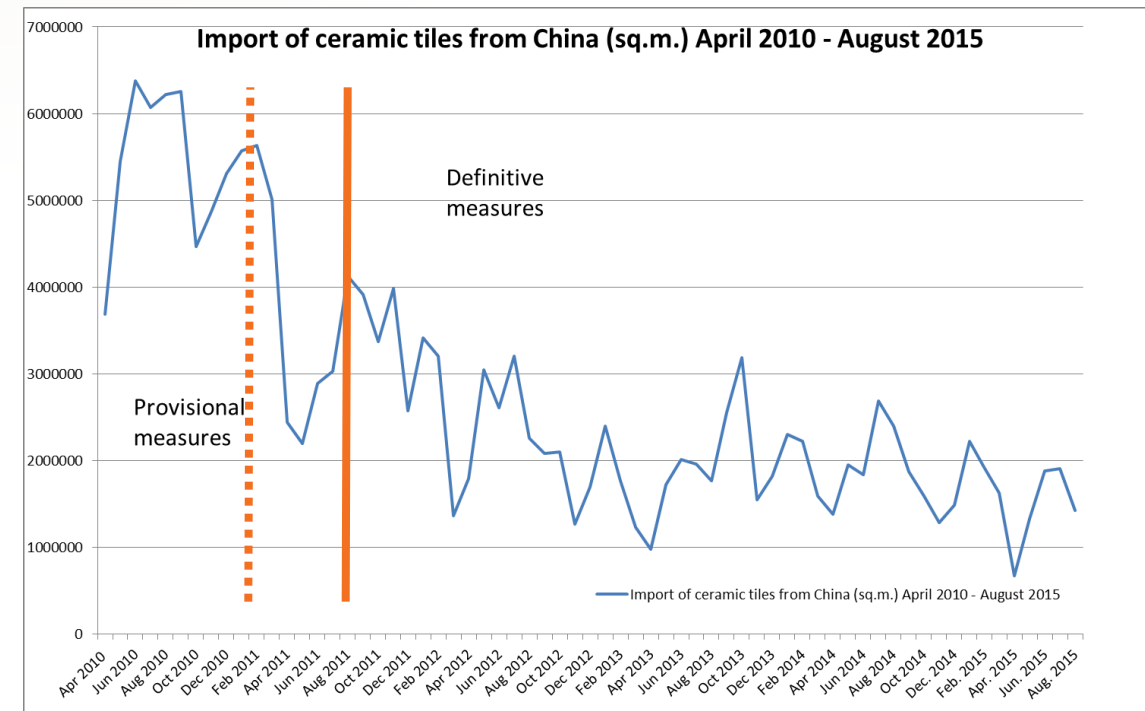
# 4. Market economy status of China: impact

- Effect on the ceramic industry if MES is granted prematurely
- Cerame-Unie's membership represents **200,000 direct jobs**
- **80%** of small & medium enterprises
- **Around 100,000 ceramic direct jobs** are being defended by anti-dumping measures:
  - Ceramic wall and floor tiles
  - Ceramic tableware
- Only efficient anti-dumping tools can level the playing field

## 4. Market economy status of China: impact

### Impact of effective AD measures in the ceramic tiles sector 2011 - 2015

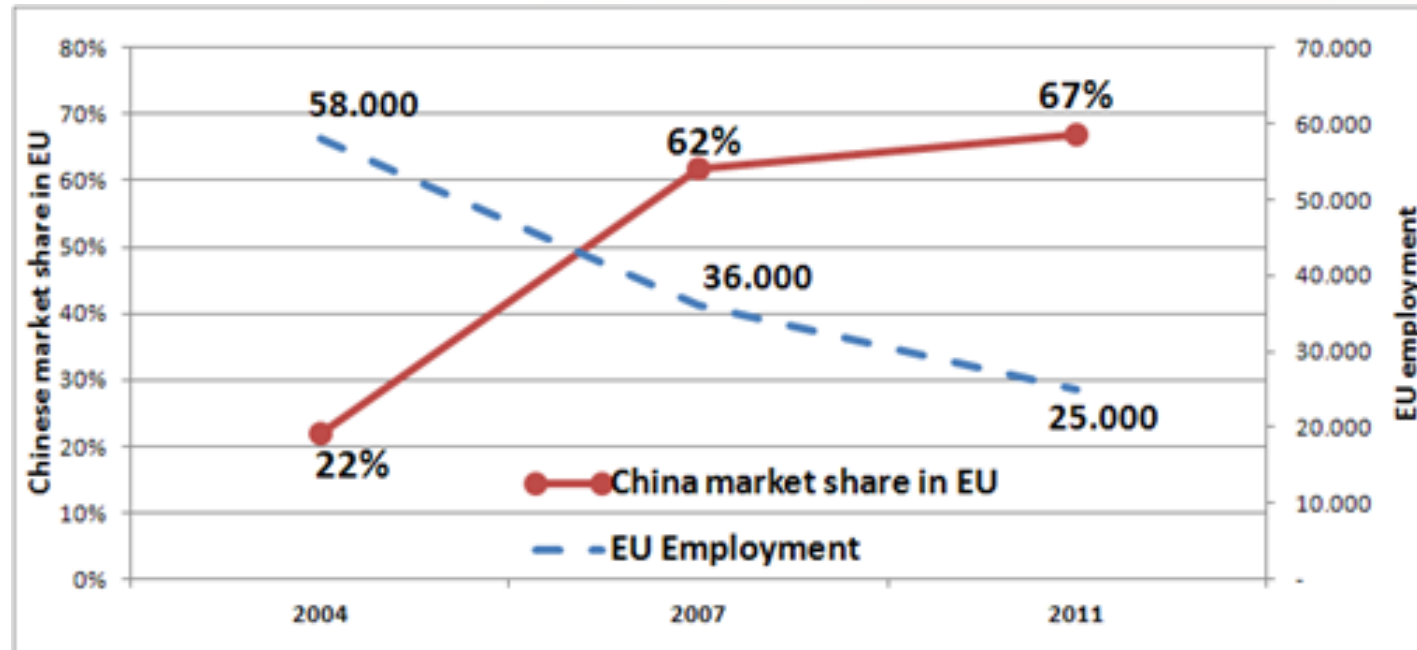
- In force since Sept 2011
- Imports from China decreased by over 65%
- If AD measures were removed around **70,000 direct jobs** are at risk
- Majority are SMEs
- **36.5 %** average duty for Chinese companies having cooperated and **69.7%** for non-cooperating Chinese companies



Source: Eurostat 2015

# 4. Market economy status of China : impact

## In absence of AD measures in ceramic tableware sector 2004-2011

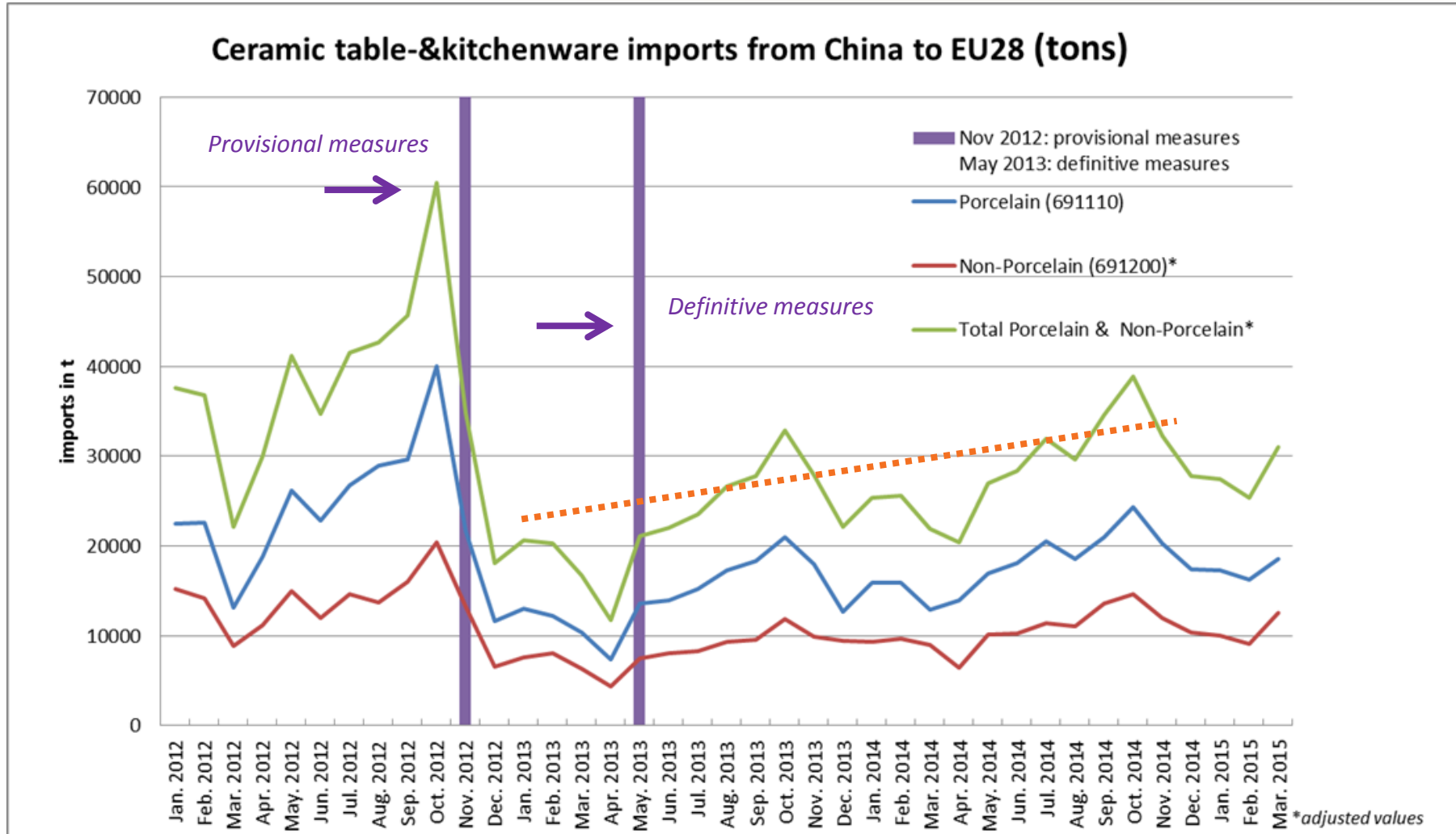


Source: Eurostat 2015

- Period: 2004 – 2011  
(no AD measures in place)
- China's market share increased from **20% to almost 70%**
- Ceramic tableware sector lost over **33,000 direct jobs**
- **Around 25,000 direct job** currently at risk if AD measures are removed

# 4. Market economy status of China

- Definitive anti-dumping duties imposed on 15 May 2013 (duty range: 13.1%-36.1%)



Source: Eurostat June 2015



## 4. Market economy status of China: key messages

- China to **demonstrate** first it fulfils market economy criteria
- Significant amount of **jobs at stake** in the EU
- Need for a rigorous & transparent **impact assessment**
- EU should **coordinate** with major partners in the WTO
- Any unilateral EU action would be **irreversible**
- EU TDI would be **weakened with extremely low or no AD duties** on China
- **No reversal of the burden of proof** on EU companies
- Anti-dumping complaint today is already **very expensive and burdensome** particularly for **SME sectors**

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**Thank you for your attention!**