

CERAMIC MANIFESTO 2024-2029

Ensuring Europe's sustainability with ceramic manufacturing

Deeply rooted in Europe



No other industry has a heritage that goes as far back as ceramics. Bronze age pottery, Roman aqueducts and medieval roof tiles are but a few examples that show both our history and the durability of our products.

Today, Europe is the world leader in high quality and strategic ceramic products such as wall and floor tiles, bricks and roof tiles, sanitary ware, tableware, vitreous clay pipes or refractory ceramics for most high temperature processes, or advanced ceramics for transport, defence, medical devices and other value chains.

The ceramic industry is mainly SME driven and provides local jobs and local value creation.



ABRASIVES



BRICK AND ROOF
TILES



WALL AND FLOOR
TILES



TABLE AND
ORNAMENTALWARE



SANITARYWARE



REFRACTORIES



TECHNICAL
CERAMICS



CLAY PIPES



EXPANDED CLAY



FLOWER POTS

Why ceramics matter



€37 billion
Production value



200,000
direct employment



€5.3 billion
positive trade balance



Resilience

Producing in and for Europe enhances the EU's strategic supply chain security, reduces dependencies on third countries and supports a resilient Europe.



Sustainability

R&D and investments in decarbonisation have ensured that European ceramics have the lowest carbon footprint in the world.

Building a net zero future

Ceramics support climate adaptation measures and are key for CO₂ neutral, circular and long-lasting buildings by significantly reducing the embodied carbon of new houses and by supporting the energy-efficient renovation of existing buildings.



Innovation

The European ceramics industry is the world leader in both product innovation and innovation in manufacturing technologies.



Numerous challenges facing ceramic industry

Over the past years, ceramics manufacturing has overcome many challenges (COVID pandemic, war in Ukraine, energy crisis). However, today, the industry is facing multiple threats simultaneously. Because of its broad product offering and specialisation, not all ceramics companies face the same issues, but some challenges are common to most companies.

High cost of energy

On average, energy accounts for 30% of production costs. The ceramics sectors are therefore very vulnerable to energy price volatility.



Lack of international level playing field

European ceramics compete with low-cost products from third countries produced with far less stringent environmental requirements, which risks carbon, jobs and investment leakage.



High capital costs

In order to remain competitive and reduce emissions for the green transition, continuous investments are required which have become costly to finance.



Challenging exports

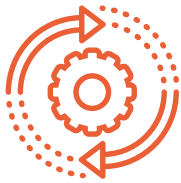
European ceramics face tariff and non-tariff barriers in several countries, which are threatening fair access to important markets.



The role of EU policy

For the manufacturing of ceramics in Europe to be viable and sustainable, a range of EU and national policies must be adapted to restore competitiveness and create the conditions that will allow for further investments to secure the future of the sector in Europe.

No wishful thinking - effective support for technology readiness and green energy infrastructure is a key requirement



The green transition and the sustainable decarbonisation pathway of the ceramic sector as described in the "[Ceramic Roadmap to 2050 – Continuing our path towards climate neutrality](#)", needs to be acknowledged. The current EU decarbonisation target for 2030 requires technologies, infrastructure and decarbonised energy sources that might become reality in the future but are not available in the short term.

No unilateral policies without considering the bigger picture



In parallel, the implementation of unilateral climate policies without assessing the social and economic sustainability of the decarbonisation pathway, has left the industry without any real possibility of significant short-term progress on decarbonisation. This leads to an increase in costs for European companies and, thus, a loss of international competitiveness.

Our 6 key policy priorities

ETS Review

An urgent review of the EU ETS which includes:

- expanding access to equivalent measures for SMEs/small emitters
- enabling indirect cost compensation to promote the electrification of production processes
- ensuring free allocation rules effectively protect from the risk of carbon leakage
- establishing fair allocation rules for cogeneration
- revising the role of financial entities in ETS



Export adjustments and no scope extension without proper impact assessments under the CBAM

Guarantee export adjustments under the CBAM to allow EU producers to remain competitive in export markets. Sectors should only be included in the CBAM after a thorough impact assessment demonstrating a clear benefit and feasibility, considering their trade intensity.



Material-neutral policies for construction

Ensure the adoption of material-neutral policies for construction that consider the full life cycle. This should include the long lifespan and durability of construction materials.



Access to green energy

Provide secure access to sufficient green energy sources at competitive prices in an integrated European market.



A level playing field

Ensure an effective level playing field within and beyond the EU Single Market with the rapid use of effective trade defence measures whenever justified.



A harmonised approach

Adopt coherent regulatory instruments and standards across the EU based on scientific research and economic feasibility across the industry (e.g. BRef, food contact materials, CMD, REACH, ...).

