Cerame-Unie The European Ceramic Industry Association

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Position paper

"Scenarios for a transition pathway for a more resilient, greener and more digital construction ecosystem"

Cerame-Unie welcomes the stakeholder consultation launched by the European Commission to design scenarios for a transition pathway for a more resilient, greener and more digital construction ecosystem. As further inputs to the questionnaire, Cerame-Unie would like to 1) raise below some concerns about the definition of the construction ecosystem by the European Commission – and 2) highlight how ceramics construction products contribute to a greener and more digital construction ecosystem.

1) Construction ecosystem: the built environment should be envisaged as a whole

Cerame-Unie deplores that '*the manufacturing of most essential building materials is not included within the construction ecosystem as many of them are part of the Energy Intensive Industries ecosystem',* as stated in the Staff Working Document published by the European Commission (p.8). Building materials do not have a purpose in themselves – much more, they are the basic foundation of the construction business. Without building materials, there is no construction. **The inclusion of all construction products in the construction ecosystem is the cornerstone of an integrated approach towards sustainability in the construction sector and built environment.**

Cerame-Unie also regrets that the setting adopted by the European Commission is rather artificial and non-inclusive: construction products classified in the 'energy intensive industry ecosystem', such as ceramics, should not be excluded from the construction ecosystem. **It should be possible to classify construction products in several ecosystems when necessary.**

Construction is an ecosystem in which Europe is a global market leader. The construction ecosystem provides hundreds of thousands of direct and indirect local jobs in Europe. As mentioned in the Staff Working Document, the industrial construction ecosystem employs approximately 24.9 million people in the EU and is dominated by micro and small enterprises. R&D, innovation and technology leadership are – still – in Europe and the utmost should be done to keep those resources in the European Union.

The construction ecosystem is extremely sustainable, not only, but specifically because of the long-lasting products and systems with life cycles of well above 100 years. In a full life-cycle approach, this ecosystem contributes positively to a low carbon economy.

Inspiring and collaborative initiatives, such as the New European Bauhaus, which aims at shaping future ways of living, should be further developed and promoted.

2) Ceramics for a greener and more digital construction ecosystem

For a green transition with ceramics

The green transition includes a variety of actions from sustainability, circularity, waste disposal and management along the value chain. It is important that all provisions in relation with these actions are based on scientifically accepted assessment methodology. For many years now, Life Cycle Assessment (LCA) and Environmental Products Declaration (EPD) are reliable and trusted tools used on a voluntary basis by ceramic manufacturers to deliver information on the environmental performance of products. Based on the European standard EN15804, EPDs offer a scientifically based implementation of sustainability principles across Europe and beyond. Sustainability performance assessments must be carried out preferably at building level, according to a scientifically accepted assessment methodology, such as Level(s).

a) Energy renovation

Ceramic construction products (i.e. clay bricks, blocks, roof tiles, pavers, wall and floor tiles, sanitaryware, expanded clay) will be pivotal to Europe's new near-zero energy/zero emission building stock as well as its Renovation Wave objectives. These products are affordable and provide comfortable, energy-efficient, safe and healthy homes to millions of people in Europe.

Ceramic construction materials provide high levels of safety in case of fire or flood. They also ensure a high indoor air quality, as no toxic emissions emanate from the building fabric into the internal environment. Ceramic wall and roof systems not only increase comfort but reduce heating and cooling costs and emissions. Innovative ceramic sanitary appliances contribute to water and energy efficiency, notably in the context of voluntary smart tools promoted by the industry such as the Unified Water Label.

Both renovation and new construction should be promoted. Mandatory examinations should be carried out to determine whether deep renovation (purely energetic renovation) or demolition and subsequent rebuilding is ecologically and economically more reasonable. It is sometimes more efficient to entirely rebuild a building than to renovate an old one. In addition, a new building can be more energy-efficient, and will be better adapted to new social needs as well as to recent urban developments around it. Therefore, renovation and new construction should receive the same fiscal and financial incentives.

b) Resource consumption, waste and circularity

The durability and reusable qualities of ceramic construction materials have been known for centuries. The ceramic industry, as well as all other partners in this ecosystem, supports the goal to move away from a linear 'produce, use, waste' model to a circular model in which resources and materials are reused or recycled. Ceramic products are resource-efficient and stand out with their high durability thanks to their long lifespan. After the end-of-life stage, ceramic products can be reused or recycled. Use of long-lasting, reusable and/or recyclable products such as ceramic products has to be encouraged, and a whole life cycle analysis should become binding.

The ceramic industry is already making a major contribution to the shift towards a circular economy through innovative production processes and sustainable products – for example, by minimising raw material consumption and waste generation during the production process, optimising raw material selection, refining product design and promoting supply-chain cooperation for recycling. However, regulatory obstacles hampering further development of circular practices in the industry should be lifted. Developing circular practices and adapting technical requirements of installations can generate significant costs for the industry. Incentives should be developed to encourage further circular practices.

c) Preservation and restoration of biodiversity

The ceramic industry together with partners in the construction ecosystem actively help to preserve biodiversity; with the promotion and restoration of biodiversity in clay quarries for example. The unique landscape, especially aquatic environments, created by quarrying operations can have a positive impact on habitats and wildlife in and around these quarries. To document the biodiversity in used and restored pits, databases are being set up; this is notably the case in Germany.

Digitalisation

Digitalisation of the construction ecosystem is not an objective but a tool. Digital EPDs based on EN standards and Smart CE based on the CPR, deliver the data required by public procurement. Industry offers solutions to the market players, such as smart CE marking.

About Cerame-Unie

Cerame-Unie is the European Ceramic Industry Association, representing interests of all major European ceramic producers. The EU Ceramic Industry is a world leader in producing value added, uniquely designed, high quality ceramic products manufactured by flexible and innovative companies, the majority of which are SMEs. The ceramics industry represents an annual production value of around €30 billion, accounting for approximately 25% of the global production, and over 200,000 direct jobs throughout the EU.

The major producing countries in the EU are Italy, Germany, Spain, France, the UK, Portugal and Austria. Production is also strong in the Czech Republic, Poland, and Hungary, all of which have growing and dynamic ceramic sectors that traditionally export to other EU countries.

The EU Ceramic Industry is export-oriented with 30% of its production sold outside the EU market. It is competitive, both domestically and internationally.