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Dear Members,

As recently elected PRE President, I am honoured to contribute to the PRE Annual Report. Last year saw yet more growth in terms of active membership, as around 80 participants from 12 countries attended the 62nd PRE Congress in Istanbul.

Throughout the year activities took place in the fields of environment, chemicals management, trade and research. In addition to regular meetings with PRE members and European institutions, PRE organised a number of ad-hoc meetings with downstream user representatives, especially in the field of its REACH and SPIRE activities.

PRE regularly highlights the vital and strategic role that the European refractory industry plays both at European and global level.

At European level, PRE furthers its messages as a member of Cerame-Unie, the umbrella association representing the European ceramic industry. Cerame-Unie exchanges frequently with EU policymakers on issues that affect the European refractory industry. Cerame-Unie also organises the European Parliament Ceramics Forum, a platform for ceramic representatives and MEPs and EU officials to discuss relevant legislative developments.

At global level, PRE holds the Secretariat for the World Refractories Association (WRA). This platform on which to discuss regulatory issues, circulate statistics and promote the industry, counts three continental associations, three national associations and five multi-national companies as its members. In 2015 the WRA had a successful General Assembly meeting in Vienna.

I would like to take this opportunity to thank François Wanecq for his great contribution to the association as PRE President from 2013 to 2015. He handed over a thriving association that I look forward to contributing to as its President until 2018.

Last but not least, it is important to remember that the success of PRE relies on the manpower and expertise provided by its members. Thanks to the continued engagement of our national associations and direct members we are able to inform European institutions and regulators about the economic importance of the European refractory industry and promote the future development of the European refractory industry.

Thank you for your support, and I hope that you will appreciate this 2015 edition of the PRE Annual Report.

Yours sincerely,

José Maria Dominguez
PRE President
2. PRE Mission and Structure

PRE, the European Refractories Producers Federation, is the European refractory industry liaison office located in Brussels. It was founded in 1953 and offers a European platform on which its members can exchange views and experiences in the common interest.

PRE represents 12 national associations in 17 European countries as well as the four multi-national groups which are direct members of PRE for their European activities. Moreover, the majority of world-leading refractory companies are European.

PRE has no commercial aim. In the scope of EU legislation and standardisation, its mission is to promote the interests of European Refractory Producers. The activities of the federation are aimed at achieving these purposes through working with the European institutions (European Commission, European Parliament and the Council), and a wide range of stakeholders such as the European Committee for Standardization (CEN), the Confederation of European Business (BusinessEurope), and other EU associations such as Eurofer (steel industry), CEMBUREAU (cement industry), CEFIC (chemical industry), IMA-Europe (industrial minerals), Euromines (European mining industry), etc.

PRE is a member of Cerame-Unie aisbl, the European Ceramic Industry Association. Through Cerame-Unie the interests and concerns common to the whole of the ceramics industry are communicated to the European institutions.

PRE structure

GENERAL ASSEMBLY

PRESIDENT
José Maria Dominguez

SECRETARY GENERAL
Astrid Volckaert

EXECUTIVE COMMITTEE

TECHNICAL COMMITTEE
Peter Quirmbach
3. PRE Membership

PRE represents:

12 National Associations (representing 17 countries, 160 companies, half of which are Small and Medium sized Enterprises)

and

4 Direct Members (multinational groups):

- Calderys
- Magnesita
- Refratechnik
- Vesuvius

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4. PRE Statistics

Yearly statistics on workforce, production and sales in the refractory industry in Europe are compiled by the PRE Secretariat with the data supplied by the national associations, and are presented at the PRE General Assembly. These statistics provide information on the different product groups on a country level and are available for members only.

<table>
<thead>
<tr>
<th></th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
<th>2013</th>
<th>2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Workforce (long-term)</td>
<td>18.929</td>
<td>18.212</td>
<td>18.023</td>
<td>18.818</td>
<td>19.228</td>
</tr>
<tr>
<td>Production (1,000 tons)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total production</td>
<td>4.121</td>
<td>4.287</td>
<td>3.905</td>
<td>3.912</td>
<td>4.120</td>
</tr>
<tr>
<td>Shaped products</td>
<td>2.312</td>
<td>2.393</td>
<td>2.174</td>
<td>2.169</td>
<td>2.225</td>
</tr>
<tr>
<td>Unshaped products</td>
<td>1.810</td>
<td>1.894</td>
<td>1.731</td>
<td>1.743</td>
<td>1.895</td>
</tr>
<tr>
<td>Sales (Mln €)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total sales</td>
<td>3.170</td>
<td>3.537</td>
<td>2.966</td>
<td>3.290</td>
<td>3.517</td>
</tr>
<tr>
<td>Shaped products</td>
<td>2.074</td>
<td>2.284</td>
<td>2.201</td>
<td>2.085</td>
<td>2.134</td>
</tr>
<tr>
<td>Unshaped products</td>
<td>961</td>
<td>1.118</td>
<td>1.026</td>
<td>996</td>
<td>1.194</td>
</tr>
<tr>
<td>Unspecified</td>
<td>135</td>
<td>133</td>
<td>133</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

The data presented are those of the PRE members only, PRE non-members are estimated to account for a further 20% of the workforce and 15% of the turnover.

End-use in tons

Total 2014: 3.6 million tons
**PRE member workforce**

Increase in workforce from 2013 to 2014: 2%

**PRE member production**

Increase in production from 2013 to 2014: 5%
Decrease in production from 2007 to 2014: -15%

**PRE member sales**

Increase in sales between 2013 and 2014: +7%
5. PRE Activities

PRE Annual Congress and General Assembly

From 27 to 29 May European refractory producers gathered in Istanbul for the 2015 PRE Congress. This 62nd annual Congress attracted around 80 participants from 12 countries and was kindly hosted by SEREF, the Turkish Ceramic and Refractories Manufacturers Association.

Members began their stay in Turkey with a welcome cocktail and dinner on 27 May. The Economic and Executive Committee meetings took place the next day, followed by the PRE annual General Assembly on 29 May. Guest speaker Dr Cem Karakaş, CFO of Yıldız Holding, opened the meeting with a speech on Turkey’s economy. The General Assembly also agreed on a new PRE President for the 2016-2018 period, Mr José Maria Dominguez, who represents the Spanish refractory association ANFRE in the PRE Board. He will succeed Mr François Wanecq, CEO of Vesuvius plc, who was President for the period 2013-2015.

The next Congress in Krakow will take place in June 2016, hosted by the Polish refractory association SPMO.

PRE Executive Committee

The PRE Executive Committee meets several times a year and is composed of representatives of the six largest national associations and the four direct members. This Committee sets the priorities for the PRE work plan, follows-up on the activities of the different PRE Working Groups and Committees and prepares the financial and regulatory aspects of the PRE General Assembly. The PRE Executive Committee is chaired by the PRE President.

In 2015, members of the PRE Executive Committee were:

- François Wanecq - PRE President / Vesuvius plc
- Astrid Volckaert - PRE Secretary General
- Franz Buxbaum - Austria (RHI AG)
- Didier Pessiot - France (IFB Refractories)
- Thomas Seger - Germany (RHI Urmitz AG & Co. KG)
- Cesare Pegoraro - Italy (Keratech S.p.A.)
- José Maria Dominguez - Spain (Refractarios Alfran S.A.)
- Salih Erez - Turkey (Haznedar A.S.) (second half of 2014)
- John Maxwell - Calderys Refractory Solutions
- Michael Oberhummer - Magnesita Refractories GmbH
- Bernd Scheubel - Refratechnik Holding GmbH
PRE Technical Committee and Environment WG

The PRE Technical Committee and Environment WG met in March and October 2015. The main activities discussed related to REACH, ETS, trade, research, and the revision of refractory HS codes.

REACH authorisation: Refractory Ceramic Fibres, Borates and Coal tar pitch, high temperature are listed in the 5th and 6th ECHA recommendations for substances to be included in the REACH Authorisation list (Annex XIV). The REACH Committee meeting launched the discussions on their possible inclusion in October 2015 and a decision will be taken in 2016. These substances are of utmost importance to the refractory industry.

The Cross Industry Initiative (CII), of which PRE is a member through Cerame-Unie, prepared a position paper asking the European Commission for better regulation in chemicals management. In particular, it focuses on the fact that for certain uses of substances the exposure is limited to the workplace. Hence workplace legislation—including binding occupational exposure limits (BOELs)—is better suited than the REACH Authorisation process to regulate these substances.

Emissions Trading Scheme: Following the European Council agreement on the 2030 climate and energy framework in late 2014, a debate started in 2015 on how to reach the EU’s emission reduction ambitions by reforming the Emissions Trading Scheme (ETS) for the 2021-2030 period. According to the Council conclusions, sectors under the ETS have to reduce their emissions by 43% compared with 2005, but at the same time the text specified that “in order to maintain international competitiveness, the most efficient installations in these sectors should not face undue carbon costs leading to carbon leakage”. The European Commission published its proposal for the revision of EU ETS directive in July 2015.

Cerame-Unie informed the European Commission of the industry’s concerns and published an updated version of the position paper on post-2020 EU ETS review. In addition to an earlier paper offering common recommendations, the Alliance of Energy Intensive Industries (13 industries including Cerame-Unie) also voiced its concerns in a joint press release.

The negotiations between the EU Member States, the European Parliament and the Commission are expected to continue until at least mid-2017. The EU ETS Directive review will be adopted with the ordinary legislative procedure.

ReStaR: Launched in October 2013, the ReStaR project concluded after two years with a presentation to the Research Executive Agency (REA) in November 2015. This project was funded under the EU’s 7th Research Framework Programme (FP7) and involved 13 partners (RTDs and SMEs) in 7 countries. It aimed at improving, promoting and ensuring the reliability, precision and efficiency of the current European testing standards that form the basis of the technical data sheets for refractory products. The REA-European Commission were pleased with the project, highlighting the high quality of the technical work and its dissemination through articles, presentations at events and the website. Work is still ongoing at standardisation level under the EU framework (CEN TC187) and at ISO level. In particular, the work under ReStaR led to the drafting of revised EN testing standards and to the start of the discussion at ISO level.

CU starter kit on research: Following the interesting information received at the CU research conference in December 2014, Cerame-Unie prepared a document explaining the different EU funding schemes that exist, with examples of ceramic-funded projects as well as information on the European Technology Platforms, National Contact Points and the Enterprise Europe Network. This document is available to all PRE members.

Revision HS codes: PRE members extensively discussed the upcoming revision of the HS codes as members of the World Refractories Association (WRA) Task Force. The Task Force held a series of telephone conferences that lead to a better understanding of the current classification of refractory products. On this basis, a flow chart was developed to clarify the situation for the industry and enforcement authorities. Recommendations were made to improve the HS codes legal notes as well as the explanatory notes. This work will feed into the 2017-2022 official HS revision cycle.
**PRE Communication and events**

PRE launched a **new website** in late 2015. The website has a modern layout and is responsive to mobile and tablet devices. Visit it at [www.pre.eu](http://www.pre.eu).

Five **newsletters** were published and circulated to PRE members in 2015. These newsletters contain information on PRE and Cerame-Unie events, EU policy developments and interesting publications.

PRE was involved in international **events** throughout the year:

- PRE Secretary General Astrid Volckaert gave a speech on behalf of Cerame-Unie at the SPIRE event *Connecting innovative small & big industries* in June. CU is a founding member of A.SPIRE, the private part of the PPP SPIRE that focuses on the sustainable process industries. She highlighted the importance of SMEs receiving EU funding for research. SMEs face many difficulties when seeking EU funding including limited resources, both human and financial, and a lack of connections at EU level. But European and national structures, i.e. associations and research centres, can help SMEs to participate in research projects.

- 58th International Colloquium on Refractories in Aachen in September

- 14th Biennial Worldwide Congress UNITECR2015 in Vienna in September

- ECREF and PRE co-organised the 2nd European Seminar on Refractories, entitled *REFRACTORIES - Key Technology and its Applications*, in Hoehr-Grenzhausen in September. Across three days 25 participants from 7 countries were introduced to the basics of refractory raw materials, products and system solutions, through numerous industry- and application-related examples. Fourteen experts from universities, research institutions and industry shared their knowledge on specific and varied requirements of modern refractory products and technology, looking closely at a range of factual applications from current practice. The organisers intend to further expand this event.

- Ceramitec 2015 in Munich in October

**World Refractories Association**

The World Refractories Association (WRA) is a forum to debate regulatory issues affecting global trade, circulate aggregated industry statistics, promote the interests of the worldwide refractory industry, and act as a counterpart to other world industry organisations such as the World Steel Association. It is composed of continental associations including Europe (PRE), Latin America (ALAFAR) and North America (TRI) as well as national associations from China (ACRI), India (IRMA) and Japan (JRA). Multinational companies Calderys, Magnesita Refratários S.A., RHI A.G., Refratechnik and Vesuvius plc are also direct members. Mr François Wanecq, CEO of Vesuvius, is inaugural WRA President.

Following the creation of the WRA in November 2014, PRE, which holds the WRA Secretariat, launched the **WRA website** to highlight its membership and increase visibility.

The WRA held its first General Assembly in Vienna, Austria on 14 September. Members met to discuss global trends, future developments and the progress made regarding the revision of the refractory Harmonised System (HS) customs codes. A new round of revision of the HS codes will start in 2017.

The next WRA General Assembly is scheduled for 2017.
6. Cerame-Unie Activities

CU Advocacy
Cerame-Unie frequently meets with EU policymakers, but in 2015 ceramic executives had the rare opportunity to meet with Commissioner Elżbieta Bieńkowska, European Commissioner for Single Market, Industry, Entrepreneurship and SMEs (top right), and Commissioner Carlos Moedas, European Commissioner for Research, Science and Innovation (bottom right).

In an annual meeting with DG GROW in October, the CU delegation exchanged with officials from DGs GROW, CLIMA and EMPL on a number of important dossiers.

Moreover CU is one of 10 industry associations in the European Commission’s High Level Expert Group on Energy Intensive Industries, allowing the voice of the ceramics industry to be heard in regular meetings.

CU Communication
Cerame-Unie launched a new website in October. It is user-friendly and intuitive, with improved navigation and new functionalities. Moreover, consulting the new website on the go is smooth since it is fully responsive to mobile and tablet. Visit it at www.cerameunie.eu.

CU publishes a Newsletter in January and July, informing EU officials, alliances and members on ongoing policy issues. Subscribe via the website.

CU is also active on Twitter. Tweets range from reporting on events and projects where CU is involved to communicating relevant EU policy developments and news from CU members or alliances. Follow us @CerameUnie.

Ceramic Days and European Parliament Ceramics Forum (EPCF)
Cerame-Unie organised the 2015 Ceramic Days from 29 November to 2 December in Brussels. Over 120 participants attended sectoral meetings, the Cerame-Unie General Assembly and public debates. On 1 December EPCF Chairs MEP Paul Rübig and MEP Inmaculada Rodríguez-Piñero co-hosted the 16th European Parliament Ceramics Forum. Trade, particularly the thorny issue of whether or not to grant China Market Economy Status, and climate, namely the carbon leakage protection in the post-2020 review of the EU Emissions Trading Scheme, featured on the agenda.

The 17th Plenary meeting will take place on Tuesday, 29 November 2016 in Brussels.

For more details on speakers’ contributions to the 16th Plenary, read the event report. For more on the EPCF visit www.epceramicsforum.eu.
PRE

Refractory products are a vital element in all high-temperature processes, such as metals making, the production of cement, petrochemical processes, glass and ceramics. Without refractories there would be no cars, no planes, no trains, no gas or electricity, and we would be eating from wooden plates and living in mud-brick huts.

PRE promotes the interests of European Refractory Producers and offers a platform to exchange views and experiences in the common interest.

PRE is a member of Cerame-Unie AISBL.