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1. **Message from the President**

Dear Members,

It is a pleasure to present to you the 6th edition of the PRE annual report.

Throughout the year activities took place in the fields of environment, chemicals management, trade and research. Key actions were taken on the revision of the HS codes, on the REACH authorisation of Coal Tar Pitch, high temperature, on the revision of the Carcinogens Directive and ETS Directive and on trade related issues, notably the (non)-granting of market economy status to China.

In addition to a successful congress, PRE experts met regularly in the different PRE and Cerame-Unie Committees and Working Groups. In addition, PRE continued to highlight 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 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 seven multi-national companies as its members. In 2016 the WRA had a successful Board meeting in London.

I would like to take this opportunity to thank Astrid Volckaert for her great contribution to the association as PRE Secretary General from 2009 to 2017, having started her career at PRE in 2005. I am also pleased to welcome Ms Simona Vackeova to become the new PRE Secretary General in the course of 2017.

It will be our goal for 2017 to make our annual congresses more dynamic, including a more active participation of the National Associations and Direct Members. The importance and a better visibility of SME’s at PRE and CU will also be an objective for the coming years.

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 2016 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.
3. PRE Membership

PRE represents:

12 National Associations (representing 17 countries, over 160 companies, more than two thirds of which are Small and Medium sized Enterprises)

and

4 Direct Members (multinational groups):

Calderys
Magnesita
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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.
5. PRE Activities

PRE Annual Congress and General Assembly

The 63rd PRE congress took place in Krakow, Poland and was attended by over 80 participants from 13 European countries.

During the PRE Economic Committee and General Assembly, PRE members were updated on 2015 PRE production statistics and the different European policies currently being debated in the European institutions (such as the future of the Emissions Trading Scheme or the revision of the Carcinogens and Mutagens Directive). Mr Dariusz Konieczny, Head of law and technology in the Polish Cement Association, gave a presentation on the Polish, European and world cement market.

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 2016, members of the PRE Executive Committee were:

José Maria Dominguez - PRE President, Spain (Refractarios Alfran S.A.)
Astrid Volckaert - PRE Secretary General
Franz Buxbaum/ Stefan Borgas - Austria (RHI AG)
Gilbert Ricci - France
Thomas Seger - Germany (RHI Urmitz AG & Co. KG)
Paolo Gandolfi - Italy (Sanac S.p.A.)
Salih Erez - Turkey (Haznedar A.S.)
John Maxwell - Caldeyrs Refractory Solutions
Thiago Avelar - Magnesita Refractories GmbH
Bernd Scheubel - Refratechnik Holding GmbH
Patrick Bikard - Vesuvius plc
The PRE Technical Committee met in March, October and November 2016. The main activities discussed related to REACH, CMD, BREF, research and the revision of the HS codes. The PRE Technical Committee also appointed Mr Stock as new Chair of the Committee, succeeding Prof. Quirmbach.

**Coal Tar Pitch, high temperature:** The Coal Tar Pitch High Temperature (CTPHT) was recommended in September 2014 for inclusion in the Annex XIV of Reach, the so-called Authorisation List. It was followed by a public consultation to which PRE replied. The REACH Committee adopted end of 2016 its addition to the authorisation list, publication in the OJ is foreseen for spring 2017. The Latest Application Date (LAD) is 21 Months, despite PRE activities to defend a longer LAD. For the “intermediate use” for slide gate assemblies, PRE experts on CTPHT have edited a technical guidance document which has been reviewed by the consultant Bipro. For the uses that will not be covered by an exemption, PRE has organised a workshop meeting in June focused on the possible strategies for CTPHT Application for Authorisation (AfA).

**Refractory Ceramic Fibres (RCF):** Al (Zr) RCF have been proposed to be added to the REACH authorisation list. Over the past years, both PRE and ECFIA have been meeting commission officials to address our concerns. The REACH Committee decided in 2016 that it is appropriate to postpone the decision on the inclusion of RCF in Annex XIV to REACH (the authorisation list) for the time being. At the same time, a binding occupational exposure limit value is proposed by the European Commission for RCF under the revised Carcinogens and Mutagens Directive (CMD). The proposed limit value is 0,3 fibres/ml. Although challenging, industry can live this proposal, which seems also accepted by Parliament and Council. A political agreement on the revision of the CMD is expected in 2017.

**Ceramic BREF:** The current Ceramic Manufacturing Industry Best Available Techniques (BAT) Reference document, the so-called Ceramic BREF, was published in 2007 and is going to be reviewed officially in 2018. The BREF has gained more importance as it becomes, with the IED Directive, the legal base for the factory permits in the EU. To be prepared for the upcoming revision, a CU BREF Task Force was created which discusses the strategy, based on data linked to the emissions and abatements systems used in the ceramic production sites. The national associations and company experts are involved in this exercise.

**Research:** In 2016, the European Commission funded the DREAM project, under the SPIRE 2016 calls on the retrofitting of new and existing installations. The DREAM project aims to design, develop and demonstrate a radically improved architecture for ceramic industrial furnaces, characterised by optimised energy consumption, reduced emissions, and lower operating costs compared to currently available technological solutions. This will be obtained by substantially enhancing specific furnace parts (control system, refractories, emissions abatement system) and by adding new modules and sub-systems (CHP unit, heat pipes) to the current furnace architecture.

DREAM will develop and demonstrate technologies enabling a significant advancement in the sustainability of ceramics processes, implementing 5 synergic lines of research and 3 industrial demonstrators, which will act as technological showcases for market deployment. The DREAM project kickoff meeting took place in the Ceramic-Union offices on 12-13 October.

**Revision of the HS codes:** PRE members finalised the proposal to modify the HS codes for refractories. PRE submitted its proposed changes in July 2016 to the European Commission (EC). The review of the HS codes is still a work in progress at the level of the EC and World Customs Union (WCO).

PRE members also debate extensively climate and trade issues, notably within the Ceramic-Union Cli-
PRE Communication and events

Five newsletters were published and circulated to PRE members in 2016. These newsletters contain information on PRE and Cerame-Unie events, EU policy development and interesting publications.

It was agreed that Cerame-Unie would begin to highlight positive messages throughout all communications and through the different channels for the year 2016.

Twitter was used for multiple campaigns in 2016, which allowed the Cerame-Unie account to gain followers and visibility on the platform. The Twitter monthly impressions average since January 2016 is 38K and gaining an average of 20 new followers per month.

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, Vesuvius plc, Beijing Lirr and PNCOare also direct members. Mr François Wanecq, CEO of Vesuvius, is inaugural WRA President.

The Board meeting of the World Refractories Association (WRA), held in April in London, brought together 14 CEOs and Association Presidents from 5 different continents.

The next WRA General Assembly is scheduled for September 2017.
Thousands march in Brussels against China MES

On 15 February thousands of employees, trade unions and employers marched in Brussels to urge policy makers to stop China dumping and reject Market Economy Status (MES) for China. A European Industrial Manifesto for Free and Fair Trade was published ahead of the march. The March was organized by AEGIS Europe, an alliance of 30 European industrial sectors including steel, aluminium, ceramics, glass, solar panel and bicycle manufacturing, which combined generate over €500 billion in annual turnover and millions of jobs.

The European Industrial Manifesto for Free and Fair Trade declares: “Together, we the employees, trade unions and employers of European industry oppose MES for China until it becomes a fully-fledged market economy. We call on the European Parliament, Member States and Commission: Say YES to jobs & fair trade! Say NO to MES for China!”

Ceramic Days and European Parliament Ceramics Forum (EPCF)

The 2016 Ceramic-Days were held from Tuesday 29 November until Thursday 1 December 2016. This year the objective of the Ceramic-Days was to understand how labour and energy intensive industries can continue to contribute and further develop sustainable European jobs. The 17th European Parliament Ceramics Forum on 29 November and the high-level event on 30 November were open to the public and were both a great success.

The European Parliament Ceramic Forum (EPCF) met for its 17th plenary meeting in Brussels. The event was hosted by EPCF Chair MEP Inmaculada Rodríguez-Piñero, and attracted over 100 participants from EU institutions, the ceramic industry and other stakeholders. The EPCF was divided into two panels titled “Promoting green and safe jobs in a sustainable ceramic industry” and “For an ETS fostering low carbon innovation in European SME’s”.

During the closing conference of the 2016 Ceramic Days the panelists discussed how the ceramic industry composed mostly of SME’s is able to strengthen its leadership through investments and innovation. Our high level speakers discussed the policies which can contribute to growth, investment and industrial policy.
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.