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Dear Members,

I am pleased to share with you the PRE Annual Report for the period June 2017 - June 2018.

Throughout this period, Refractory Products Europe has continued to advocate for the European refractory ceramics industry across various different levels of government and civil society.

Refractory products are a vital and strategic element in all high temperature processes, such as metals making, the production of cement, petrochemical processes, and 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 and to represent the European industry across governments and across the world.

At the European level we held our annual congress in Chester, UK at which we hosted in a vibrant discussion with four esteemed speakers on the topics of innovation and market trends. The issue of raw materials scarcity and rising raw material prices in China was at the forefront of our debate during the congress and remains of great concern for the European refractory industry this year. We were also delighted to welcome Mr. Jon Bolton, CEO of Liberty Speciality Steel, to deliver the keynote at our General Assembly with a presentation on the current state of the steel industry. See here more about last year’s event.

Meanwhile, at the global level, PRE continued in its position as the Secretariat for the World Refractories Association (WRA). This platform facilitates discussions on regulatory issues, statistical gathering and analysis and promotion of the industry across the world. In 2017, the WRA had a successful 2nd General Assembly on the occasion of UNITECR 2017 in Santiago, Chile. The next WRA Board and WRA General Assembly are planned in Beijing on 15-16 November 2018. PRE is also a principal member of the UNITECR and the next UNITECR 2019 will be held in Yokohama in October 13-16, Japan.

Ours is a sector where research, development, and innovation hold the keys to our success. With the proper tools in our hands we can successfully respond to global challenges. With this I share with you the PRE Annual Report for the period June 2017 - June 2018 and as always, I wish you a prosperous and productive year ahead.

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

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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
 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.
5. PRE Activities

PRE Annual Congress and General Assembly

The 64th PRE Congress took place in Chester, UK and was attended by around 70 participants from 14 European countries. The congress was kindly hosted by BCC, the British Ceramic Confederation.

During the PRE Economic Committee and General Assembly, PRE members were updated on 2016 PRE annual statistics and main import-export trends and the different European policies currently being debated in the European institutions (including an update on market access and EU trade defence system, the future of the Emissions Trading Scheme or the revision of the Carcinogens and Mutagens Directive).

A panel debate on raw materials took place during the Economic Committee, and four external speakers made presentations on the topics of innovation, market trends and developments in China. The issue of raw materials scarcity and rising raw materials prices in China was central to this panel debate. Jon Bolton, CEO of Liberty Speciality Steel opened the General Assembly with a presentation on the current state of the steel industry.

Next year’s PRE Congress will take place on 6-8 June 2018 in Paris, France and is kindly organised by SNIFPR (Syndicat National des Industries Françaises de Produits Réfractaires - National Union of French Refractory Industries).

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 2017, members of the PRE Executive Committee were:

José Maria Dominguez - PRE President, Spain (Refractarios Alfran S.A.)
Astrid Volckaert/Simona Vackeova* - PRE Secretary General (*from 1 April 2017)
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.)
Roman Gažúr - Czechia/Slovakia (SMZ Jeľšava)
John Maxwell (replaced by Cyprien Maugras) - Caldeyrs Refractory Solutions
Thiago Avelar - Magnesita Refractories GmbH
Bernd Scheubel - Refratechnik Holding GmbH
Patrick Bikard - Vesuvius plc
PRE Technical Committee

The PRE Technical Committee met in March, October, and November 2017. Discussions included REACH, CMD, BREF, research and standardisation (CEN/ISO) as well as HS Codes revision and climate and energy matters relevant to the European refractory industry.

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 its addition to the authorisation list, with publication foreseen for spring 2017. The Latest Application Date (LAD) is 21 months; PRE advocated for a longer LAD. For the “intermediate use”, such as sliding gate assemblies, PRE experts on CTPHT have revised a technical guidance document. The revision of the document took place after a meeting hosted by Eurometaux in April with the metal and inorganics sectors using CTP in follow-up of the letter of ECHA on the status of potential Authorisation Applications for CTP-HT and Anthracene users in the metals and inorganic sector.

Refractory Ceramic Fibres (RCF)

RCF have been proposed to be added to the REACH autorisation list. Over the past years, both PRE and ECFIA have been meeting commission officials to address 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 has been agreed at European level under the revised Carcinogens and Mutagens Directive (CMD). The proposed limit value is 0.3 fibres/ml.

Ceramic BREF

The Ceramic BREF is a document for the ceramic industry that provides the legal basis for EU factory permits under the Industrial Emissions Directive. The current Ceramic Manufacturing Industry Best Available Techniques (BAT) Reference document, the so-called Ceramic BREF, was published in 2007. The official start of the revision of the Ceramic BREF has been postponed until 2019. To be prepared for the revision, Cerame-Unie has been collecting data related to the emissions and abatements systems used in ceramic production sites across Europe and has created a specific task force to discuss the topic more in depth.

Research

The HARMONI project aims at bringing together all the relevant stakeholders of the process industry to jointly identify, analyse and propose solutions to the regulatory bottlenecks and standardization needs that hamper their innovation processes and the market uptake of their results, necessary to move towards a more sustainable and competitive European process industry. ECREF is an active partner and Cerame-Unie (CU) a member of the advisory board. CU will play a role of facilitator between the CU members and ECREF to gather data, distribute questionnaires, and designate CU members to attend to specific meetings.

New AD methodology & Modernisation of trade defence instruments (TDIm)

On 15 November the EP Plenary endorsed the draft report of the Rapporteur Cicu (A8-0236/2017) on “Protection against dumped and subsidised imports from countries not member of the EU”. The Commission intends to publish the newly adapted AD methodology rules by 20 December together with the report on market distortions.

Just as the new AD methodology was endorsed, the EU institutions are taking the momentum to advance and close the TDI modernisation file 2013/0103(COD). In November two political trilogue negotiations took place where Lesser Duty and future rules affecting profit margins were discussed. On
5 December the “last” round of trilogues between the Council and the Parliament were held on the modernisation of trade defence instruments. The Council, the Commission, and the Parliament agreed on a final deal including a 3 week public notice, a minimum target profit of 6% and a 17% of individual threshold to remove the Lesser Duty Rule. Cerame-Unie discussed the outcome of the trilogues at the CU Trade WG. In the next steps, the political parties of the European Parliament need to formulate their position ahead of the vote in the International Trade Committee (INTA) in January 2018 and ahead of the EP plenary foreseen for February 2018. The new TDI rules should enter into force in mid-2018. Cerame-Unie discussed the outcome of the trilogues at the CU Trade WG.

PRE Communication and events
Five newsletters were published and circulated to PRE members in 2017. These newsletters contain information on PRE and Cerame-Unie events, EU policy development and interesting publications.

3rd European Seminar on Refractories
On 5-7 September 2017, ECREF, the European Centre for Refractories and PRE co-organised for the third time a seminar on refractories. The seminar was intended for employees of the refractory industry and downstream industries, wishing to improve their understanding of refractories and its applications in the different industries.

The seminar under scientific supervision of Prof. Quirimbach offered 13 lecturers with lectures from basic science to application technologies. The event was attended by 30 participants from ten countries, the Netherlands, the US, Poland, Luxembourg, Spain, Slovenia, Italy, Greece, the UK and Germany. All participants enjoyed the opportunity to share best practices at this seminar, as confirmed by the survey at the event.

World Refractories Association
The Second World Refractories Association General Assembly took place on 27 September in Santiago de Chile, in the context of the UNITECR 2017. The WRA General Assembly offered an opportunity to present the initial work developed by the WRA Board since the 1st General Assembly in Vienna in 2015 regarding statistics, customs codes revision and safety data collection. About 40 participants attended the event and exchanged on the future orientations and objectives of the World Refractories Association. The next WRA Board and WRA General Assembly are planned in Beijing on 15-16 November 2018.

New President of the WRA
Stefan Borgas, CEO of RHI Magnesita, was elected as the new president of the World Refractories Association (WRA) and took office in the first days of January 2018. He will assume the presidency previously occupied by François Wanecq, former CEO of Vesuvius plc, for two years.

Mr. Borgas and the RHI Magnesita delegation thanked Mr. Wanecq for his work and dedication as inaugural president of the WRA and thanked the whole Vesuvius team for the seamless handover they facilitated together with the WRA secretariat. “It is a great honour and pleasure for me to chair our industry’s global association. I will continue with my team to work hard to further promote the interests of the refractory industry worldwide and expand its global network”, said Stefan Borgas. Read the full press release here.
6. Other Activities

UNITECR 2017
PRE attended the 15th Unified International Technical Conference on Refractories in Santiago de Chile on 26-29 September. UNITECR 2017 gathered nearly 500 participants from the refractory industry and over 150 scientific papers were presented in 17 different areas. Mike O’Driscoll and Pedro Videla gave key note speeches at this Biennial Worldwide Congress, discussing Dead Burned and Fused Magnesia Supply to the Refractories Industry and sharing Perspectives to consider in the Refractory Industry.
The next UNITECR 2019 will be held on 13-16 October in PACIFICO Yokohama, Yokohama, Japan and hosted by TARJ – Technical Association of Refractories, Japan. For more information on the next UNITECR 2019, see here.

60th International Colloquium on Refractories 2017
On 18 October, PRE attended the 60th International Colloquium on Refractories 2017 in Aachen, Germany hosted by the European Centre for Refractories (ECREF) and German Refractory Industry Association (VDFFI). This platform offers companies the opportunity to briefly present their organization, new products, processes, and services to the participants of the colloquium. The 60th ICR covered topics including raw materials, processing technology, energy, environmental protection and legislation, industry 4.0, and R&I programs. The 61st International Colloquium on Refractories will be organised on 26-27 September in Aachen, Germany.

Ceramic Days and European Parliament Ceramics Forum (EPCF)
The 2017 Ceramic-Days were held from 21-22 November. During these two days topics such as trade, climate and energy, industrial strategy were presented, and the annual public conference took an in depth look at research and innovation trends within our industry.

The European Parliament Ceramics Forum (EPCF) met for its annual cocktail and dinner on 21 November in the European Parliament. 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. Cerame-Unie President Alain Delcourt, announced during that dinner that MEP Inmaculada Rodríguez-Piñero would remain chair of the EPCF for another year marking her third year within this role.

During the closing conference of the 2017 Ceramic Days, members and guest were greeted by a keynote by Ms Doris Schrocker, Head of Unit - Industrial Technologies Directorate, DG Research & Innovation, Daniel Gauthier, SPIRE President presented SPIRE PPP and the achievement an perspective under FP9. Following the presentation of Research and Innovation case studies, discussion group shared their experience of R&I progress in their topic area (Digitalisation, energy efficiency or resource efficiency). After the successful close of the 2017 edition, we look forward with great anticipation to hosting the next European Ceramic Days on 4 and 5 December 2018.
PRE

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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.