



60<sup>th</sup> Anniversary of  
Tiles & Bricks Europe

Ceramics, quality for life

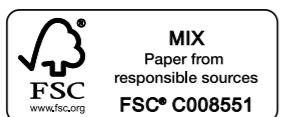
60<sup>th</sup>



/ Ceramics, quality for life

## Tiles & Bricks Europe

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**Dr. Heimo Scheuch  
TBE President**

**I am proud to celebrate the 60<sup>th</sup> anniversary with you  
and I am looking forward to TBE's prosperous future**

Dear reader,

I am very glad to present you this brochure, which celebrates the 60<sup>th</sup> anniversary of our European association TBE (Tiles & Bricks Europe).

1952 was a remarkable year not only in the history of TBE but also of European integration: the European Coal and Steel Community entered into force on 23 July and the European Parliament Assembly met for the first time on 10 September. On 30 October of the same year, representatives of the European tile and brick industry met in Zurich and founded TBE. This was the commencement of a successful history of partnership throughout our sector.

For 60 years, TBE has been operating as a platform facilitating the dialogue between our industry and European institutions. Over time, the membership base has extended significantly, and today it includes industry associations and companies from 20 European Union Member States plus Croatia, Norway, Russia and Switzerland.

The 60<sup>th</sup> anniversary celebrations also represent an important opportunity to reflect on the challenges that our industry will have to tackle in the next decades, such as sustainable construction, climate change, resources and energy efficiency. As you will appreciate in this brochure, our sector is very well positioned in facing these challenges.

Clay bricks, blocks, roof tiles and pavers are durable, affordable and provide comfortable, safe and healthy homes to millions of people. Furthermore, they combine traditional architectural heritage with innovative and future-oriented construction methods. Last but not least, clay products offer valuable solutions to save energy and reduce greenhouse gas emissions in the building sector.

I am proud to celebrate this 60<sup>th</sup> anniversary with you and I am looking forward to TBE's prosperous future.

**Dr. Heimo Scheuch  
TBE President**



**Mr. Ioannis MalLOURIS**  
TBE Vice-President

## TBE is a reliable partner of European institutions and other relevant stakeholders

Dear colleague,

**With its 60 years of experience, TBE is one of the longest-lasting industry representations in Europe. Since the foundation of the association, brick and tile manufacturers have considered the cooperation at European level an essential added value for their business.**

Today, TBE is a reliable partner of European institutions and other relevant stakeholders. It offers its members a valuable platform to exchange information and best practises in many policy areas, including sustainability, construction, climate, energy and standardisation. The dialogue with policy makers in these areas helps our industry anticipate the impact of the regulatory framework on the competitive position of the sector.

Such cooperation with European institutions is even more important in these difficult times, as Europe is playing a major role in tackling the current challenges. In this sense, we warmly welcome the action plan recently published by the European

Commission "Construction: unleashing the potential of low energy buildings to restore growth". This initiative highlights the relevance of the construction sector in the European economy and acknowledges it as a driving force for the creation of jobs and sustained growth. It also foresees the active involvement of stakeholders in order to identify a concrete set of measures aiming at the improvement of investment conditions.

As they have done in the last 60 years, the TBE members are eager to contribute in a constructive way to the debate on this topic as well as on many other subjects. With this in mind, we are celebrating this anniversary and we are looking forward to cooperating with you.

**Mr. Ioannis MalLOURIS**  
TBE Vice-President



**MEP Karl-Heinz Florenz**

## It is very important to maintain a constructive dialogue

**On the occasion of the 60<sup>th</sup> anniversary of TBE, I am very pleased to host the stakeholder workshop at the European Parliament. Financing energy-efficient buildings: how the EU can contribute to affordable housing**

I am also glad to announce that the event is part of the programme of the 10<sup>th</sup> edition of the European Week of Regions and Cities (OPEN DAYS 2012). The workshop offers an interesting opportunity for policy makers and other relevant stakeholders to discuss the challenges of affordable and energy-efficient housing. The EU can make a significant contribution in this area through a consistent regulatory framework and better access to financial resources. Nowadays, the regulatory framework plays a major role in the competitive position of European companies. For this reason, it is very important to maintain a constructive dialogue between representatives of the European institutions and industry associations. The cooperation with TBE for the organisation of the workshop represents a clear example of this constructive dialogue and offers a good opportunity to exchange views on such a vital subject. Last but not least, I would like to express my personal compliments to the TBE members for the 60<sup>th</sup> anniversary of the association. I wish you a successful future.

**MEP Karl-Heinz Florenz**



**Dr. Johannes Hahn,  
Commissioner for Regional Policy**

## Bricks and roof tiles are more than merely building materials

**It is a pleasure for me to hear that this year, the 60<sup>th</sup> anniversary General Assembly of TBE is taking place in Brussels, the heart of Europe.**

Bricks and roof tiles are more than merely building materials. They have made major contributions to the built environment all over Europe and are – and will continue to be – part of the European cultural heritage. Bricks and roof tiles are made from three natural elements: clay, fire and water. However, the sector is constantly stepping up its commitment to research and to the development of sustainable building materials and building solutions, and has committed to supporting the environmental targets of the EU. Therefore during the last years enormous efforts have been undertaken by the sector in order to become more energy-efficient and less CO<sub>2</sub> intensive. It is now up to the construction industry and architects to join forces to develop and build the new buildings of the future: nearly zero-energy buildings.

Therefore I would like to highlight the current regional policy reform and its link with energy-efficient buildings. Best wishes for the TBE General Assembly and the 60<sup>th</sup> anniversary of TBE.

**Dr. Johannes Hahn,  
Commissioner for Regional Policy**



MEP Claude Turmes,  
intervening at the TBE  
Stakeholder Workshop  
on Near Zero-Energy  
Buildings, Brussels, 22 June 2012

## TBE – a reliable partner



**Tiles & Bricks Europe represents industry associations and companies from 20 European Union Member States plus Croatia, Norway, Russia and Switzerland.**

The association promotes the interests of the clay brick, block, paver and roof tile industry in Europe. It provides a forum for its members to exchange information on technical development, sustainable construction, climate change, resource efficiency and other emerging issues.

In this way, the association facilitates the dialogue on these issues within the industry and between sector representatives and European institutions. The activities are organised around specialised working



TBE stand at the 2011 Sustainable Building Conference in Helsinki

groups of technical experts from national associations and companies. Members are regularly informed about upcoming issues through monthly newsletters. The association organises public events on the most relevant subjects for the industry which are attended by EU officials, trade associations' representatives, architects and other interested stakeholders.

Furthermore, TBE is a full member of Cerame-Unie, the European Ceramic Industry Association. TBE also coordinates the representation of the clay brick and roof tile industry at the Sustainable Building Conference. Last but not least, we collaborate closely with our corresponding associations in Australia, North America and South Africa. Our main partners are the European Commission, the European Parliament and the Comité Européen de Normalisation (CEN).

Thanks to its 60 years of experience, TBE is a reliable partner of European institutions and other relevant stakeholders. Our members are committed to contribute in a constructive way to the debate on European policy issues.

## TBE structure

### General Assembly

#### Executive Committee

- President  
H. Scheuch (AT)
- Vice-President  
I. Malouris (GR)
- Internal auditor  
H. Gastinel (FR)

#### Members

- C. Almeida (PT)
- T. Bisgaard (DK)
- M. Cunial (IT)
- M.E. Gracia Iguacel (ES)
- M. Hadjigavriel (CY)
- P. Jonnard (FR)
- M. Kasa (AT)
- C. Keller (CH)
- G. Koch (AT)
- P. Kolowratnik (AT)
- M. Olbrich (AT)
- M. Oldridge (UK)
- M. Roth (DE)
- F. Terwindt (NL)
- J. Van den Bosche (BE)

### TBE Secretariat

Secretary General  
A. Aiello

### Product Group Masonry

Chairmanship  
M. Kasa (AT)

### Product Group Clay Roofing Tile

Chairmanship  
M. Cunial (IT)  
I. Dorgeret (FR)

## Working Groups

### Housing

Chairmanship  
H. Scheuch (AT)

### Sustainable Construction

Chairmanship  
K. Liepach (DE)

### Construction Products Regulation (CPR)

Chairmanship  
G. Koch (AT)

### Regulated Dangerous Substances (RDS)

### European Emission Trading Scheme (EU-ETS)

### Life Cycle Assessment (LCA)

## Cerame-Unie Secretariat

Managing Director  
R. Batier

Technical and Environmental Director  
A. Volckaert

Construction and Sustainability Manager  
N. Pargana

Communications Manager  
B. Wilhelm

Trade Policy Manager  
S. Vackeova

Management Assistant  
N. Le Poupon

Clay extraction results  
in new nature



## A competitive and future-oriented industry

© Photo: Kees Hummel  
The sector is very well prepared to tackle the challenges of the next decades

**The European tile and brick industry represents more than 700 companies, from SMEs to large international groups, which employ around 50,000 people across Europe.**

Over the last 60 years, the sector has invested heavily in product and process innovations that have revolutionized the manufacturing process and delivered modern building solutions.

This technological progress has profoundly modified the look of brick and roof tile plants. Today, kilns are fully automated and heat recovery systems optimise the overall energy efficiency. Furthermore, modern process technology ensures that the environmental impact is minimal.

New research is looking into those elements which will shape the plants of tomorrow, such as alternative sources of energy, energy efficiency technologies, recycling of final products, use of recycled raw materials. At the same time, research and development is constantly delivering

innovative products that contribute to safe, comfortable and energy-efficient buildings.

Thanks to these efforts, the industry has achieved a strong competitive position. As a result, the sector is very well prepared to tackle future challenges, namely sustainable construction, climate change, resource and energy efficiency.



**“Highly thermal insulating clay blocks are the ideal material for the construction of energy self-sufficient houses!”**

Timo Leukefeld is professor at several universities and author of various books on energy efficiency. Besides he also has his own company acting as a consultant for energy self-sufficient buildings. He is also an adviser for politicians communities and enterprises.



**Prof.  
Timo Leukefeld,  
Germany**

“Our energy self-sufficient house is heated by the complementary energy from the sun. The solar energy is stored in a large tank and a battery for weeks or even months. No power connection and no more expenses on oil, gas or electricity are necessary. Of similar importance is the monolithic external clay block wall made from special high-tech clay products that provide comfortable thermal indoor climate, both in winter and in summer. The result is a complete energy autarchy of the building, without any required energy input from fossil fuels or electricity from the grid. Regarding primary energy consumption, CO<sub>2</sub> output and costs, such a house concept is 80 per cent better than a standard passive house and is therefore really a house of the future based on well-proven technology.”



## The added value of clay building products



01

### Durable products delivering comfortable, safe and healthy homes

Clay building products are perfectly suitable for construction

In many people's minds, a brick house is a goal in life. Indeed, clay building products are perfectly suitable for construction, as they are **durable and affordable**. Firstly, bricks and roof tiles have an average lifecycle of over a century. This allows home owners to easily pass their residence on to the next generations over time. Secondly, clay building products require little or no maintenance and ensure an excellent thermal insulation. This helps keep the energy bills low and save money.

All brick buildings are **robust** and provide safe shelter. The fire resistance is excellent as well, as clay products maintain their properties even at temperatures above 1,000° C. Furthermore, robust clay bricks and blocks provide resistant solutions in seismic zones.

A secure home is only the first step towards healthy and comfortable living. Clean air is what humans want, and brick buildings provide it. In western countries people spend over 90% of their lifetime in closed rooms. Polluted indoor air and mould can be a serious issue and healthy buildings

help to prevent it. Due to their mineral consistency and insulating properties, clay products are not only **100% VOC-free** but also 100% mould-proof. Finally, they provide insulation from sound and vibrations – electric and electrostatic – as well as ionising radiation, which contributes to our general **wellbeing in daily life**.



02

### Contributing to sustainable and energy-efficient buildings

The industry is constantly developing innovative solutions for sustainable buildings

The building sector represents 40% of the total energy demand. That explains why policymakers in the EU are very keen to hear the contribution from the housing sector in the battle against climate change. Clay building products play a major role in this regard, they provide sustainable solutions from an environmental, economic and social point of view.

**High thermal insulating clay blocks** help minimise heating and cooling costs, while **roof tiles with photovoltaic cells** contribute to carbon-free energy generation. For this reason, they are frequently used in low-energy, passive and nearly-zero-energy houses.

Adding brick shield enhances the thermal performance of buildings. A typical single-family house from 1990 had a common U-value of 0.50 W/m<sup>2</sup>K. Whilst retaining its appearance, the cavity is filled and current installations can easily achieve a U-value of 0.25 W/m<sup>2</sup>K for walls and even 0.14W/m<sup>2</sup>K for top products. This means a **significant drop in annual energy consumption** from 69 to 33 kWh/m<sup>2</sup> and consequently less CO<sub>2</sub> emissions.

Today, the industry is constantly developing innovative solutions for energy-efficient buildings, such as clay façades, which can reduce the energy consumption of buildings by 40%.



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## Preserving architectural heritage across Europe

03

No matter where you reside in Europe, chances are high that a brick plant is nearby. Over 1,300 production sites are situated close to quarries all over Europe providing local jobs and keeping transport emissions low. This means that buildings are frequently constructed with clay from the local region as bricks travel limited distances from the quarry to their final destination.

That explains why our industry understands and values the regional dimension of the European building tradition. In this regard, the large variety of shapes, formats and colours of clay building products helps preserve the regional architectural heritage across Europe. Furthermore, their long lifecycle allows for the **trans-generational transfer** of this cultural heritage over the centuries.

Buildings are frequently constructed with clay from the local region



## From traditional to innovative building solutions

04

New techniques have boosted the performance of clay products to an outstanding level

5,000 years ago, clay was already used as a working material. Easy to mix and flexible to mould, it quickly started playing an important role in construction. Churches, town halls and other monuments are only a few examples of the numerous buildings that can testify the **long durability** of clay bricks, roof tiles and pavers.

Over time, new techniques were developed that boosted the performance of clay products to an outstanding level and made them perfectly suitable to innovative and future-oriented buildings. Today, clay bricks, blocks and roof tiles are essential components in the construction of **low-energy, passive and nearly-zero-energy houses** or even plus-energy buildings.

The focus of our industry's research does not end at the doorstep. Ceramic roof tiles help recover clean water. Recent studies have revealed that ceramic roof tiles are the perfect products to provide good-quality harvested water thanks to their hydrophobic coating. Moreover, specially designed ceramic pavers can be part of **sustainable urban drainage systems** filtering and cleaning rainwater through geotextile membranes and coarse graded aggregates.

A long history facilitates building on the knowledge of the past. Over 100 years ago recycling deliberately emerged with Victorian Town Ash on the sites of coalmines and the idea of re-using other materials persists to this day. Today, biogenic sources like sawdust or hay can be added to create the pores in clay blocks to increase their thermal insulating performance. Such innovations result from the will to provide **better buildings for the world of tomorrow**.



## 05

### Efficient over the lifecycle

The industry has invested heavily in improving the manufacturing process

Clay building products provide energy and resource-efficient solutions in each step of their lifecycle. Over the last decades, the industry has invested heavily in improving the manufacturing process. Early action in the industry led to a 40% decrease in the energy required for the production of 1 m<sup>2</sup> brick wall in 2007 compared to the 1990s.

Today, the energy consumed in the firing and drying phase is constantly monitored in order to ensure the correct temperature and avoid any wastage. Furthermore, energy consumption is optimised with heat-recovery systems, while wastewater treatment systems avoid any risk of leakage. Energy and resource efficiency in the production phase is also achieved through the use of secondary raw materials and the lightening of products, such as slim bricks with -30% weight.

As an extractive industry relying on natural resources for its raw materials, the brick and roof tile sector takes the challenge of biodiversity seriously. In this regard, quarries and riverbanks are restored and

returned to their natural state during and after extraction.

The lifecycle of clay products does not necessarily finish with the already long life of the building. Clay bricks, blocks and roof tiles are inert, which makes them suitable for re-use and recycling. Building and demolition waste is used extensively throughout Europe for roadwork and as a secondary aggregate. New research is also assessing the potential of using ceramic debris as a raw material component for the production of clay products.



**"Clay roof tiles are the number one roofing material thanks to their technical characteristics, unique aesthetics and simple handling"**



Piet Jacobs has been Director and owner of the family business Jacobs Dakbedekkingen for many years. Today, his son is running the business. Piet Jacobs is a member of the Dutch federation for pitched roofs, HHD Het Hellende Dak. He is currently IFD President, having been elected for the term 2010 to 2013 after which time he will become the Senior Vice-President for another three years.

IFD is the highest interest group for the roofing trade in the world. The majority of its members are located in the EU. All full members and the majority of partners come from small and medium enterprises (SME). The IFD full members represent 15,500 roofing companies with 135,000 employees overall and a turnover of about € 11 billion.

## Piet Jacobs, Netherlands

President of the International Federation of Roofing Trade (IFD)

Clay roof tiles are well-known for their durability and stability, and also technically they have significantly advanced in recent years. Manufacturers of clay roof tiles and roofing contractors have collaborated on holistic solutions for the entire roof through novel products. These innovations enable clay roof tiles to create various shapes of roofs allowing a high degree of individuality and design. This provides a roofer numerous possibilities to fully demonstrate his craftsmanship.

Clay roof tiles are highly desirable and flexible in use. The wide choice available from traditional and hand-made tiles to modern plain and interlocking ones, provides tailored solutions for both inclined and low pitched roofs as well as for facades, in new build and refurbishment. The development of larger formats with optimised weight has made roofing completions easier and quicker. Equally, significant environmental benefits can result from this more efficient use of material. That is why clay roof tiles are the most requested and most sustainable product in the roofing sector.



## 60 years of TBE

	President	Vice-President
1952 - 1954	J. Rothéa (F)	M.B. Costamagna (F)
1954 - 1956	Dr. M. Rizzo (I)	T. Pierfederici (I)
1956 - 1958	O. Weiss (A)	K. von Rosmus (A)
1958 - 1960	Dr. E. Rauch (D)	Dr. O. Bott (D)
1960 - 1962	J. von Thiel de Vries (NL)	J. Laumans (NL)
1962 - 1964	P. Hartmann (DK)	D. Mellbye (N)
1964 - 1966	J. Vigne (F)	M. Maury- Laribi��re (F)
1966 - 1968	G. du Bois d'Enghien (B)	J. Verbeeck (B)
1968 - 1970	A.M. Dias Coelho (P)	D.M. Megre (P)
1970 - 1973	Dr. L. Ravetta (I)	C. Muttoni (I)
1973 - 1976	C. Mumenthaler (CH)	P. Binkert (CH)
1976 - 1979	Prof. K. Leitl (A)	Dr. H. Gruber (A)
1979 - 1982	A.G.B. King (1979/80) (UK)	
	D. Jones (1980/82) (UK)	D.S. Hartley (UK)
1982 - 1985	E.A. B��umer (D)	E.P. Rauch (D)
1985 - 1988	A. Paloheimo (SF)	T. Nilsson (DK)
1988 - 1991	C. Korevaar (NL)	J.F.M. Bots (NL)
1991 - 1994	J. Ampe (B)	Ch. Dumoulin (B)
1994 - 1996	P.M. Johnson (UK)	Ch. Rose, Esq, CBE (UK)
1996 - 1998	Dr. W. Reithofer (A)	Dr. E. Schaschl (A)
1998 - 2000	P. Keller (CH)	Dr. R. Furler (CH)
2000 - 2002	V. Vitolo (I)	Dr. M. Cunial (I)
2002- 2004	C. Damen (NL)	H. Gastinel (F)
2004 - 2006	C. Schenck (F)	A. H��ermann (D)
2006 - 2008	A. H��ermann (D)	H. Scheuch (A)
2008 - 2011	H. Scheuch (A)	
2011 - Today	H. Scheuch (A)	I. Malouris (G)

**On the occasion of the 2<sup>nd</sup> International Congress of the Ceramic Industry, representatives of the European brick and tile industry met in Zurich to discuss the situation of the industry and exchange information on best practices.**

Considering the success of the event, they decided to meet two years later in Paris, where they launched the idea of creating a European association.

The official foundation of TBE was announced at the conference held in Zurich on 30 and 31 October 1952. At the same time, Mr. Jean Roth  a (FR) was unanimously elected as first TBE President, while Mr. Jacques Brossard, who was then Managing Director of the French Association, was appointed as TBE Director. The membership covered 12 countries: Austria, Belgium, Denmark, Finland, France, Germany, Italy, the Netherlands, Norway, Sweden, Switzerland and the UK. They represented 7,000 production plants and 300,000 employees.

The main activities of the association included the collection of statistics, the comparison of test methods and results, the exchange of technical information and the promotion of clay building products at European level. One of the major results was achieved in 1962 with the publication of a technical dictionary in seven languages.

Over the years, the number of TBE members increased significantly, with the entrance of Portugal (1996), Greece (1988), Czech Republic (1995), Hungary and Slovakia (1995), and Poland (1995). Following this enlargement, the structure of the association was modified during the General Assembly in Prague in 1995 in order to implement simplified procedures and a faster decision-making process.

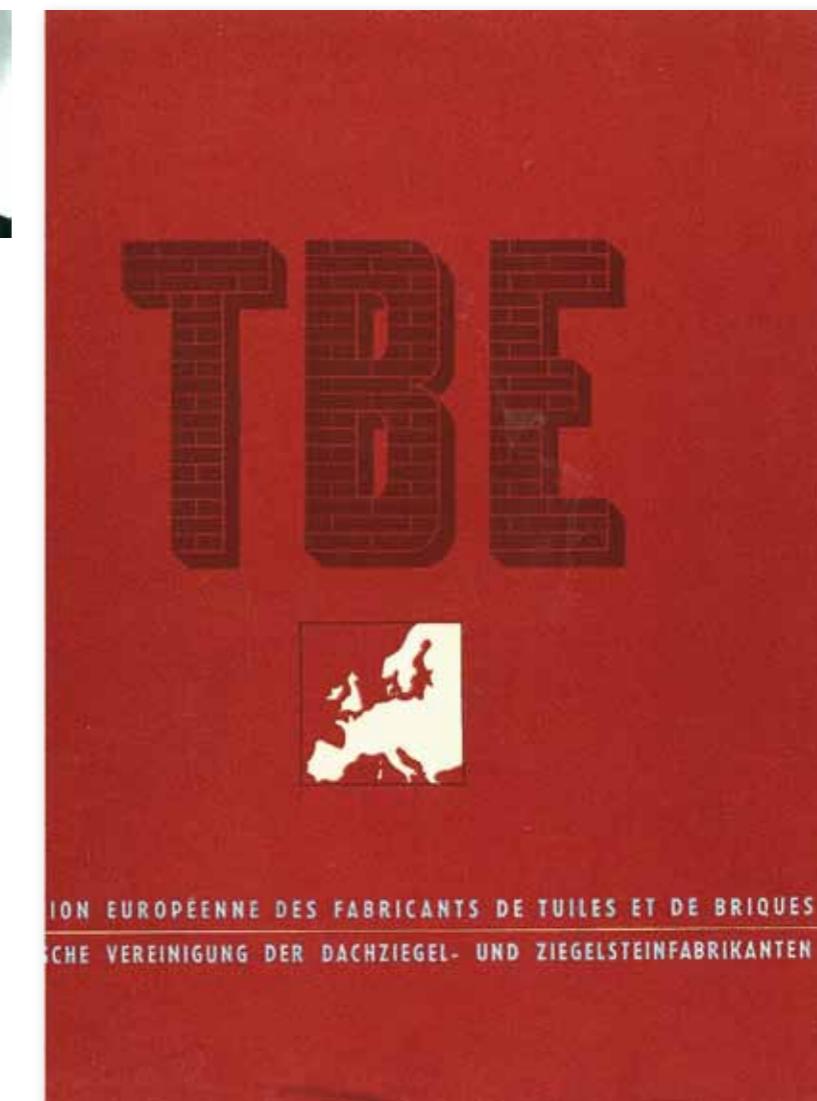
Another major step in the history of TBE dates back to 18 January 2008, when the association was officially registered as an international non-profit organisation (AISBL) under the Belgian Law. At the moment, the membership includes 20 European Union Member States plus Croatia, Norway, Russia and Switzerland. Furthermore, TBE is a full member of Cerame-Unie, the European Ceramic Industry Association.



## A long history of successful cooperation



**Mr Jean Roth  a**  
First president of TBE



## Current members of TBE (2012)



### AUSTRIA



**President**  
Gewerke KR Franz Olbrich

It is my pleasure to congratulate TBE on its 60<sup>th</sup> anniversary. The association of the Austrian brick and roof tile industry helped found TBE 60 years ago and today we are more than ever convinced that our industry can only solve the challenges of the future together. We therefore wish the organisation and its members all the best for the coming years!

**Secretary General**  
Secretary-General for Austrian affairs:  
Dipl.-Ing. Norbert Prommer  
Secretary-General for European affairs:  
Dipl.-Ing. Gerhard Koch

**Number of members:**  
17 companies; 27 factories

**Turnover:** 160,25 million euro

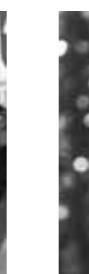
**Number of employees:** 878

**Name, contact details**  
Verband Österreichischer Ziegelwerke (VÖZ)  
Wienerbergstraße 11, 1100 Wien  
Tel.: +43 1 587 33 46-0  
Fax: +43 1 587 33 46-11  
E-mail: verband@ziegel.at  
Website: www.ziegel.at

**Founding year:** 1950

**Member of TBE since** 1952

### BELGIUM



**President**  
Mr. Burt Nelissen

Although the brick sector in Belgium has resisted relatively well in 2011, the expectations for 2012 remain negative. Different indicators, such as the number of building permits, the "construction barometer", the order books of architects and contractors, etc. indicate that the activities in the building sector will be at a low level in 2012. The "Construction Confederation" is expecting that less than 40,000 new houses will be built in 2012. At the end of 2011, production decreased due to several circumstances and at the end of the year it became obvious that the sector was in a recession. 2012 will be a particularly difficult year for all the players in the Belgian sector of the construction of new buildings.

**Secretary General**  
Mr. Jozef Van Den Bossche

**Number of members:** 30 companies

**Turnover:** 330 million euro

**Number of employees:** 1,600

**Name, contact details**  
Belgische Baksteenfederatie vzw,  
Kartuizersstraat 19 b19, 1000 Brussel  
Federation Belge de la brique asbl,  
rue des Chartreux 19 b19, 1000 Bruxelles  
Tel.: + 32 2 511 25 81  
Fax: + 32 2 513 26 40  
E-mail: info@baksteen.be / info@brique.be  
Website: www.baksteen.be / www.brique.be

**Founding year:** 1947

**Member of TBE since** 1952

### BULGARIA



**President**  
Dipl.-Ing. Dimitar Georov

In the deepest crisis our industry has suffered since the mass privatisation process in the 1990s, it is wonderful to see that a number of plants are still investing and working hard towards modernisation and innovation. This makes me feel optimistic for the post-crisis period and the competitive power we are going to have against other industries, as well as importers.

**Number of members:**  
10 companies

**Turnover:** 15-18 million euro (estimate)

**Number of employees:** approx. 700 (estimate)

**Name, contact details**  
9 Balkandji Yovo Str  
1612 Sofia  
Tel: +359 2 9553455;  
Tel: +359 888 595656;  
Tel: +359 888 564545  
E-mail: ceramic\_union@dabv.bg

**Founding year:** 1999

**Member of TBE since** 2011

**CYPRUS**

**President**  
Mr. Antonis Christodoulou

Following the expansion of the construction market we had in Cyprus between 2005 and 2009, unfortunately, the last 2.5 years we have been facing increasing difficulties. We have entered a recession period and due to the major problems faced by the banks in Cyprus, which are affecting the economy of the country, and the upcoming measures by Troika, we believe that our sector will suffer even more.

**Secretary General**  
Mr. Marios Hadjigavriel

**Number of members:**  
7 companies; 9 factories

**Turnover:** 18 million euro

**Number of employees:** 130

**Name, contact details**  
Cyprus Brick & Tile Association  
P.O. box 12503  
CY-2250 Nicosia

**Founding year:** 1975

**Member of TBE** since 2009

**CZECH REPUBLIC**

**President**  
Mr. Ing. Jiří Matějka

Currently, the size of the Czech construction sector is decreasing. In 2012 there was a decrease in housing construction, including housing planning, of around 10%. Due to a lack of support from the state, a further decrease is expected in the next three years. As for production capacities, there are frequent lay-offs due to production surpluses for burnt bricks, roof tiles and all building materials in general.

**Number of members:** 11 companies;  
24 factories

**Turnover:** about 104 million euro

**Number of employees:** 1,300

**Name, contact details**  
Ing. Jiří Matějka, Nové Homole 61, CZ - 370  
01 České Budějovice  
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Fax: +420 387 250 609  
Mob.: +420 606 651 102  
E-mail: jirimatejka@volny.cz  
Website: www.cscm.cz

**Founding year:** 1993

**Member of TBE** since 1995

**DENMARK**

**President**  
Mr. Jens Piper

We have never recorded a lower activity in the building & construction industry in Denmark than during the years 2009 to 2011. When the private housing sector is doing well, we are normally also in good shape, but when the financial situation concerning banks and building activity levels is as critical as now – also due to the crisis with the euro – the sales of houses are seriously reduced. It seems that in 2012 and 2013 we will also have to fight this extreme low building activity on a national level. Six years or more with low sales is very hard for our industry.

**Secretary General**  
Mr. Tommy Bisgaard

**Number of members:** 40 companies (in Denmark, Norway and Sweden); approx. 70 factories

**Turnover:** 400 million euro

**Number of employees:** approx. 1,200

**Name, contact details**  
Kalk- og Teglværksforeningen  
Nørre Voldgade 48  
1358 Copenhagen K  
Tel.: +45 33 32 34 34  
Fax: +45 51 54 24 54  
Fax: +45 33 32 95 78  
E-mail: kalktegl@mail.dk  
Website: www.byg-i-tegl.dk  
www.mur-tag.dk  
www.taenkitegl.dk  
www.tegelinformation.se  
www.bygitegl.no

**Founding year:** 1893

**Member of TBE** since 1952

**FINLAND**

**President**  
Dr. Jaakko Raikkonen

The total construction volume in Finland grew by almost 5 per cent in 2011, says Jaakko Raikkonen, president of the Finnish Brick Industry Association. In 2012 the volume is expected to contract by 2 to 4 per cent. All sectors except renovation of buildings and civil engineering will shrink in 2012. New residential construction picked up considerably in 2009–2010, after the recession, partly thanks to stimulation of flat building and partly due to low interest rates and the revival of the overall economy. In 2011 some 31,500 dwellings were built, of which 11,000 were single-family homes. Brick is the most popular facade material in Finland. The year 2012 looks a little bit gloomy for new residential construction. The volume is forecast to contract by a tenth compared to 2011 partly due to a decrease in the construction of state-subsidised dwellings. The biggest challenge in the brick industry is to achieve a larger share in the market of facades of single-family homes. The volume of new non-residential construction increased by 8 per cent in 2011 following drastic drops in the two previous years. A slight decline was registered for 2012, and the volume will further diminish in 2013. Brick is also a widely used material in chimneys and fireplaces in Finland.

**Secretary General**  
Mr. Juha Luhanka

**Number of members:** 3 companies;  
5 factories

**Turnover:** 30 million euro

**Number of employees:** 150

**Name, contact details**  
Finnish Brick Industry Association  
c/o Finnish Association of Construction Product Industries RTT  
Mr. Juha Luhanka  
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FIN-00131 Helsinki  
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Fax: +358 9 1299 420  
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Website: www.tili-info.fi

**Founding year:** 1929

**Member of TBE** since 1952

**FRANCE**

**President**  
Mr. Francis Lagier

The housing outlook in France is quite alarming. Despite 2011 being a rather good year, housing permits in 2012 have been decreasing rapidly (- 20% in comparison with 2011), and therefore our industry is worrying a lot. We are almost back at the levels of the 2009 crisis.

However, we are still confident for the medium term: the market share of clay products for use in detached houses has been constantly growing for the last 5 years. We have noticed in particular that, for the first time in 30 years, clay products (both blocks and bricks) have become the most widely used construction materials for building houses. This is due to the well-known characteristics of our materials: aesthetics, health benefits (indoor air quality), very long service life, thermal performance and affordability. Therefore we hope that 2013 and the following years will bring good news to our industry.

**Secretary General**  
Mr. Bruno Martinet

**Number of members:** 96 companies;  
149 factories

**Turnover:** 991 million euro

**Number of employees:** 5,229

**Name, contact details**  
FFTB  
(French Federation for Roof Tiles and Blocks)  
17, Rue Letellier  
75015 Paris  
Tel.: +33 1 44 37 07 22  
Website: www.fftb.org

**Founding year:** 1936

**Member of TBE** since 1952

**GERMANY**

**President**  
Mr. Helmuth Jacobi

After nearly 15 years of steady decline after the reunification of the country, the turnover of the brick and roof tile industry in Germany increased by about 15 percent last year. A slower but hopefully steady improvement of the situation will take place in the coming years.

**Secretary General**  
Mr. Martin Roth

**Number of members:** 80 companies;  
120 factories

**Turnover:** 1.3 billion euro

**Number of employees** around 9,000

**Name, contact details**  
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Schaumburg-Lippe-Straße 4  
D-53113 Bonn  
Tel.: +49 228 9149318  
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E-mail: info@ziegel.de  
Website: www.ziegel.de

**Founding year:** 1897

**Member of TBE** since 1952

## GREECE



## HUNGARY



## ITALY



**President**  
Mr. Ioannis Malouris

The economic crisis which has affected the entire EU since 2008, and particularly the southern European countries, had as a result the almost complete destruction of the productive capacity of the construction sector (–70% between 2007 and 2011) and therefore also the ceramics industry in Greece. A contributing factor in this dramatic fall (or collapse) is certainly the fact that in previous periods of growth Greece did not manage to proceed with well-planned and regulated activities for the construction industry, both practically and through the necessary legislative framework for public and private projects based on the needs of the country. Perhaps the only alternative for companies in the industry is shifting to projects and seeking opportunities abroad as long as there is uncertainty about the future, and as such long-term planning is impossible. For the future reconstruction of the economy the keyword is growth. Concrete actions from the EU to support investment plans will ultimately revive our industry in order for it to become competitive again, to create jobs and to attract new investments. Certainly the continuous delays in undertaking such actions on the EU's political level is simply postponing the revival of the southern economies.

**Secretary General**  
Mr. Konstantinos Christodoulidis

**Number of members:** 30 companies

**Turnover:** 60 million euro

**Number of employees:** around 600

**Name, contact details**  
Association of Greek heavy clay industries  
Tavaki 4A, PC 57001  
Thermi Thessaloniki  
Greece  
Tel.: + 30 2310489575  
E-mail: info@sevk.gr, sevk@otenet.gr

**Founding year:** 1954

**Member of TBE** since 1988

**President**  
Dipl.-Ing. Aladár Kató

The construction sector in Hungary is in a deepening crisis and in 2011 figures dropped to a particularly low level. The Hungarian brick manufacturing industry is in an extremely difficult situation, because its main market, the construction of new dwellings, has further shrank compared to the previous years. In Hungary 1.27 new homes were built per 1,000 inhabitants in 2011, which is one of the lowest values in the EU. According to statistical forecasts, a further drop in this value is to be expected. The Hungarian brick manufacturing enterprises are struggling for economic survival. Companies have had to significantly cut back their workforce and close many of their factories. The remaining factories work well below their capacity. The Hungarian roof tile manufacturing companies are in a better position, because in addition to the construction of new homes, the market for the renovation of buildings is also significant for them. Furthermore, they have better opportunities to export their products. The development of the housing sector is of utmost importance for society and the economy, and it can make a significant contribution towards achieving ecological targets (i.e. climate protection through the improvement of the energy efficiency of buildings). In order for Hungary to note positive changes, a predictable governmental housing policy and the creation of a suitable financing environment are a must. It is highly important for Hungary that the resources of the ERDF in the 2014-2020 EU programming period are made available to the housing sector (for both new buildings and renovation).

**Secretary General**  
Ms. Ágnes Ladányi (Executive Manager)

**Number of members:** 11 companies;  
+ 5 companies providing services.

**Turnover:** 100 million euro (estimate)

**Number of employees:** approx. 1,000

**Name, contact details**  
Magyar Tégla Szövetség  
1092 Budapest, Ráday u. 42-44.  
Tel./Fax: +36 1 2017056  
E-mail: iroda@teglasszovetseg.hu  
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**Founding year:** 1995

**Member of TBE** since 1998

**President**  
Arch. Luigi Di Carlantonio

Over the past five years, the Italian brick and tile industry has halved its production levels, which were just above 10 million tonnes in 2011. Consequently, the number of companies has also decreased: 170 production sites are still active, while 41 plants are closed or at a standstill. Unfortunately, the signals for the near future are not encouraging: a significant drop is foreseen in 2012 and another one, though less marked, is expected in 2013. Production is expected to stabilise only in 2014. The persistence of such a critical situation has forced companies to rethink their strategies, aiming at the optimisation of their business structures and focusing on high-quality solutions which are in line with the criteria of sustainability, energy efficiency and structural safety, with particular reference to seismic zones. Therefore, working with associations is essential for directing decision-making and organising the consensus among the different players on the programmes to be carried out, investment in research and communication.

**Number of members:** 95 companies;  
125 factories

**Turnover:** 980 million euro

**Number of employees:** 6,500

**Name, contact details**  
ANDIL Associazione Nazionale Degli Industriali dei Laterizi  
Via A. Torlonia, 15 – 00161 ROMA  
Tel.: +39 06 44236926  
Fax: +39 06 44237930  
Website: www.laterizio.it  
www.solaioinlaterizio.it  
www.copertureinlaterizio.it  
www.lateriziofacciafista.it

**Founding year:** 1945

**Member of TBE** since 1952

## NETHERLANDS



**President**  
Mr. D.K.J. Tommel, Ph.D

A pile of bricks is a well-known symbol of construction. It might also stand for future challenges. At a time when Europe, and construction in particular, is in a crisis, it is difficult to imagine that future. Nevertheless, our industry is thinking about that future and beyond. The Dutch ceramic industry has published a roadmap called "Building Ceramics 2030". It is a plan, supported by our entire industry, for the future of the ceramics process and ceramics products.

It is my strong belief that in 2012 the Dutch industry is on the verge of new, more fundamental developments facing new requirements of sustainability. These requirements are necessary for the long-term performance of the buildings of tomorrow and consequently for the functional and technical characteristics of the products and materials from which these buildings are constructed. The use of single ceramic building products, like bricks or ceramic roof tiles, will slowly bring added value to our production based on the characteristics of the material in function of its application: independent, interdependent or in systems. This trend is marked by the development of the ceramic building materials into a multitude of appearances. Today, our industry is ready for tomorrow!

**Secretary General**  
Mr. Ewald L.J. van Hal, LL.W

**Number of members:** 20 companies

**Turnover:** 360 million euro

**Number of employees:** 1,750

**Name, contact details**  
Vereniging Koninklijke Nederlandse Bouwkeramiek (KNB)  
(Royal Association for Building Ceramics)  
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NL 6880 AD Velp (Gld.)  
Tel.: +31 26 3845 630  
Fax: +31 26 3845 631  
E-mail: info@knb-keramiek.nl  
Website: www.knb-keramiek.nl

**Founding year:** 1884

**Member of TBE** since 1952

## POLAND



**President**  
Mr. Michał Staszewski

Unfortunately the Polish economy has suffered a full-scale slowdown this year, which has impacted the building industry as well. Furthermore, banks have tightened mortgage standards, which has resulted in fewer people willing to buy flats or build houses. Consequently, the number of building permits issued in the first seven months of the year 2012 has decreased by 11% in comparison with the same period last year.

Unfortunately, there are no indications that this negative trend in the building market will be reversed in the coming months. Additionally, our industry is more and more affected by the EU's strict CO<sub>2</sub> emissions regulations, which may change the financial situation of producers. Nevertheless, we believe that ceramics as a building material, which guarantees comfort of living and is perceived as an investment-friendly material, will keep its position in these tough times, and gain new consumers and a stronger market position. –

**Secretary General**

Jolanta Kapuścińska

**Number of members:** 19 companies;  
44 factories

**Number of employees:** approx. 2,000

**Name, contact details**

ZPCBIS - Employers Union of Building Ceramics and Calcium Silicates Industry - Poland  
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Tel.: +48 22 826 31 01  
Fax: +48 22 826 88 55  
E-mail: zwiazek@zwiazek.org.pl  
Website: www.zwiazek.org.pl

**Founding year:** 1994

**Member of TBE** since 1995

## PORTUGAL



**President**  
Mr. Duarte Garcia

The Portuguese tiles and bricks sector, like other construction-related sectors, is facing a difficult market, which is affecting the activities of the producing companies, some of which have even had to close, while others were forced to reduce their production. We were not taken by surprise by neither the crisis nor the consequences! What surprised us is the dimension of this crisis, in which many of the factors negatively influencing the market converged. The recovery will be difficult and time-consuming, and for the surviving companies many of the habits that have now settled in will endure: trust, payment terms and credit are issues that take long to recover from, and renewed management, innovation and marketing strategies are needed if the prior conditions are to be restored. Still, all this effort from the companies might not be enough if a solution for the steady increases in energy costs – which have been intolerably burdening the production costs of enterprises – is not achieved.

**Secretary General**  
Mr. José Luís Sequeira

**Number of members:** 30 companies,  
40 factories

**Turnover:** 95 million euro

**Number of employees:** 1,325

**Name, contact details**  
APICER - Associação Portuguesa da Indústria de Cerâmica  
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3020-053 Coimbra/Portugal  
Tel.: +351 239497600  
Fax: +351 239497601  
E-mail: info@apicer.pt  
Website: www.apicer.pt  
www.ceramica.pt

**Founding year:** 1996

**Member of TBE** since 1996

**SPAIN**
**President**  
**Dr. José Malpresa**

The current situation of the manufacturers of clay construction products is really complicated. Since the construction of new housing has completely stagnated, the manufacturers have been facing an unsustainable situation for a long time. Generally speaking, due to the decline in the sales of clay construction products that began in 2008, companies have been forced to adapt to the market demand. Consequently, manufacturers are now concentrating their production in certain months of the year to avoid overstocking. This has had a direct impact in other areas, such as the number of employees, the turnover, etc.

To face this situation, the industry aims to remain competitive through innovative products and systems, by reducing production costs and by increasing the energy efficiency in the production plants. Hispalyt will work to ensure competitiveness and a high level of environmental commitment.

**Secretary General**  
**Dr. Elena Santiago Monedero**
**Number of members:**  
 200 companies

**Turnover:** 360 million euro

**Number of employees:** 9,600

**Name, contact details**  
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Fax: +34 917 709 481

E-mail: hispalyt@hispalyt.es

Website: www.hispalyt.es

**Founding year:** 1968
**SWITZERLAND**
**President**  
**Dr. Peter Burkhalter**

The Swiss market has gone through a substantial restructuring over the past 25 years. The number of production sites has been reduced to 16 nationwide. Except for the market leader ZZ Wancor AG, which is part of the Wienerberger Group, all other brick factories are family-owned and often also managed by the owners. In the last 10 years all the mergers and succession plans have been contemplated locally. Due to the importance of the transportation costs the market of the Swiss tile industry remains local. Thanks to the favourable economic developments in the Swiss construction industry over the last decade, our industry has become more sustainable. Some of our members took advantage of this situation by renovating and updating their plants and touching new grounds in the innovation process. These investments are very important for our industry. With respect to the general growth of the industry we depend greatly on the architectural trends in which the roofing tile market in particular cannot really be increased for new constructions. In the refurbishment market the roofing tile market remains very attractive. The industry was also impacted by the earthquake legislation. A lot of engineers were not convinced by the earthquake safety of our ceramic wall products. Therefore, important efforts have been made and are still being made to balance this structural challenge. In particular, our industry has to ensure that we can keep our share in this competitive market. However, I think that due to the large-scale renovation of the Swiss building stock there will be a huge demand for construction in the next few years, both in terms of refurbishment and reconstruction. Due to the interesting real estate price evolutions over the last years local Swiss experts share the opinion that Switzerland will remain an interesting market for the real estate and construction industry in the next decade.

**Secretary General**  
**Mr. Ruedi Räss**
**Number of members:** 10 companies;  
 21 factories

**Number of employees:** approx. 560 - 600

**Name, contact details**  
 Verband Schweizerische Ziegelindustrie VSZ  
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 CH-3006 Bern 6  
 Postfach 371, CH-6210 Sursee  
 Tel.: +41 31 356 57 57  
 E-mail: mail@domoterra.ch  
 Website: www.domoterra.ch

**Founding year:** 1891

**Member of TBE since 1952**
**UK - BRICKS**
**President**  
**Mr. Alan Baxter**

The construction market has declined and is responsible for taking the UK economy into a double-dip recession. New build activity continued to grow in 2011 and, overall, housing output rose by 8%, a modest increase compared to 2010, when housing output was 25% higher year-on-year. Drastic cuts to the public sector capital budgets are, however, starting to have an impact on housing activity with public-sector starts 14% lower year-on-year in 2011, whilst output in the public repair, maintenance and improvement (r&m&i) sector contracted by 8%. With the hoped-for private sector-led recovery threatened as the economy struggles to regain momentum, the outlook for private-sector housing has deteriorated. In 2012, private starts are forecast to total just 104,000, 3% higher than in 2011, before activity accelerates in 2013. Conditions in the private housing (r&m&i) sector are set to remain depressed in 2012 with output flatlining as the subdued economic conditions drag down activity. A return to growth is anticipated in 2013 with output expanding by 1.7%. The absence of mortgage availability for the private sector coupled with companies retaining cash to keep debt low has hit the construction industry. Most clay products are sold into housing, and the difficulty in obtaining finance is balanced by the critical undersupply of housing. House building will increase slowly from 2013-14; the growth for more general construction will depend on government policy and private initiatives.

**Secretary General**  
**Mr. Simon Hay**
**Number of members:** 15 companies  
**Turnover:** 350 million pound sterling

**Number of employees:** around 4,000

**Name, contact details:**  
 The Brick Development Association.  
 The Building Centre,  
 26 Store Street, London WC1E 7BT  
 Tel.: +44 207 323 7030  
 Fax: +44 207 580 3795  
 E-mail: Brick@brick.org.uk  
 Website: www.brick.org.uk

**Founding year:** 1946

**Member of TBE since 2010**
**UK - ROOF TILES**
**President**  
**Mr. Alex Patrick-Smith, Managing Director - Hinton Perry and Davenhill Ltd.**

Clay roof tiles have an enduring appeal and are widely regarded as a premium roofing product. The UK industry has invested heavily over recent years to improve production and energy efficiency with a view to delivering a truly sustainable product, which has brought clay tiles to a broader audience. Given the choice, the superior aesthetic of clay tiles means specifiers would tend to opt for clay and this is reflected in the increase seen in the market share for clay roof tiles in the UK over the last 15 years.

**Secretary General**  
**Mr. Christopher Hall**
**Number of members:** 5 companies,  
 5 factories

**Turnover:** 55 million pound sterling

**Number of employees:** 1,000

**Name, contact details**  
 BCC  
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 Station Road  
 Stoke-on-Trent  
 ST4 2SA  
 Tel.: +44 1782 744631  
 Fax: +44 1782 744101  
 E-mail: chrish@ceramfed.co.uk  
 Website: www.ceramfed.co.uk

**Founding year:** 1981
**RUSSIA**
**President**  
**Mr. Vladislav Gerashchenko**

We integrate the industry for the benefit of each particular enterprise!

**Secretary General**
**Mr. Peter Hennig**  
 GD of Wienerberger Kirpitch

**Number of members:** 14 companies

**Turnover 2011:** 8 billion RUR (200 million euro)

**Number of employees:** more than 1,000

**Name, contact details**

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 129085, Russia, Moscow, Prospect Mira, 101, p.1  
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 E-mail: apksm@mail.ru  
 Website: www.apksmrf.ru

**Founding year:** 2008

**Member of TBE since 2012**
**TBE DIRECT MEMBERS****Belgium - Roof Tiles**
 Association des Tuiliers Belges - Koramic  
 Roofing Products  
 Courtrai, Belgium
**Croatia**
 Tondach Croatia  
 Matije Gupca 2, HR 49221 Bedekovcina
**Croatia**
 Wienerberger Illovac  
 D. Pokupje 2, HR 47000 Karlovac
**Estonia**
 Wienerberger Estonia  
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**Latvia**
 Lode AS  
 Liepas str 1, Liepa parish  
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**Norway**
 Wienerberger Norway  
 Wienerberger AS, Strengeneveien 31, N-3825  
 Lunde
**Sweden**
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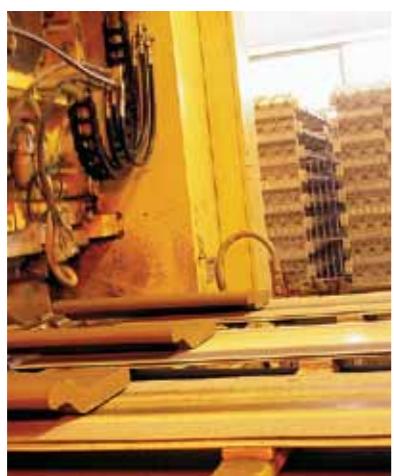
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