60th Anniversary of Tiles & Bricks Europe

Ceramics, quality for life
I am proud to celebrate the 60th 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 60th 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 60th 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 60th anniversary with you and I am looking forward to TBE’s prosperous future.

Dr. Heimo Scheuch
TBE President
Bricks and roof tiles are more than merely building materials

TBE Vice-President

Mr. Ioannis Maliouris
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 practices in many policy areas, including sustainability, construction, climate, energy and standardisation. The dialogue with policy makers in these areas helps our industry appreciate 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 Maliouris
TBE Vice-President

On the occasion of the 60th 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 10th 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 60th anniversary of the association. I wish you a successful future.

MEP Karl-Heinz Florenz

It is very important to maintain a constructive dialogue

Bricks and roof tiles are more than merely building materials

It is a pleasure for me to hear that this year, the 60th 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 CO2 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 60th anniversary of TBE.

Dr. Johannes Hahn,
Commissioner for Regional Policy

MEP Karl-Heinz Florenz

Dr. Johannes Hahn, Commissioner for Regional Policy

Mr. Ioannis Maliouris
TBE Vice-President
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 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.
A competitive and future-oriented industry

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 revolutionised 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.

“The sector is very well prepared to tackle the challenges of the next decades.”

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, CO2 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.”

© Photo: Kees Hummel
© Photo: Juliusz Sokolowski
The added value of clay building products

Durable products delivering comfortable, safe and healthy homes

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.

Contributing to sustainable and energy-efficient 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/m²K. Whilst retaining its appearance, the cavity is filled and current installations can easily achieve a U-value of 0.25 W/m²K for walls and even 0.14W/m²K for top products. This means a significant drop in annual energy consumption from 69 to 33 kWh/m² and consequently less CO₂ 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%.
Preserving architectural heritage across Europe

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 help 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

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.

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

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.
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 m² 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.
60 years of TBE

President | Vice-President
---|---
J. Rothéa [F] | M.B. Costamagna [F]
1954 - 1956 | 1954 - 1956  
Dr. M. Riso [I] | T. Pfeiffer (I)
1956 - 1958 | 1956 - 1958  
Dr. E. Rauch [D] | Dr. G. Boll [D]
J. van Thiel de Vries [NL] | J. Laumanns [NL]
1962 - 1964 | 1962 - 1964  
P. Hartmann [DK] | D. Mellbye [N]
J. Vigne [F] | M. Maury- Lariére [F]
A.M. Dias Coelho [P] | D.M. Megre [P]
Dr. L. Ravetta [I] | C. Muttoni [I]
C. Mumenthaler [CH] | P. Binkert [CH]
Prof. K. Leitl [A] | Dr. H. Gruber [A]
A.B. King [1979-80] [UK] | D.S. Hartley [UK]
E.A. Bäumer [D] | E.P. Rauch [D]
C. Korevaar [NL] | J.F.M. Bota [NL]
J. Ampe [B] | Ch. Dormoulin [B]
P.M. Johnson [UK] | Ch. Rose, Esq, CBE [UK]
Dr. W. Reithner [A] | Dr. E. Schaus [A]
P. Keller [CH] | Dr. R. Farler [CH]
V. Vito [I] | Dr. M. Cunial [I]
2002 - 2006 | 2002 - 2006  
C. Damen [NL] | H. Gaselin [F]
C. Schenck [F] | A. Hörmann [D]
2006 - 2008 | 2006 - 2008  
A. Hörmann [D] | H. Schuch [A]
2008 - 2011 | 2008 - 2011  
H. Schuch [A] | I. Maliauzis [G]
2011 - Today | 2011 - Today  
H. Schuch [A] | I. Maliauzis [G]

On the occasion of the 2nd 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 Rothéa (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 (1998), Czech Republic (1993), 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.
Current members of TBE (2012)

### Austria

**President**
Gewerke KR Franz Olbrich

It is my pleasure to congratulate TBE on its 60th 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**
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 (VOZ)
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
Fédération Belge de la brique asbl,
rue des Chartreux 19 b19, 1000 Bruxelles
Tel.: +32 2 511 35 81
Fax: +32 2 513 26 40
E-mail: info@baksteen.be / info@brique.be
Website: www.baksteen.be / www.brique.be

Founding year: 1999

Member of TBE since 2011

### 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 595456;
Tel.: +359 888 564565
E-mail: ceramic_union@abv.bg

Founding year: 1999

Member of TBE since 2011
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:
Cypriot Brick & Tile Association
P.O. box 12503
CY-2250 Nicosia
Founding year: 1975
Member of TBE since 2009

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 shapes, 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 Bjørgaard
Number of members: 60 companies (in Denmark, Norway and Sweden); approx. 70 factories
Turnover: 400 million euro
Number of employees: approx. 1,200
Name, contact details:
Kalk- og Topparkeføreningen
Nørre Voldgade 48
1388 Copenhagen K
Tel: +45 33 32 34 34
Fax: +45 33 32 95 78
E-mail: kalk@kalkforeningen.dk
Website: www.byg-ieteg.dk
www.mar-laag.dk
www.lastekglei.dk
www.teglinformation.se
ww.byggilegi.no
Founding year: 1993
Member of TBE since 1995

We have noticed in particular that, for the most popular façade material in Finland, brick is the most widely used construction material for building houses. This is due to the well-known characteristics of our materials: aesthetics, health benefits (indoors 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. Jaakko Raikkonen
Number of members: 96 companies; 149 factories
Turnover: 991 million euro
Number of employees: 5,229
Name, contact details:
FINland
Ziegelindustrie e.V.
Bundesverband der Deutschen Ziegelindustrie e.V.
Schauersburg-Lippe-Straße 6
D-53113 Bonn
Tel.: +49 228 9149318
Fax: +49 228 9149328
E-mail: info@ziegel.de
Website: www.ziegel.de
Founding year: 1897
Member of TBE since 1952

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 3 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 (indoors 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. Francis Lagier
Number of members: 80 companies; 120 factories
Turnover: 1.3 billion euro
Number of employees around 9,000
Name, contact details:
Bundesverband der Deutschen Ziegelindus trie e.V.
Schauersburg-Lippe-Straße 6
D-53113 Bonn
Tel.: +49 228 9149318
Fax: +49 228 9149328
E-mail: info@ziegel.de
Website: www.ziegel.de
Founding year: 1897
Member of TBE since 1952
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. The construction sector in Greece is a well-known symbol of the national economy and its performance is considered crucial for the recovery of the entire industry, for the future of the ceramics process and ceramic products. It is my strong belief that in 2012 the Dutch industry is on the verge of new, more fundamental developments facing new requirements for sustainability. These requirements are necessary for the long-term performance of the buildings and materials from which these buildings are constructed. The use of single ceramic building products, like bricks or ceramic roof tiles, will allow the energy efficiency to be increased in our production based on the characteristics of the material in function of its application: independent, interdependent or in systems. This is a European level of our production and for the surviving companies 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.

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 CO2 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 those tough times, and gain new consumers and a stronger market position.

The construction sector in Hungary is a well-recognized symbol of the national economy and its performance is considered crucial for the revival and renaissance of the country. The construction sector is in a multitude of appearances. Today, our industry is ready for tomorrow! 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 CO2 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 those tough times, and gain new consumers and a stronger market position.
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. Hipaipay 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
C/ Orense, 10 - 2ª Planta, Ofic. 13-14
28020 Madrid
Tel.: +34 917 709 480
Fax: +34 917 709 481
E-mail: hipsaltpy@hipsaltpy.es
Website: www.hipsaltpy.es

Founding year: 1968

President
Dr. Peter Burkhardt

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 22 Marco AG, which is part of the Wienerberger Group, all other brick factories are family-owned and 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 laying new grounds of 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 in new constructions. In the refurbishment market the roofing tile market remains very attractive. The industry was also affected by the earthquake in Switzerland. 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 the structural challenge. In particular, our industry has to ensure that we can keep our share in this competitive market. However, the effect 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 increasing real estate price reductions 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 Riss

Number of members: 10 companies; 21 factories
Number of employees: approx. 560 - 600

Name, contact details
Verband Schweizerische Ziegeldienste VSZ Ellerstrasse 19, Postfach CH-3004 Bern 6
Postfach 371, CH-4210 Sursee
Tel.: +41 31 356 97 97
E-mail: mail@domoterra.ch
Website: www.domoterra.ch

Founding year: 1891
Member of TBE since 1952

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

Secretary General
Mr. Peter Hanh

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 3796
E-mail: Brick@brick.org.uk
Website: www.brick.org.uk

Founding year: 1966
Member of TBE since 2010