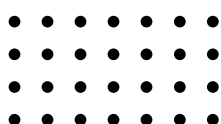
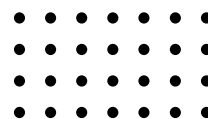




2024

Activity Report





Rue d'Arlon 55 – BE-1040 Brussels

Tel.: + 32 2 234 10 11

secretariat@cembureau.eu

www.cembureau.eu



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Cementing Europe's Future



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Table of content

04

Cement & Concrete
in Europe

06

Our Path to Net Zero
by 2050

09

2024:
A Year in Review

13

2024 Highlights

22

Climate Change
& Energy

25

Circular Economy
& Processes

29

Health & Safety

31

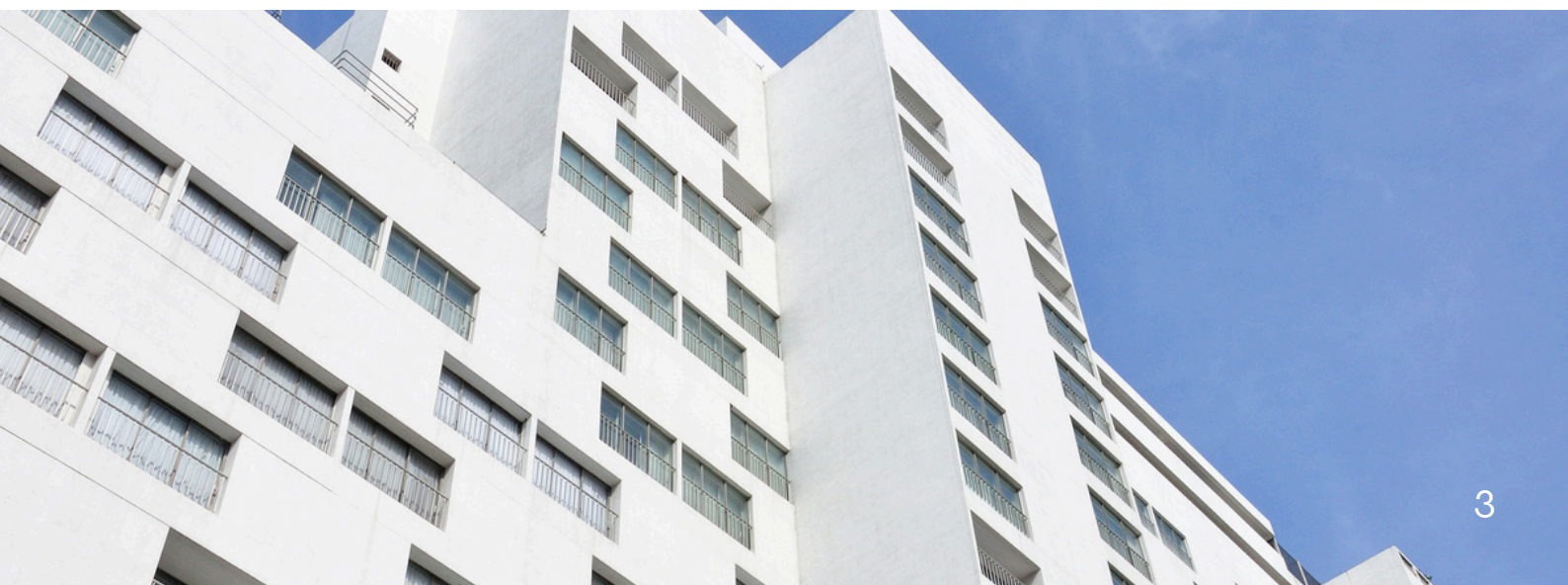
Markets & Products

33

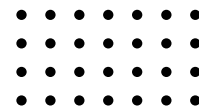
The Economy

49

About us



Cement & concrete in Europe



OUR VALUE CHAIN

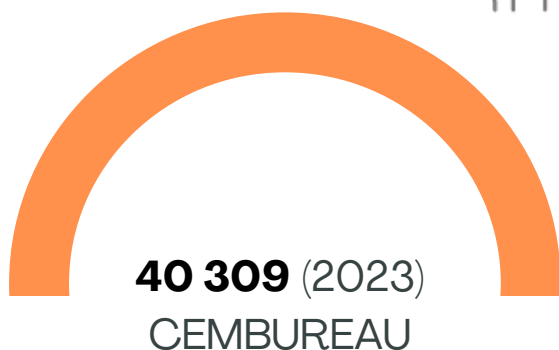
Cement plays a key, but often unnoticed, role in our lives. Whilst everyone knows the word cement, it is often confused with concrete or mortar. **Cement** is a key ingredient in both **concrete** and **mortar**, and it is always mixed with other materials before its use:

- **Cement** mixed with water, sand and gravel forms **concrete**, which is what the vast majority of cement is used for.
- **Cement** mixed with water, lime and sand forms **mortar**.

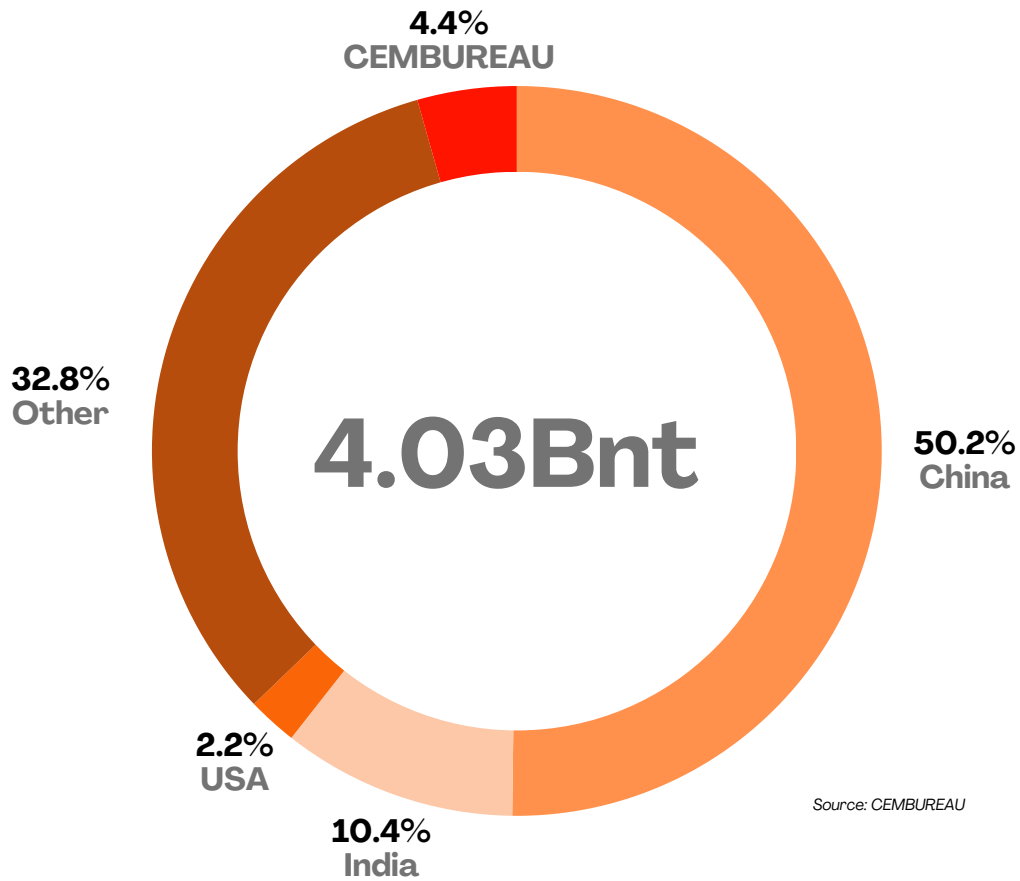
Cement and concrete have been used to build durable structures for quite some time. Thanks to the special binding properties of cement, concrete is a very resilient material that can bear heavy loads and resist environmental extremes. It is the basic material for all types of **construction**, including housing, roads, schools, hospitals, dams and ports, as well as decorative applications (such as patios, floors, staircases, driveways, pool decks etc) and items like tables, sculptures or bookcases.

KEY FACTS & FIGURES

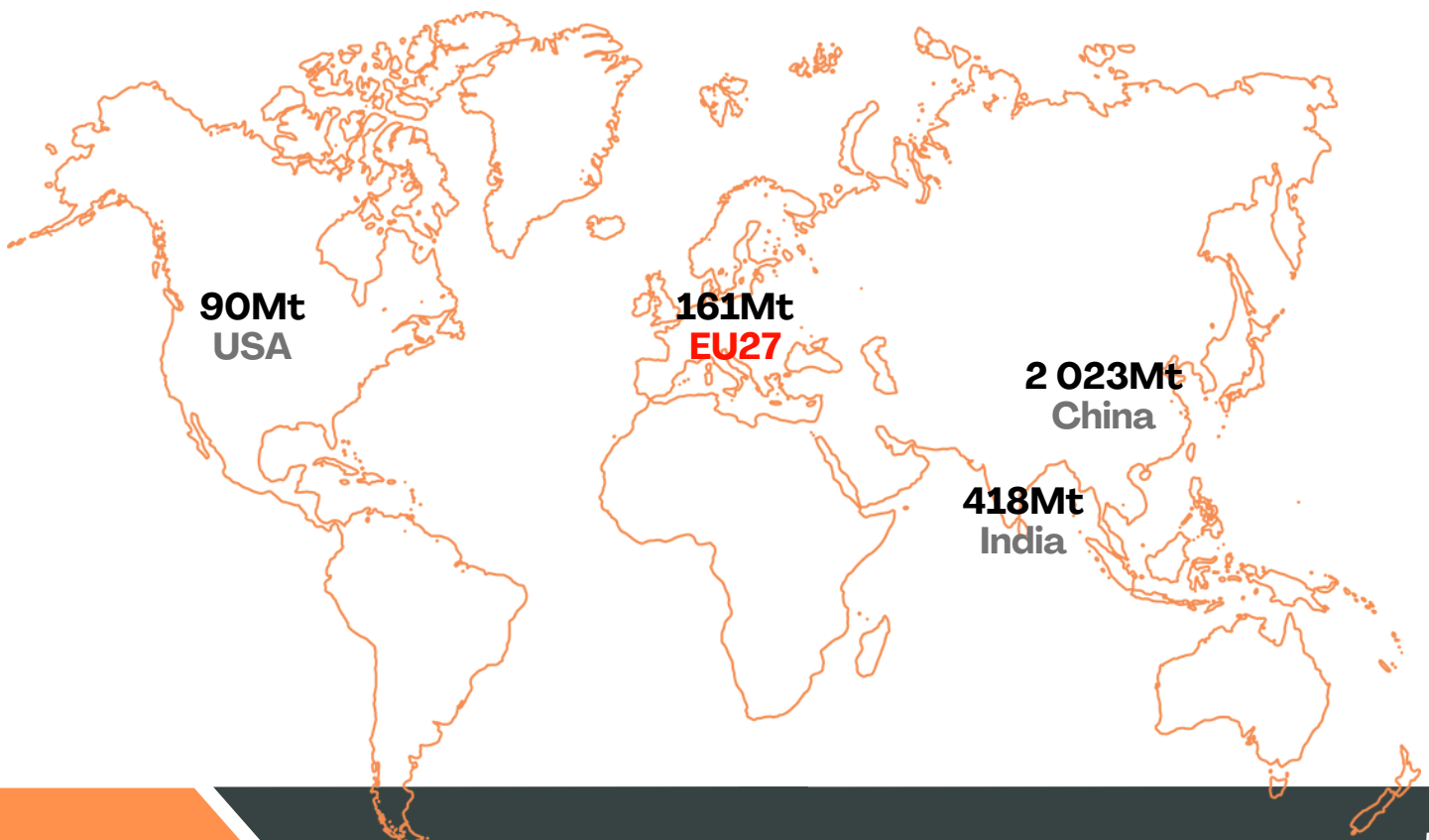
Cement sector employees



WORLD CEMENT PRODUCTION 2023

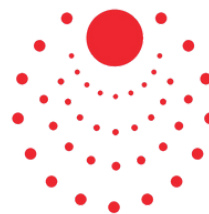


MAIN WORLD PRODUCERS IN 2023



A rectangular array of dots arranged in 4 rows and 7 columns. There are 4 rows and 7 columns of dots.

The updated roadmap quantifies each decarbonisation lever, exploring the challenges and opportunities of each technology, as well as technical feasibility. This revision not only assesses our progress to date but also examines what the sector could achieve at a 2040 time horizon.



CEMBUREAU 2050 roadmap

The infographic features a circular chart with segments representing different emission reduction measures. The chart is divided into three main color-coded sections: grey for 1990 emissions, red/orange for 2021 emissions, and green for 2050 emissions. A red arrow points from the 1990 emissions value to the 2050 emissions value.

Category	Value	Unit
1990 emissions	804	kg CO ₂ /t of cement
2021 emissions	-147	
2050 emissions incl. downstream	-131	kg CO ₂ /t of cement down the value chain
CCUS	-374	

Measures and their contributions to emission reduction:

- 5C - Construction Carbonation**: -60
- CO₂ Capture in built environment**: -60
- 5C - Concrete**: -74
- Concrete mix**: -66
- Carbon neutral transport**: -8
- 5C - Cement**: -154
- Clinker substitution**: -137
- Electrical efficiency and renewable electricity**: -29
- Carbon neutral cement transport**: -10
- Increase of CO₂ due to calcined clay**: +21
- 5C - Clinker**: -126
- Decarbonated raw materials**: -25
- Low carbon clinker**: -16
- Biomass Fuels**: -47
- Thermal efficiency**: -22
- Fuel switch / H₂ & electrification**: -16

Reaching the ambition level set forth in the Roadmap requires the deployment of breakthrough technology, innovation, new business methods and processes along the 5C value chain. A competitive regulatory framework to enable such deployment is a necessary precondition for its success and for the implementation of **breakthrough technologies**. The large variety of projects include the use of construction and demolition waste and other materials to partially replace extracted limestone; non-recyclable and biomass waste to replace fossil fuels; more energy-efficient kilns; development of innovative low-clinker cements; deployment of carbon capture and storage/use (CCUS) technologies; optimised concrete mixes and building techniques and the potential for concrete to carbonate up to 23% of the CO₂ process emissions (which represent two thirds of the total CO₂ emissions in clinker production).

Throughout 2024, we emphasized the fact that to deliver on its ambition, the sector needs a business case for decarbonisation investments, supported by **appropriate policy measures**. In particular, we focused on the following key areas where policymakers can make a difference:

- **An effective and watertight Carbon Border Adjustment Mechanism (CBAM):** A level playing field on carbon is indispensable to stimulate low-carbon investments and support carbon emission reductions worldwide. As the operational phase of CBAM will start in 2026, it is key that the mechanism is fully watertight and that the risks of circumvention and fraud are minimised.
- **Financial support** for the decarbonisation of the sector needs to be significantly ramped up. The existing EU and national funding programmes remain limited and not suitable to support large-scale deployment. In the decade to come, the cement industry will contribute significantly to the EU ETS. At least 75% of these ETS revenues should be frontloaded and put in a dedicated Deployment Fund to support the deployment of large-scale transformation projects at our manufacturing plants.
- **Development of a pan-European CO₂ transportation and storage network:** A large number of carbon capture, use, and storage (CCUS) pilot projects are being developed by the cement industry across Europe. Alongside continued support for CCUS, EU and national policymakers should urgently look at developing a pan-European CO₂ infrastructure network to allow for the transport, storing and/or re-use of the CO₂ captured in the cement plants. Fair access to infrastructure at reasonable conditions is also an essential prerequisite. The Net Zero Industry Act supports the development of CO₂ infrastructure, but dedicated policies will be needed to support both CO₂ storage and transport.
- **Access to Supplementary Cementitious Materials (SCMs):** Throughout Europe, cement plants are actively exploring avenues to augment the incorporation of SCMs in cement manufacturing and therewith reducing the clinker content.

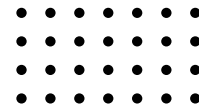
With the availability of fly ash from the power sector and blast furnace slag from the steel sector diminishing as a consequence of the decarbonisation of both sectors, new and alternative sources of SCMs (calcined clays, recycled concrete fines, natural pozzolans) are being explored. A sizeable amount of clinker per tonne of cement will always be needed to ensure the durability and strength of concrete used.

- **Decisive action on circular economy to support the use of non-recyclable waste and biomass waste in cement production – continued access to zero-rated sustainable biomass and alternative raw materials:** 2023 data show that the European cement industry substitutes 53% of its fossil fuels by non-recyclable waste and biomass waste. This allows significant CO₂ savings in our emissions and further brings wider benefits through the circular use of these wastes that would otherwise be incinerated or landfilled. Policies should facilitate waste shipment between EU countries, discourage landfill and minimise exports of waste outside of the EU, and support the use of non-recyclable wastes in the EU industry. It is of crucial importance to have continued access to zero-rated sustainable biomass.
- **Ambitious policies to reduce European buildings' CO₂ footprint, based on a life-cycle approach, which incentivise the market uptake of low-carbon cements:** The EU cement industry is taking an active role in the debate on a carbon neutral built environment and low-carbon construction products. The new Construction Products Regulation (CPR) and the CPR Acquis process will support a well-functioning system.

The acquis process for cement already started. The new standardisation request for cement will make it possible to introduce new lower carbon cements into the EU market and thereby facilitate the transition to a climate neutral society.

- **Creation of lead markets:** Market demand for low-carbon, circular products needs to be incentivised at a moment where investments are made to decarbonise our manufacturing process. EU and Member States policies, and in addition, private players have a role to play. These actors need to enable the uptake of low-carbon and circular products through public procurement and other facilitating measures. CEMBUREAU outlined possible actions in its [position paper](#) published in November 2024, such as making the use of Environmental Product Declarations (EPDs) mandatory or adoption of green public procurement criteria in public procurement.
- **Industrial competitiveness** is critical for the sector. CEMBUREAU is a signatory of the Antwerp Declaration and will work constructively for the execution of the Clean Industrial Deal. It is critical that in the coming months, concrete policy measures are advanced by the EU to support the decarbonisation of energy-intensive sectors whilst preserving their competitiveness.

2024: A Year in Review



FOREWORD PRESIDENT AND CHIEF EXECUTIVE

In 2020, CEMBUREAU was one of the first associations to publish a Carbon Neutrality Roadmap following the publication of the European Commission's EU Green Deal in December 2019. In May 2024, our Association published an [update of the roadmap](#), this time in anticipation of the five-year term of the new Commission which took office on 27th November 2024. The roadmap update sets out a more robust ambition for the cement sector, which is based on the projects that have been initiated by the cement companies across the value chain, referred to as the 5C approach (clinker-cement-concrete-construction-carbonation). The combination of deep decarbonisation technologies, innovation and change in business models allows a projection of zero emissions over cement by 2050, which creates the potential of negative emissions over the value chain.

Ambitious as the roadmap update may be, it also introduces a sense of realism. In terms of resources, for instance, it points out that the reduction of clinker-to-cement ratio can only achieve the 60% ambition set forth for 2050, if we can be assured of 66 million tonnes of clinker substituting materials, which is almost the double the amount of what we have today.

Another interesting figure is the increased demand for energy, which will rise from 20 TWh in 2021 to a range between 47 TWh and 113 TWh by 2050, depending on the type of technologies and especially the types of carbon use deployed. When it comes to the overall ambition, the roadmap update now also introduces a 2040 figure of 78% CO₂ emission reduction over cement. This figure signals that the cement industry will not reach the 90% emission reduction level that the Commission intends to put forward for the economy as a whole.

This brings us to the timing and the next steps for the execution of the updated roadmap. The intention of the publication of the roadmap in May was to prepare for a proactive and constructive dialogue with the new Commission on the key competitive conditions for an investable decarbonisation business case for our sector. The four main areas outlined in the roadmap tie in perfectly with the core priorities for the new Commission, as outlined in the Political Guidelines of Commission President von der Leyen dated 18th July 2024. These Guidelines are complemented by the findings of the Draghi Report on the Future of the European Union and the Letta Report on the Internal Market. The message from all these documents is clear and aligned: the European Union is losing out on competitiveness, and there is an urgent need to complement the Green Deal with a competitiveness and industrial agenda.



When President von der Leyen described the Green Deal, at its launch in 2019, as “Europe’s man on the moon project”, the Clean Industrial Deal, scheduled for early 2025, should be the rocket that gets us there.

CEMBUREAU has identified four main (low carbon energy) engines that are all essential to carry and power that rocket. For each of them, our Association has laid the groundwork over the past year discussing the roadmap policy messages with all levels of policymakers at European and national level. Throughout these meetings, we clarified the financing, regulatory, and infrastructure needs for a successful transformation of the cement industry in Europe. The incentive for policymakers to accompany our sector on its path is simply that the targets set by the EU for reaching zero emissions by 2050 cannot be reached without the decarbonisation of the cement sector and the contribution of lower carbon concrete to a sustainable built environment.

The work that has been initiated in 2024 will need to be followed up with concrete action plans once the Clean Industrial Deal has been published and sets the scene for a range of regulatory initiatives, comparable to the “Fit for 55 package”, this time focused on the enabling competitive framework.

Throughout 2024, the core priority for our sector remained ensuring an effective and watertight implementation of CBAM to minimise the risk of circumvention and fraud. CEMBUREAU has cooperated closely with its members to identify the main entry points for cement and clinker to the European Union and assess how much of the imports relate to clinker and cement, respectively.

In ongoing and constructive discussions with the competent Commission services and customs authorities in the Member States, this analysis has been combined with a request to refine the customs coding system with a view to allowing customs authorities to differentiate between different cement types upon import. A competitive level playing field with third-country operators is a necessary precondition to support the business case for investment in the decarbonisation of our sector.

Financing the transition requires significant investments, especially when it comes to deep decarbonisation projects. The European Commission’s 2040 Climate Target Plan estimates the investment needs for the four largest energy-intensive sectors at EUR 340 billion for the period 2031-2040 and at EUR 500 billion over the 2025-2040 period. In our messaging, we have continuously emphasised a deployment focus of the Innovation Fund and a stronger coordination between various funding sources with consistency in terms of timelines, definition of eligible costs, funding levels, as well as clarity on cumulation between funding instruments. The frontloading of future EU ETS revenues into a cement-specific decarbonisation fund has been raised in meetings with several Commission services. It transpires from these meetings that, going forward, we will need to substantiate these demands by concrete suggestions on how such return of funds could be put in operation and what mechanisms can be put in place to facilitate access to funding.



Infrastructure is the third main chapter of necessary policy conditions. Access to infrastructure for lower carbon energy sources, both thermal and electrical, but also for CO₂ pipelines and storage sites, is critical for the deployment of projects along our value chain. With 58% of fossil fuels in cement kilns replaced by alternative fuel sources from a variety of waste streams, the European Union is a global frontrunner in reducing its recourse to fossil fuels. Achieving higher targets of alternative fuels requires continued access to waste, including biowaste. CEMBUREAU has worked hard over the past year to ensure sustainability criteria under the Renewable Energy Directive (RED) are met for waste fed into the cement kilns. The assessment depends, however, on a patchwork of national approaches. In terms of breakthrough technologies, a viable business case for carbon capture can only exist if there is certainty on the availability of a pipeline network and storage sites. We are pleased to see that our message has been heard loud and clear when introducing the 50 million tonnes of CO₂ capture target in the Net Zero Industry Act which also includes provisions on permitting and coordination of financing for transformative and net zero technologies. The cement industry is characterised by long investment cycles which require a strong political stability. Going forward, CEMBUREAU's focus will therefore be on a strict implementation of the Net Zero Industry Act and ensuring regulatory certainty for all our projects, including those where CO₂ captured is put to use.

Throughout the discussions with policymakers, it becomes increasingly clear that the enabling regulatory, infrastructure, and financing conditions for manufacturing in energy-intensive industries will be complemented by incentives for the uptake of lower carbon products. In a decarbonising society, there will be an increasing demand for greener infrastructure and construction. In this context, the activities in our membership over the past year have focused on ensuring a workable legal framework for bringing our products to market under the revised CPR and the Energy Performance in Buildings Directive (EPBD). In elaborating our position, we paid particular attention to the “hooks” we need in legislation to attach the industry's efforts to bring low carbon products to market. Significant efforts have gone into the development of a framework definition of low carbon cement and discussions have been initiated to reach a better level of understanding of novel mechanisms that can help the deep decarbonisation of our sector, such as the chain of custody methods. In combination with a [position paper developed on lead markets](#), where we also tip our toe in the water of national lead market initiatives, this is an area for further development in 2025.

Achieving a sustainable cement industry is only possible when we also include the social component in our journey. The cooperation between CEMBUREAU and the European Federation of Builders and Woodworkers (EFBWW), representing the workers, has intensified in 2024 through an EU-funded project which has come forward with a series of recommendations to adapt the workforce for the skills that will be required when transforming the industry.

The recommendations and the final skills study, elaborated with VDZ as a consultant, will be presented at a conference in May 2025, where also follow-up actions will be agreed upon.

Developing an enabling regulatory framework requires a close coordination between all levels of government. We have been fortunate over the past year to have been able to rely on our members;

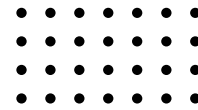
national associations, company experts, and project leaders who all have, in addition to the members of our Working Groups, Task Forces, Steering Committee and Board, provided us with practical input that has allowed us to engage in a proactive manner with policymakers with well-developed and fact-based messages. We very much look forward to continuing this cooperation in 2025!

Ken McKnight
CEMBUREAU
President

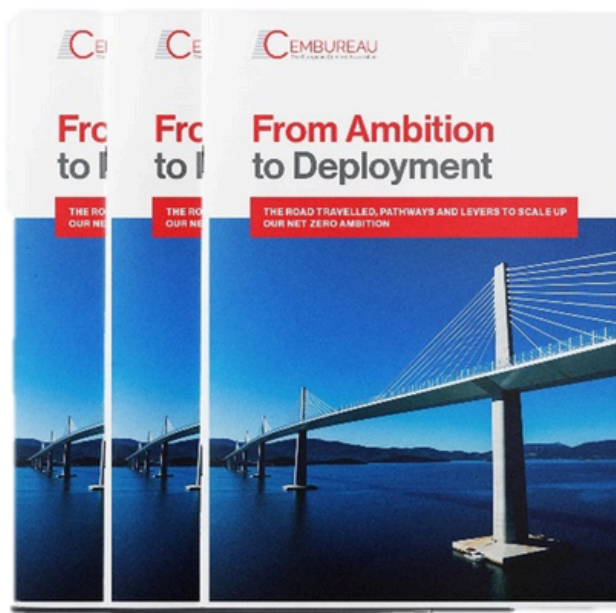
Koen Coppenhof
CEMBUREAU
Chief Executive



2024 Highlights



CEMBUREAU NET ZERO ROADMAP UPDATE



In May 2024, four years after the publication of our initial roadmap, we published our [Net Zero Roadmap](#) update, outlining the European cement industry's climate ambition along the cement and concrete value chain. Since the publication of our first roadmap in 2020, our sector has clearly moved from ambition to deployment. We have the potential to scale up our climate ambition, and to achieve this potential, we need policymakers to take decisive actions and ensure supportive policies.

In light of the significant decarbonisation projects ongoing throughout the EU industry, our updated roadmap revisits the sector's ambition as follows:

- By 2030, the roadmap projects a 37% reduction in CO₂ emissions related to cement production, and 50% down the value chain.
- By 2040, a 78% reduction on cement, and 93% down the value chain.
- By 2050, the roadmap projects net zero cement production in Europe and looks at the potential to become carbon negative over the value chain.

The roadmap also highlights that key policy measures which are indispensable to meet this ambition, including:

- The implementation of a watertight CBAM
- The ramping up financial support to support decarbonisation investments
- The need for guaranteed access to affordable decarbonised energy, infrastructure and raw materials
- The creation of lead markets for low-carbon, circular products

Communications Campaign for the Launch of the Updated 2050 Net Zero Roadmap

A key focus of CEMBUREAU's communications activities in 2024 was the launch of our updated 2050 Net Zero Roadmap, outlining the European cement sector's climate ambition and the policy framework necessary to achieve it. To ensure maximum visibility and engagement, we ran a comprehensive, multi-channel communications campaign spanning social media, press outreach, industry engagement, and strategic partnerships.

The campaign officially began in April, with an announcement across our social media channels, setting the stage for the roadmap's release the following month. In the lead-up to the launch, we engaged with our members through dedicated calls to introduce the campaign and brainstorm collaborative promotion efforts. To support coordinated outreach, we developed and distributed a membership communication toolkit, which included a [press release](#) (available for translation), the roadmap and its executive summary, visuals, animation videos, an invitation to the launch webinar, and a social media content plan with more than 80 post suggestions.

In May, during the roadmap's launch week, we executed a series of high-impact communication activities. On May 20, the roadmap and an accompanying press release were distributed under embargo to key media contacts, followed by a public release on May 21. To further elevate visibility, we published an [op-ed in EURACTIV](#), reinforcing the importance of policy support for the cement industry's decarbonisation. In parallel, we hosted a webinar on May 21, titled "Scaling Up Our Net Zero Ambition:

CEMBUREAU's Roadmap Update", - see the next section - bringing together industry experts to discuss the roadmap's updates and policy conditions. Throughout this period, we actively engaged with journalists, securing interviews and coverage in industry publications to expand the reach of our message.

The campaign's social media strategy played a central role in driving engagement. From April to October, we ran an organic social media campaign, which was supplemented by a paid social media campaign from October to December across LinkedIn, X, Instagram, and YouTube. A key highlight was the release of six animation videos, including one explaining the roadmap itself and five dedicated to our core policy asks related to CBAM, waste management, CCUS, lead markets, and financing. In total, more than 330 social media posts were published generating over 350,000 impressions, demonstrating strong audience engagement.

Further amplifying our outreach, in September, we sponsored a week of POLITICO's Climate & Energy newsletter, ensuring high-level visibility among policymakers and key industry stakeholders. To continue the conversation beyond the launch, we also released a [podcast episode](#) in July, exploring the roadmap's key updates and policy conditions.

The campaign successfully positioned CEMBUREAU as a key voice in the decarbonisation debate, generating a significant number of impressions and clicks on social media, op-eds, and industry articles.

By leveraging a mix of digital, media, and member-driven outreach, we ensured that the 2050 Net Zero Roadmap and its policy asks reached a wide audience, reinforcing

the cement sector's commitment to achieving carbon neutrality and advocating for the necessary regulatory support.



🚀 Today we've launched an update to our Carbon Neutrality Roadmap, setting even higher benchmarks for sustainability in the **#cement** industry!

Here's what's new:

🌱 **Increased ambitions:** We've raised our alternative fuel ambitions to 95% by 2050, up from 90%, reflecting significant progress made since 2020.

🔵 **Clinker substitution:** Our goal for **#clinker** to cement ratio is now more ambitious, aiming for 60% by 2050 to enhance sustainability in cement production.

🇪🇺 **Detailed **#CCUS** projections:** With robust investments in Carbon Capture, Utilisation, and Storage, we now include a 2030 projection for CCUS deployment.

🕒 **New 2040 roadmap:** To ensure alignment with EU objectives, we've set specific 2040 ambitions across all levers, tracking our journey towards a lower carbon footprint.

Discover the full roadmap and what it means for our future 📄
<https://lnkd.in/dpe97puD>

#Cement2050



👍❤️ You and 76 others

16 reposts

Reactions



Launch Webinar “Scaling Up Our Net Zero Ambition: CEMBUREAU’s Roadmap Update”

We organised a webinar [“Scaling Up Our Net Zero Ambition: CEMBUREAU’s Roadmap Update”](#) on 21 May 2024 to mark the launch of the updated Net Zero Roadmap. The webinar focused on the EU cement industry's bolstered ambitions for decarbonisation by 2030 and 2050, including an interim 2040 objective, the key decarbonisation levers to decarbonise the cement and concrete value chain, the critical role of EU and national policies in facilitating technological deployment and scaling necessary for the industry's transformation, and finally the need for cooperation throughout the value chain to achieve this ambition.

Attended by over 300 participants, the webinar welcomed as speakers: Koen Coppenholle, CEMBUREAU CEO; Rob van der Meer, CEMBUREAU Industrial Policy Director; and Alexandre Paquot, Director – Innovation for a Low-carbon, resilient economy at DG CLIMA, European Commission.



Cementing Europe's Future: Where Next for Industrial Decarbonisation?

Our annual event 2024, “Cementing Europe's Future: Where Next for Industrial Decarbonisation?”, held on October 16th in Brussels, focused on bringing industrial decarbonisation forward, discussing where the industrial policy should fit in the new Commission's agenda, actions needed to bring forward investments at EU and national level, the concrete obstacles to investments, and fostering cooperation throughout the value chain to facilitate decarbonisation. Attracting over 300 participants, both in-person and online, the event drew attention to the critical journey towards achieving net zero by 2050, under the banner #Cement2050.

Opening the conference, CEMBUREAU President Ken McKnight highlighted the urgency for a cohesive EU policy that integrates energy efficiency, permitting, and CO₂ infrastructure development to drive industrial decarbonisation. Following him, Pascal Canfin, MEP & Member of the ENVI Committee at the European Parliament, underscored the need for a “Clean Industrial Deal” that balances stable policymaking with effective financing and fosters cohesive dialogue among decision-makers. He stressed the importance of stability and predictability within the industrial policy framework and voiced support for the CBAM, emphasising that revenue from the ETS should directly fund decarbonisation initiatives.



The event's core discussions unfolded over a panel featuring insights from Krzysztof Bolesta, Secretary of State, Polish Ministry of Climate and Environment; Paula Rey García, Deputy Head of Unit, DG Energy, European Commission; Rachael Moore, Managing Director at CarbStrat; Manon Dufour, Executive Director, E3G; and Aris Tsikouras, Director Decarbonisation Strategy for Titan Cement Group. During the panel Mr. Bolesta reiterated the need for a comprehensive, clean industrial policy with financial support that incentivises CCS technology adoption and regulatory cooperation between the EU and Member States.

Ms. García committed to bringing the panel's insights back to the Commission, emphasised the need for pragmatic measures within the Clean Industrial Deal. Ms. Dufour underlined the international dimension of decarbonisation, calling for EU diplomacy and trade policies to reflect competitiveness in the green economy. Ms. Moore marked the Clean Industrial Deal as a unique opportunity to prioritise decarbonisation goals across the EU, suggesting that regulations focus on outcomes rather than prescriptive methods.

Mr. Tsikouras expressed the importance of dedicated funding and incentives to expedite infrastructure development and provide a unified, EU-wide approach to CO₂ storage.

Finally, CEMBUREAU CEO Koen Coppenhelle wrapped up the event by highlighting the need for a collaborative approach among industry, government, and society to achieve carbon neutrality by 2050.



CONCRETE DIALOGUE 2024

On 11 June 2024, the 2025 Concrete Dialogue was themed “Concrete in Antwerpen – infrastructure for sustainability in the city”. Together with our partners from Concrete Europe, we organised for a group of EU stakeholders – including Commission officials, non-governmental organisations, and think tanks – a visit to one of the biggest construction sites in Europe, the Oosterweel Link in Antwerpen and to the De Rycke Beton Concrete Plant in Beveren. This presented an occasion to outline the role that concrete plays in the development of mobility infrastructure in cities which allows for improved mobility and urban regeneration. During the event, Concrete Europe presented its most recent position paper on concrete’s contribution to circular economy.



HOW QUARRIES PROVIDE HOME TO EUROPEAN ENDANGERED SPECIES

In November 2024, CEMBUREAU hosted the webinar ["How Quarries Provide a Home to European Endangered Species,"](#) attracting over 100 participants. This online event welcomed stakeholders from the European Commission, academia, and the cement industry, focusing on how quarries contribute to improving the conservation status of Europe’s protected species.

Aligned with [CEMBUREAU’s Biodiversity Roadmap](#), the webinar showcased the sector's commitment to supporting endangered species conservation.

Moderated by Dr Carolyn Jewell, a member of the CEMBUREAU Biodiversity Task Force, the session highlighted the progress made by the cement industry in rehabilitating former quarries and enhancing biodiversity through the regeneration of flora and fauna in active sites. It featured insightful presentations, including success stories from CEMBUREAU members, demonstrating the industry's efforts in ecological restoration.

 November 13 14:00 CET

How quarries provide a home to European endangered species

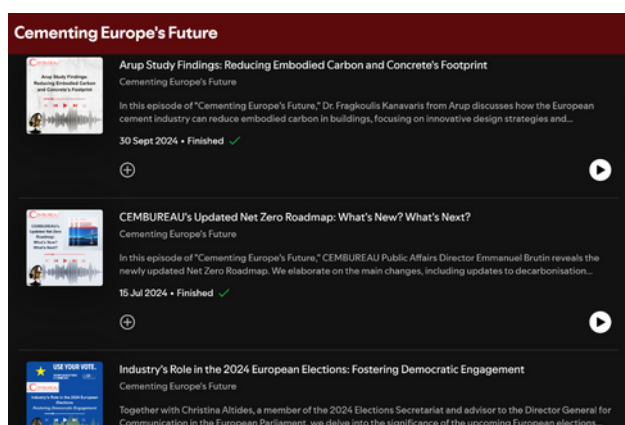
MEET THE SPEAKERS

 Alexandra Silva BIODIVERSITY PROJECT MANAGER, SECIL	 Przemyslaw Oginski POLICY OFFICER, EUROPEAN COMMISSION, DG ENVI	 Florence Curet SENIOR PROGRAMME MANAGER, BUSINESS AND NATURE, IUCN
 Dr. Alice Nunes UNIVERSITY OF LISBON	 Thomas Putzmann PROJECT MANAGER QUARRY GEOLOGIST, CEMEX	 Nikos Nikolakakos ENVIRONMENT & RESOURCES MANAGER, CEMBUREAU

moderated by Dr. Carolyn Jewell

CEMENTING EUROPE'S FUTURE PODCAST SERIES

In October 2023, CEMBUREAU introduced the Cementing Europe's Future podcast series, providing an engaging audio platform to explore the European cement industry's sustainability journey. Hosted by CEMBUREAU, the podcast delves into key discussions on decarbonisation targets and industry innovations. In 2024, CEMBUREAU released 14 episodes covering topics such as the European elections, carbonation, and the use of secondary cementitious materials. The podcast is available on our [website](#) and [Spotify](#).



NEW COMMUNICATION MATERIALS

In addition to 12 new podcast episodes and 6 animation videos – mentioned above – , in 2024, we significantly expanded our portfolio of communication materials. Over the course of the year, we released 15 position papers, 8 reports, and 2 press releases.

We published 2 brochures focusing on biodiversity. The first, [Tracking Progress: The Cement Industry's Journey Towards Enhanced Biodiversity](#), assessed the progress made since the launch of our Biodiversity Roadmap.

The second, a [case study-based Q&A brochure](#), showcased biodiversity initiatives across Europe, offering concrete examples of how the industry is advancing conservation efforts. Additionally, we updated our [co-processing brochure](#), providing the latest insights on the role of co-processing in waste management.

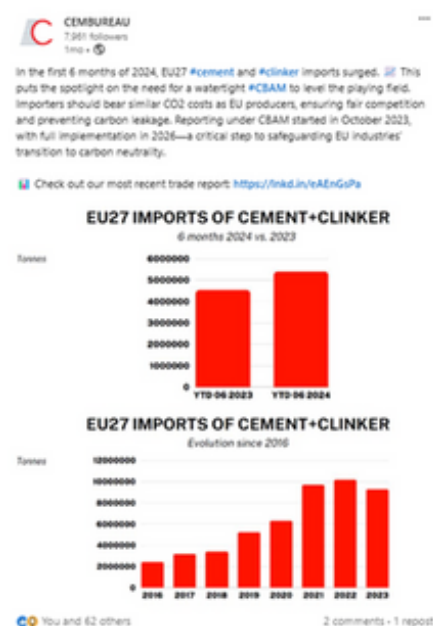
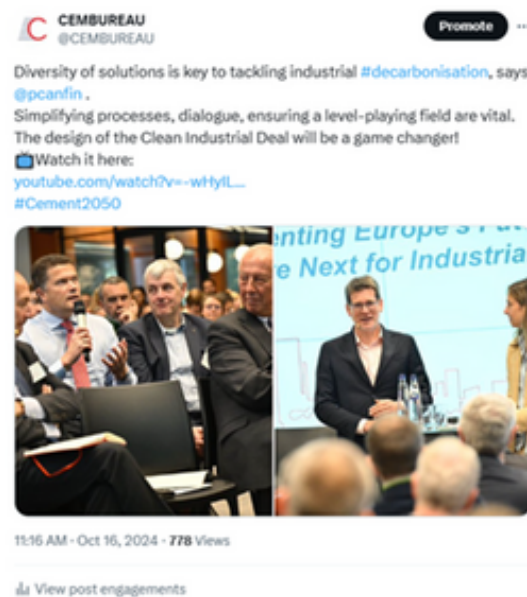
To maximise visibility and reach, we contributed four op-eds and numerous articles to industry publications. We also sponsored POLITICO's Climate & Energy newsletter for one week, ensuring high-level exposure among policymakers and stakeholders. Our outreach extended beyond written materials, with a strong emphasis on digital and event-based communications. We organised 12 events—both in-person and online—including internal webinars and joint events with partners.



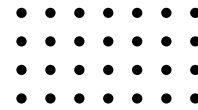
CEMBUREAU SOCIAL MEDIA PERFORMANCE

In 2024, CEMBUREAU significantly strengthened its presence across social media platforms, using digital engagement as a driver for advocacy and outreach. Over the year, we posted a total of 835 times, maintaining an active presence on LinkedIn (349 posts), X (357 posts), Instagram (83 posts), and Threads (46 posts).

A major focus of our social media strategy was the promotion of our 2050 Net Zero Roadmap and its policy asks, which accounted for more than 330 of these posts. Through targeted messaging and engaging content, we successfully amplified industry priorities, reaching a wide audience of policymakers, stakeholders, and industry professionals. LinkedIn remained our most impactful platform, generating 575,208 impressions, 7,400 reactions, and 126 shares as of 16 December 2024.



Climate Change & Energy



WORKING GROUP A

In 2024, two major topics dominated discussions within the European cement industry: the implementation of the revised EU ETS and the rollout of the CBAM. Both regulatory changes present significant challenges while also shaping the sector's pathway toward decarbonisation.

The first key issue remains the shift in the EU ETS benchmark concept from clinker to binder. From the outset of this proposed change, industry concerns have centred on its implications for our operations. Over the past year, the definition of the binder concept has been clarified to encompass clinker and four alternative hydraulic binders: calcined clay, calcium sulfoaluminate binders, calcium aluminate cement binders, and alkali-activated binders. However, it is important to note that only calcined clay can be used in combination with clinker to produce cement, whereas the other three represent distinct materials intended for different applications and markets. Throughout 2024, the European Commission collected data for the EU ETS benchmark period (2026–2030), with final decisions on the benchmark methodology anticipated by late 2025 or early 2026.

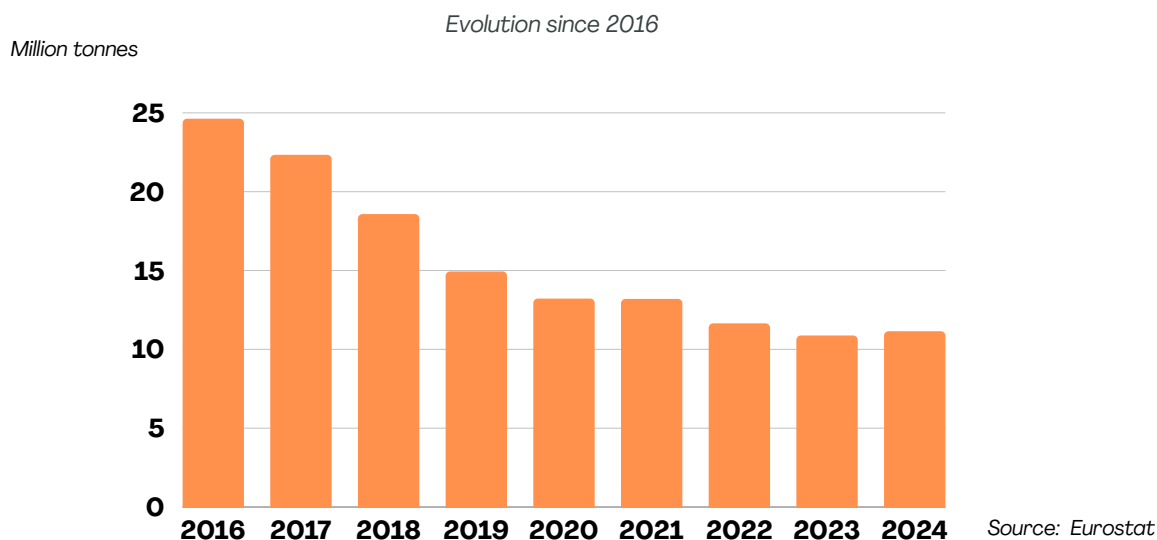
Beyond the unresolved benchmark concept implementation, additional compliance challenges have emerged, including the drafting of Carbon Neutrality Plans and the introduction of the Energy Efficiency bonus/malus system. The cumulative effect of these changes has been a steadily increasing administrative burden on EU ETS installations. The shift in the benchmark concept was largely driven by EU institutions and certain NGOs, who contend that Europe's clinker-to-cement ratio has not decreased sufficiently. However, publicly available data from the last three years indicate that the ratio has, in fact, declined by 2%.

The second major issue for the sector is the implementation of CBAM, which entered its transitional phase in 2024, requiring cement importers in the EU27 to report their CO₂ emissions. Throughout the past year, multiple implementing and delegated acts have been drafted and adopted by EU institutions, aiming to ensure a robust and watertight CBAM framework. A critical element of CBAM's success is the ability to prevent underreporting of emissions from imported cement, ensuring that monitoring and reporting obligations for non-EU producers align with EU27 standards. Additionally, accurate reporting of the clinker content in imported cement remains an essential aspect of compliance.

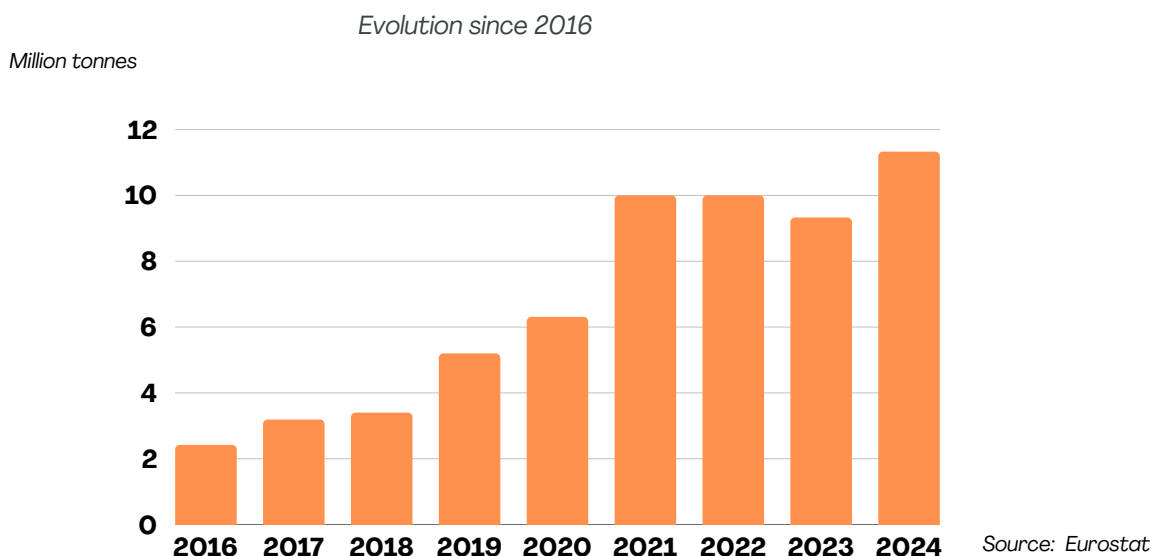
In preparation for full CBAM implementation, CEMBUREAU has worked to map key transport corridors, particularly ports and railway routes, through which cement and clinker enter the EU. Furthermore, Eurostat data confirms that at least 94% of imported materials consist of either clinker or CEM I, thereby significantly limiting the scope for CBAM circumvention for the time being. However, trade patterns may change going forward and are followed up closely by CEMBUREAU.

Amid these regulatory shifts, one notable positive development within the EU ETS framework in 2024 was the formal recognition of CO₂ absorbed as carbonates in construction materials as permanent removals. This acknowledgment marks a key milestone in aligning emissions accounting with the industry's decarbonisation efforts.

EUROPEAN UNION CEMENT+CLINKER EXPORTS

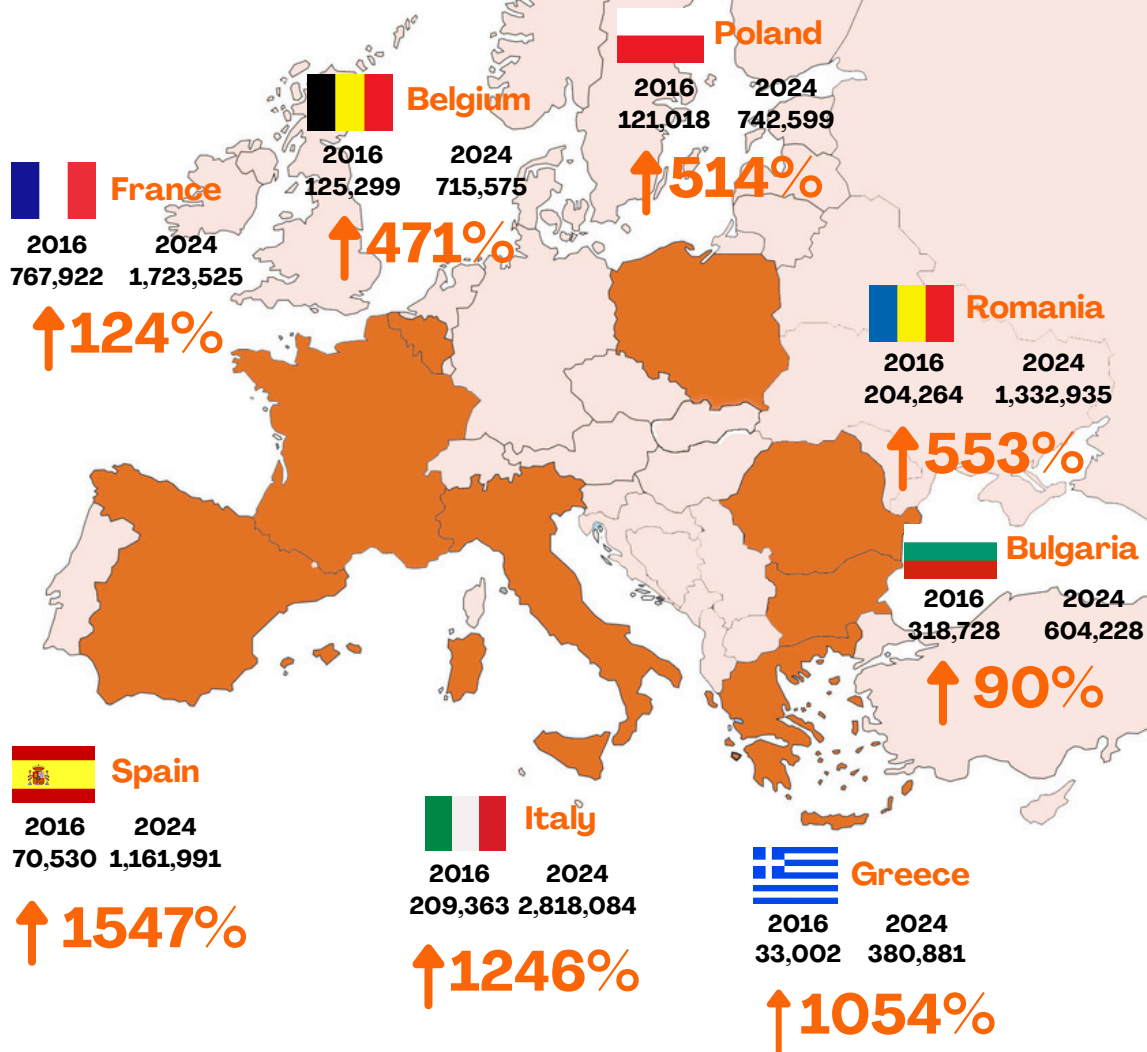


CEMENT+CLINKER IMPORTS TO EUROPEAN UNION

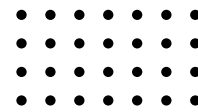


FOCUS ON SELECTED EU COUNTRIES' CEMENT IMPORTS

Data in tonnes



Circular Economy & Processes



WORKING GROUP B

In May 2024 the international standard ISO 4349:2024 “Solid recovered fuels — Determination of the recycling index for co-processing” was [published](#). The standard describes a globally accepted methodology for calculating the share of the Solid Recovered Fuels (SRF) recycled in cement kilns (mineral component). Notably, the standard defines co-processing as: “*use of SRF in manufacturing processes for energy recovery and simultaneously for material recovery of mineral components.*”

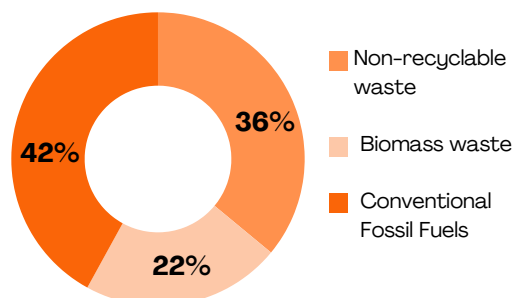
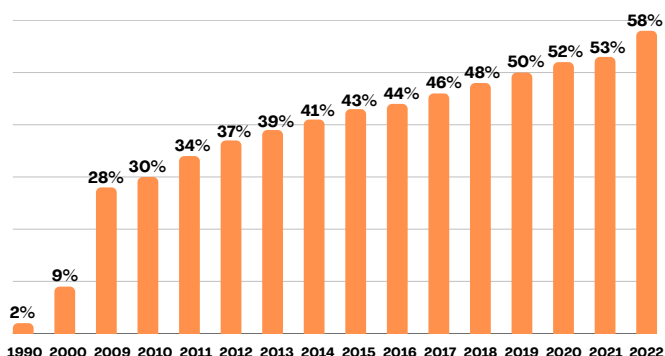
Building on this standard, the Spanish Cement and Environment Labour Foundation (CEMA) conducted a [study](#) measuring the Recycling Index of 63 samples of waste used in the cement industry – including industrial RDF, municipal RDF, animal meal, sewage sludge, end-of-life vehicles, wood waste. The results showed an R-index (9) ranging from 5.8 to 25.8%, depending on the waste type.

CEMBUREAU further strengthened its collaboration with the composite materials sector, leading to the publication of a joint Life Cycle Assessment (LCA) [study](#) on the treatment of glass-fibre-reinforced composite waste through cement co-processing. Commissioned by nine industrial associations and conducted by SGS, the study found that “*each ton of end-of-life (EoL) composite waste treated in a cement facility saves up to one ton of CO₂ compared to traditional waste incineration methods.*”

On June 21st in Seville, Spain, the European Commission hosted the launch event for the new Innovation Centre for Industrial Transformation and Emissions ([INCITE](#)). INCITE is designed to gather information on innovative techniques for decarbonisation and pollution reduction, both from Europe and globally. This information will be available during the revision of the Best Available Techniques Reference documents (BREF). Additionally, INCITE aims to publish an annual report detailing sector-specific techniques, starting with steel, cement, and chemicals.

ALTERNATIVE FUEL USE

% of Thermal energy from alternative fuels
in the cement sector in the EU 28



EMISSIONS REPORTING

According to the latest data available, the European cement industry continued to reduce its emissions per tonne of product in 2022. Data published by the GNR project, show that between 1990 and 2022, the EU27 cement industry achieved the following reductions:

- Gross CO₂ emissions per tonne of grey clinker decreased by -12.6% (compared to -12.9% last year).

- Net CO₂ emissions per tonne of grey clinker decreased by -24.2% (compared to -23.6% last year).

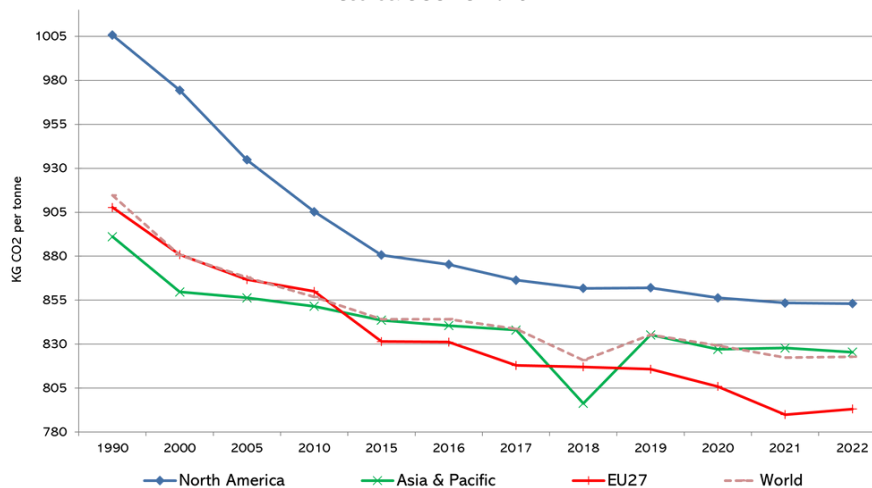
- Gross CO₂ emissions per tonne of cementitious material decreased by -17.8% (compared to -16.1% last year).

- Net CO₂ emissions per tonne of cementitious material decreased by -28.3% (compared to -25.8% last year).

Most indicators showed an improvement, ranging between 0.5% and 2.5%, compared to last year.

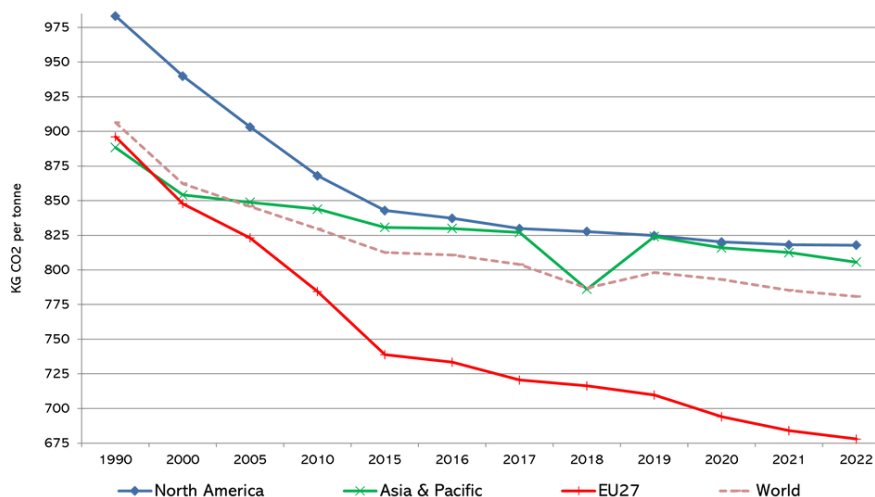
Gross emissions Grey clinker

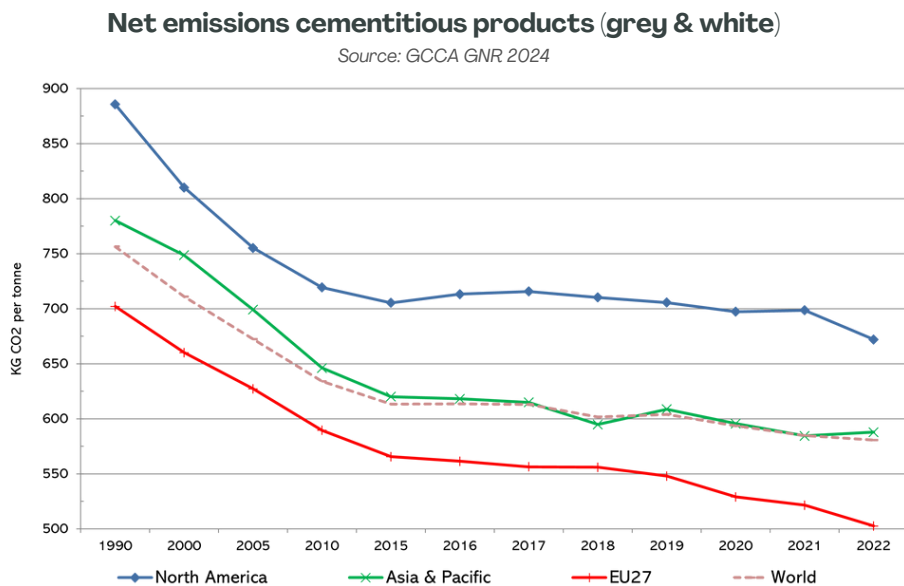
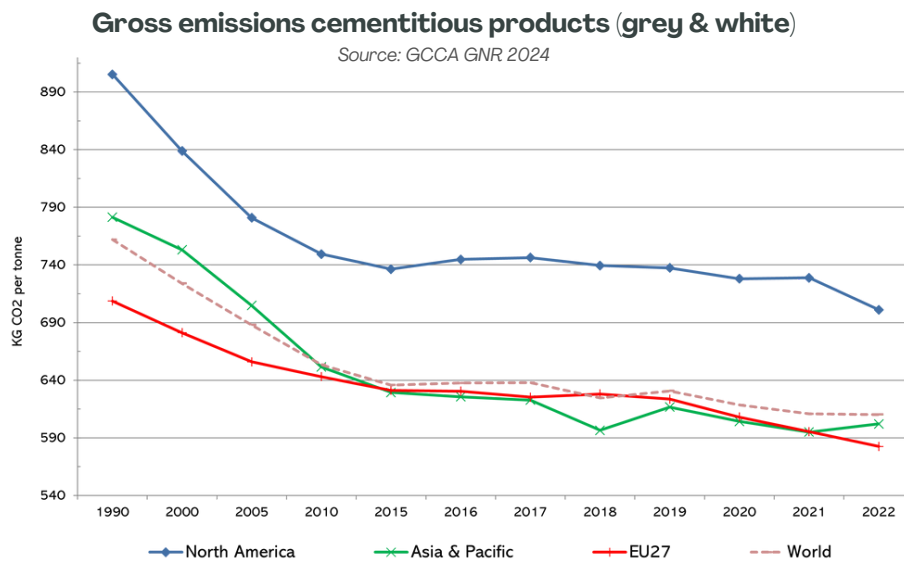
Source: GCCA GNR 2024



Net emissions Grey clinker

Source: GCCA GNR 2024



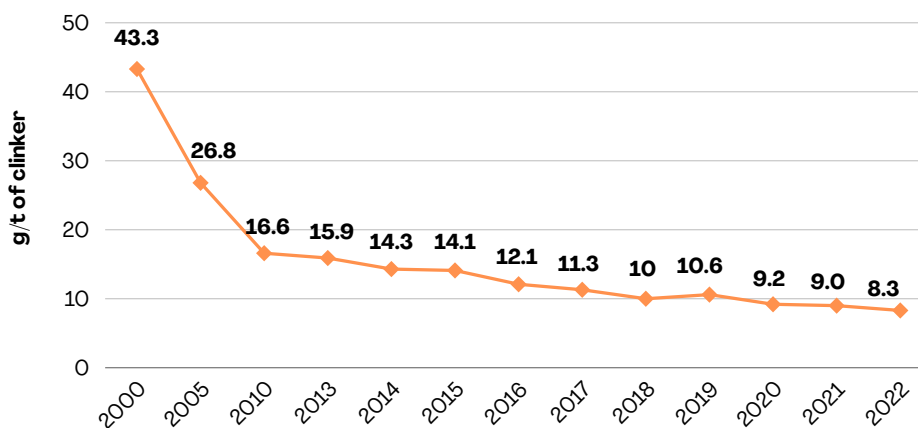


As these data show, the European cement industry is amongst the world's best performing regions with its emissions output on a continuous downward trend. In this respect, it is important to note that whilst the data for the EU covers close to 100% of plants, this is not the case for other areas.

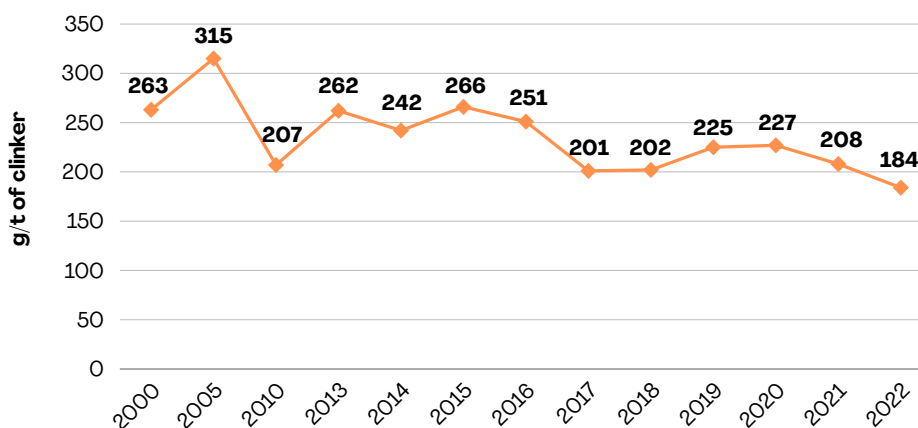
In some regions, comparison with other parts of the world is challenging as not all regions have 100% data collection coverage, typically including only the best performing plants in the GNR data collection.

The data below is collected between 2000 and 2023 within the CEMBUREAU membership region.

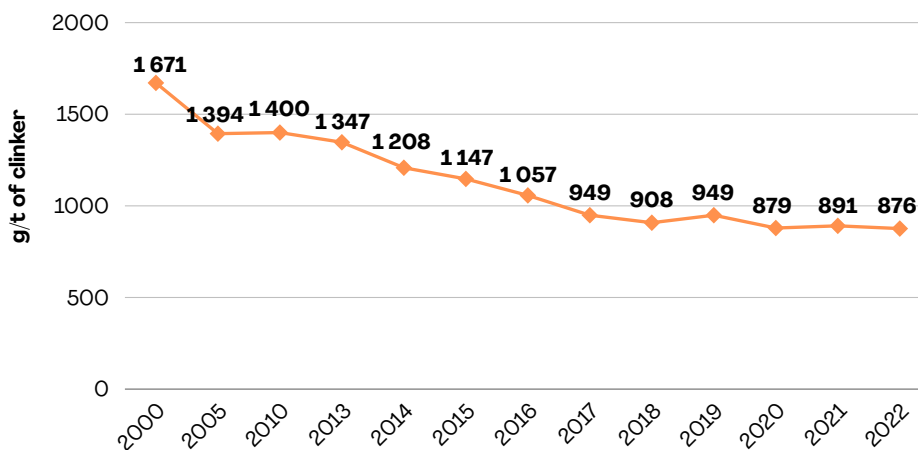
Dust emission/clinker production



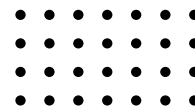
SO₂ emission/clinker production



NO_x emission/clinker production



Health & Safety



WORKING GROUP C

SKILLS DEVELOPMENT

Since 2023, CEMBUREAU has been collaborating with EFBWW (European Federation of Builders and Wood Workers) on an EU co-funded project aimed at mapping skills needs in the cement sector through 2050. VDZ (German Cement Association) was engaged as a consultant to conduct an in-depth study of the EU legal framework and its impact on current and future skills and training requirements. The study also focused on six Member States — Belgium, France, Germany, Greece, Poland, and Spain.

To support this work, the CEMBUREAU Ad Hoc Expert Group on Skills, along with its members, contributed through a dedicated workshop, a structured questionnaire, and social data collection efforts. Based on the study's findings, a final workshop was held in December, where common recommendations were developed for policymakers, social partners, and training providers to guide future skills development in the sector.

CLP/REACH Regulations

Throughout 2024, CEMBUREAU actively monitored and informed its members — via its Task Force on Chemicals and Working Group C — on the revision of the classification, labelling, and packaging (CLP) [regulation \(EU\) 2024/2865](#), which entered into force in December 2024.

Among the key regulatory changes affecting the sector are new requirements for formal labelling formats, the introduction of digital labelling, and new advertising rules. Questions related to the interpretation of these requirements will be addressed in the upcoming European Chemicals Agency (ECHA) guidance document.

In addition, ECHA has proposed a new status of recovered aggregates from an article to a substance or mixture under REACH. This proposal is currently under discussion at CARACAL (Competent Authorities for Registration, Evaluation, Authorisation, and Restriction of Chemicals and Classification, Labelling, and Packaging). Industry stakeholders' supply chain have provided legal and policy recommendations to EU policymakers and national authorities, advocating for the continued status of recycled aggregates as articles under REACH.

The Task Force on Chemicals also served as a platform for industry-wide knowledge exchange, facilitating discussions on REACH, CLP, and other related regulations. Additionally, an external expert from the European Federation of Concrete Admixtures Association (EFCA) provided an insightful presentation on synthetic polymer microparticles, contributing to the sector's understanding of emerging regulatory trends.

RCS/NEPSI INITIATIVES

The [NEPSI](#) in ACTION, an EU co-funded initiative, continues to play a crucial role in promoting the European Network of Silica (NEPSI) to decision-makers and industry stakeholders. As a sectoral [social dialogue agreement](#), NEPSI is instrumental in ensuring best practices in managing respirable crystalline silica (RCS) exposure.

CEMBUREAU supported its members by organising a webinar dedicated to the NEPSI reporting exercise, featuring contributions from the NEPSI Secretariat. In 2024, the cement sector achieved 100% KPI reporting, reflecting strong industry engagement.

Further reinforcing NEPSI's objectives, two new e-learning courses were developed, and a series of national seminars took place across France, Hungary, Sweden, Italy, Spain, and Poland, culminating in a final conference in Brussels.

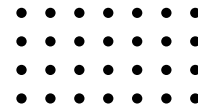
CEMBUREAU members played an active role in these events. Additionally, the Task Force on Respirable Crystalline Materials invited the NEPSI Secretariat to discuss ongoing actions and relevant legal initiatives, fostering greater industry alignment.

SHARING BEST PRACTICES & EU-OSHA CAMPAIGNS

As an EU-OSHA partner, CEMBUREAU remained actively engaged in promoting occupational health and safety best practices across the sector. Members were kept informed about the 2024 focus areas and key publications of the [Healthy Workplace Campaign on the Digital Age](#). Efforts to exchange best practices extended beyond the cement industry, with CEMBUREAU exploring collaborative opportunities with other sectors on guidance and regulatory compliance measures. These discussions were facilitated through Working Group C exchanges. To ensure continuous updates and engagement, CEMBUREAU also launched a dedicated Health & Safety Newsletter, providing members with regular insights and developments in the field.



Markets & Products



WORKING GROUP D

2024 marked a year of strategic milestones for Working Group D (WGD), with significant progress in cement and concrete sustainability, regulatory frameworks, and industry collaboration.

Four out of the five 5Cs in CEMBUREAU's updated Roadmap —clinker reduction in cement (Cement 2C), optimised concrete mixes (Concrete 3C), leaner construction designs (Construction 4C), and carbonation-driven mineralisation (Carbonation 5C) – are directly linked to WGD-related issues. These areas will play a critical role in shaping the sector's contribution to the EU's carbon neutrality goals.

The Antwerp Declaration for an Industrial Deal co-signed by CEMBUREAU, reinforces the need to stimulate demand for low-carbon products. CEMBUREAU contributes to this debate through its definition of low-carbon cements, which is based on the International Energy Agency's (IEA) banding system where cement types are plotted according to Global Warming Potential values and adjusted to reflect the national average clinker-to-cement ratio. Additionally, the European Commission's Clean Industrial Deal aims to further support the development of lead markets, creating stronger incentives for sustainable construction materials.

The Construction Products Regulation (CPR) continued to shape the regulatory landscape for cement. Progress in the CPR Acquis process indicates that revised cement standards will effectively address environmental and carbon footprint considerations by 2028. As a result, additional ecodesign requirements will not be necessary, reaffirming the sector's proactive role in decarbonisation.

Chain of custody methods emerged as a new focus area for WGD in 2024, requiring extensive internal discussions to define core parameters for work within CEN/TC 350 on a Technical Specification. In parallel, WGD engaged with GCCA and BCG on the development of a chain of custody framework, contributing to a more transparent and verifiable approach for monetising emissions reductions through deep decarbonisation across the cement value chain.

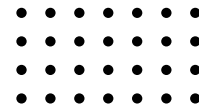
Beyond regulatory and technical developments, 2024 also saw major advancements in research and industry collaboration. The discussion on slag allocation was concluded with CEN's final decision in favour of economic allocation, which was fundamental for the sector. Meanwhile, WGD actively contributed to the scientific discourse on decarbonisation in construction, with the publication of a research paper on the CEMBUREAU-Arup study, "Reducing the Embodied Carbon of Concrete-Framed Buildings through Improved Design and Specification".

Important progress occurred in discussions within the IPCC on carbonation, with a new opportunity for the recognition of the IVL calculation methodology supported by the international group formed by CEMBUREAU, GCCA, PCA and IVL. Collaboration with Concrete Europe intensified across multiple policy areas, including on the calculation

of lifecycle global warming potential under the Energy Performance of Buildings Directive (EPBD), and carbon removals in the cement and concrete value chain, input to the guidance for the Drinking Water Directive implementation, and advocacy on the status of recycled aggregates under REACH.



The Economy



CEMENT AND CONSTRUCTION MARKET

GLOBAL AND REGIONAL CEMENT PRODUCTION AND CONSUMPTION

MATRIX main world producers

The G20 Group + permanent invitee Spain

Cement production (Million tonnes)

Country	2001	2005	2010	2015	2019	2020	2021	2022	2023
China	661.0	1 079.6	1 881.9	2 350.0	2 300.0	2 376.9	2 362.8	2 118.0	2 022.9
India	102.9	146.8	220.0	270.0	320.0	290.0	351.6	387.6	417.7
EU28 / EU27*	225.6	251.1	192.1	167.2	182.1	171.5	182.5	175.8	161.1
USA	88.9	99.4	65.2	83.4	88.6	89.3	93.0	93.0	90.0
Brazil	39.4	39.2	59.1	72.0	53.4	61.1	65.9	63.6	66.5
Turkey	35.9	42.8	62.7	71.4	57.0	72.3	78.9	73.7	81.5
Russian Federation	28.7	49.5	50.4	69.0	54.1	55.8	60.1	60.8	63.0
Indonesia	31.1	36.1	39.5	65.0	64.2	64.8	69.2	69.5	66.9
South Korea	52.0	49.1	47.4	52.0	56.4	47.5	50.4	51.1	51.1
Japan	79.5	72.7	56.6	55.0	58.3	51.1	50.2	48.9	47.7
Saudi Arabia	20.0	26.1	42.5	55.0	42.2	53.4	53.7	52.6	49.0
Mexico	33.2	38.1	34.5	39.8	47.5	41.9	45.2	43.9	48.0
Germany	32.1	31.9	29.9	31.1	34.2	35.5	35.0	32.9	28.2
Italy	39.8	46.4	34.4	20.8	19.2	18.1	20.6	18.8	18.8
France	19.1	21.7	18.0	15.6	16.5	16.7	17.5	16.8	15.4
South Africa	8.4	12.1	10.9	14.0	12.4	13.3	13.4	13.0	13.3
Canada	12.1	13.5	12.4	12.5	13.4	13.0	14.0	13.7	13.7
Argentina	5.5	7.6	10.4	12.2	11.5	9.9	12.1	13.0	12.9
United Kingdom	11.9	11.6	7.9	9.6	9.1	8.0	9.0	8.4	7.7
Australia	6.8	9.1	8.3	9.3	10.0	9.6	9.6	10.1	11.1
Spain	40.5	50.3	26.2	15.1	17.4	16.2	18.6	18.5	17.9

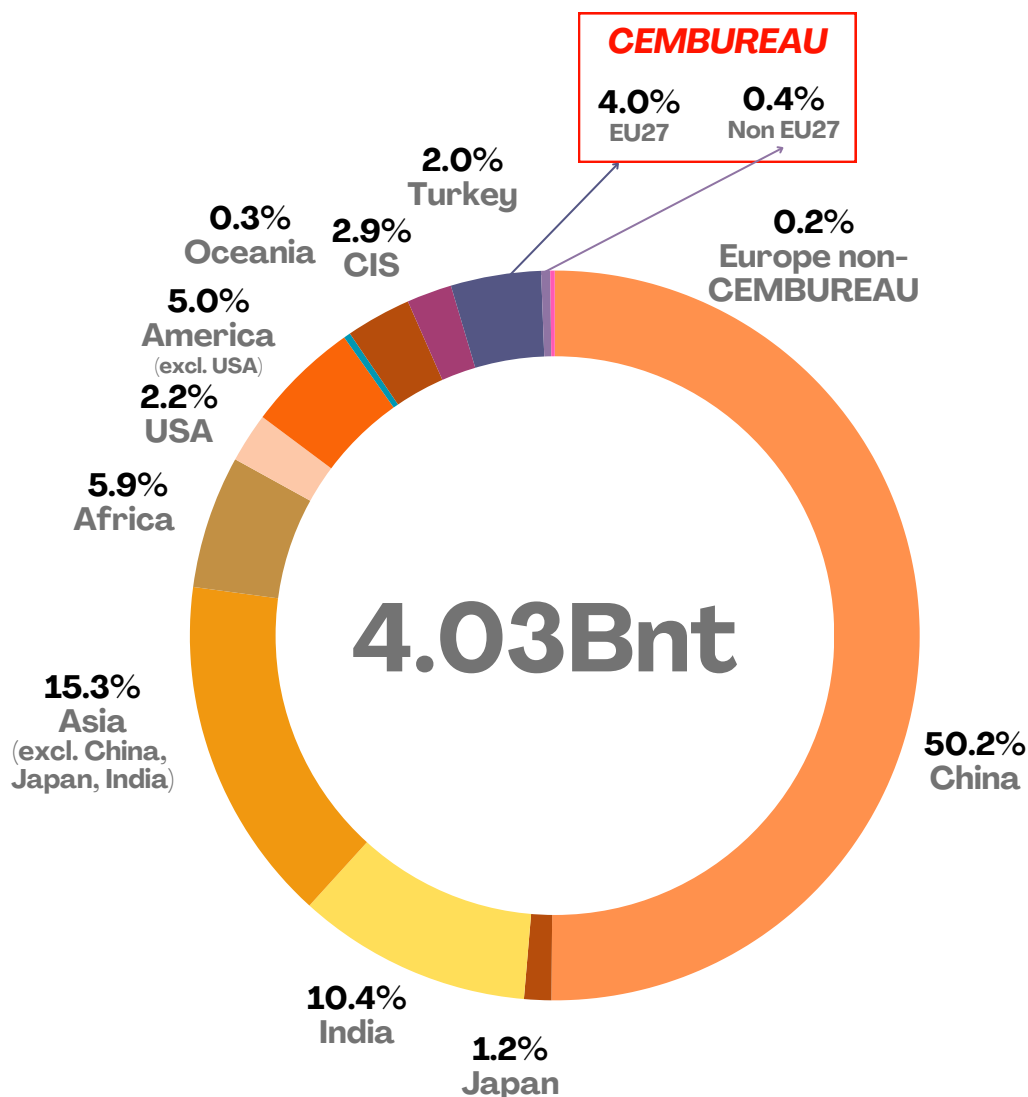
EU28 until 2019 / EU27 as of 2020 reporting year

Sources: CEMBUREAU, US Geological Survey, Global Cement Report, country websites

Global cement production in 2023 is estimated at approximately 4.03 billion tonnes (Bnt). In 2023, China still represented approximately 50% of the world's cement production, with the EU27 representing 4.0% and CEMBUREAU members representing 4.4% of the world's production (excluding Turkey from the CEMBUREAU area as of 2023).

For 2024, International Cement Review reported in January 2025 a world production of 3.89 billion tonnes, with Chinese production dropping below 2 billion tonnes (1.84 billion tonnes) due to the lingering property crisis.

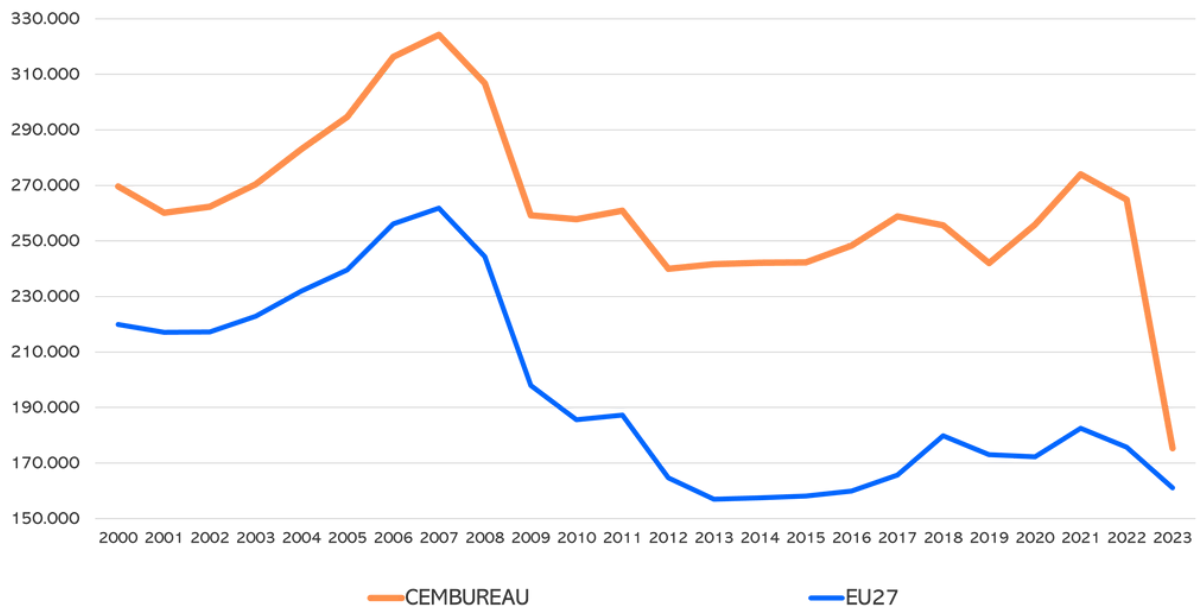
**World cement production in 2023, by region and main countries,
% Estimations**



Sources: CEMBUREAU, US Geological Survey, Global Cement Report, country websites

Looking at the below production data of the next page the consumption data, we CEMBUREAU membership and EU27 and in observe the following trends:

Cement Production (in Ktonnes) EU27 & CEMBUREAU / 2000-2023



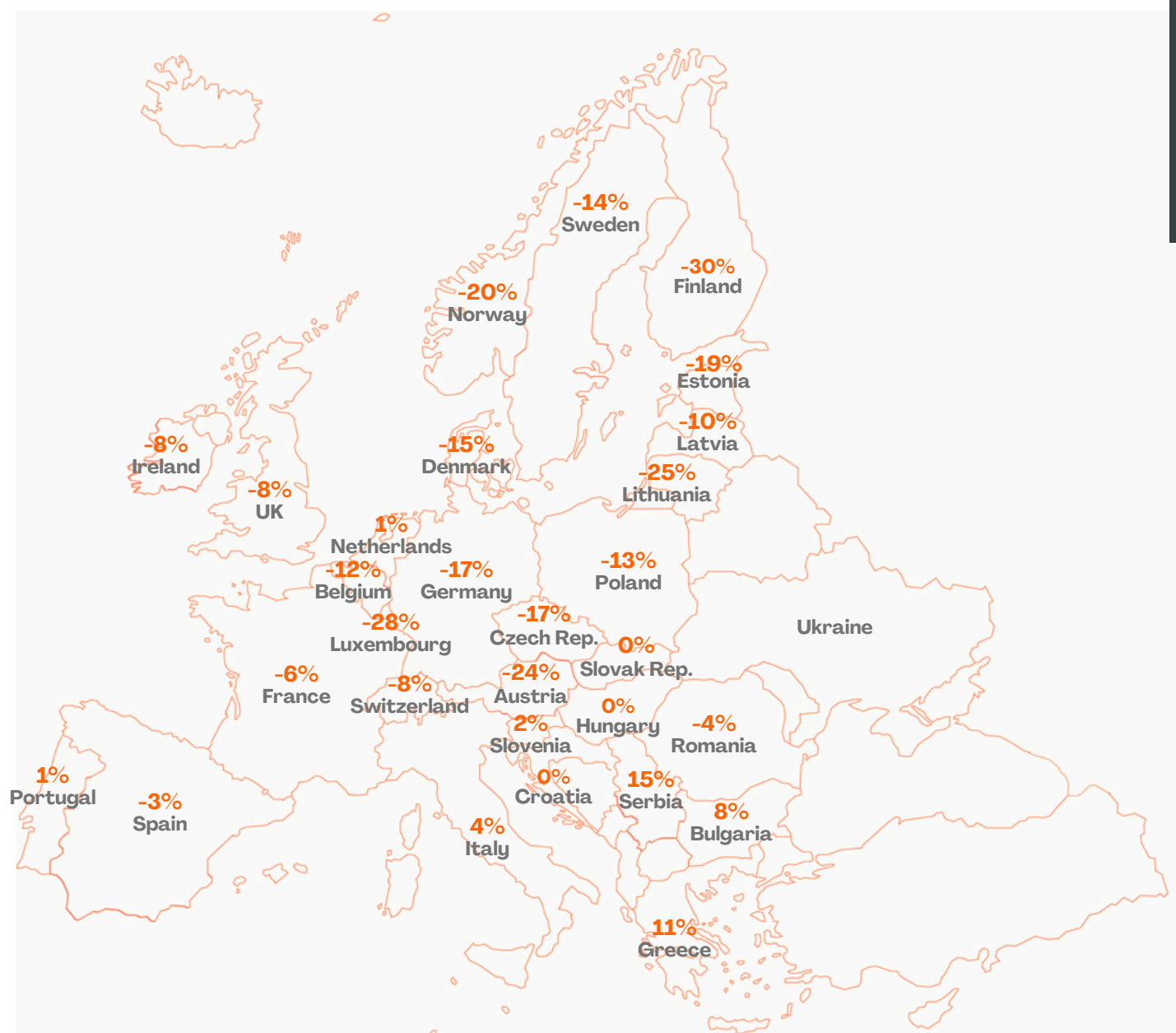
Production for the CEMBUREAU area, as shown in the graph above, decreased by 89.4 Mt to 175.4 Mt in 2023. This decrease of 33.8% is essentially due to Turkey leaving the CEMBUREAU membership, but also a volume contraction in most of the member countries. Additionally, the EU-27 saw a decrease of 14.7Mt or 8.4%, reflecting market contraction in most countries, resulting in an EU-27 production of 161.1 Mt.

Cement consumption decreased in CEMBUREAU membership from 237.7 Mt in 2022 to 169.0 Mt in 2023.

Once again, this decrease of 28% is essentially due to Turkey leaving the membership. The EU27 countries saw a decrease of 12.9 Mt to 150.8 Mt in 2023. CEMBUREAU member countries experienced wide differences in consumption evolution from 2022 to 2023, as the map below shows, but the overall evolution was – again – more negative than in 2022 vs. 2021: more than twenty countries saw a consumption contraction, whereas only seven countries saw consumption growth.

Evolution of cement consumption in CEMBUREAU countries

Variation 2023/2022 (%)



Source: CEMBUREAU

Looking at the forecasts for domestic consumption of cement reported by Euroconstruct for a EU15 subgroup – excluding Denmark, UK, Norway and Hungary – the estimate is a decrease by -0.7% in 2024, with growth forecasts of 2.4%, 2.3%, and 1.8% in 2025, 2026, and 2027 respectively.

CONSTRUCTION MARKETS

The following statistics are based on data and forecasts from Euroconstruct (November 2024), and the Eastern European Construction Forecasting Association (EECFA, December 2024).

In 2024, the total construction output in the Euroconstruct area¹, reached €2.211 trillion, which is -2.4% compared to 2023, while GDP in the Euroconstruct area increased by 0.9%.

Major drivers of the negative evolution are the COVID-19 pandemic, from which the construction sector has not yet fully recovered, followed by the war in Ukraine. The effects have accumulated in 2024, which was the worst year for construction since 2020. The most important economic factors acting negatively up to 2025 are the inflationary shock due to outbreak of wars,, significant rise of construction cost, high credit costs and public debt, and financing balance. Besides, there were also local factors which are the effects of climate change, essentially floodings, fires, and droughts.

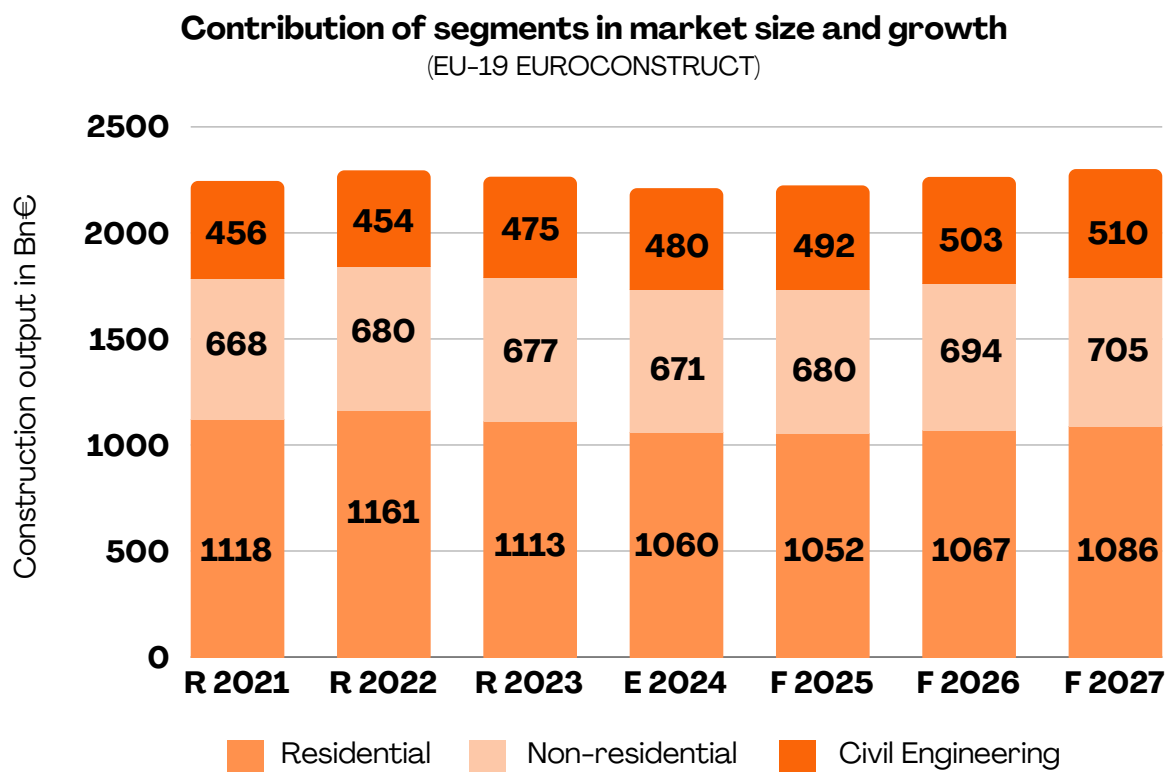
The situation can vary significantly from one country to another, depending, among other factors, on alleviating measures implemented by the authorities. More information can be found in the below Country Reports section.

Looking forward, in the Euroconstruct area, the construction volume is expected to take up as of next year, with +0.6% in 2025, improving with an outlook for 2026 (+1.8%) and 2027 (+1.7%). The construction outputs are €2.22 trillion, €2.26 trillion and €2.30 trillion for respectively 2025, 2026 and 2027.

Within the EECFA area², construction activity in the Southeast European region slightly declined after reaching its peak in 2023, following several years of strong growth. However, the current level remains robust and is expected to hold steady through 2026. In Eastern Europe, the overall outlook appears stable at first glance with growth in civil engineering and non-residential construction helping to offset a decline in housing. Nonetheless, a significant contraction is forecast in the broader building construction market.



CONSTRUCTION MARKETS BY SEGMENTS



R: Realised - E: Estimated - F: Forecast

Source: EUROCONSTRUCT

Looking at construction market segments in 2024, the main drag on European construction growth was new residential construction. Real estate prices, high interest rates, and construction cost were and will remain the main factors inhibiting development. Tight economic conditions also affected residential renovation. In non-residential buildings, industrial buildings emerged as the largest sector, followed closely by office and commercial buildings. The business and profit situation of many companies will leave little room for building replacement and extension. Civil engineering played a stabilising role in the construction sector, which is due to the needs related to transport networks and energy production and distribution.

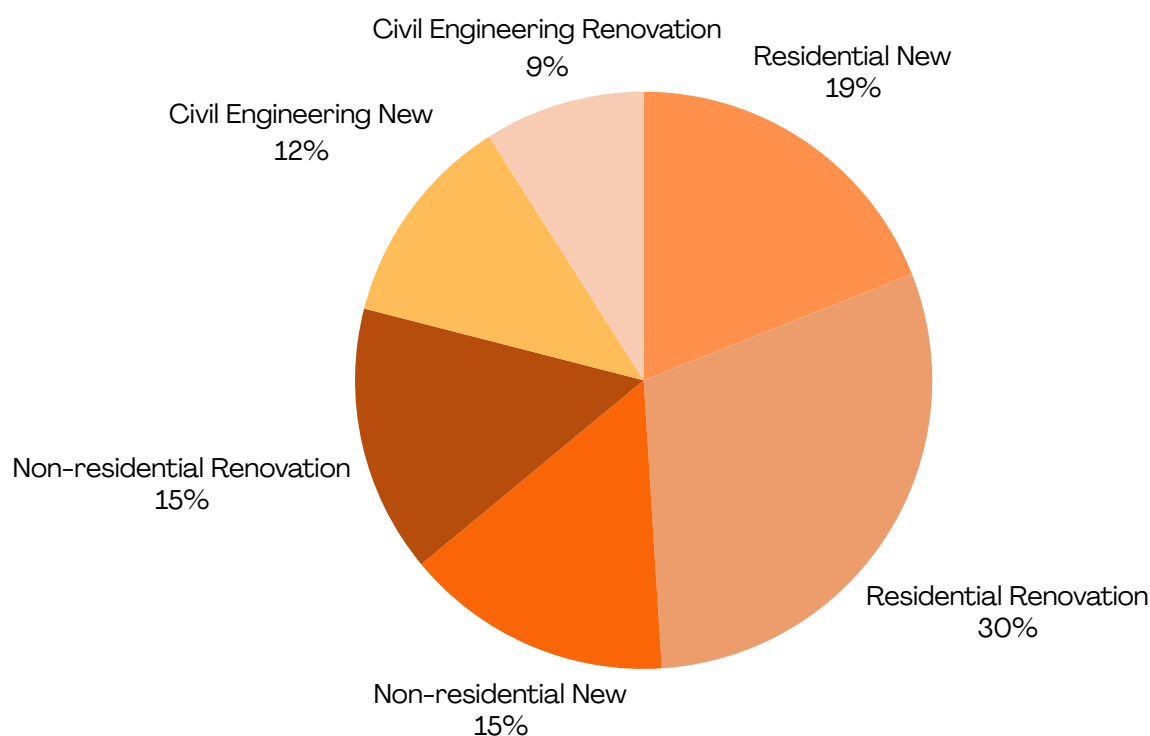
Compared to 2023, in 2024 total buildings saw a contraction of -3.3% - residential buildings with -4.8% and non-residential buildings with -0.9%, and civil engineering grew by +1.1%. Residential building showed, as always, the most important segment, with civil engineering as the best growing segment. Residential buildings renovation is, with -2.1% in 2024, showing higher resilience than new residential buildings (-9.1% in 2024).

In the construction output growth forecasts for 2025, 2026, and 2027, civil engineering is once again leading the way, with projected growth rates of +2.5%, +2.1%, and +1.5%, respectively. In comparison, building construction shows growth rates of 0.0%, +1.7%, and +1.8% over the same period. Within this segment, residential buildings are expected to grow by -0.8%, +1.4%, and +1.8%, while non-residential buildings are projected at +1.3%, +2.1%, and +1.6%.

This means that by 2027, buildings, in particular residential buildings, should take again the lead not only on total volume, but also growth rate.

The split between segments is almost constant over time, with 34% for new buildings, 45% for building renovations, and 21% for civil engineering. Moreover, within residential construction, renovation is the most important segment.

**Construction markets by segments in 2023,
34% account for new buildings, 45% for building renovation
& 21% for Civil Engineering**



Source: EUROCONSTRUCT

¹ Euroconstruct (19 countries), including Austria, Belgium, Denmark, Finland, France, Germany, Ireland, Italy, Netherlands, Norway, Portugal, Spain, Sweden, Switzerland, United Kingdom, Czechia, Hungary, Poland, Slovakia

² Eastern European Construction Forecasting Association (EECFA), which includes Southeastern Europe (Bulgaria, Croatia, Romania, Serbia, Slovenia) and Eastern European Region (Russia, Turkey, Ukraine).

COUNTRY REPORTS



AUSTRIA

In Austria, cement production and consumption in 2024 are estimated to have declined by 10% compared to the previous year. The demand for cement in one- and two-family houses fell significantly, primarily due to challenging financial conditions for obtaining loans. In contrast, civil engineering projects appear to have secured stable funding.

At present, the outlook for 2025 does not indicate any clear signs of recovery.



BELGIUM

Between 2022 and 2023, cement consumption is estimated to have decreased by 6.1%. This slowdown is attributed to a moderate decline in construction activity and a shift from new construction to renovation. In 2024, construction activity saw a sharp decline, with new construction falling by 7.3%, while growth in residential renovations stalled. Only infrastructure projects showed positive progress, increasing by 3%.

A modest recovery is expected in the residential sector in 2025. However, in the longer term, construction activity is projected to rebound significantly due to an anticipated housing shortage, while infrastructure activity is expected to remain stable.



BULGARIA

According to statistical data, market growth in 2024 is estimated at approximately 8.0%. Construction output increased by 8.6%, with growth distributed as follows: 5.9% in buildings, 8.8% in facilities, and 11.8% in specialized construction.

For most of 2024, there was no regular government, which significantly impacted infrastructure construction. As a result, only a few major projects remained in development. However, real estate and residential construction remained strong, continuing to be the main driver of cement consumption growth.

In 2025, the construction sector is expected to remain close to or slightly below 2024 levels. A cooling of the real estate market is possible, but some recovery in infrastructure is anticipated following the formation of a new government at the beginning of 2025.



CZECH REPUBLIC

Cement consumption in the Czech Republic increased by 4% in 2024, but this follows a 20% decline between 2022 and 2023, indicating a slow recovery for the construction industry. According to the Czech Statistical Office, construction output fell by 2.4% year-on-year (y-o-y), mainly due to building construction (-4.1%), while civil engineering remained stable (+0.8%).

In 2024, construction companies with 50+ employees secured 82,232 orders, a 7.8% increase y-o-y, with a total value of CZK 387 billion (+15.6%). New building construction orders rose to CZK 177 billion (+13.7%), while civil engineering orders reached CZK 210 billion (+17.3%).

Despite permitted construction values reaching CZK 579.7 billion, they declined 3.6% y-o-y due to bureaucratic delays. 36,477 dwellings were started (+2.2%), while completed dwellings dropped 20% y-o-y. Most construction activity was concentrated in Prague, Středočeský, and Jihomoravský regions.



DENMARK

Cement production (-1%) and consumption (-2%) remained at 2023 levels, with a positive trend at the end of the year. A 5-10% increase is expected in 2025 compared to 2024. Residential and commercial construction did not grow as expected in 2024 despite stabilizing material prices and lower interest rates. Infrastructure projects, including the Fehmarn Belt Link, continued to drive growth, supported by energy, port, and transport developments. The outlook for 2025 is positive, especially for housing and commercial construction, though external factors may impact the market. Stricter CO₂ regulations take effect in July and may influence cement consumption.



ESTONIA

Cement consumption in 2024 remained stable compared to 2023, with no significant growth in export volumes, particularly impacting the precast sector. Across all construction material segments, volumes remained close to 2023 levels, with energy prices and interest rates as key influencing factors.

Residential building permits increased by 1.6%, while user permits for new residential buildings declined sharply by 31.4%. In the non-residential sector, building permits fell by 6.2%, whereas user permits rose by 6.8%. The average building size in both segments decreased, measured in thousand m² and m³.

Construction volumes remained low, with the price index rising 1.6% compared to 2023, driven by labour costs (+6.3%), machinery (+1.6%), and a slight decline in material costs (-1.1%). A moderate volume improvement is expected in 2025.



FINLAND

In 2024, cement consumption is estimated to have contracted by approximately 5%. The decline in demand was primarily driven by a sharp and ongoing reduction in housing construction, partially offset by a slight recovery in non-residential construction starts. Civil engineering output also continued to decline due to high interest rates and a weakening macroeconomic outlook.

In 2025, construction output is expected to begin recovering.



FRANCE

Cement production and consumption in France is set to fall once more, by an estimated -10% to -12% in 2024 compared with 2023. Rising interest rates on mortgages and cuts in public housing subsidies have led to a historic decline in new construction, which remains the leading cement market (-21.3% in 2024 for residential and -6% for non-residential). The slight increase of +2.3% in the public works sector in 2024 has not offset the deterioration in the construction sector. In 2025, demand in the cement sector could stabilise. This will be driven by a moderate upturn in new construction and stabilisation in the public works sector.



GERMANY

Cement demand declined by approximately 10% in 2024. Since 2020, around one-third of the market volume has disappeared due to high construction costs, rising interest rates, and an uncertain economic and political environment.

The construction sector's weakness is primarily driven by an underperforming residential sector. Although demand remains high, the construction of residential buildings is barely profitable under the current unfavourable conditions. Only civil engineering has shown a recent positive trend.

In 2025, cement demand is expected to stagnate at best. The February 2025 elections will determine whether the new federal government can improve the business environment and support market recovery.



GREECE

The Greek economy expanded by 2.1% in 2024, with similar growth expected in 2025. Construction activity saw significant improvement in 2024, with the number of new building permits increasing by 12.8%, corresponding to a 16.2% rise in building surface.

In 2023, cement production grew by 0.8%, domestic consumption increased by 9.7%, and imports of clinker and cement surged by 27.3% compared to 2022. While inflation is gradually declining, energy costs remain high, though they are partially subsidised by the state.

The outlook for the cement sector in 2025 remains positive, with both public and private investments continuing to grow.



HUNGARY

The current legal environment in Hungary — including the 90% mining fee (above €50/t), CO₂ quota tax (€36), CO₂ transaction fee (€15), and the ban on RDF imports — has significantly increased costs for domestic cement producers, hindering operations, green investments, and waste management. Export restrictions on building materials have further disrupted the market.

Cheaper imported cement has pressured domestic production, while inflation and rising interest rates have led to a decline in construction activity. Energy and transport costs have further weakened competitiveness.

In 2024, building construction fell by 9.0%, civil engineering grew by 8.2%, and specialised construction increased by 12.2%. Key challenges are inflation, energy prices, manpower shortages, investment slowdown, and import competition.

The 2025 outlook remains uncertain, as market conditions will strongly impact construction and cement production.



IRELAND

Housing completion figures for Ireland in 2024 came in lower than 2023 despite strong housing requirement, driven by lower apartment completion. The new Government have committed to delivering 300,000 homes by the end of its mandate in 2030, meaning a doubling of output. The Government has also committed to a review of their capital projects plan, the National Development Plan. Barriers remain in the form of resourcing of water and electricity infrastructure, and the planning process. New planning legislation is yet to come into full operation and it is yet to be seen if this will help the delivery.



ITALY

In 2024, cement consumption increased by 2.5% compared to 2023, while production grew by 1%. This moderate rise was driven by infrastructure investments, particularly public works funded by the PNRR, which offset the decline in residential construction. The construction sector saw a 5.3% contraction, with residential buildings experiencing a sharp downturn, while non-residential and public works remained resilient.

In 2025, a further 7.0% decline is expected, with private investments slowing. Government policies and energy costs will be key factors shaping the market, highlighting the need for strategic measures to sustain demand and ensure long-term industry stability.



LATVIA

Construction output declined by 4.3%, primarily driven by a 20% drop in new buildings, as high interest rates significantly constrained the residential sector. However, power infrastructure projects, including solar and high-voltage networks, contributed to an 8% year-on-year increase in the infrastructure segment.

Cement consumption contracted by approximately 7% year-on-year, though domestic production declined at a slower rate due to a 10% drop in imports. Exports fell by 5%, impacted by weak demand in the Nordic markets and challenging conditions in Estonia.

The 2025 outlook remains cautiously optimistic, supported by easing interest rates and projected GDP growth of 2%. However, budgetary challenges surrounding the Rail Baltica project could limit its role as a volume driver.



LITHUANIA

In 2024, cement demand in the domestic market increased by 11.8% compared to 2023, driven by investments in non-residential and infrastructure projects. In 2024, construction companies in Lithuania carried out 6% more construction work compared to 2023. The largest share—51.4%—consisted of engineering structure projects, followed by non-residential building construction at 31.5% and residential building construction at 17.1%. The volume of cement sales in the domestic market is projected to grow steadily by 5-6%, driven by increasing demand for engineering and infrastructure projects as well as non-residential buildings.



LUXEMBOURG

There were no positive geopolitical developments in 2024 and the construction market in Luxembourg continued its downturn, declining by approximately 19% in the housing and office sectors. Civil engineering remained stable, supported by ongoing projects. Export markets also saw a decline, though it was less severe than in Luxembourg.

On a positive note, the existing housing market in Luxembourg began to recover, with properties finding buyers. This shift was driven by national policy measures and lower interest rates offered by banks. Looking ahead, the 2025 market is expected to stabilise at historically low levels, with a potential slight recovery in the fourth quarter.

However, investment programmes for decarbonisation remain a major concern. The prolonged market weakness has made it difficult to implement the necessary price adjustments to support these initiatives.



THE NETHERLANDS

In 2024 the cement market is expected to have had an evolution of around -7%, reaching a total volume of 3,750 kton, according to the cement federation and the evolution of cement import.

Completions of residential constructions decreased by more than 7.5% in 2024. New constructions in the non-residential sector showed a smaller decrease of around 3.5%. The infrastructural sector has produced around 2.5% less in 2024.

There are many uncertainties on the Dutch construction market. Sustainability issues, lack of labour force and political instability dampen expectations for 2025. We expect that construction output, as well as the cement market, will continue at the level of 2024.



NORWAY

Norway's GDP grew by 1.0% in 2024, driven by strong domestic demand and exports in technology and renewables. Inflation stabilised but remained above the long-term average and the central bank's 2025 target. The central bank held interest rates steady, avoiding cuts due to high inflation and low unemployment.

The construction industry declined by 4.9%. Residential construction fell by 7.4%, a milder drop than 2023's 11.3%, due to high interest rates, rising costs, and weak consumer confidence. Non-residential construction declined by 4.8%, exceeding 2023's 3.1%. Infrastructure construction remained stable, with a 1.3% decline, supported by renewable energy and transport investments.

The cement industry declined, reflecting weaker housing and commercial activity, though signs of stabilisation have emerged.



POLAND

In 2024, cement production increased by 6.5%, while consumption grew by 6.8% year-on-year. Despite overall challenges in construction, cement demand remained strong, driven by new project starts and infrastructure investments.

The construction sector faced a 7% decline, with residential construction down 10% due to fewer advanced developments being commissioned. Non-residential construction fell 7%, though improving market conditions and declining inflation signal a shift toward recovery. Civil engineering contracted by 4%, impacted by delays in EU-funded projects. However, H2 2024 saw a rebound, supported by the release of National Recovery Plan funds, boosting engineering projects.

Looking ahead, construction activity is expected to grow by at least 4% in 2025, driving further cement production growth of around 6%. Key external factors include the ongoing war in Ukraine, EU regulations, and the increasing deployment of EU infrastructure funds.



PORTUGAL

Cement consumption increased by 2.5% in 2024. GDP grew by 1.7% in 2024, with a projected acceleration to 2.2% in 2025. This momentum reflects a more favourable environment, driven by improved financial conditions, an expected rise in external demand, and larger inflows of EU funds. However, the external environment remains subject to significant economic and geopolitical risks.

The construction sector is estimated to have grown by 3.0% in 2024, with civil engineering being the most dynamic segment (+5.1%). The other subsectors performed as follows: residential buildings grew by 1.5%, while non-residential buildings recorded a 0.5% increase.

For 2025, cement consumption is expected to grow by 2.6%, while construction activity is projected to increase by 4.0%. The civil engineering sector is expected to lead with +6.0% growth, while residential buildings and non-residential buildings are forecasted to grow by 2.5% and 1.0%, respectively.



ROMANIA

According to provisional data from the National Institute of Statistics, cement consumption in 2024 increased by 8% compared to 2023, largely driven by growth in infrastructure investment in the transport sector.

In the same year, the volume of construction works, as a gross series, decreased overall by 5.9% compared to 2023.

However, different trends were observed across structural elements: maintenance and current repair work declined by 11.2%, new construction works decreased by 5.3%, while capital repairs increased by 1.8%.

By construction category, non-residential buildings recorded an 8% decline, while civil engineering works increased by 2%. Residential buildings experienced a significant decline of 22.1%.

According to estimates from the National Commission for Prognosis, construction is expected to remain the most dynamic sector of the economy in 2025, with an average annual growth rate of 5.4%, assuming continued absorption of European funds.



SERBIA

Cement production in 2024 increased by 3.2%, while consumption grew by 4.7% compared to 2023, reaching 2.75 Mt and 3.20 Mt, respectively.

Construction activity in Serbia recorded significant growth in 2024, with an expected annual GVA increase of 9.9%. The main growth drivers were projects in transport infrastructure, pipelines, communication, and electrical networks.

For 2025, the construction industry is expected to contribute positively, with projected growth of 7.6%. Further development in the sector will be supported by new construction projects linked to the EXPO 2027 preparations.



SLOVAKIA

After a significant fall in the domestic cement market in 2023 by almost 13%, the situation stabilized in 2024 without further market losses. The residential sector is still suffering from high interest rates and therefore continued to decline by more than 5% in 2024. A similar scenario is expected in 2025 (approximately -3.5%).

The non-residential sector grew by 3.5% in 2024, with even stronger growth expected this year, mainly due to a few large ongoing projects. Infrastructure projects stagnated in 2024; however, three new highway tenders are expected to be closed soon, leading to a projected 5% increase in this sector.



SLOVENIA

Cement production in Slovenia increased by 3% in 2024, while cement consumption rose by 7%. However, construction activity declined by 10% in the first 11 months, with civil engineering (-14%) and building construction (-13%) seeing the biggest drops. Government investment fell by 7%, and spending on new buildings, constructions, and renovations decreased by 24%.

In 2024, 2% fewer building permits were issued, with a notable 11% drop for residential buildings, while non-residential permits increased by 5%. Inflation eased from 7.4% (2023) to 2.0% (2024). Looking ahead, GDP growth is expected to strengthen over the next two years.

Based on data from issued building permits, construction activity is anticipated to increase, supported by strong government investment. Key drivers of growth include projects in flood defence construction, flood recovery efforts, and investments under the Recovery and Resilience Plan.



SPAIN

In 2024, cement consumption in Spain grew by 2.9%, reaching 14.88 Mt. The second half of the year reinforced this growth trend, with December closing with a 10.4% increase compared to the previous year. Public investment in infrastructure rose by 2%, while non-residential construction declined by 7.5% and residential construction increased by 13%. Cement exports fell by 9.3% (3.62 Mt), and clinker exports dropped by 5.3% (1.21 Mt), yet Spain remained the EU's leading exporter. A 5% increase in cement consumption is projected for 2025, surpassing 15 Mt, as forecasted by Oficemen.



SWEDEN

Sweden's GDP grew by 0.7% in 2024, driven by strong domestic demand and exports in technology and renewables. While the shift to renewables boosted investments, it also raised energy costs, affecting households and businesses. Inflation stabilised, supported by stable energy prices and monetary policies. The Riksbank lowered interest rates, stimulating consumer spending and business investments.

The construction sector declined by 5.3%. Residential construction fell by 10.8%, a milder drop than 2023's 29.3%, due to high interest rates, rising costs, and weak consumer confidence. Non-residential construction fell by 6.7%, a sharper decline than 2023's 4.1%. Infrastructure construction remained stable, growing 0.3%, supported by renewable energy and transport investments.

The cement sector declined, reflecting lower housing and commercial activity, though signs of stabilisation have emerged.



SWITZERLAND

The Swiss cement industry experienced a 4.6% decline in deliveries in 2024, with a total of 4.02 million tons of cement consumed in Switzerland. The year was challenging for the construction industry due to the slow economic recovery, uncertain economic conditions, and high energy prices, all of which negatively impacted construction activity. However, a trend reversal was observed toward the end of 2024, offering cautious optimism for 2025. Factors contributing to the recovery include a sharp drop in inflation, low interest rates, and their positive effects on construction activity, leading to a cautiously positive forecast for the year ahead.



UKRAINE

In 2024, cement production in Ukraine amounted to 7.9 million tons, which is almost at the 2023 level (7.4 million tons) and 28% lower than pre-war 2021 production volumes.

Cement consumption in Ukraine in 2024 remained at 6.3 million tons, the same as the previous year. Cement imports to Ukraine in 2024 totalled 39.95 thousand tons. Of the total imports, white cement accounted for 51.1%, ordinary cement for 27.8%, and hydraulic cement for 19.6%.

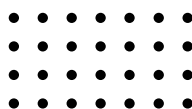
From January to September 2024, the volume of construction products produced in Ukraine increased by 33.4% compared to 2023. During this period, the construction of engineering structures increased by 34.7%, residential construction by 22%, and non-residential construction by 37.5% compared to 2023.



UNITED KINGDOM

Using ready-mixed concrete sales volumes as a proxy for cement demand, compared to 2023, total annual sales fell by 10.8%, their lowest level in over 60 years. Sales in 2024Q4 rebounded by 5.7% compared to 2024Q3 and a slow recovery in demand is expected to continue into 2025. The recent upturn can be partly attributed to signs of recovery emerging in housing. Lower mortgage rates have supported a rise in approvals, while house prices are climbing again. New commercial, industrial, and public non-housing work has been hampered by high financing costs and economic volatility. Infrastructure work has been sustained by large projects like HS2, which saw 'peak' construction in 2024. Cost inflation and planning-related delays remain a constraint on the pipeline of new projects.





About us

MISSION

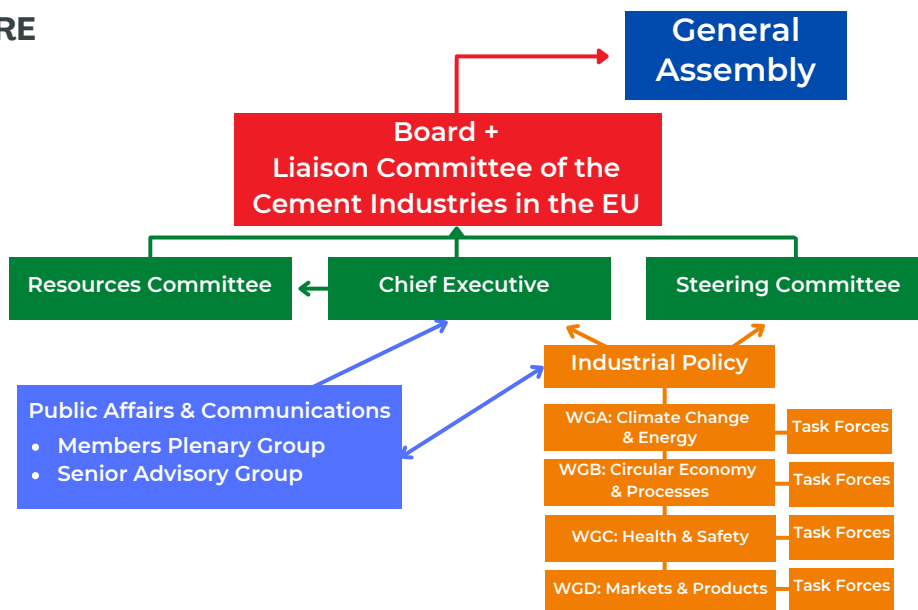
CEMBUREAU, the European Cement Association is based in Brussels and is the representative organisation of the cement industry in Europe. Currently, its Full Members are 23 national cement industry associations and cement companies of the European Union (except for Malta) plus Norway, Switzerland and the United Kingdom. Croatia, Serbia and Slovakia are Associate Members of CEMBUREAU. Cooperation agreements have been concluded with Vassiliko Cement in Cyprus and UKRCEMENT in Ukraine.

The Association acts as spokesperson for the cement industry before the EU institutions and other public authorities and communicates the industry's views on all issues and policy developments regarding technical, environmental, energy, employee health and safety and sustainability issues. In addition to the EU, permanent dialogue is maintained with other international organisations (e.g. OECD, IEA), the Global Cement and Concrete Association (GCCA) and sister associations in other parts of the world.

Serviced by a multi-national staff in Brussels and with the input from its Members via four Working Groups as well as several Task Forces set up on an ad hoc basis and directly reporting to the appropriate Working Group, CEMBUREAU acts in relation to all developments at European level affecting the cement industry.

CEMBUREAU plays a significant role in the world-wide sustainable development of cement and the ready-mixed and precast concrete industries in co-operation with its Member Associations and other relevant organisations. The Association regularly organises events on specific issues aimed at improving the market perception of the concrete industry and promoting the use of generic cement and concrete products. In addition, the Association regularly commissions studies to evaluate specific issues of importance to the industry.

STRUCTURE



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Chief Executive



Cathy Roeland
Personal Assistant &
HR Manager



Nour-Eddine Chafki
Logistics, Real Estate &
Finance Manager



Latifa Ben Yamoun
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Marie-Hélène Troger
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Miette Dechelle
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Vagner Maringolo
Sustainable Construction
Manager

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**Situation on
30 April 2025**

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Vice President: **Jesús Ortiz Used**

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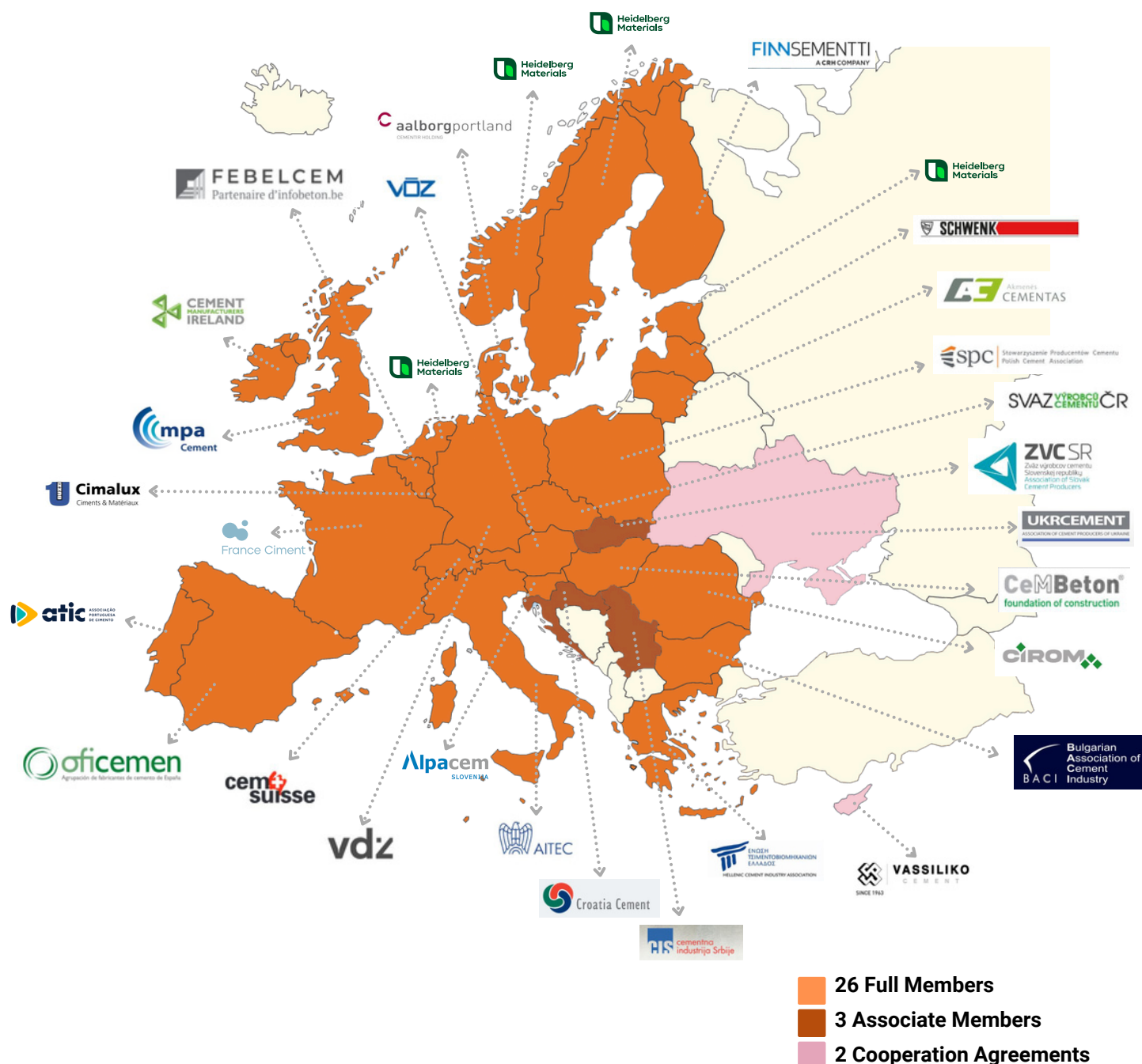
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OUR MEMBERS

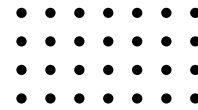
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For more information about our members, please see

<https://cembureau.eu/about-us/our-members/>

Partnerships



ALLIANCE FOR A COMPETITIVE EUROPEAN INDUSTRY

The [Alliance for a Competitive European Industry \(ACEI\)](#) was formed in 2004 by 11 major European industry sector associations and BUSINESSEUROPE. The common objective of its Members is to promote the competitiveness of European industry on a global scale. The Alliance therefore encourages a policy and regulatory framework that supports that objective, reinforcing and complementing BUSINESSEUROPE's work in this respect by providing a sectoral perspective. The industry sectors concerned represent the interests at EU level of some 6 000 large companies and 1.7 million SMEs with a combined output of nearly 5 trillion euros turnover and 1.3 trillion euros added value. These companies directly employ about 23 million people in the EU.

ALLIANCE OF ENERGY INTENSIVE INDUSTRIES

The [Alliance of Energy Intensive Industries](#) is made up of fourteen European associations representing energy-intensive industries with an aggregated turnover of more than 1000 billion Euros per year and directly employing over 3 million people. These industries are fundamental to Europe's entire economic fabric and support downstream processing and employment through the entire value chain.

They also contribute to Europe's R&D, innovation and technical excellence, as well as to European balance of trade and through economic value added and taxes to the economies of its Member States.

CONSTRUCTION PRODUCTS EUROPE

[Construction Products Europe](#) represents the interests of all European construction products manufacturers. Construction Products Europe was established in 1988 as an AISBL, a non-profit making organisation under Belgian law. More recently, the association changed its name from CEPMC to Construction Products Europe to better reflect its scope and expertise. As such, the new name creates a more accurate reflection of the association's activities and alongside the change of name Construction Products Europe has developed a new logo and website. Construction Products Europe has a rotating presidency and vice presidency and their secretariat is based in Brussels.

ECRA (EUROPEAN CEMENT RESEARCH ACADEMY)

CEMBUREAU has a long-standing relationship with the European Cement Research Academy (ECRA) based in Düsseldorf. With a membership of over 40 leading cement producers worldwide, ECRA supports and conducts research activities on the production of cement and its application in concrete.

ECRA and CEMBUREAU regularly interact in the areas of research and innovation as well as on technical matters. ECRA and CEMBUREAU have also worked together in organizing international conferences on CO₂ infrastructure where technical and project-related practical expertise was linked to the overall policy context. CEMBUREAU is also a Member of the ECRA Technical Advisory Board.

CONCRETE EUROPE

Concrete Europe (formerly the [European Concrete Platform](#)), is a European association incorporated as a non-profit association under Belgian law. With its membership comprising BIBM (European Federation for Precast Concrete), CEMBUREAU, EFCA (European Federation of Concrete Admixtures Associations), and ERMCO (European Ready Mixed Concrete Organisation) as Full Members and Aggregates Europe – UEPG and EUPave (the European Concrete Pavings Association) as Associate Members, Concrete Europe covers concrete related issues at European level, including the energy performance of buildings, fire safety and Eurocodes. aims to better communicate to EU stakeholders and those within the construction value chain the concrete sector's role in attaining the objectives of the EU Green Deal concerning sustainable construction.

GLOBAL CEMENT & CONCRETE ASSOCIATION

Launched in January 2018, the [Global Cement and Concrete Association \(GCCA\)](#) is the voice for the sector on the global stage, representing 44 member companies and 28 affiliate organisations, including CEMBUREAU. The GCCA aims to promote the benefits of cement & concrete for sustainable construction, highlighting the sector's innovation efforts and carbon neutrality ambitions. Headquartered in London, the GCCA complements and supports the work done by associations at national and regional level.

NEPSI

[The European Network for Silica \(NEPSI\)](#) is the first European multi-sectoral social dialogue agreement of its kind, which gathers the undersigned signatories of the Social Dialogue "Agreement on Workers' Health Protection Through the Good Handling and Use of Crystalline Silica and Products Containing it".

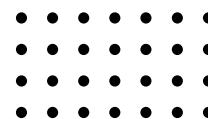
Since 2006, the Agreement aims to protect the health of employees occupationally exposed to respirable crystalline silica generated by a work process in eighteen industry sectors, minimising such exposure by applying good practices (see [new guide and tools](#)) and reporting every two years. NEPSI is recognised in Recital 19 of Directive (EU) 2017/2398 as a valuable instrument to complement regulatory measures.

REACH ALLIANCE

The REACH Alliance is an “association de fait” representing the Inorganic Industry and regrouping several sectors. The purpose of the Alliance is to represent the interests of the industrial sectors vis-à-vis the European Institutions and related Agencies (i.e. [ECHA](#)) and committees or groups (i.e. [CARACAL](#),

and subgroups) in the context of the regulations [REACH](#) and the [CLP](#), its implementation and review, and upcoming implementation of the ‘[Chemicals Strategy for Sustainability](#)’. In addition, CEMBUREAU is a member observer of the [CII - Cross-Industry Initiative for better regulation in chemicals management](#).





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Rue d'Arlon 55 – BE-1040 Brussels
Tel.: + 32 2 234 10 11
secretariat@cembureau.eu
www.cembureau.eu



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