

BUSINESS PLAN

CEN/TC 67 CERAMIC TILES

EXECUTIVE SUMMARY

Business Environment

- Europe represents:
 - near 15% of the ceramic tiles world market
 - a comparable percentage of the installation materials (adhesives, grouts and membranes) world market.
- Number of application sectors: internal and external walls and floors
- Parties involved:
 - Ceramic tiles industry and installation materials industry;
 - Operators of the various application sectors;
 - Consumers.

Benefits

- 1 standards on test methods were adopted for adhesives and 5 for grouts,
- 1 harmonized standard satisfying the essential requirements of the Construction Products Regulation 305/2011 (CPR) on requirements, AVCP, classification and designation of tile adhesives,
- 1 harmonized standard satisfying the essential requirements of the Construction Products Regulation 305/2011 (CPR) on requirements, test methods, AVCP, classification and designation of liquid applied water impermeable products for use beneath ceramic tiling,
- 1 standard on definitions and specifications was adopted for grouts,
- 16 standards on test methods were adopted for ceramic tiles,
- 1 harmonized standard satisfying the essential requirements of the Construction Products Regulation 305/2011 (CPR) on definitions, classification, characteristics and marking for ceramic tiles,
- 1 technical report on general rules for the design and installation of ceramic tiling,
- the need to harmonise different regulations and specifications in force within different European countries in order to remove technical barriers to trade and to create one single market.

Priorities

To make European standards on ceramic tiles and installation materials (adhesives, grouts and membranes) periodically revised and updated as needed to incorporate evolution in the industry.

1 BUSINESS ENVIRONMENT OF THE CEN/TC

1.1 Description of the Business Environment

The following political, economic, technical, regulatory, legal, societal and/or international dynamics describe the business environment of the industry sector, products, materials, disciplines or practices related to the scope of this CEN/TC, and they may significantly influence how the relevant standards development processes are conducted and the content of the resulting standards:

It is hard to see how a unique industry like the stone industry can find its bearings in the large process of European unification or be directly changed by it. What is certain is that there will be definite changes for the companies. The Euro will show up all the differences in prices and costs and will therefore accentuate the competition between more and less efficient productive systems. The EU table will become the most important place for the definition of real intervention policies along with the settlement of trade conflicts. When a foreign market becomes a domestic market, power relations alter since the technical and political systems of reference change and the control and regulation of commercial, informative and all other flows are handed over to different organs. The role of European bureaucracy is of prime importance as too is that of the local administrations which manage to make themselves heard and the new ground for discussion between productive districts or rival sectors or disagreeing countries centers on the apparently more neutral subject of standards.

As far as legal factors influencing the market are concerned, the Construction Products Regulation 305/2011 (CPR) must be taken into consideration. CEN/TC 67 is one of several CEN technical committees involved in the preparation of technical specifications supporting the CPR.

1.2 Quantitative Indicators of the Business Environment

The following list of quantitative indicators describes the business environment in order to provide adequate information to support actions of the CEN /TC 67:

PRODUCTION

REGION	2014	
	PRODUCTION	%
ASIA	8.168,3	69,51%
UE	1.219,2	10,38%
CENTRAL AND SOUTH AMERICA	1.105,8	9,41%
EUROPE NON EU	639,1	5,44%
NORTH AMERICA	301,3	2,56%
AFRICA	313,0	2,66%
OCEANIA	4,6	0,04%
TOTAL	11.751,3	100,00%

CONSUMPTION

REGION	2014	
	CONSUMPTION	%
ASIA	7.866,0	67,02%
UE	879,7	7,50%
CENTRAL AND SOUTH AMERICA	1.204,5	10,26%
EUROPE NON EU	652,1	5,56%
NORTH AMERICA	446,4	3,80%
AFRICA	642,7	5,48%
OCEANIA	45,3	0,39%
TOTAL	11.736,8	100,00%

EXPORT

REGION	2014 EXPORT	
		%
ASIA	1.271,9	50,96%
UE	833,8	33,41%
CENTRAL AND SOUTH AMERICA	122,7	4,92%
EUROPE NON EU	134,0	5,37%
NORTH AMERICA	74,5	2,99%
AFRICA	58,1	2,33%
OCEANIA	0,8	0,03%
TOTAL	2.495,9	100,00%

Source: Prometeia - Confindustria Ceramica, "Observatory estimates on the global market for ceramic tiles"

2 BENEFITS EXPECTED FROM THE WORK OF THE CEN/TC

The European standards worked out by TC 67 represent a very important reference point for the international market.

3 PARTICIPATION IN THE CEN/TC

All the CEN national members are entitled to nominate delegates to CEN Technical Committees and experts to Working Groups, ensuring a balance of all interested parties. Participation as observers of recognized European or international organizations is also possible under certain conditions. To participate in the activities of this CEN/TC, please contact the national standards organization in your country.

The following European countries have attended TC 67 meetings and its working groups meetings and participated in the elaboration of standards: Belgium, Finland, France, Germany, Ireland, Italy, Norway, Poland, Portugal, Spain, Sweden, Switzerland, Turkey and UK.

4 OBJECTIVES OF THE CEN/TC AND STRATEGIES FOR THEIR ACHIEVEMENT

4.1 Defined objectives of the CEN/TC

Elaboration of standards within the scope of the TC 67, adjusting the work program as necessary to the needs of the market and in response to the standardization requests given by the EC.

The objectives of TC 67 will be addressed by working groups in the following sections.

Working Group 1 (Test methods) is working on the revision of the test methods in EN ISO 10545 from Part 1 to 16 under Vienna Agreement with ISO/TC 189.

Working Group 2 (Product specifications) has been working during the past few years on the revision of EN 14411 which includes, apart from other minor changes, improved dimensional tolerances which better reflect the current market situation, and the alignment to the new Construction Products Regulation in relation to CE Marking as well as the revised answers to M/119 and M/121

Working Group 3 (Adhesives and grouts for tiles) dealing with the standardization of different products used for internal and external tile installations on walls and floors and on installation aspects. Its present tasks:

- the revision of test methods on adhesives and grouts;
- the revision of harmonized EN 12004 "Adhesives for tiles – Requirements, evaluation of conformity, classification and designation" and of harmonized EN 14891 "Liquid applied water impermeable products for use beneath ceramic tiling bonded with adhesives – Requirements, test methods, evaluation of conformity, classification and designation".

Working Group 4 (Design and installation of ceramic tiling) The decision is taken during the TC plenary to disband this WG as no more active.

WG 5 (Product category rules for ceramic tiles and installation products for ceramic tiling) started its activity with the first meeting held on 2015-10-21 to develop PCR for ceramic tiling. For the time being it was decided to activate a new WI to develop PCR for ceramic tiles, while the one related to installation materials will be developed in future.

4.2 Identified strategies to achieve the CEN/TC's defined objectives.

The first priority for the work of CEN/TC 67 is, at present, the revision of standards supporting the Construction Products Regulation 305/2011, in which TC 67 is heavily involved with three harmonized standards on product specification and several supporting standards on test methods in its work program.

The work of CEN/TC 67 is carried out through its four WGs 1, 2, 3 and 5 in strict collaboration with ISO/TC 189 "Ceramic tiles" and in official liaison with:

CERAMEUNIE

EMO

Proposal for a liaison between WG 5 and CEN/TC 350/WG 3.

4.3 Environmental aspects

The environmental pillar requires preserving of resources with offered good operational features.

For ceramic tiling and related materials it means saving of resources, optimized exploitation of raw materials, including water, (energy-) optimized production and optimized transport.

Manufacture has been documented as the phase of the tiling materials Life Cycle which is characterized by the most significant environmental impact factors. The main and most significant environmental aspects associated to this phase of the tiling Life Cycle refer substantially to products packaging and management of the wastes produced during tiling installation.

On the other hand, the main and more significant environmental impact of a tiling in use is associated to the maintenance procedures and activities. No significant environmental impacts on air, water and soil quality/contamination occur, associated to ceramic tiling, provided that tiling have been correctly designed, installed and managed.

The end of life of a ceramic tiling is its demolition, The main environmental aspect of this phase of the Life Cycle are associated to the fact that the materials of the basic tiling functional layers (ceramic tiles, adhesives, grouts and screeds) are intrinsically inert, and therefore not available to chemical or physical changes even exposed to chemically aggressive, dry or wet conditions/environments, as well as to fire conditions. Therefore, the demolition wastes from tiling not including membranes or other organic layers do not have significant environmental impacts. Moreover, tiling demolition waste have been proved to be suitable for different useful applications in civil engineering (including, for example, also the manufacture of aggregates for concrete).

Each NWI proposal will be reviewed for direct impacts on the environment and also for benefits to the sustainability of the ceramic tiling. Suggestions for minimising impacts and offsetting impacts whilst maximising benefits will be required for each proposal.

CEN/TC 67 is working in strict collaboration with CEN/TC 350 "Sustainability of construction works" and CEN/TC 351 "Construction Products - Assessment of release of dangerous substances".

5 FACTORS AFFECTING COMPLETION AND IMPLEMENTATION OF THE CEN/TC WORK PROGRAMME

Having considered what stated in the sections above, and in order not to lose reliability, it is essential that the work is carried out in an acceptable period of time in order to meet the aims of the industry.