

Dear colleagues,

For a few years now, the ceramics industry in Europe has been undergoing an unprecedented development, because it has changed more radically over the past 10 years than the previous 50 years.

These changes took place in all areas:

- The dimension of the tiles increases more and more, that means they became really large.
- Thickness of the tiles is getting thinner and thinner, culminating in very thin tiles.
- Very differently structured surfaces and thus we don't know how to make the joints.
- Non-porous back of the tiles makes tile laying and adhesion of tiles more and more difficult.
- Increased weight of tile packages while we would like to make labour in this profession easier and would like to train women.

As a matter of course, all these changes took place without prior consultation with us, the tile laying companies, the main group affected, and the adhesive manufacturers, who are also concerned.

We are forced to adapt to every new type of tile without obtaining any explanation on the part of the manufacturer concerning type of joint, care or adhesion. But to our customers, on the other hand, we on our own are liable for the completed work.

At the same time, the manufacturing standards have not been adapted accordingly, so they are virtually identical, whether the size of a tile is 20 x 20 cm or 120 x 90 cm.

In addition to that, difficulties arise due to the technical development in the building industry, i.e. the ground we're working on varies enormously more and more and sometimes we encounter really multi-layered ground.

- Smoothed concrete surfaces for glued tiles which are never completely smooth.
- Flowing screed of different types which often tend to crack.
- Underfloor heating with more or less compact insulation material.
- Acoustic or thermal insulation or even both together under the ground.

Here too, the industry places its new products on the market without consultation with us and, worst of all, without bothering about possible effects on tile laying. Although there are tests carried out in the laboratories under optimum conditions, there is nothing to substitute real conditions on the construction site. So we are being used as guinea pigs for the development of new products while maintaining full responsibility, because in case of problems it is always we who will be held liable.

This statement may seem pessimistic to you, but I think, it's realistic and shows very well the difficulties of our profession given this soaring development. We are not against all this progress, quite the opposite, but it should be manageable and in coordination with us and our respective committees. We want to be considered partners and entrepreneurs on our own responsibility, not simply tile "layers" as is often the case.

In the light of this, the EUF reacted already a few years ago and took the initiative by organising meetings and discussion forums with members of the ceramics industry to break the silence which became unbearable and damaging for our industry, regardless of whether industry or tile laying companies were involved. We all will lose and we already lost a lot.

A first meeting took place in Marseille in the context of a novelty presentation of Saint-Gobain.

A second discussion forum took place in Dijon during the conference of French tile layers, in which also the EUF took part.

In 2009, a third meeting was arranged by the EUF in the context of the exhibition in Bologna.

In the course of these three meetings between industry and tile layers we took stock of the points at issue. These are mainly the large sizes whose currently valid tolerances don't correspond to today's manufacturing techniques and which we therefore only reluctantly lay and recommend to our customers. Some representatives of the industry have been taking a stand for reducing these tolerances, and we are pleased to see that, but what we want is an obligation for all European manufacturers. Following my presentation, my British colleague will give you an overview of the progress in the field of European standards.

Furthermore, we talked about many other topics but the most common one was the reduction of the weight of the tile packages to a maximum of 25 kg. In this case we also want an obligation for all European manufacturers. At a time when we would like to make labour in the building professions easier and the weight of cement bags has been reduced to 35 kg or even 25 kg, it is not acceptable that some tile packages weigh up to 40 kg. Consider the situation of our employees who are the only ones to carry these packages by hand every day.

After the meeting in Bologna we established contact with the CET, a merger of tile manufacturers within Cérame Uni representing the whole ceramics industry.

First talks took place in Brussels on the occasion of a workshop of the CET. For the end of June a special meeting with the EUF is planned to come to a real agreement concerning all these topics and to schedule them.

All these meetings took place in a good atmosphere, although everyone expressed his opinion very clearly. But it is a committed and open dialogue that is underway and we would like to involve also the adhesive manufacturers as indispensable partners.

We had a long way to go, but I'm convinced that we will achieve our goal and I will take a personal interest in this.

For several reasons the partnership between industry and our companies is absolutely necessary.

We have to improve the image of ceramics, which is the most noble material for floors and walls, but we cannot emphasize its value because everyone acts alone, on his own, instead of acting all together. I would like to illustrate this with an example. Let's have a look at very thin tiles lately available on the market. Some tile layers recommend them for use exclusively on walls, which in my opinion is very reasonable. Others, however, lay them on floors and walls. But our companies have to perform the work, we were not asked for our opinion and

now confusion reigns in view of this topic. The reputation of the whole profession could be ruined, although a coordination between all parties concerned before the market launch would allow an outstanding product presentation. This does not seem to be reputable and we all would be losers.

We also have to begin regaining market shares we already lost to materials such as PVC or parquet. They are much better organised and have perfectly elaborated laying instructions for both, customer consultants and tile layers. We should take this as an example, because it has proved itself.

We also have to be innovative, launch a new acoustic insulation on the market that guarantees tightness at the same time, and present these new products to architects and clients. In so doing, we can regain the market shares we all need, especially in the world of today. This applies to both, the industry and the tile layers we stand for.

But only if we all work together it is possible to achieve this goal, because if we do nothing, our situation on the market will get worse and that would be a pity.

Dear representatives from the industry, dear colleagues, since we have met in Bologna the progress of our work is very promising, but we have to go much further. Please, set up working groups to discuss the aforementioned topics and we will enthusiastically participate in the meetings with the industry concerning the future of the whole ceramics industry and you becoming real partners – the key issue of the EUF members.

All of our own, we are weak and vulnerable. Together we are stronger, more efficient and more innovative and can put ceramics back on the map. Ceramics lost a bit of its reputation and that's really a pity.