

BUSINESS PLAN

CEN/TC 125 MASONRY

EXECUTIVE SUMMARY

The scope of CEN/TC 125 is "Standardization in the field of masonry units of clay, calcium silicate, dense aggregate concrete, lightweight aggregate concrete, autoclaved aerated concrete, natural stone, manufactured stone, mortar for masonry, ancillary components for masonry and associated test methods."

Masonry products are manufactured by a very traditional and extremely large industry. Masonry has a long history, spanning well over 5,000 years. It is used in all construction activities, including infrastructure, industrial, commercial, public and particularly housing. In addition to the obvious benefits of housing the masonry industry is an important provider of employment.

The construction sector in the EU in 2013 was valued at €1,162 billion. Whilst specific data for the value of masonry products are difficult to separate from the general construction statistics for the 27 EU Member States, the manufacturing sector is dominated by Germany, France, UK, Italy, Spain and the Netherlands, accounting for the nearly 75% of production and economic value in Western Europe, and roughly proportionate to population and economic activity.

The sector is dominated by large multinationals, in both brick and block production, similar to that seen in the mortar production sector. Whilst the majority of masonry units (bricks and blocks) are exported widely throughout Europe, traversing Member State borders, products such as mortar tend to be produced and sold in local markets, typically < 50 km from the site of production. Dry bagged mortars are traded and exported widely within and outside of Europe, with significant export markets in the Far East. High value to weight products such as ancillary components are traded and exported worldwide from EU manufacturers.

Masonry products in Europe are governed by the Construction Products Regulation 305/2011, laying down harmonised conditions for the marketing of construction products and repealing council directive 89/106/EEC. CEN/TC 125 standards address the Commission's Mandate M/116 which is derived from that Regulation (and its predecessor Construction Products Directive), and will be used as the technical basis to support commercial transactions and to ensure compliance with the Regulation.

A particular feature of masonry units is their weight to value ratio which can mitigate against long distance export. Export across common national boundaries in mainland Europe is widespread and there is a small, but significant export market for European masonry units to the Far East where they are bought for their quality and style. Dry mixed mortars are also exported in significant quantities within mainland Europe. Ancillary components generally have a higher weight to value ratio and here the export market world-wide is substantial.

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.

Masonry products covered by CEN/TC 125 are:

- masonry units, comprising bricks and blocks;
- mortar, with the exception of site made mortars;
- ancillary components, including ties, straps, hangers, lintels and bed joint reinforcement.

These products are manufactured by a very traditional and extremely large European industry, masonry construction being important in satisfying a basic need for providing buildings in which people can live and work. The market for these basic products has seen significant fluctuations over the years and is to a great extent a barometer of a country's prosperity and growth.

Masonry products in a large part of Europe come under the aegis of the Construction Products Regulation 305/2011, laying down harmonised conditions for the marketing of construction products and repealing council directive 89/106/EEC, and it is in response to European Commission Mandate M116 deriving from that regulation, on which the CEN/TC125 work programme is based. The standards in that work programme are used as technical bases to support commercial transactions, as well as meeting the needs of the regulatory authorities.

The costs for energy, manpower and new facilities influence the profitability of the European masonry industry.

Owing to the large size of the industry, the sector is important for employment. Increasing needs of the market concerning cost and quality require continuing improvement of equipment and processing in the masonry products industry. These technical influences will also affect standardization, particularly with respect to the revision of European Standards in order to mirror the state of the art in a traditional industrial sector with a widely varying product range.

This variation is due to different geological/climatic conditions within the EU and the many traditional practices, which in turn are linked to the intrinsic characteristics of local and regional sources of raw materials and this has to be recognised in the standardization process. For example, in regions bordering the North Sea cavity construction (involving a facing outer leaf and blockwork inner leaf) tends to predominate; in central European countries rendered masonry often constructed in vertically perforated units is common, whereas in Mediterranean areas the tradition is for horizontally perforated units to be used.

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.

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Spain and the Netherlands, accounting for the nearly 75% of production and economic value in Western Europe, and roughly proportionate to population and economic activity.

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2 BENEFITS EXPECTED FROM THE WORK OF THE CEN/TC

Legal factors are pre-eminent for CEN/TC 125 with virtually the whole of the work programme deriving from the Construction Products Regulation 305/2011 and the mandated requirements of the European Commission (Mandate M116), relating to mechanical safety and health. The product specifications are harmonized standards, addressing the requirements of European Commission Mandate M/116, which enable complying products to be CE marked. This process will aid the completion of the European single market and lower barriers to trade.

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.

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

4.1 Defined objectives of the CEN/TC

To use the best information available and knowledge of European legislative requirements as the basis upon which to formulate and update European Standards for masonry products which satisfy the needs of the marketplace, changing technology and the essential requirements of the Construction Products Regulation. This will include:

- standards for clay, calcium silicate, aggregate concrete, autoclaved concrete, manufactured stone and natural stone masonry units;
- standards for masonry mortar and rendering and plastering mortar;
- standards for ancillary components for masonry, including ties, straps, hangers, brackets, lintels and bed joint reinforcement;
- standard test methods for masonry in support of European masonry construction codes;
- in conjunction with CEN/TC 241 and under the authority of CEN/TC 125, standards for the selection, design and application of external rendering and internal plastering.

The standards to be produced by CEN/TC125 will help maintain the level of quality of products traded in Europe for given intended uses.

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

CEN/TC 125 has developed a range of product specifications and associated, but separate, test methods which as far as practicable:

- are common to more than one product;
- have taken into account other test methods and apparatus relating to similar products.

Product specifications and associated test methods are initially prepared and developed by TC 125's Working Groups and Task Groups. Nearly all of the test methods and all of the product specifications relating to the EC mandated work have been published. The process is overseen by CEN/TC 125 acting generally in a management and policy capacity. The reason for this is the inter-dependence of the products which together form masonry, their wide variety in material and form and the need to minimize diversity. In a similar role a smaller co-ordinating group of CEN/TC 125 comprising representatives of each country meets more frequently to deal with immediate matters. This reduces costs to CEN Members. As much work as practicable is conducted by correspondence.

All meetings, by common consent, are conducted in English.

The structure of the TC, CG, WGs and TGs will be reviewed from time to time to suit the requirements of the work programme. The current structure reflects the wide product variation, with 6 WGs and 2 TGs.

CEN TC 125 liaises with a number of other CEN TCs via documentation transfer or by direct representation, each as appropriate.

4.3 Environmental aspects

In line with the CEN policy on addressing environmental issues in relation to product standards, CEN/TC 125 recognises the need to consider any potential impact resulting from the use of masonry products in construction and the potential for impacts on the environment in use. To these ends CEN/TC 125 is committed to addressing these potential issues in the development and production of associated masonry standards.

Currently, CEN/TC 125 has 2 TGs, one looking into the reporting of Regulated Dangerous Substances, and in particular the release to soil, surface and groundwater from masonry products, as well as the release of substances into indoor air. This TG is shortly to be converted to a WG in order for wider consultation and participation of representatives and the process of drafting guidance into the next revision of the product standards.

The second TG is focused on the development of guidance to be included in future product standards in respect of the development of Product Category Rules (PCR), to enable manufacturers to make Environmental Product Declarations in compliance with EN 15804.

In order to maintain the most up to date understanding of the development within these areas, the TC has active representation within CEN/TC 350 'Sustainability of construction works' and CEN/TC 351 'Construction Products - Assessment of release of dangerous substances' that feed back information in respect of current activities of these standards committees.

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

With the implementation of the standards currently underway, their significance and importance to the industry at large should ensure that industry provides the necessary resources for future participation and maintenance of the CEN/TC 125 suite of standards. Future participation in EN standards amendment and revision work could be quite intensive. In 2014, 85 standards have been published and 20 standards are being revised following the systematic review. The replacement of the Construction Products Directive with the Construction Products Regulation 305/2011 will require all TC 125 standards to be revised in accordance with the new Regulation.