

BUSINESS PLAN

CEN/TC 246 NATURAL STONES

EXECUTIVE SUMMARY

Business Environment

Natural stones and agglomerated stones are used in flooring, cladding, vanity and kitchen tops.

The parties involved are natural stones industry and agglomerated stones industry, operators of the various application sectors and consumers.

Benefits

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.

31 standards were adopted for natural stones;

17 standards were adopted for agglomerated stones.

Priorities

To make European standards available on natural stones and agglomerated stones related to:

- terminology,
- test methods,
- products,

which may be placed on the market only if they are suitable for a given intended use that is they satisfy the essential requirements of the Construction Products Regulation 305/2011 (CPR)

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 centres 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 246 is one of several CEN technical committees involved in the preparation of technical specifications supporting the Construction Products Regulation 305/2011 (CPR).

All the considerations made for natural stones are applicable to the market of agglomerated stones, so that WG 4 will carry out the same activities of CEN/TC 246 concerning market environments.

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:

Definite information is not something you can say about the dimensional stone market, which in too many countries, some of which are even very important for this industry, does not receive the attention it deserves. However, apart from figures, the latest picture of the trends and quantities of production volumes show unquestionable signs of a definite, clear growth, especially in some areas that are newcomers to the industry economy. The consumption that followed the growth of the building and housing market in many recently-developed countries has boosted the production of materials, and the same reasons as those that produced the more general economic development of such countries as China have benefited the sector through a range of competitive factors of local progress that ended up sweeping away the old productive scenario of ten years ago. In brief, we are witnessing a double course of progress: on one side, a general economic development that boosts the housing market and with it the use of stone, on the other side a development of the industry, backed up and promoted by the investment plans of the local governments, which increases wealth creation and economic progress in large areas of the world. This leads to more production at lower costs, with better and better value for money, which is also involving the traditional consumer markets, changing their habits and supply. Quarried materials thus saw their total figures dramatically increase, as confirmed over the year.

The international trade has grown in proportion to the growth of production, even if local stone consumption is increasing by at least as much. In any case, the importance of the sub-continental trade areas is increasing, for instance the European Union, the Middle East, the south-east of Asia and the American continent, both the north and the south.

Production facilities of agglomerated stones are today distributed all around the world. In Europe several plants are present since a long time in Portugal, Spain, Germany and Italy, while new productions started up in recent years from developing countries such as Czech Republic, Bulgaria, Romania and Turkey. Outside Europe elevated productions come mainly from Middle East (Israel), Far East (China, South Korea and Taiwan) and North America (United States and Canada).

Agglomerated stones market follows of course the trend of natural stones, and all the considerations related to situation of the natural stones can be applied also to the agglomerated stones. Anyway agglomerated stone products are purchasing always more relevant positions on the market, and this trend seems to be continuously growing up. In fact, the international situation has changed over the past year, when only the European countries were interested to the application of these products in alternative to natural stones and ceramic tiles. Today the distribution of the final product is generalised and applications are present worldwide.

2 BENEFITS EXPECTED FROM THE WORK OF THE CEN/TC

The European standards worked out of TC 246 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.

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, adjusting the work programme as necessary to the needs of the market and in response to the mandates given by the EC.

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

The first priority for the work of CEN/TC 246 is, at present, the completion of standards supporting the Construction Products Regulation 305/2011 (CPR), in which TC 246 is heavily involved with three harmonized standards on product specification for natural stones and two for agglomerated stones and several supporting standards on test methods in its work programme. The organisation of the work of TC 246 has been established following a simple criterion: WG 1 was given the task of preparing standards on terminology, classification and characteristics of natural stones; WG 2 was charged with test methods, WG 3 was entitled to prepare the product standards and WG 4 was given the task of preparing standards on agglomerated stones.

The work of CEN/TC 246 is carried out taking into consideration other CEN/TCs dealing with stone based materials such as:

- CEN/TC 125/WG1/TG6 "Natural stones for masonry";
- CEN/TC 178/WG2 "Natural stone paving units";
- CEN/TC 128/SC8 "Stones for roofing";
- CEN/TC 154/SC4 "Armourstone";

cooperation is established with:

- CEN/TC 339 "Slipperiness".

Informal contacts with the relevant committee of ASTM have also been established.

4.3. Environmental aspects

TC 246 works to promote the sustainable use of natural stones and agglomerated stones understanding the environmental impact of entire life-cycle. Construction works must be designed and built in such a way that they will satisfy also the basic requirement of sustainability. In this way TC 246 will work in order to provide a common tool for environmental policies and business decision taking into account the following path:

- Quarry life cycle. Sustainable development must be integrated in the design and management over the life cycle of quarry from exploration to post closure.
- Asset life cycle. Optimization in terms of sustainable development performance of the manufacturing facility.
- Product life cycle. The product's full life cycle: from the extraction of resources, through production, use, and recycling, up to the disposal of remaining waste and consequences of products on economies, environment and social systems.

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 completed in an acceptable period of time. The lack of interest in the standardisation process of a part of this sector is the cause of lack of funding and expertise which can result in delays.