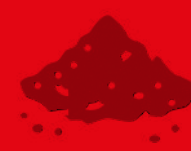


THE SECRET INGREDIENT

At the most basic level, ceramics require four fundamental ingredients

WATER, AIR, EARTH AND FIRE



But there is a “hidden” component, one that is almost invisible but present in European and Spanish ceramics.

A distinctive feature, which makes the process of creating European ceramics special.

This **SECRET INGREDIENT** is **RESPECT**

Each and every piece of European and Spanish ceramics is made with...

**RESPECT FOR
PEOPLE**

**RESPECT FOR
CUSTOMERS**

**RESPECT FOR THE
ENVIRONMENT**

**RESPECT FOR
IDEAS**

RESPECT FOR THE ENVIRONMENT

European manufacturers' pieces comply with strict quality and sustainability standards, implementing the latest available technologies to improve energy efficiency and reduce environmental impacts, demonstrating a commitment to efficient resource use throughout the production process and reusing materials. Some widespread measures in the European and Spanish ceramics industry include:

01 **Replacement of energy vectors with those which produce fewer emissions in the stages where it is technically feasible:** use of electricity from renewable sources, electric vehicles, high-efficiency cogeneration, natural gas in kilns, etc.

02 **Life cycle analysis (LCA)** to optimise manufacturing processes and guide companies in the reduction of environmental impacts throughout the product life cycle.

03 **Implementation of voluntary eco-labels such as DAP**, which offer precise and transparent information about the environmental impact of a product throughout its life cycle.

04 **Residual heat recovery from kilns** for use in other stages of the process.

05 **Use of ever more efficient burners and kilns, and high-efficiency cogeneration systems** which provide 20% savings on primary energy.



06 **Reuse of sludges and aqueous suspensions**, drastically reducing water consumption, recycling and reusing 100% of wastewater in a closed cycle and achieving zero discharge.



07 **Reuse of 100% of clay waste** before firing and recovery of a large proportion of fired shards.



08 **Exhaustive dust emissions control** in the storage and transport of raw materials.



09 **A growing number of companies** with ISO 17889-1 certification.



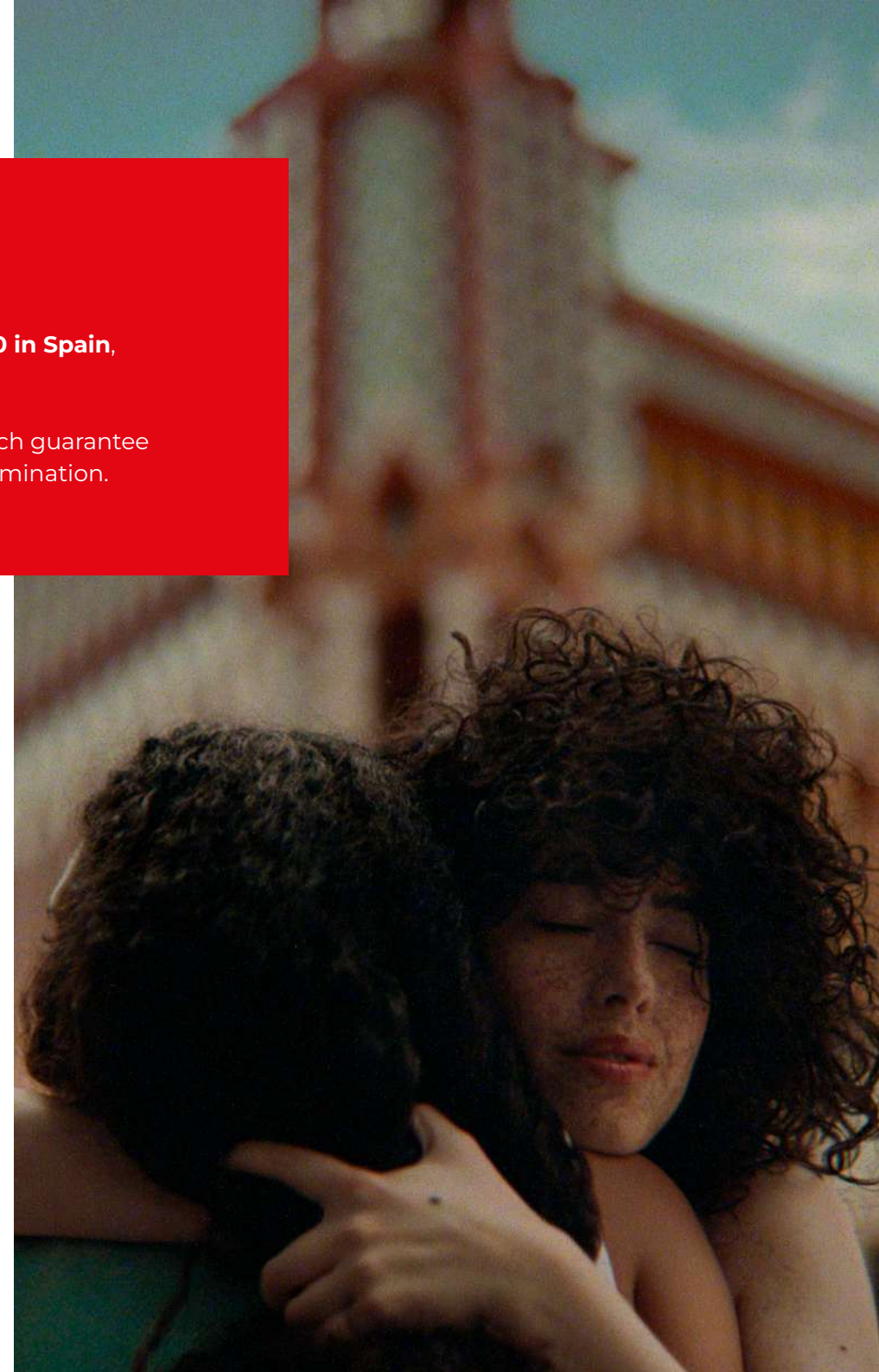
10 **Drastic reduction in material usage** thanks to the use of digital printing.



RESPECT FOR PEOPLE

The European ceramic tile manufacturing industry accounts for over 48,000 direct jobs, 15,000 in Spain, and it is estimated that for every direct job, three to four indirect and induced jobs are created.

This industry operates under strict labour regulations established by the European Union, which guarantee fair working conditions and health and safety, as well as promoting gender equality and non-discrimination.



LABOUR REGULATIONS

All EU countries have their own regulatory framework aligned with EU labour laws, meaning that the industry has regulations such as **the worker's statutes** in Spain (Estatuto de los Trabajadores), which govern fundamental aspects of employment:

- ◆ Contracts, working time, leave, holidays, grounds for suspension or termination of contracts and union rights.
- ◆ Furthermore, sectoral collective bargaining agreements negotiated between companies and unions set the salaries, specific working time and other conditions specifically applicable to the industry. Other laws such as the **Social Security Law** also guarantee rights such as disability or retirement benefits, and there are additional regulations covering specific labour situations.



OCCUPATIONAL RISK PREVENTION

The European ceramics industry strictly follows the rules imposed by the European Union, assessing and mitigating possible risks to employees. In Spain, the **Occupational Risk Prevention Law** and other regulations ensure high safety standards, supervised by the Labour and Social Security Inspectorate. Some of the most widespread measures in the industry for protecting the health and safety of its employees are:

- ◆ **The mandatory use of PPE** (personal protection equipment) such as safety boots, heat- and cut-resistant gloves, earplugs, and masks.
- ◆ Physical protection elements such as **safety barriers**.
- ◆ **Technological protection elements** such as photocells or laser sensors.

HIGH LEVEL OF TECHNIFICATION AND TASK AUTOMATION

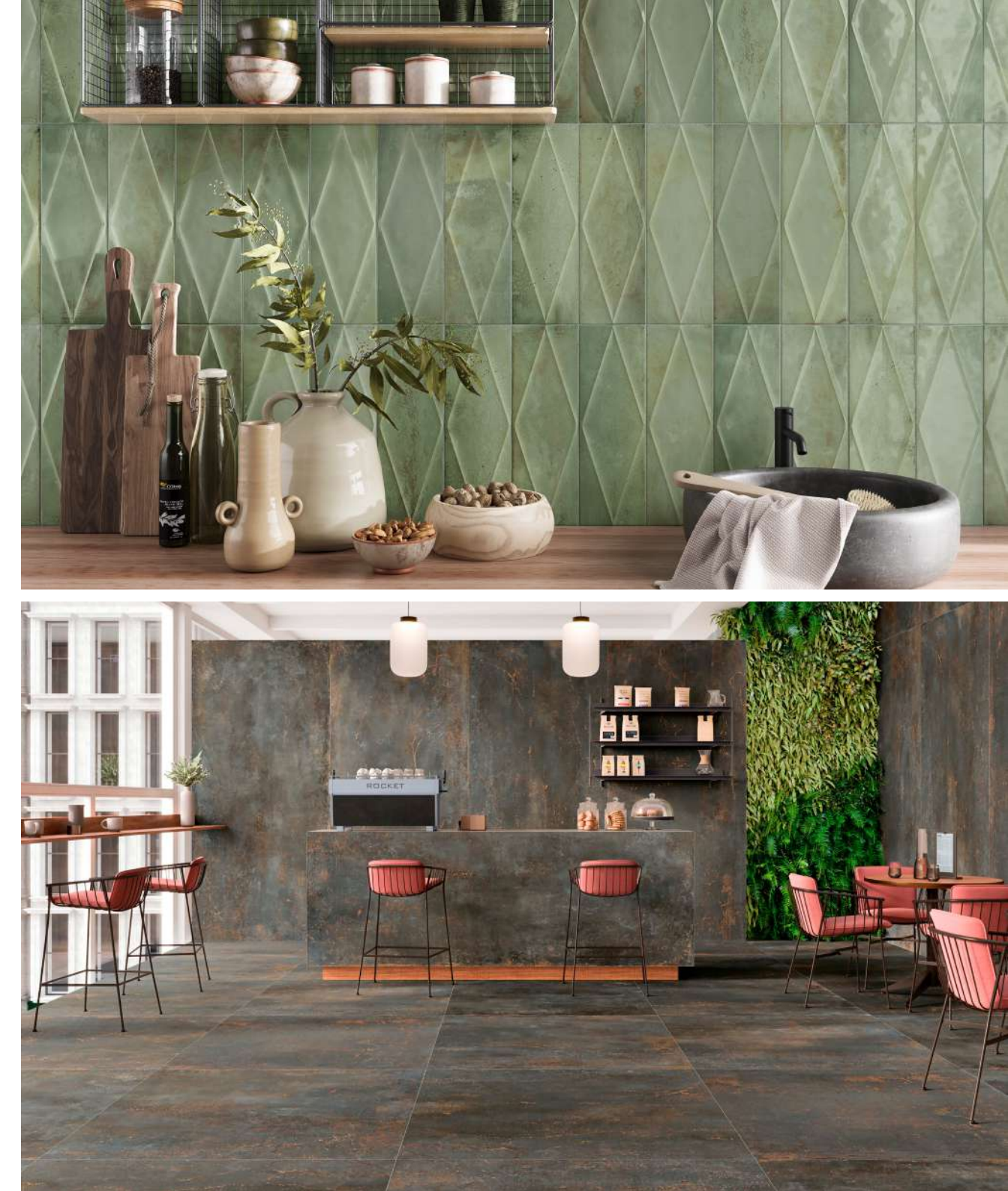
Looking after and facilitating the activities of workers is one of the main priorities of the industry. Which is why it shows a constant commitment to innovation, adapting production processes and implementing new automation and digitalisation technologies to significantly



reduce physical exertion, meaning workers are fundamentally engaged in control and supervision tasks.

SPECIFIC ONGOING TRAINING

There is an extensive high-level training ecosystem for professionals who want to specialise in the industry. This includes university studies specialising in areas such as chemical engineering, industrial engineering, design and commerce, as well as vocational training courses aimed at better educating the professionals of the future. Ceramic clusters such as the ITC (Ceramics Technology Institute), promote innovation and knowledge transfer among companies in the industry.



RESPECT FOR IDEAS

The European ceramic wall and floor tile industry is a world leader in technological development, design and quality, driven by strong investment in research development and innovation (R&D+i). The industry's capacity to anticipate, along with its versatility and adaptability, allow it to stand out and position itself globally, with a third of its production exported outside Europe.

The European sector creates synergies of innovation with all members of the ceramics cluster, providing the knowledge and data that allow companies to permanently remain at the forefront of the latest technological advances and design trends.

The main technological developments applied in the ceramics industry originated in Europe. One example is the development of digital ceramic printing technology, which emerged in Spain and represented a paradigm shift in the manufacturing process and the generation of ceramic designs.





RESPECT FOR CUSTOMERS

The companies of the European ceramics industry deeply appreciate their relationships with their customers, treating them more like partners than just buyers and striking up long-term dealings. This commitment to customer satisfaction translates to:

01 Investments in promotional tools, such as display stands and samples, to improve the visibility of their products in their customers' retail outlets, helping them with their final sales.



02 Organising training for their distributors' sales networks, providing training on products and new developments, sales techniques, market trends and the use of support tools. With this, they seek to help distributors offer better recommendations to their customers and ensure satisfaction with the end product.



03 Advising and supporting customers such as construction companies and architectural studios to ensure that products are used correctly in accordance with the project specifications.





RESPECT: THE SECRET INGREDIENT IN EUROPEAN CERAMICS