



FEDERATION EUROPEENNE & INTERNATIONALE
DES INDUSTRIES DE LA PIERRE NATURELLE

EUROPEAN & INTERNATIONAL FEDERATION
OF NATURAL STONE INDUSTRIES

MARMO+MAC
24/27 SEPT 2024 VERONA ITALY



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General Assembly

Friday, 27/09/2024, 10.30 h

Minutes

1) Welcome: The President could welcome the delegates from all over Europe. Even our old friend from Prague, Jiri Holec, took the trouble to travel to Verona and delighted the meeting with his presence.

2) In memory of Ragnar Kjserud (Norway) and Chris Kelsey (UK)

The delegates honoured the two personalities lost for the European stone family. Jane Buxey regretted the tremendous loss for the stone federation.

3) The President: Hermann Graser

Among the many initiatives Euroroc undertook within the industry panel in Brussels together with partners the President emphasized the importance of load bearing construction with natural stone.

4) Report from Member federations: the economic situation in volatile times

Developments in the member states are largely dependent on the situation in the construction industry. However, there is a wide range between the member states. While solid growth can be observed on the Iberian Peninsula, countries such as Germany and Austria are not experiencing positive development in the construction sector. For example, the construction industry in Spain showed dynamic growth in 2024. Infrastructure and residential construction in particular are experiencing a tailwind from subsidies. At 4 percent, construction output in 2024 is growing at around twice the rate of GDP.

Portugal: at 6.7% in real terms, gross domestic product in 2022 recorded the highest increase in 35 years. In 2024, economic growth again exceeded many expectations with an estimated growth rate of more than 3%.

In the UK, the size of the UK construction market is estimated at USD 398.68 billion in 2024 and is expected to reach USD 466.57 billion by 2029, which corresponds to an average annual growth rate of 3.19% over the forecast period (2024-2029). Increasing construction activity in the country is driving the market.



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A shortage of skilled workers remains a key challenge for the natural stone industry. Across Europe, up to 70% of companies complain of difficulties in recruiting qualified personnel. This not only affects the current order situation, but also poses a long-term risk to the industry's growth.

On average, prices for all construction materials stabilized at a high level over the course of 2024. While some prices (reinforcing steel, glass) fell until December 2024, other products (construction timber, non-ferrous metals) saw an increase. Prices for energy-intensive products (cement, ready-mix concrete) moved sideways. In the natural stone sector, there is strong price pressure on new tenders. Overall, material prices in the natural stone sector are expected to remain stable in 2025 compared to 2024.

Overall, we can speak of a positive sales trend in the natural stone sector, which indicates that demand for natural stone products and services will remain high in 2024, even if inflation-related influences are excluded. Many companies across Europe recorded growth, particularly in the restoration and monument preservation sector.

The interest rate trend on the capital market remains a major problem. According to calculations by the ECB, the interest rate for new mortgage loans in Central Europe has tripled since the end of the low-interest phase. Due to the higher financing costs, this is having a negative impact on yield expectations in rental housing construction, while at the same time posing financing problems for potential homeowners.

For example, the real estate industry in Germany reported that affordable housing construction projects had to be cancelled. As a survey shows, the situation is getting worse. For 2025, it is expected that 38% of the already curtailed new construction plans will not be feasible. More than two thirds of housing companies would no longer be able to build any new apartments at all in 2025 based on the current situation. The natural stone industry is not so negatively affected by these scenarios, as refurbishment and restoration of existing buildings provide a solid counterbalance.

5) Work not only in Brussels:

Soil Monitoring Law:

Joint position from the European non-energy extractive industry
(Aggregates Europe-UEPG, CEMBUREAU, Cerame-Unie, ECGA, EUROGYPSUM,
Euromines, EUROROC, EXCA, IMA-Europe)

21 May 2024

Request:

The non-energy extractive industry calls for the Council to exclude raw material deposits and regulated mining areas from the scope of the Soil Monitoring Law (SML). As emphasised in the Critical Raw Materials Act (CRMA) recently published, it is essential to secure and improve access to domestic raw materials for a resilient and competitive



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EU industry. To respond to the EU demand for raw materials, we extract them from the soil and bedrock, and then we restore the land after our operations in full compliance with the conditions of the permit. The restored land is in good health and its final destination is usually agriculture or natural area with restored ecosystems.

Concretely, we recommend amending the soil definition (Article 3 paragraph 1 point 1) and soil destruction (Article 3 paragraph 1 point 17) as follows:

(1) "soil" means the top layer of the Earth's crust situated between the bedrock and the land surface, which is composed of mineral particles, organic matter, water, air and living organisms, excluding raw material deposits and regulated mining areas;

(17) "Soil destruction" means the destruction of soils by mining, quarrying, landscape modelling, materials disposal or construction, preventing them from delivering ecosystem services other than raw material supply and water infiltration in sub-soil.

Justification:

The first proposal corresponds in the first part (excluding raw material deposits) to amendments 217 and 266 adopted in the EP plenary on 10 April 2024 and the second part (and regulated mining areas) to amendment 245 by MEP Hildegard Bentele. Without this amendment, the raw materials stored in the ground itself (as well as the surrounding rock and soil layers) would be defined as "soil". Consequently, the extraction of raw materials would be categorised as "soil degradation" and would therefore no longer be permissible in the future. It contradicts the Critical Raw Materials Act recently adopted, making access to deposits even more difficult and thus jeopardizing the supply of raw materials in the EU.

In the second proposal, the reference to 'mining, quarrying' should be removed. In mining and quarrying, (top)soil shall be disposed apart in very specific conditions to maintain the organic life and ecosystem. It is acknowledged as a valuable material for the restoration projects.

Therefore, it should be clarified in the Council's position that raw materials deposits and regulated mining areas are not soils within the meaning of the Directive and therefore not within the scope of the Soil Monitoring Directive likewise, mining and quarrying activities do not destroy soils, as otherwise raw material extraction would be restricted, which is certainly not the intention of the EU Commission or the European legislator. In view of the upcoming Council Working Party on the Environment meetings and the General Approach scheduled for 17 June 2024, where the dossier will be discussed at both technical and political levels, we encourage you to take into account our above requests.

The Cash and Financial Report 2024 of Euroroc is available to the member federations.



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6) NEEIP meetings Brussels

1. Access to Resources
 - a. Implementation of the Critical Raw Materials Act
 - b. Implementation of the Net Zero Industrial Act
 - c. Future Commission Raw Materials Supply Group meeting?
 - d. Role and activities of The Essential Raw Materials Coalition
2. Taxonomy & Sustainable Finance criteria
 - a. Use of raw materials (circular economy, climate change adaptation)
 - b. Restoration of extraction sites (biodiversity)
 - c. Extraction (biodiversity, climate neutrality)
3. Environment
 - a. Implementation of the Nature Restoration Law
 - b. Implementation of the Industrial Emissions Directive
 - c. Impact of the EU Soil Health Law
4. Circular Economy
 - a. Revision of the Waste Framework Directive (focus: food waste & textile)
 - b. The potential of backfilling and mining waste
 - c. EU and national End-of-waste criteria

7) Fake names – not only “Milano”

<https://www.stone-ideas.com/103708/schweden-keramikfirmen-falschen-natursteinnamen/>, <https://www.stone-ideas.com/103727/sweden-fake-stone-names-for-ceramic-tiles/>.

Tile companies there have marketed their products under local natural stone names / Also “Jura” is used as fake

Sweden’s Natural Stone Association (Sveriges Stenindustriförbund) is fletching its teeth at counterfeiter from the ceramics industry.

There is a particularly perfidious way of misusing the name of local natural stone there, initiated by the company Bricmate: in September 2020, it launched a product on the market called “granite ceramics,” for which it had the name Norrvange protected.

Norrvange, however, is a place in Sweden where a family business has been extracting the famous limestone with the same name from the mountain for generations.

This kind of consumer deception has never been seen anywhere else in the world. Just imagine: A manufacturer of ceramics from Italy would have the name “Carrara tiles” protected for its products.

It is curious that the authorities in Sweden agreed to Bricmate’s request in the first place. Things are now gathering momentum in Sweden in two respects.

Firstly, there are other ceramic manufacturers who are following the same path as Bricmate, for example the company Stenbolaget. It has named its ceramics after a whole



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series of place names, such as Borghamn, Alböke, Kolmården and Offerdal. All of them stand for local natural stone in Swedish and are very well known.

The limestone quarried in Kolmården is even included in the list of Geoheritage Stones. These are natural stones from all over the world that have found and continue to find significant use in their home country and beyond.

“Jura“ is another name that Stenbolaget has given to its ceramic tiles.

As with Bricmate, the Swedish Natural Stone Association has now also made representations to the culprit, Stenbolaget. Its founder and CEO, Johan Gustafsson, used windy arguments: Stenbolaget wanted to prevent “other ceramic suppliers from selling their inferior products under this name. We are not the first and will surely not be the last to use granite ceramics with brand protection. That is why protection seems necessary.“

In addition, the company also has genuine natural stone in its product range, says the company boss: it is enriching for the customer to find the various products with their names right next to each other.

Kai Marklin, head of the Natural Stone Association, vehemently disagrees: one and the same name for two completely different products is a deliberate misleading of the customer.

He reports cases where ceramics with Swedish names have already been brought onto the market in Sweden, although they actually came from southern Europe.

Things are also gaining momentum: such name fraud will soon end in the European Union. This is because the Geographical Indications Protection (GI) are in force since November 2023 (transition period expected to last until December 2025), and such misuse of geographical names will be banned.

However, natural stone companies or associations must go through the protection procedure. We had reported on this.

Examples from France show that it is feasible for the natural stone side.

They also show that such protection has a rapid effect on the other side: in the case of the French limestone Pierre de Bourgogne, the association had persuaded the name falsifiers to give in simply by warning them of legal action.

8) Environmental Products Declaration

Examples from UK: Albion Stone and Portland Stone



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9) **Stone-Ideas**.com (Peter Becker)

Report about the research and the broad information basis of industry related issues.

10) Presidency – New term to begin

The General Assembly voted unanimously for Hermann Graser as president for another year up to the next General Assembly in 2025 in Verona. Reason: The death of the potential successor of the stone federation and important ongoing projects in respect of load bearing stone in the EU. The delegates thanked Mr. Graser for his willingness to continue in office.

11) Miscellaneous and date of next meeting

Next meeting: Friday, 26.09.2025, 10.00 h in Verona