



ACTIVITY REPORT 2009-2010:  
**A SUSTAINABLE BUILT  
ENVIRONMENT FOR EUROPE**

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# PRESIDENT'S MESSAGE



Eurogypsum has celebrated its 50th anniversary in 2010. Eurogypsum was created at the same time as the European Parliament and European Commission was born. We have shared a long road and the Gypsum Industry has played an essential role in partnerships with European institutions.

In the foreword to the Eurogypsum's 50th anniversary book, the Austrian MEP Paul Rübiger said "In the 50 years since its founding, Eurogypsum has made a great contribution to technological development in construction. The gypsum industry companies will continue along this path working together through their Federation. I'm convinced of their commitment".

For many years, the European Gypsum Industry has been addressing the life-cycle impacts of its processes, products and systems for enhancing a pleasant, healthy and comfortable environment. The European Gypsum Industry has thus achieved significant results benefiting the environment and society as a whole: extracting in a sustainable way, rehabilitating quarries, enhancing biodiversity, reducing and recycling gypsum production and construction waste.

With the principles of sustainable construction, we focus on wider criteria: reduce, reuse, and recycle resources; protect nature in all activities; apply life cycle economics in decision making; and thus create a quality built environment to name a few quality aspects: aesthetics, durability, maintainability, comfort.

In recent years, Eurogypsum has been taking the necessary measures to improve the gypsum demolition waste management, in order to reach the 70% target for recycling, re-use and material recovery of construction and demolition waste.

Another essential task for society and for Eurogypsum is to promote energy efficiency in construction. This solution is advantageous in the energy efficiency upgrade of old buildings with preservation of façade. It enables the owners to renovate their own apartments in a building block without the need of collective decisions. The inside insulation reduces heat loss by up to 60%, improves the thermal comfort in the home and may serve as a noise barrier.

Gypsum is obviously a very exciting material, the magic mineral transformed into plaster and indefinitely recyclable.

Sustainable construction is a key opportunity for the Gypsum Industry. Its promotion will be the core objective of my presidency.

**Bernard Lekien**  
Eurogypsum President

# ABOUT EUROGYPSUM



## THE EUROPEAN GYPSUM INDUSTRY

Founded in 1961, Eurogypsum is the European federation of national associations of gypsum products manufacturers. Their annual turnover is around 10 Billion Euro.

The European Gypsum Industry represents around:

- ▲ 160 quarries;
- ▲ 100 plasterboards plants;
- ▲ 65 plaster powder plants;
- ▲ 15 blocks plants;
- ▲ 8 gypsum fibre boards plants;
- ▲ 30 gypsum ceiling tiles plants ;
- ▲ around 15 million tons of FGD Gypsum production – synthetic Gypsum produced through the desulfurisation process of the Coal Power Plant Stations –

We provide direct employment to 28,000 persons and indirectly to 85,000 persons (plasterers and plasterboard erectors).

The European gypsum market for plasterboard is a highly concentrated market. We have three main players operating worldwide with European know-how.

SMEs are very active in building plaster, Gypsum ceiling tiles and gypsum blocks, mainly in Spain. R&D investments have also been carried out in the field of plasters and ceilings, giving exceptional results and innovative products.

## EUROGYPSUM VISION FOR A SUSTAINABLE EUROPEAN BUILT ENVIRONMENT

The European Gypsum Industry contributes to the quality and sustainability of Europe's built environment by offering the best interior building solutions.

These products and solutions are:

- ▲ Safe and healthy;
- ▲ Achieving performance with the best environmental footprint;
  - Products are 100% recyclable;
  - Produced with natural and synthetic raw material in a life cycle thinking perspective;
  - With a high discipline in quarry rehabilitation and biodiversity preservation.
- ▲ Most aesthetically pleasing (including comfort and well being);
- ▲ Most technically competent solutions for fire, acoustics, thermal and structural integrity –impact resistant-;
- ▲ Easy to use, to install and to dismantle;
- ▲ Most economic.

## EUROGYPSUM VOCATION IN EUROPE

**Anticipate industrial changes for a sustainable construction.**

**Adapt to those mutations with win-win policy solutions in constant dialogue with the EU Institutions.**

Our main assignment consists in promoting a sustainable built environment for Europe thanks to the environmental, social and economic credentials of gypsum products and solutions.

We fill in this purpose by:

- ▲ Contributing to a sustainable European policy framework towards a green growth with high environmental, social and economic standards;
- ▲ Shaping opinion through position papers, industry best practices and initiatives;
- ▲ Supporting EU legislation with EU funded projects;
- ▲ Developing collaborative networks with relevant stakeholders.

## EUROGYPSUM COOPERATION WITH EU STAKEHOLDERS

- ▲ Created in 1961, registered in Belgium as an AISBL (International Non-Profit Association);
- ▲ Membership: Gypsum national associations in 15 countries and 5 associate members companies;
- ▲ Associate member of CEPMC (Council of European Producers of Materials for Construction);
- ▲ Member of NEEIP (Non-Energy Extractive Industry Panel);
- ▲ Member of the REACH Alliance.

## EUROGYPSUM CONTRIBUTION TO THE EU POLICIES

- ▲ Member of the Raw Materials Supply Expert Group (RMSG) convened by DG Enterprise;
- ▲ Member of the Working Group on Groundwater convened by DG Environment;
- ▲ Partner of the Build up initiative: <http://www.buildup.eu/>
- ▲ Member of the “European Business Advisory Group” for “the European Platform on Life Cycle Assessment” convened by the JRC-Institute for Environment and Sustainability;
- ▲ Member of the European Parliament Forum for Construction (FOCOPE) <http://www.focope.eu/>.
- ▲ Partner of Countdown 2010: <http://www.countdown2010.net/>

**FOCOPE**



# EU POLICIES FOR RAW MATERIAL

## A. EU RAW MATERIAL INITIATIVE (RMI)



### 1. Securing Sustainable Access to Raw Materials within the EU



Access to mineral resources within the European Union is a concern of the European non-energy extractive industries and in particular of the European Gypsum Industry as it implies significant financial investments, extremely heavy, long and expensive administrative permitting procedures, continuous and sometimes arduous dialogue with the local communities.

Within that context, the European Gypsum Industry welcomes and actively supports the Raw Material Initiative launched by the European Commission in 2008.

The European Gypsum Industry key objectives to develop sustainable extraction in the EU include:

- ▲ Effective national land-use planning policy allowing the regular supply of raw material,- including in Natura 2000 areas-, and avoiding excessive urbanization that might disrupt this regular supply;
- ▲ Effective dialogue with the local communities leading to a mutual comprehension on the real benefits of extraction for the EU economy and society;
- ▲ Promotion at national level of a one-stop-shop system covering all environmental assessments in one single process and linking the national authorities involved in a permitting procedure.

## 2. Minerals Criticality



The critical characteristics of specific minerals (among others Gypsum) have been analyzed in a report published in July 2010. This report defines 14 metal raw materials as critical at EU level (reason: high supply risks due to high share of the worldwide production and low substitutability and recycling rates).

Eurogypsum grants merits to the report and considers the methodological approach well founded.

Although raw gypsum has not been classified as critical at European level, it is still critical in some local areas, where the recourse to alternative solutions would have a significant impact on logistics and therefore on carbon footprint. According to the political and social environment and to EU internal supply facilities, construction minerals might be considered as critical. As the list of critical minerals is reviewed every 3 years, a reassessment of the construction minerals can then be carried out.



## B. BIODIVERSITY STEWARDSHIP - HOW QUARRYING BRINGS BENEFITS TO ECO-SYSTEMS AND LOCAL COMMUNITIES



The UN declared 2010 the International Year of Biodiversity (IYB). The European Union is also committed to the protection of biodiversity having a political engagement to halt biodiversity loss within the EU by 2010.

Biodiversity is an all encompassing term to describe the variety of all life and natural processes on Earth. The Convention on Biological Diversity defines biodiversity as “the variability among living organisms from all sources [...] this includes diversity within species, between species and of ecosystems” (Article 2, CBD).

Eurogypsum has moved from words to actions and performances in this most far-reaching field.



The European Gypsum Industry Objectives for a Sound EU Strategy on Biodiversity are

**a. Combining Ecology and Business Needs in a Sound Scientific Way**

A common misconception is that active quarries are noisy, dusty and sterile places where native plants and animals are absent. In reality, many quarries provide wildlife heavens in areas where biodiversity is otherwise limited by other forms of land-use such as intensive agriculture.

In the field of nature conservation and quarrying, the European Gypsum Industry supports rational evaluation over preconception by facilitating comprehensive and sound scientific fundamentals and applied research combining ecology and business needs.

**b. Recognizing the “Acquis” of the Non-Energy Extractive Industries in enhancing positively Biodiversity in Quarries**

The brochure on biodiversity in gypsum quarries published in 2010- during the international year of biodiversity- demonstrates that quarrying has a positive environmental impact on the eco-systems increasing biological diversity during and after use of the quarry.

Eurogypsum will enhance cooperation activities with the Non-Energy Extractive Industries for measuring quantitatively and qualitatively the results already obtained and realizing the full scientific potential of creating biodiversity in quarries.

### C. EMISSIONS TRADING SCHEME (ETS)



The Directive 2003/87 of the European Parliament and of the Council establishing a scheme for greenhouse gas emission allowance trading within the Community, in respect of the Kyoto Protocol's project has been adopted on 27 October 2003.

The Directive has been reviewed in 2008 to improve and extend the scope of the greenhouse gas emission allowance trading scheme of the community. In this revision was included the drying or calcination of gypsum or production of plaster boards and other gypsum products, where combustion units with a total rated thermal input exceeding 20 MW are operated.

The Directive entered into force on 23 April 2009.

Eurogypsum seriously considered its inclusion in the list of sectors and subsectors which are deemed to be exposed to a significant risk of carbon leakage. After due consideration, Eurogypsum reached the conclusion that although the ETS will result in significant costs to the Gypsum Industry, these do not represent for the time being a quantitative case for carbon leakage as defined by the Commission. Eurogypsum members will therefore comply with the directive as it has been adopted by the European Parliament without applying for a carbon leakage case.

Eurogypsum dedicated time and efforts on the benchmarking methodology for the transitional free allocation of allowances (2013-2027). According to the Directive, each installation could emit a certain number of tonnes of CO<sub>2</sub>, 80% of them being allocated free of charge. This percentage will drop to 30% in 2020 and 0% in 2027.

After a constructive dialogue with the Commission services during 2009 and up to June 2010, Eurogypsum produced the benchmark curves and the required sectoral "rule book" governing the benchmark methodology for Gypsum in June 2010.

# SUSTAINABLE CONSTRUCTION: OUR AMBITIONS



The shift of the construction industry towards a path parallel to the overarching sustainable development movement is what we call sustainable construction. This effort addresses the entire life cycle of buildings: their planning, design, construction, operation, modifications, renovation, retrofit, and ultimate disposal. According to the Conseil International du bâtiment, sustainable construction could be defined as: “the creation and operation of a healthy built environment based on resource efficiency and ecological principles”.

Gypsum is virtually indispensable for the interiors of homes and offices and all types of building intended for human use, such as schools, shops, airports, etc. Its superior performance in providing everyday comfort, in fire resistance, and in acoustic and thermal insulation, heralds an ever greater role for it both in the retrofit of existing buildings and in buildings of the future. In fact, the safety and protection of people and property against fire, and effective thermal and acoustic insulation of buildings depend, more often than not, on the unique properties of Gypsum. Gypsum also equilibrates humidity and heat peaks. It is indeed capable of storing humidity when a room is humid and automatically releasing this humidity if the indoor air becomes too dry.

## A. SUSTAINABLE ENERGY ECONOMY: INSIDE INSULATION

### 1. Background of the EU Policy on Energy Efficiency in Buildings

Reducing energy consumption and increasing energy savings are among the main goals of the European Union. The Commission will publish a revised energy efficiency action plan in March 2011 to meet its 2020 energy savings target (20% of current energy use should be cut in a cost-effective manner by 2020). Buildings, which account for 40% of our energy consumption, will be the focus of the EU's new energy savings plan and are essential to deliver a sustainable energy economy for us to live in, in 2020 and beyond.

### 2. Inside Insulation: a Key Instrument to realize the 2020 Target



According to the European Commission (Energy Efficiency Recast Directive, 2010), 160 to 210 Mt/year CO<sub>2</sub> can be saved by 2020 using advanced techniques and insulation systems to retrofit or build better buildings. These are 4-5% of EU total CO<sub>2</sub> emissions in 2020.

The heat loss by conduction through the solid external walls accounts for 45% of the total heat loss through the envelope of an un-insulated house<sup>1</sup>. Inside insulation:

- ▲ Can reduce **heat loss** by up to 60%;
- ▲ Improves the **thermal comfort** in the home and may serve as a **noise barrier**;
- ▲ Increases **fire resistance** of the walls as well as their moisture and mold resistance;
- ▲ Reduces **carbon dioxide** emissions causing pollution and climate change;
- ▲ Is outstanding when you need to **preserve historical buildings or renovate your house**;
- ▲ Does not need a **building permit**;
- ▲ **Allows renovating your own apartment in a building block without needs of collective decisions.**

Inside insulation is thus crucial to optimize the effectiveness of the Commission current portfolio of energy efficiency policies with a pay-back for both society and the owner.

### 3. Inside Insulation: Key Factors to make it happen



1. In many countries, the typical heat losses in a single family home can be broken down as follows:

Walls	45%
Roof	20%
Floors	13%
Airtightness	13%
Windows and doors	9%

The European Gypsum Industry supports the European Union energy and climate goals. We cannot afford to miss the 2020 energy savings targets and therefore we need now high level political leadership and accelerated actions to secure the 2020 objective by among other measures, driving an ambitious energy efficiency action plan with a strong focus on the refurbishment of the existing building stock.

The European Gypsum Industry demands:

#### **Communication**

Powerful public awareness campaign aimed at citizens, policy makers and professionals to explain the advantages of retrofitting buildings with inside insulation.

#### **Conviction**

Strong commitment at the highest political level at national and EU level to set an ambitious target to effectively retrofit buildings<sup>2</sup>.

#### **Compliance**

Ensure the effective and prompt implementation of existing energy efficiency policies and initiatives.

#### **Cash**

- ▲ Policy makers should set up reliable funding mechanism, i.e.:
  - Use the revenues from the auctioning of ETS emissions rights to provide income to such funding mechanism;
  - Investigate existing and additional tax/fiscal policies as an incentive to adopt energy efficient solutions;
  - Create loan schemes to assist in the uptake of energy efficient measures, especially for buildings with a high upfront cost. These loans could, overtime, be repaid by the borrower in line with the energy savings made.
- ▲ Member States should be encouraged to develop schemes that provide incentives to go beyond the minimum legal requirements for energy efficient measures e.g. for energy efficient retrofits of public buildings, dwellings and social housing, and for ecological new buildings.

2. In the UK, the government (Energy and Climate Change Secretary, 2010) has a stated aim to retrofit the UK's entire housing stock of 26 million homes by 2030

## B. RECYCLING ECONOMICS: RECYCLING GYPSUM CONSTRUCTION AND DEMOLITION WASTE



### 1. Background

The EU has established an ambitious target in the new Waste Framework Directive (WFD) of 70% for the recycling of Construction and Demolition (C&D) waste. Gypsum is only one of a number of C&D wastes, but the European Gypsum Industry is determined to play its part in helping the EU to achieve this target. In the UK, the government (Energy and Climate Change Secretary, 2010) has a stated aim to retrofit the UK's entire housing stock of 26 million homes by 2030.

### 2. Eurogypsum Commitment

Our aim is to promote in real life an ever increasing culture of sustainable production and consumption patterns for gypsum products and systems within the Gypsum Industry and with the relevant stakeholders in the construction chain.

The Gypsum Industry takes advantage of the eternal recyclability of Gypsum to move the construction chain towards a positive environmental footprint.

Enhancing the access to natural resources by developing outstanding C&D waste management will indeed divert C&D waste from landfill applying the waste hierarchy (prevent-reuse-recycle-recover-dis-



pose) in accordance with the life-cycle impact of gypsum products and systems (from extraction until the end-of-life).

### 3. Eurogypsum Efforts

#### a. Waste Prevention: Design for Construction

1. Promotion of an efficient and interactive dialogue with construction site managers for proper storage, handling, sequencing, fixing and finishing of gypsum products and systems;
2. Promotion of demountable and reusable partitions for commercial buildings;
3. Promotion of, whenever feasible, bespoke size boards (plasterboards, fibreboards and blocks).

#### b. Waste Disposal Reduction Measures: Design for Deconstruction

1. Promotion of research and development for the design of gypsum products and systems which ensure that recycling is maximised, i.e. that diversion from landfill is taking place effectively;
2. Promotion of selective deconstruction and sorting among the relevant stakeholders and more particularly the demolition industry;
3. Promotion of research and development for ensuring the proper recycling of gypsum demolition waste;
4. Optimisation of the internal recycled material input capacity of gypsum manufacturing plants.

### 4. Eurogypsum next Steps

The European Gypsum Industry wishes to go forward in reducing the environmental impact of construction at the end of the life cycle, i.e. at the demolition phase of a building or during major renovation of a building.



## C. SUSTAINABLE BUILT ENVIRONMENT

### 1. Life-Cycle Thinking



Eurogypsum carried out in 2009 a European life-cycle assessment on plasterboard. The Life cycle inventory data are available in the Life Cycle Platform data base. This task was accomplished by PE International with the data provided by the European Gypsum Industry.

Please see <http://lca.jrc.ec.europa.eu/lcainfohub/datasetList.vm?topCategory=Systems&subCategory=Construction>

On this basis, Eurogypsum produced an environmental product declaration of plasterboard –explanatory note- in compliance with ISO 14040.

### 2. Green Public Procurement (GPP) Criteria for Wall Panels



The basic concept of GPP relies on having clear, justifiable environmental criteria for products and services, based on a life-cycle approach and scientific evidence base. In the Communication “Public procurement for a better environment” (COM (2008) 400) the Commission recommended the creation of a process for setting common GPP criteria.

The criteria used by Member States should be compatible to avoid a distortion of the single market and a reduction of EU-wide competition. Having common criteria reduces considerably the administrative burden for economic operators and for public administrations implementing GPP.

In 2009 and 2010, the Commission consulted the stakeholders on a set of criteria for 8 new sectors – among others wall panels-. An interactive process between Eurogypsum and the Commission took place which was finalized in July 2010 with the publication of the technical report and of the product sheet of wall panels.

Please see: [http://ec.europa.eu/environment/gpp/second\\_set\\_en.htm](http://ec.europa.eu/environment/gpp/second_set_en.htm)

### 3. Calcium Sulphate Consortium REACH Registration



As from 2009, Eurogypsum has set up and coordinated a consortium to provide a joint submission dossier for Calcium Sulphate –EINECS 231-900 3-CAS 7778-18-9.

The consortium consists as of 2010 of 260 legal entities. The common registration dossier was submitted on 10 May 2010 by the Lead registrant – Saint-Gobain Placo Ibérica SA.

#### 4. A European Project: Finishing and Skimming



An Innovative Plasterboard Finish: new and better Jobs by Q4 level of finish Skimming with Plaster – a European Project for Growth and Jobs meeting the current and future Demand of the End Users.

In 2009 and 2010, Eurogypsum developed a project to recommend common drywall jointing & finishing surface quality levels classifications and its penetrations into the market.

# OUR MAIN EVENTS

## A. EUROGYPSUM WORKSHOP MAY 2009

On 13 May 2009, Eurogypsum held its annual workshop entitled: **towards excellence in sustainable production and consumption.**



45 participants from the Gypsum industry and from European associations active in the construction sector attended this seminar. The presentations were made by officials of the Commission: Mr. Jacek Truszczyński presented the Eco-Design Directive for non-Energy related products and the energy label directive issues; Mrs. Gergana Miladinova gave the status on the recast of the Energy Efficiency in Buildings Directive; Mrs. Rugile Balzekaite introduced the current developments of the eco-label for buildings; Mrs. Alenka Burja spoke about the green public procurement initiatives of the Commission for construction products. The last presentation given by Ms. Laure Baillargeon summed up the previous ones and gave an overview on the EU sustainable product policy and its benefits for industry.

The Gypsum Industry supports the Commission initiatives in a field where the gypsum products and solutions are at the forefront of sustainable innovation. However, one should always keep in mind that construction products are components of a building. The system –a wall, a roof, etc. - should be the basis for legislation, not the components which only prove their performance in a system, and if adequately installed. Therefore the link between the product and the system (works) can never be broken.

## B. GREEN WEEK 2009: CLIMATE CHANGE: ACT AND ADAPT



In 2009, Eurogypsum has been awarded an exhibition stand during Green Week 2009.

The theme of the stand was to show that gypsum building systems already reduce carbon footprint in existing buildings.

Gypsum solutions incorporate insulation materials. Insulation/plaster board laminates usually consist of plasterboard laminated with insulating material typically to a total thickness of up to 90 to 120mm. The construction of the laminates reduces the amount of heat and/or the cold which would otherwise pass through into the wall and outside. So you have comfort in winter and summer.

Approximate costs, savings and payback<sup>3</sup>:

Measure	Annual saving per year	Installed cost	Installed pay-back	CO <sub>2</sub> saving per year
Internal wall insulation	517 Euro	from 46 Euro/m <sup>2</sup>	6-7 years 3 years DIY	around 2,4 tonnes

3. <http://www.energysavingtrust.org.uk/Home-improvements/Home-insulation-glazing/Solid-wall-insulation>  
[http://oxfordsolar.energyprojects.net/links/tech\\_solidwall.htm](http://oxfordsolar.energyprojects.net/links/tech_solidwall.htm)

## C. 50 YEARS ANNIVERSARY OF EUROGYPSUM: STRASBOURG 2010



Eurogypsum celebrated its 50 years existence on 16 June 2010. It wished a city representative of the European spirit for this event. And Strasbourg has historically been a bridge of unity between France and Germany. It is furthermore the city of Robert Schuman, one of Europe's organization Founder.

For that occasion, Eurogypsum published a book entitled 50 years Eurogypsum-50 years innovation with a foreword of MEP Paul Rübig (EPP-Austria). Invited MEPs to the Gala Dinner which took place at the prestigious Palais Rohan were MEPS Paul Rübig, Richard Seeber, Gaston Franco, Jean-Paul Gauzes, Françoise Grossetête, Lambert van Nistelroij, Anja Weisgerber, Martin Kastler, Emma Mc Clarkin, Julie Girling, Sergio Cofferati, Vittorio Prodi.



This presence encouraged our members to have in the future stable and fruitful relationships with the MEPs. The industry could also share very positive messages with them on building sustainable houses saving energy and improving the environmental footprint of the construction Industry.

On 17 June 2010, A seminar was held in the European Parliament premises hosted by the Austrian MEP Paul Rübiger from the European People Party. Eurogypsum members received an explanation of the way the European Parliament and institutions operate.



The beauty of Gypsum is its sustainability. Indeed Gypsum provides a uniquely positive answer to complex environmental equations of this century; be it in relation to the sourcing of raw materials, to the use of gypsum products in buildings and to their recycling at the end of their useful life. Gypsum further provides safe, low-cost, comfortable and convenient solutions to the built environment.

- ▲ Gypsum cannot burn.
- ▲ Gypsum does not contain any hazardous substances and is thus non-toxic.
- ▲ Gypsum is indefinitely recyclable.
- ▲ Gypsum is therefore a “wonder” mineral as well as a sustainable resource



# ANNEX I

## DIRECTORY

### BOARD

<b>President</b> .....	Bernard Lekien (FR)
<b>Vice-President</b> .....	Claude Alain Tardy (FR)
<b>Treasurer</b> .....	Alexander Knauf (DK)
.....	Maurizio Casalini (IT)
.....	Esteban Oyarzabal (ES)
.....	Maciej Dyja (PL)
.....	Manfred Grundke (DE)
.....	Jean-Marie Vaissaire (BE)
.....	Jean-Michel Desmoutier (UK)
<b>Chairman of the Environment and Raw Material Committee</b> .....	René Moretti (F)
<b>Chairman of the Scientific and Technical Committee</b> .....	Yves Benkemoun (F)
<b>Chairman of the Marketing and Communication Committee</b> .....	Prof. Dr. Hans-Ulrich Hummel (D)
<b>Secretary General</b> .....	Christine Marlet (BE)
<b>Assistant</b> .....	Martine Capite (BE)

# ANNEX II

## MEMBERS' LIST

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### BELGIUM AND LUXEMBURG

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### NORDIC COUNTRIES (SWEDEN, NORWAY, DENMARK, FINLAND)

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