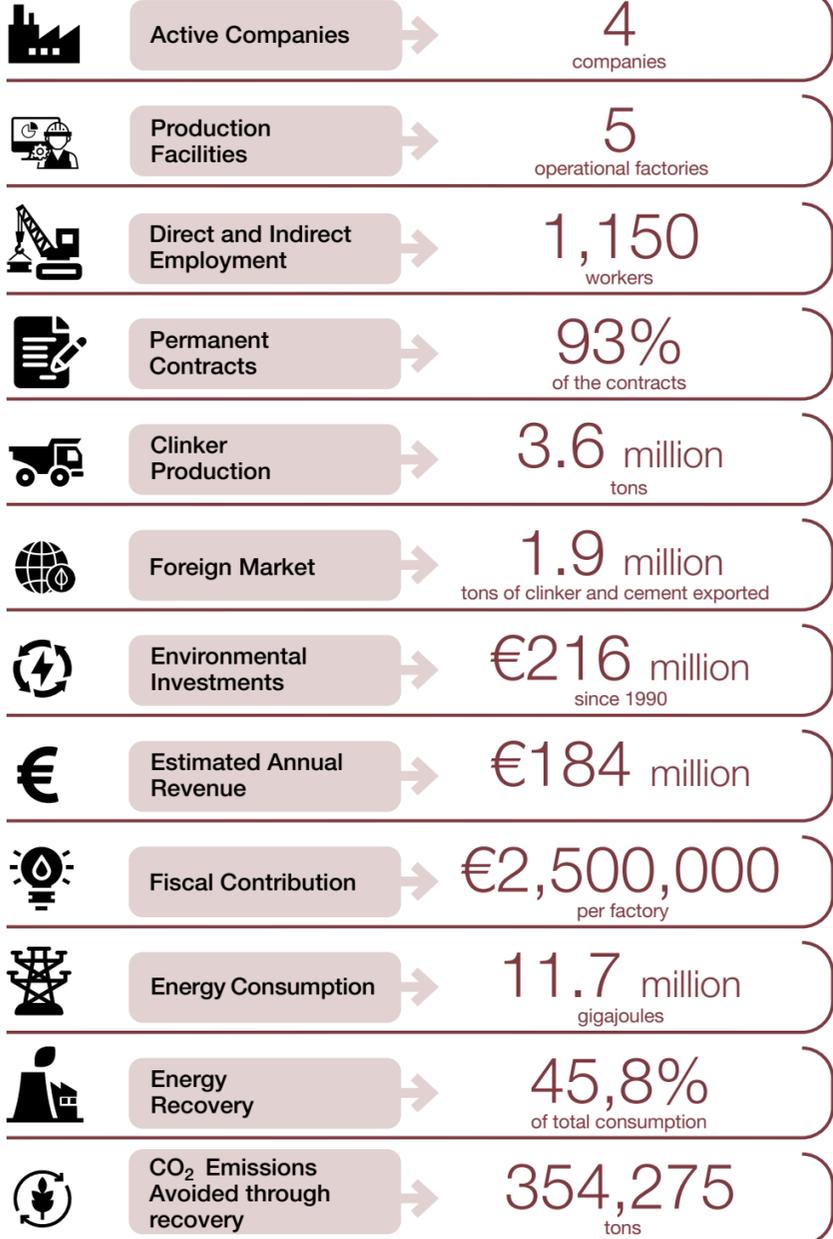


AN OVERVIEW OF THE CATALAN INDUSTRY

The dimensions, volume, capacities, socio-economic influence, and investments for the protection of natural spaces within the sector that produces the most sustainable construction material: cement.



ACTIVITY REPORT 2022

ABOUT US

Ciment Català is the organization that brings together all the companies with fully integrated cement production plants in Catalonia.

OBJECTIVES

- Social Responsibility and Sustainability.
- Quality and proper use of the product.
- Dissemination of technical knowledge.

ACTIVITIES

- Representation before Public Administration.
- Preparation of studies and reports.
- Promotion of Sustainability.

CEMENT

Due to its properties and applications, cement is the product that contributes the most to the development and habitability of the planet. Cement is synonymous with progress.

+ Info	+ Info	+ Info
Catalan version:	Spanish version:	English version:

València 245, 3r 5a - 08007 BARCELONA
Tel. 93 487 22 83

www.ciment-catala.org



The long-awaited year of economic recovery after the havoc caused by the COVID-19 pandemic ended with results significantly below the expectations. The lack of public infrastructure projects resulted in low levels of cement consumption in Catalonia. It was also a year marked by high production costs due to the soaring energy and fuel prices.



SECTOR BALANCE



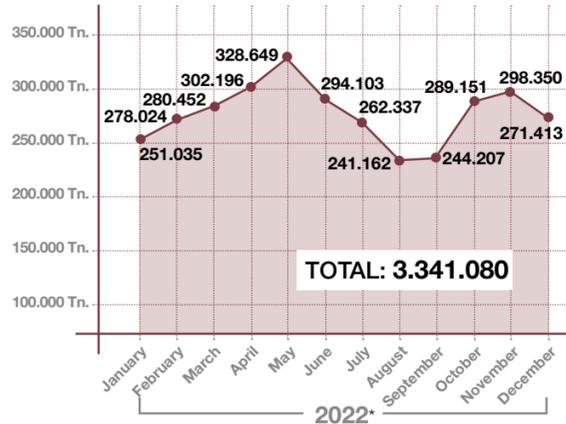
Cement Production

The production of 3.34 million tons represents an 8% annual increase, a figure still far from the needs of a developed society.



Cement Consumption

Despite the increase of nearly 25% in the volume of public infrastructure tenders, the lack of execution kept the Catalan cement market at a low level.



Note: Figures in tons. *Provisional data
Source: Oficemen



Note: Figures in tons. *Provisional data
Source: Oficemen



Foreign Markets

Exports closed at 1.86 million tons, only a 5.3% increase compared to the previous year, as the exponential growth of energy costs affected international competitiveness.

	2022*
Exports	1,855,896
Imports	60,231

Note: Figures in tons. *Provisional data
Source: Oficemen



Employment and Induced Economic Activity

Job stability (93% permanent contracts), the quality and resilience of jobs, the experience of the workforce, and the progressive inclusion of women are characteristics of employment in the sector.

Evolution of the number of employees		
Year	2022	Change
Direct employment	537	0%
Indirect employment	613	6%
Total employment	1,150	3%

Source: Oficemen

SUSTAINABILITY REPORT

Energy Recovery

The substitution rate reached 46%. This utilization of the calorific value of waste allowed Catalan factories to avoid the emission of more than 354,000 tons of CO₂ from fossil fuels, resulting in a significant contribution to the fight against Climate Change.

TYPE OF WASTE	2022	Variation 2021
Vegetable Biomass	15,253	-19,2%
RDF-MSW	190,335	8,2%
Animal Meals	36,877	22,2%
Urban Wastewater Sludge	3,958	-35,1%
Wood	40,713	0,3%
NFRs	16,452	-1,9%
Total	300.589	5,6%
% of energy substitution	46%	3%
tons of CO₂ from fossil fuels avoided	354.275	7,0%

Note: Data in tons. / Source: Generalitat de Catalunya

Material Recovery

The utilization of by-products or waste as raw materials for production experienced a growth of 44% in 2022. This allowed saving the extraction and consumption of more than 288,000 tons of natural resources, a 60% increase compared to the previous year.

TYPE OF WASTE/PRODUCT	2022	Variation 2021
Dewatered sludge for clinker	1.638	-9%
Carbonate Sludge (industrial paper mills)	4.630	-38%
Concrete waste	19.137	-44%
Other alternative raw materials	26.378	148%
Iron shavings	16.457	-28%
Granulated slags	169.174	68%
White slags from steelmaking	11.498	194%
Waste, rocks, ornamental industries, and crude derivatives	17.225	100%
Total	266.137	44%
% of material recovered	4,7%	46%
tons of natural resource exploitation avoided	288.276	60%

Note: Data in tons. / Source: Generalitat de Catalunya

Environmental Investments

The utilization of waste for cement production accounted for nearly half of the environmental investment in 2022, followed by the field of energy efficiency. It is also noteworthy that funds allocated to the control of environmental effects increased by 254% compared to the previous year.

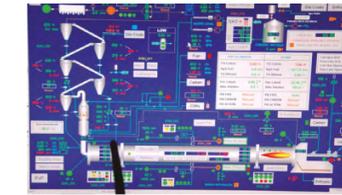
INVESTMENT DESTINATION	AMOUNT
Reduction of emissions of particles into the atmosphere from localized sources (chimney emissions)	29.049
Prevention and reduction of particle emissions into the atmosphere from material handling	187.577
Reduction of nitrogen oxides (NO _x) and sulphur oxides (SO _x) emissions	28.004
Reduction of noise emissions	85.000
CO ₂ savings through recycling and recovery of waste as alternative raw materials	2.231.158
CO ₂ savings through waste recovery as the use of alternative fuels	384.718
Visual impact	426.959
Control of environmental effects	212.329
Energy efficiency	846.930
Biodiversity	14.500
Total	4.446.224

Note: Figures in €

HIGHLIGHTS OF 2022



WORKING SESSION WITH ARC AND DGQA OF THE GENERALITAT
The session on Circular Economy and Climate Neutrality was held at the Santa Margarida i els Monjos factory.



ALL FACTORIES ACHIEVE 100% EMISSION TARGETS
The **Monitoring Committee of the Voluntary Agreement** certifies this performance throughout the year 2021.



WARNING ABOUT THE RISK OF RELOCATION OF PRODUCTION PLANTS
Concern in the sector about the significant increase in electricity prices and CO₂ emission rights.



PARLIAMENTARY GROUPS JOIN THE DEFENSE OF THE INDUSTRY

Intense institutional relations work by **Ciment Català** with different parliamentary groups and government members.



COSTS UNDERMINE THE INTERNATIONAL COMPETITIVENESS OF CEMENT FACTORIES

The price of electricity and insufficient access to alternative fuels lead to a decline in exports.



JOINT EFFORT WITH FOMENT DEL TREBALL FOR PUBLIC WORKS EXECUTION

Ciment Català explicitly supports the demand for the acceleration of pending investments in Catalonia.



MORE ALTERNATIVE FUELS FOR CLIMATE NEUTRALITY

The Directorate General of Industry of the Generalitat shows receptiveness to the requests made by **Ciment Català**.



VARIABLE MANUFACTURING COSTS INCREASED BY 40% IN THE LAST YEAR

Concern in the sector about the exponential rise in the price of petroleum coke (the main fuel for kilns).



SUPPORT FOR THE INTERNATIONAL CONFERENCE CEMTECH EUROPE 2022

The edition held in Barcelona brings together over 300 delegates from 40 countries to address decarbonization.