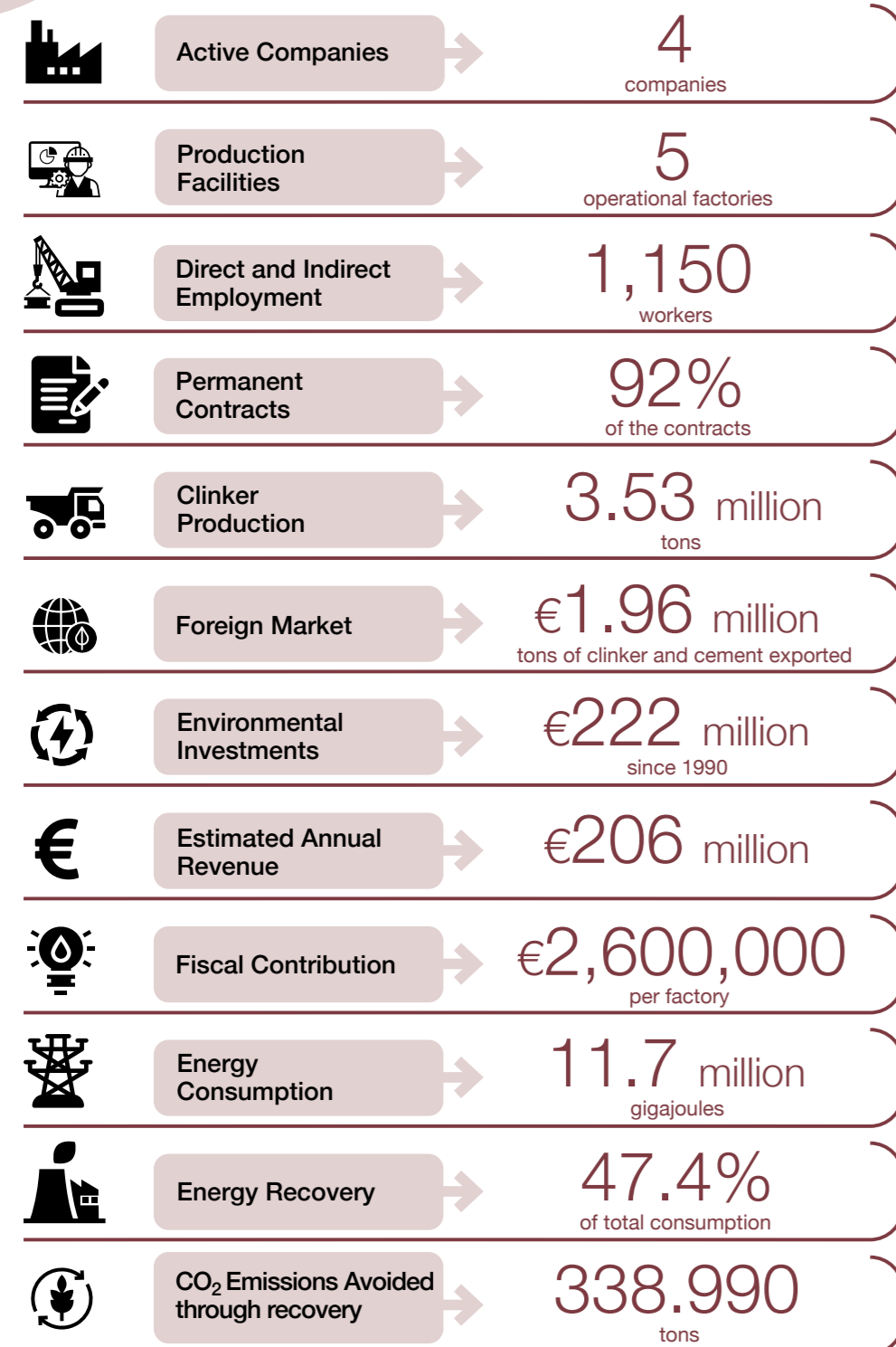


# AN OVERVIEW OF THE CATALAN INDUSTRY

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 2023

## 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  
Catalan version:



+ Info  
Spanish version:



+ Info  
English version:



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

[www.ciment-catala.org](http://www.ciment-catala.org)



The year began with high energy costs -a surge started in 2021 and increased in 2022 by the war in Ukraine- and ended with a domestic market notably down. Despite this adverse situation, Catalan cement factories continued their investments in improving facilities and processes to reach the climate neutral horizon by 2050.





# SECTOR BALANCE



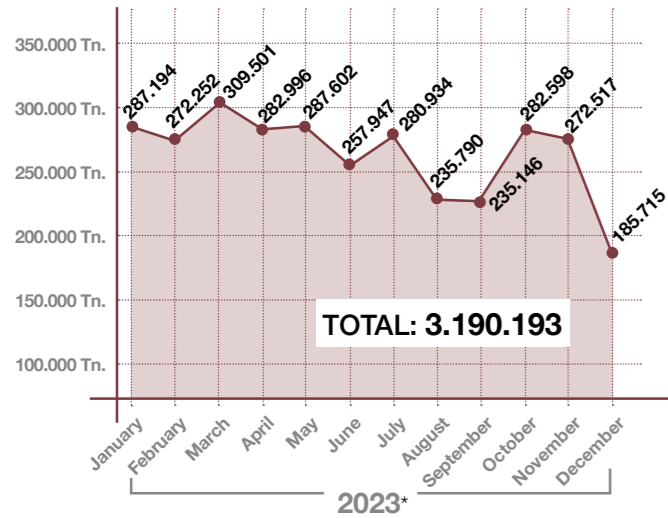
## Cement Production

Cement production continues to stagnate. The production of gray cement reached 3.19 million tons, a figure almost identical to that of the previous year.

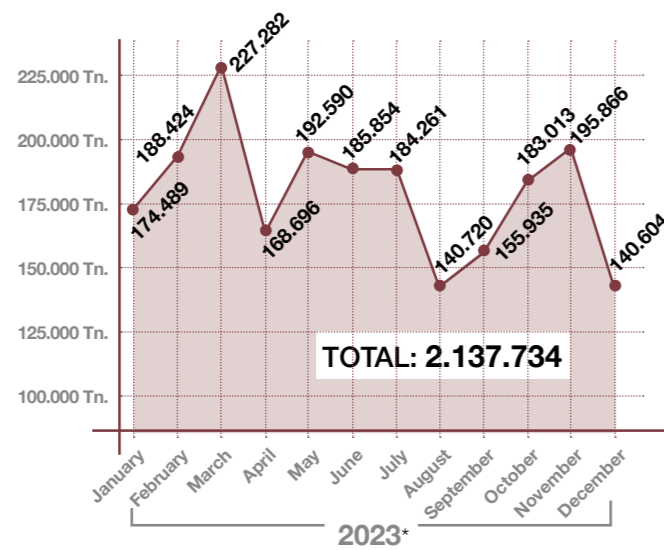


## Cement Consumption

The string of 9 consecutive months (from April to December) of declines in the consumption of cement consumption of the country will end the year with a 9% drop.



Nota: Figures in tons. \*Provisional data  
Source: Oficemen

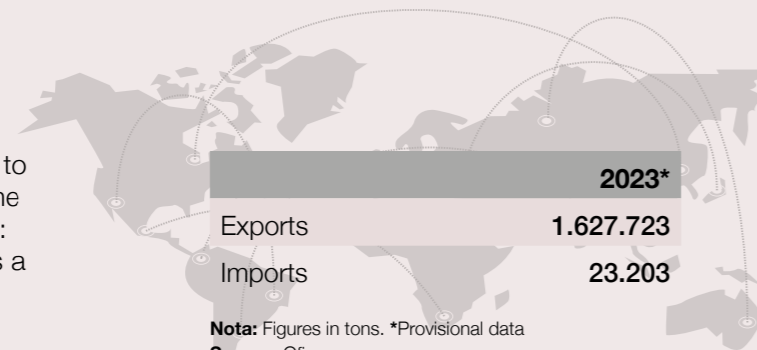


Nota: Figures in tons. \*Provisional data  
Source: Oficemen



## Foreign Markets

It is necessary to go back to 2009 to find a figure as low of exports as the one recorded in 2023: 1.63 million tons, which represents a reduction of 12%.



Nota: Figures in tons. \*Provisional data  
Source: Oficemen



## Employment and Induced Economic Activity

Job stability (92% of permanent contracts), the quality and resilience of the jobs, the experience of the staff and the progressive incorporation of women, characteristics of employment in the sector.

| Evolution of the number of employees |              |           |
|--------------------------------------|--------------|-----------|
| Year                                 | 2022         | Change    |
| Direct employment                    | 537          | 0%        |
| Indirect employment                  | 613          | 6%        |
| <b>Total employment</b>              | <b>1,150</b> | <b>3%</b> |

Source: Oficemen

# SUSTAINABILITY REPORT

## Energy Recovery

The use of waste will allow the substitution of 47% of the thermal energy consumed in Catalan factories during 2023. However, this figure has stabilized over the last few years and continues to fall short of the targets set with the Generalitat de Catalunya.

| TYPE OF WASTE   | 2023           | Variation 2022 |
|---|----------------|----------------|
| Vegetable Biomass                                       | 13.321         | 8,7%           |
| RDF-MSW   | 175.202        | -8,0%          |
| Animal Meals  | 32.190         | -12,7%         |
| Urban Wastewater Sludge                                 | 3.064          | -22,6%         |
| Wood  | 40.223         | -1,2%          |
| NFRs  | 15.743         | -4,3%          |
| <b>Total</b>  | <b>279.743</b> | <b>-6,9%</b>   |
| % of energy substitution                                | 47%            | 3,3%           |
| <b>tons of CO<sub>2</sub> from fossil fuels avoided</b> | <b>338.990</b> | <b>-4,3%</b>   |

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

## Material Recovery

The use of by-products or waste as a raw material grew exponentially again in 2023, reaching 360 thousand tons of recovered waste. This 36% increase in the total amount will increase the amount of natural resources saved by 25%.

| TYPE OF WASTE/PRODUCT                                      | 2023           | Variation 2022 |
|--|----------------|----------------|
| Cement grinding ashes                                      | 6.359          | 100%           |
| Dewatered sludge for clinker                               | 859            | -48%           |
| Carbonate Sludge (industrial paper mills)                  | 1.313          | -72%           |
| Concrete waste   | 35.080         | 83%            |
| Pozzolana  | 37.476         | 100%           |
| Other alternative raw materials                            | 81.620         | 209%           |
| Iron shavings  | 26.892         | 63%            |
| Cement grinding slag                                       | 170            | 100%           |
| Granulated slags   | 121.340        | -28%           |
| White slags from steelmaking                               | 7.085          | -38%           |
| Waste, rocks, ornamental industries, and crude derivatives | 39.197         | 128%           |
| Synthetic chalk  | 3.364          | 100%           |
| <b>Total</b>   | <b>360.763</b> | <b>36%</b>     |
| % of material recovered                                    | 6,61%          | 41%            |
| <b>tons of natural resource exploitation avoided</b>       | <b>360.834</b> | <b>25%</b>     |

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

## Environmental Investments

More than half of the 6.25 million euros invested to improve the environmental performance of Catalan factories went to projects related to the energetic valorization of waste. Overall, the environmental investments increased by 41%.

| INVESTMENT DESTINATION   | AMOUNT           |
|--|------------------|
| Reduction of emissions of particles into the atmosphere from localized sources (chimney emissions) | 88.116           |
| Prevention and reduction of particle emissions into the atmosphere from material handling          | 576.134          |
| Reduction of nitrogen oxides (NO <sub>x</sub> ) and sulphur oxides (SO <sub>2</sub> ) emissions    | 0                |
| Reduction of noise emissions   | 279.500          |
| CO <sub>2</sub> savings through recycling and recovery of waste as alternative raw materials       | 60.871           |
| CO <sub>2</sub> savings through waste recovery as the use of alternative fuels                     | 3.485.098        |
| Visual impact  | 399.758          |
| Control of environmental effects   | 304.028          |
| Energy efficiency  | 1.011.915        |
| Biodiversity   | 44.377           |
| <b>Total</b>   | <b>6.249.776</b> |

Note: Figures in €. Source: Generalitat de Catalunya

# HIGHLIGHTS OF 2023



MEETING WITH THE COUNSELOR BUSINESS AND WORK, ROGER TORRENT

The sector insists on the need to build new infrastructures and rationalization of fiscal pressure.



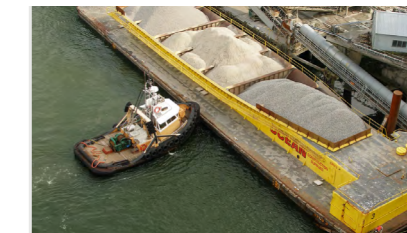
CONCERN IN THE HOUSE OF CATALONIA ABOUT WASTE REGULATIONS

Unions and employers express the risks of relocation of factories in the face of the latest legislative provisions.



DECARBONIZATION, UNDER DISCUSSION WITH THE GENERAL DIRECTORATE OF INDUSTRY

Unlike other territories, Catalonia has a limited recovery capacity due to the few authorized wastes.



POSITIONS COINCIDING WITH JULI FERNÁNDEZ, COUNCILOR OF TERRITORI

Meeting and debate for the reactivation of the consumption of cement in a sustainability and service to society.



INVESTMENT OF €4.4 M IN ENVIRONMENTAL IMPROVEMENTS DURING 2022

The **Voluntary Agreement with the Generalitat** certifies that the Catalan cement companies achieved, once again, their emissions targets.



COMMITMENT TO THE EXPANSION OF BARCELONA AIRPORT

The sector takes a position in favor of this vital infrastructure for the Catalan economy, which is promoted by the employer Foment.



THE SITUATION IN THE SECTOR IS ATTRACTING ATTENTION FROM THE PRESS

The 2022 market balance data attracts media attention for its causes and consequences.



ADHERENCE TO THE PROGRAM FOR THE REDUCTION OF GHG EMISSIONS

The Generalitat delivers the certificate attesting **Ciment Català** commitment to establish measures to reduce them.



UPDATED EDITION OF THE CATALAN VERSION OF THE BOOK "VITRUVI"

**Ciment Català** reissues the digital version of Vitruvius, the first book on construction, with improved and completed figures.