



The European Association for the Taps and Valve Industry

2012 CEIR ANNUAL CONGRESS WAS HELD IN PARIS, FRANCE



The most important event of the European Valve Industry, the CEIR Annual Congress, was held in The Tiara Chateau Hotel Mont Royal Chantilly on 3 – 5 May. More than 50 people, including some from non-European countries such as the USA and India, participated in the congress. Several external speakers were invited to the event to give an overview of the ongoing topics for the valve sector.

In addition, two visits to technical centres, the Technical Center of Mechanical Industry (CETIM) and the Scientific and Technical Center of Building (CSTB), were organised. Participants gained information about the testing and research capabilities of these technical centres. The 3-day Congress included a CEIR Board Meeting, Technical Committee meetings and a General Assembly. Participants also enjoyed a full one-day tour of the capital and a private visit to the Chantilly Castle and Museum during which everyone explored networking possibilities.

MR HOLGER FEHRHOLZ HAS BEEN ELECTED AS THE SANITARY TECHNICAL COMMITTEE CHAIRPERSON

"We are proud of the work achieved by the former Chairperson of the CEIR Sanitary Technical Committee", says Guy Van Doorslaer, Secretary General of CEIR "and are at the same time very happy to welcome the new TC Chairperson, Mr Holger Fehrholz of Similor. We trust that Mr Fehrholz's experience in the sanitary industry, his engineering background and extensive knowledge of REACH will be extremely beneficial to CEIR". Committees are at the heart of the success of CEIR. Companies are invited to contact their National Associations to see how they could contribute to and benefit from the work done by and for the industry.



CEIR CONTRIBUTES TO THE EVALUATION OF THE IMPLEMENTATION OF THE PED

The Pressure Equipment Directive (PED, 97/23/EC), well known to CEIR members, is now 15 years old. Like many other technical Directives, it needs to be "aligned" with the New Legislative Framework which, in 2008, redefined the way CE marking works, through Regulation 765/2008 and Decision 768/2008.



With the benefit of 15 years of feedback and before its content is revised, it is indeed appropriate to launch an evaluation of the implementation

of the PED. The European Commission has therefore mandated the CSES consultancy company to undertake a study, the conclusions of which will be available by the end of the year.

Through ORGALIME, the European Engineering Industries Association, CEIR was able to contribute to some of the points raised by the study. In particular, the European Commission aims at identifying benefits that were brought by the implementation of the PED and, above all, remaining issues in terms of free circulation of goods.

Everybody agrees that the PED has efficiently removed most barriers to trade while creating a high safety level. However, companies face a number of difficulties linked to its implementation: different practices between Member States and Notified Bodies, problems related to materials, insufficient use of European standards in contractual specifications. Such issues need improvement.

CEIR follows this work with great attention. However, one might ask how the conclusions will be used: it seems unlikely that a revision of a text with such importance for the industry will be launched.

PASCAL VINZIO HAS BEEN ELECTED AS THE NEXT CEN TC 69 CHAIRMAN

Pascal Vinzio, CEIR Second Vice-President, will be the next CEN TC 69 chairperson. Mr Vinzio is an engineer with an excellent knowledge of the valve industry and its challenges. He has been active in standardisation work for many years.



CREATION OF A NEW CEIR WORKING GROUP ON "ENERGY EFFICIENCY OF THERMOSTATIC HEATING VALVES"

A thermostatic radiator valve is a self-regulating valve fitted to hot water heating system radiators. A thermostatic heating valve controls the temperature of a room by regulating the flow of hot water to the radiator. Thermostatic radiator valves (air vent valves) also exist for steam radiators.

Many initiatives have been developed in the past 10-15 years for improving the environmental performance of energy-related products such as thermostatic heating valves and, in the different EU Member States, legislation (France) or voluntary labels/initiatives (Germany) already exist. Moreover, the European Commission is implementing Ecodesign criteria on several energy-related products and is currently considering running an Ecodesign study for heating control products.

The European thermostatic heating valve industry is constantly improving the performance of its products in terms of energy efficiency. It is doing so while strictly applying national and European requirements, responding to growing consumer demands for environmental preservation, and respecting minimum user comfort.

Taking the view that the EU consumer today lacks consistent information on the energy performance of these specific products, CEIR members and companies are committed to developing a simple and harmonised system to provide information on energy consumption and to promote greater consumer awareness of the real performance of thermostatic heating valves.

Having in mind these objectives, a new CEIR working group has been established with the task to coordinate among members the technical discussions relating to the energy efficiency of thermostatic heating valves.

Following the latest policy developments at European level for Ecodesign application to the CEIR industry and third party voluntary certification systems, the working group will have the task of analysing the opportunity to develop a "European" energy efficiency scheme for thermostatic heating valves.

The working group will identify the technical specifications and criteria for the energy efficiency performance classification of these products.

Depending on the results, the working group will submit a proposal for the implementation of a CEIR label, establishing the scheme and implementation conditions and rules in line with the water efficiency project developed by the ErP JWG.

CEIR IS CLOSELY FOLLOWING DEVELOPMENTS ON DUAL USE REGULATIONS AND EXPORT CONTROLS

There is no industrial process that does not require valves. That is true for pulp and paper, agrifood and pharmaceuticals, and also for more sensitive areas such as uranium enrichment and toxin growth.

In accordance with a worldwide agreement, and in order to avoid uncontrolled activities in sensitive areas, the EU has introduced over the years some specific measures to control the export of some goods. These are generally not designed or intended to be used in sensitive fields, but have characteristics that would allow the user to do so. These products are therefore called "Dual Use Items".

The main text is Regulation 428/2009 that introduces the need for an export licence for specific categories of Dual Use Items, the list of which is included in Annexes. Valves are well represented in these annexes, especially those made of high corrosion-resistant materials.

In addition, specific measures can be published to target exports to specific countries. This is for example the case with Regulations 567/2010 for North Korea and 961/2010 for Iran.

Depending on the possible final destination (nuclear power, chemical weapons...), several Working Groups, such as the "Australia group" or the "Wassenaar arrangement", issue proposals on the products to be legally controlled when exported. These proposals are not only implemented in a European Regulation, but also in legislation in the USA, Australia, etc.

One can obviously understand the reasons for such measures. However, valve manufacturers are now faced with the inconsistency of Member States' approaches when implementing them.

Indeed, national authorities are charged with applying the European Regulation, but the understanding of some clauses and the resources available vary between Member States. For example, Regulation 428/2009 introduces concepts such as the "catch-all clause", which allows authorities to ask for an export licence for products that are not on the controlled goods list, or the "principal element", that can be used to request a licence for a product which is not listed in the annexes, but could be dismantled and combined with another product with a view to building a Dual Use Item.

A different understanding of such concepts has a huge impact on the number of licences requested from valve manufacturers, country by country. Since this is a very complicated process, each manufacturer, with honest position, can request a license or not. Moreover, knowing that available resources in the Ministries differ greatly, the delay in treating a licence request varies from a few days to more than a year, depending on the exporting country! This creates significant competition distortion between markets!

As the European Commission is currently working on a revision of Dual Use Regulation 428/2009 and a reinforcement of Iran Regulation 961/2010, CEIR follows the extension of controlled goods, and also to the lack of consistency in implementation. No doubt it will be difficult to harmonise this.

ECODESIGN & ECOLABEL - TAPS AND SHOWERHEADS SOON ECO-LABELLED?

EC DG Environment is finalising Ecolabel and Green Public Procurement (GPP) criteria for sanitary tapware. If adopted by EU Member States authorities, these criteria could be applicable by the end of 2012. The EU Ecolabel is a voluntary label awarded to products and services that have a reduced impact on the environment throughout their life cycle, from the extraction of raw material through to production, use and disposal. GPP is a process whereby public authorities seek to procure goods, services and work with a reduced environmental impact throughout their life cycle.

Sanitary tapware criteria under consideration relate to water efficiency, materials, product quality and longevity, packaging, user information and information appearing on the EU Ecolabel. CEIR and its members have taken an active role in the development of these criteria, but it is not clear how they will be applied in practice at national level.

The European Commission is also currently selecting products to be subject to studies in the context of the Ecodesign policy. Taps and showerheads are among the priority products identified for this selection. Ecodesign compulsory rules aim at reducing the environmental impact of products, including their energy/water consumption or influence on energy/water use throughout their entire life cycle. However the European Commission recognises that the efficiency of taps and showerheads needs to be balanced with user satisfaction, and that practical and efficient eco-design requirements may be difficult to establish throughout Europe. CEIR and its members today pro-actively participate in these discussions but favour a voluntary approach to achieve tangible water and energy savings.

NEW CEIR WEBSITE IS ONLINE



The CEIR Marketing & Communication Committee has completed the re-design of the existing CEIR website which was decided a few months ago. The new website (www.ceir.eu) is now online.

This was one of the first working group activities of the Marketing & Communication Committee and all WG members are proud to have completed the project in such a short time.

The CEIR website is the communication channel of the association with the valve industry and will allow closer contact with all stakeholders. It has in-depth news and details about the issues that may/will affect the European valve industry, the priorities of CEIR, developments and work in the Technical Committees, press releases, reports and CEIR position papers. It is frequently updated in order to include the most recent developments in the industry.

CEIR PRESIDENT ATTENDED THE CII VALVES CONFERENCE IN INDIA



Our President, Mr Bulent Haciraifoglu, attended the 2011 Valves Conference – Roadmap to Technological Leadership in Mumbai, India on 2 December 2011. The Conference was organised by the CII (Confederation of Indian Industries).

Various participants from the Indian valve industry were present at the Conference, during which hot topics were discussed in different sessions. CEIR, as always, participated in the global valve industry events, representing the European valve industry. Mr Haciraifoglu gave a speech about the European valve industry and explained recent developments in CEIR.

NEWS FROM ACREX'12 IN BANGALORE, INDIA



ACREX is an Air Conditioning & Refrigeration Exhibition which is held once a year in rotation in New Delhi, Mumbai and Bangalore. The exhibition theme now encompasses

all services including fire fighting, plumbing and all building-related services. The exhibition is organised by the Indian Society of Heating, Air Conditioning and Refrigeration Engineers popularly known as ISHRAE. The show is supported by ASHRAE (American Society of Heating, Refrigerating and Air-Conditioning Engineers), REHVA and other associations, and has participants from all over the world from Japan to the USA. ISHRAE is an Indian Association but includes members from outside India. The Bangalore event was attended by many European, Japanese and Chinese manufacturers.

Like CEIR, ISHRAE has platforms for sanitary & plumbing valves which are represented by the Indian Plumbing Association, which has variety of participants, quite dominated by Italian and Chinese manufacturers as far as brass valves are concerned. India is an open market with very few trade barriers; the import tax of 7.5% is not applicable for many countries with "Free Trade Agreements" (FTAs) with India. India has its own standards but follows and adapts to international standards (EN, ISO, American, JIS etc). This market is growing fast and manufacturers need to catch up with the fast development of the infrastructure investments.

The major body representing "Industrial Valves & Actuators" works under the major "Confederation of Indian Industry" (CII) which Mr. Uma Shanker represents as Chairman. This is known as the CII Valves & Actuators Division. It has 27 active and paying members (Indian manufacturers) representing 70% of the market for industrial valves & actuators.

India is the hub for manufacturing of high technology valves for almost all major global players. It also has major manufacturers who participate in global markets particularly oil & gas. India does not have very strong Indian standards but adopt all international standards like API, ASME, ANSI, EN, ISO, JIS and others. CII actively and professionally participates in developing the standards like API, ASME, ISO etc. at their point of origin. Like CEIR, CII does not work on standards but work on quality enhancement. Many Indian manufacturers attend Valve World in Dusseldorf every two years.

CII Valves & Actuators Division extends co-operation with CEIR, VMA, BVMA etc. with an increasing communication. The Indian market for valves and actuators is about US\$ 2 billion and is growing at a rate of 15.2% year on year.

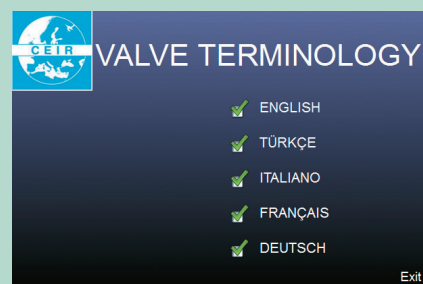
CEIR / ORGALIME STAND AT GREEN WEEK



Water is extremely important to the European Union especially in 2012 which has been named the year of water by the EU. Close to three-quarters of Europeans think that the EU should propose additional measures to address water problems in Europe, according to a Eurobarometer from March 2012. This year also sees a large number of legislative items on the agenda. Some are of particular interest to CEIR: the consultation on water efficiency in buildings, the proposal for new restrictions on chemicals in surface water (adding 15 substances to the restricted list and tightening existing limits) and the consultation on policy options for the blueprint to safeguard Europe's water. The last consultation covers three main areas: managing water demand (including water-efficient products), protecting water ecosystems and improving the availability of clean water.

The major event organised by the European Commission Directorate General for Environment called "Green Week" is this year themed on water, with the slogan "water, every drop counts". This could also apply to CEIR member companies working with the CEIR Sanitary TC on the water label. Orgalime Partnership has developed a dedicated Platform that will have a stand at "Green Week". If you are a CEIR member company and would like to see your solutions promoted on the stand, please contact the CEIR secretariat.

VALVE TERMINOLOGY CD NOW INCLUDES ENGLISH, TURKISH AND FRENCH LANGUAGE VERSIONS



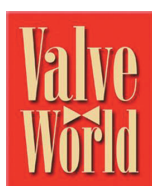
The Valve Terminology CD, prepared by POMSAD last year, now includes a French language version in addition to English and Turkish. Translations are ongoing for other languages and, in the coming months, Russian and Italian will also be included.

The Valve Terminology CD includes various types of valves and components of these valves, and provides the name of each component in different languages. As a result of this work, ease of understanding and business between different countries in Europe which speak different languages will be developed.

The Terminology CD can be found on the new CEIR website (www.ceir.eu); a CD version can be obtained from the CEIR Secretariat.

COOPERATION BETWEEN CEIR AND VALVE WORLD

CEIR has started ad hoc cooperation with Valve World. The three editions of the Gazette have been distributed with Valve World Magazine. CEIR is proud to welcome Valve World representatives to its next Annual Meeting in Chantilly (3-5 May 2012). We trust that this will be the start of a fruitful cooperation.



CEIR BECOMES AN ASSOCIATE MEMBER OF ORGALIME

The Orgalime Board has accepted the CEIR application to become an Orgalime Associate Member. This now needs to be ratified by the Orgalime General Assembly that will take place in June 2012. We trust that the General Assembly will accept our application as this will strengthen relations between the two associations. It will also provide more support to CEIR in working with the European institutions.



VALVES AND FITTINGS AT THE TOP OF EUROPEAN MANUFACTURING

On the occasion of MCE Mostra Convegno Expocomfort (27-30 March 2012), the international trade exhibition of Heating, Air-Conditioning, Refrigeration, Water Treatment, Components, Tools and Bathroom world technologies, some special CEIR events were held on 28 March.



After the Marketing & Communication Committee and Board meetings, an AVR-CEIR event open to the public and to the international press took place in the late afternoon.

In order to obtain presence on EU and increase visibility, make accreditation towards opinion leaders, and to reinforce the leadership position of CEIR as the EU key partner for Valves and Fittings; this event celebrated the 60th anniversary of the Italian Valves & Fittings Association, AVR, and also presented the first issue of the Economics Data Survey on the Valves & Fittings sector at European level.



Professor Marco Fortis (Vice-President Fondazione Edison), Luca Orlando (journalist of Il Sole 24 Ore, major Italian economy media), Bulent Haciraifoglu (CEIR President), Maurizio Brancaloni (AVR President), Ugo Pettinaroli (CEIR Marketing Committee Chairman) and Sandro Bonomi (ANIMA President) attended the AVR-CEIR Event.

Five CEIR member countries took part in the survey: Finland, France, Italy, Portugal and Turkey. While Italy and France are traditional partners, Turkey has entered the market more recently but has already been firmly asserting itself, as proved by the fact that the CEIR Presidency has been assigned to the Turkish entrepreneur Bulent Haciraifoglu.

A positive outlook has emerged from the survey: according to entrepreneurs from the above countries, a slight improvement in production will take place in the first six months of 2012, and consequently orders will also show a modest rise.

Above all it is positive that employment has not decreased, which is understandable: employees in the valves and fittings branch are highly qualified so entrepreneurs do not dismiss their workers easily.

Judging by figures in this survey, production on the whole has been constant, while, taking into consideration single products, the fittings sector is undergoing some difficulties.

Europe is facing a peculiar international economic situation: after the 2009 temporary recovery from the crisis, the second semester 2011 has shown that, once again, European economies are in difficulty. European GDP is decreasing not only in Italy; the Netherlands, Great Britain and Denmark are recording a heavier downfall of consumptions than Italy.

The European building sector is experiencing a discouraging stagnation which also affects China. The only sign of vitality comes from Russia, which is recording a growth in both production and investments, also by foreign manufacturers.

On the whole, general outlook is still and even United States have been involved in the crisis once again and living the worst time of the last 50 years.

After the crash in 2009, exports of the European fittings branch, rebounded in 2011 but the high pre-crisis level has still not been reached.

The recovery should also be considered in relation to the above positive peaks which are so far away.

China is now catching up on Italy: China was placed after Italy six years ago, but has now doubled consumption and has overtaken Italy in some cases.

Italy may however still rely on a strong national production which is a guarantee of both quality and very high technological standards, so that per capita consumption of brass bars in Italy is still the highest in Europe.

Production in the Italian districts of Valsesia and Lumezzane (Brescia) is significant, particularly for the manufacture of brass valves.

As far as the economic trend for both brass bars and end products (valves and fittings) is concerned, after the 2009 crash the sector recorded a strong recovery in 2010-2011 and once more a drop in the second half of 2011 which brought it back to 2006 figures.

Italy is at the top of the league, followed by China and Germany.

However among exporters of fittings or parts of fittings, China is in first place, followed by Italy and Germany.

VALVES AND FITTINGS IN SUPPORT OF THE VENICE LAGOON



The prestigious flood defence projects, forming part of a major plan for the physical and environmental restoration of Venice's entire Lagoon basin named Mose, are benefitting from the support of two manufacturers of valves and actuators, AUMA and ITALVALV, which are member companies of AVR, the Italian valves and fittings manufacturers' association.

Mose links the defence of the City with the architectural heritage of historic buildings and the Lagoon's ecosystem. Protection from high waters, and recovery of the Lagoon's resources, are incorporated into the scheme.

The measures to safeguard the Lagoon are being implemented as part of an integrated and systemic programme by the Consorzio Venezia Nuova, on behalf of the Italian State (Ministry of Infrastructure and Transport - Venice Water Authority).

Mobile barriers are being constructed to defend the Lagoon area, its inhabitants, towns, cities and historic/artistic/environmental heritage from high waters.

As a result of changes in the inter-relationship between water and land in the Lagoon, rising water levels have become more intense and frequent over recent decades.

To protect the Lagoon's three inlets, 78 flood barrier gates with steel panels 20 m wide and up to 28 m long are secured to concrete foundations on the sea bed in four rows.

Filled with water under normal conditions, the gates lie flat on the sea bed. If a tide of more than 1.1m is predicted, compressed air triggers the gates to rise in sequence to produce an artificial dam.

The mobile barriers for the Mose are made up of rows of independent gates consisting of a metal box structure fastened to a housing caisson by means of two "hinges". In normal tidal conditions, the gates are full of water and rest on the seabed, completely invisible and with no impingement on the fundamental exchange of water between sea and Lagoon. In the event of danger from flooding, compressed air is pumped into the gates, emptying them of water.

The gates, which function only for the period of the high water event, rise and emerge, blocking the inflow of the tide into the Lagoon.