

GAZETTE

2024 – 1





CEIR PRESIDENT GREETING

Dear Readers,

The completion of my two-year term as CEIR President is coming to end. It is a great honour to represent the European taps and valves industry. During this term we tried to achieve our objectives to move the CEIR forward to become a more open, active and efficient association.

Within the last two years, we valued the importance of collaborations. We have created new alliances and strategic partnership with the relevant organizations of our industry such as Water Europe, FPP4EU, NKBA from the USA, Valve World Exhibitor, MCE, IVS, and others.

We did visits and meetings with our potential member associations. CEIR-Taps & Valves Europe Community is the reliable and responsible expert voice of industry and we are always looking to strengthen our voice with the inclusion of credible and dynamic association such as SPAP, VDMA and some valve manufacturers from Czechia. We had, indeed, perfect opportunities to exchange views, learn more about the innovative and productive industries and explore ways to address common challenges.

In 2023, CEIR-Taps & Valves Europe launched a new educational offer in the form of webinars to raise members knowledge on key topics and foster dialogue. We have organized webinars on "PFAS Restriction Proposal - What does it mean for the industry?" as well as "CBAM Reporting Requirements" together with experts on the subjects and chairmen of our Technical Committees (TCs).

The TCs (SAN-TC & BIV-TC) continue their follow up to the related EU regulations on Drinking Water Directive, REACH and RoHS Regulations mainly on Lead Content of the alloys, restriction on use of Cr VI for Cr plating, possible restriction on PFAS, labelling of taps and showers, CBAM, ESPR – Eco-design for Sustainable Products Regulation. We have published our position paper on PFAS restriction, signed a joint letter on the importance of the "water resilience initiative" in light of the pressures on the continent's freshwater resources. The Marketing Committee continue its activities as creation of networking, representation of the CEIR by participating to the trade shows and working on creation of a statistical database by the CEIR members as well as following up the social media shares.

Last June we had productive and informative days in Marseille during the annual meeting organised by EVOLIS highlighting nuclear energy, hydrogen as an alternative source, EU strategic autonomy and the industry. The meetings were organized together with our other sister associations Europump and Pneurop. Once again, I would like to express my sincere thanks to the organizing committee of the event for their effort to make the event successful. This year POMSAD Turkish Pump and Valve Manufacturers' Association has been well prepared for the annual meeting and the general assembly. For the program of the meetings, it was aimed to create an environment conducive to the mutual discussion of all technical, technological, regulatory and economic issues on the agenda of our sector in the world.

Dear readers, once again I would like to repeat that associations, federations, and unions are the platforms where the sectors show their power and make their voices heard. Associations only survive with the contribution of their members. As CEIR, we have always felt the support of our members, and we know that we can do better by working hand in hand. Our members have always supported us in all the activities we have organized; without their support and participation, we could neither have carried out our activities nor survived. We, as CEIR Board of Directors and General Secretariat, tried to do our best to find solutions to the needs of the sector in order to merit the trust of our members. I would like to invite all CEIR members to support the activities of our association, which has maintained its voice and power on all relevant platforms without interruption. For this reason, I would like to stress once again that the participation of all our members in activities is very important in order to be a sustainable not for profit association that can stand strongly for many years to come. There are many challenges to overcome, but together we can lead and make a relevant change.

As a final word, we, as CEIR, will be happy to welcome you to our next Congress and General Assembly in Bodrum, Turkiye between 6th – 8th June 2024! Please follow up our website and LinkedIn for further details.

Nurdan Yücel, PhD
CEIR President



CEIR Activity Timeline for 2024



CEIR started 2024 launching a series of webinars on The EU's Carbon Border Adjustment Mechanism (CBAM). CBAM entered into application in its transitional phase on 2023 Q4, and the deadline for the first reporting is on 31st January 2024. CBAM has a huge impact especially on downstream industries. The webinars will give the opportunity to members and stakeholders (by invitation only) to learn about the latest policy developments in the technical and policy dossier.

The participation of our members in the meetings and working groups of the Technical and Marketing Committees will ensure the rapid formation of information, the development of solutions that will benefit the sector and the expansion of knowledge.

Follow CEIR in LinkedIn and stay tuned.



CEIR CONGRESS 2024

Bodrum, Türkiye

June 6 - June 8, 2024



We are pleased to invite you all to the CEIR 2024 Congress, which will be held from June 6th to June 8th, 2024, at the Xanadu Island Hotel in Bodrum, Turkey. With two days of conferences, social programs, expert speakers, panels, and the General Assembly, during which the new CEIR President will be elected, we, as POMSAD (Turkish Pump and Valve Manufacturers' Association), are excited to welcome our distinguished guests to Turkey.

The conference program will include keynote speeches on Intelligent Valve, Cybersecurity Act, New Drinking Water Directive, and PFAS Restrictions on the first day. On the second day, our speeches will cover Economic & Market Outlook, Politics and Policies, Climate Change & Water, and Human & Technology. Both days will also feature panels and roundtable discussions.

Over the course of three days, we will learn from experts, exchange ideas, and discuss the important aspects of our industry.

You can find all the details of the congress at www.ceir.2024, where you can register for the meeting.

CEIR SECRETARIAT UPDATES AND ACTIVITY

2023 Redefine

2023 was a pivotal year for CEIR – Taps & Valves Europe, marked by a significant rebranding to enhance its identity and broaden its influence. We introduced “Taps & Valves Europe” alongside the CEIR acronym to clarify our scope, and adopted “Reliable, Responsible Expertise” as our tagline, encapsulating our commitment as the industry’s trustworthy collective voice.

2023 was also an opportunity to establish the secretariat outside the Orgalim framework and redefine its value proposition.

- CEIR-Taps & Valves Europe delivered two webinars (CBAM, PFAS)
- Submitted two positions in public consultations (PFAS, DWD),
- Participated in international expos (ISH2023, CERSAIE)
- co-organised the joint Congress,
- Held technical workshops & meetings in Paris, Germany, Sweden.
- Additionally it has communicated several issues and calls for action to the members.
- Our outreach efforts intensified, promoting the organization’s work and the industry’s interests through the Gazette, our website, and our LinkedIn account.



2024 Grow

The dynamic momentum from 2023 carries forward into 2024. CEIR-Taps & Valves organised an online masterclass on CBAM reporting requirements, reaching new audiences and creating new revenue streams.

The Winter Meetings focused on advocacy. The Secretariat organized a Policy Manifesto Workshop with stakeholders like WaterEurope and Orgalim, setting the stage for developing the CEIR-Taps & Valves policy manifesto in light of the new European Parliament and Commission.

Efforts continued to expand the organization. With the active leadership of the President and the 1st Vice-President CEIR-Taps & Valves Europe is in advanced discussions with the national associations VDMA from Germany and SPAP from Poland, and we are hopeful about welcoming them soon. Recruitment efforts also engaged companies such as ABO Valves from the Czech Republic and CONVAL from the Netherlands, who expressed interest in joining. With these new members, CEIR will expand its presence to fourteen countries, an increase of over 20%.

The Annual Meetings (GA / Congress) in Bodrum, Türkiye, from June 6-8, will provide our community an opportunity to come together, network, and learn from one another. It will also be a time to thank the current Board for their contributions and elect a new one, making vital decisions for the future of the association.

CEIR-Taps & Valves Europe has successfully navigated a challenging transitional period and created more value for its members. The GA in Türkiye will set priorities and lay the foundation for a thriving organization that not only serves its members but also relies on their contributions and support.

Following the GA / Congress, the next step is the autumn meetings in Brussels. This session will host an important policy event to engage with newly appointed EU policymakers.

The year’s final event will be the Valves World Expo in Düsseldorf from December 3-5.

We look forward to your active participation in CEIR – Taps & Valves proceedings and hope to meet you at one of our upcoming events.

TECHNICAL AND POLICY NEWS

Will the new drinking water directive cause more problems than it solves?



The new European drinking water directive is a race against the clock. Parts of Europe need dezincification resistant brass alloys to address both health risks related to lead and Building Related Illness caused by increased leakage due to shortened durability. Additionally, we have common goals concerning circularity and reducing our climate footprint. Has the industry been given the time it needs to manage all upcoming claims and objectives?

Nordic water qualities have always posed a challenge for drinking water installations. The low alkalinity and hardness of the water make it corrosive to metallic materials. Dezincification is a phenomenon where zinc is released from brass alloys into the drinking water, leaving behind a porous structure containing a significant amount of copper. This porous structure makes valves and fittings brittle and can cause leakage. Furthermore, deposits may occur inside coupling pieces, potentially leading to blockages in the pipe system. To address this issue, the Swedish National Board of Urban Planning implemented regulations in 1970 to restrict the use of brass components to alloys with high dezincification resistance.

According to studies and extensive experience, non-DZR brass alloys leach high concentrations of metals in corrosive waters, sometimes necessitating the replacement of installations

within a few years^[1]. Simultaneously, BRI (Building Related Illness) is already a significant problem, and it will worsen without the use of DZR brass due to increased leakage problems caused by uncertain lifespans. Moisture in wood constructions leads to the growth of microbes, which release mold spores with endotoxin into the air. This can impair the immune system and result in health problems such as eye irritation, runny nose, mucous membrane and respiratory problems, skin rashes, headaches, and fatigue. Moisture in concrete constructions initiate a chemical process that breaks down floor adhesives and plastic carpets, releasing N-butanol and 2-ethyl-1-hexanol, which can cause similar health problems.

The new drinking water directive must consider the potential increase in leakage that could generate BRI-related health issues. In this context, we also need to consider our common goals of circularity and reducing our climate footprint. The introduction of lead-free brass will lead to an increased use of virgin raw materials and energy in manufacturing, (products made of virgin brass has roughly an 8 times larger climate footprint than recycled brass^[2]). Thankfully, lead concentrations in Nordic raw waters are naturally very low, and there are no external sources such as lead pipes in water distribution networks^[3]. Only 0.3 percent of all unflushed water samples in Sweden between 2017 and 2019 contained lead levels above our threshold values^[4]. The lead concentration in our drinking water is 0.9 µg/l (based on 14,000 analyses, 95% percentile). Lead contents in Finnish drinking water is even lower.

The new drinking water directive is a race against the clock, and it requires the development of new DZR brass alloys to meet the diverse range of product requirements. However, this process is very time-consuming, and it takes several years to develop and learn how to manufacture products using new alloys and have them nationally type approved. Additionally, it will take well over a year to clear out products from the supply chain of system suppliers, wholesalers, and branches. This is not just an issue specific to the Nordic countries, there are other regions in Europe with similar water qualities where DZR alloys are the most appropriate choice. With a sufficient transition period, the implementation of the new drinking water directive can satisfy not only our goals on durability and public health but also our ambitions on circularity and reducing our climate footprint. It is highly doubtful whether such a scenario can be fulfilled. Who will be made responsible for that?

About SAI (Svensk Armatur Industri)

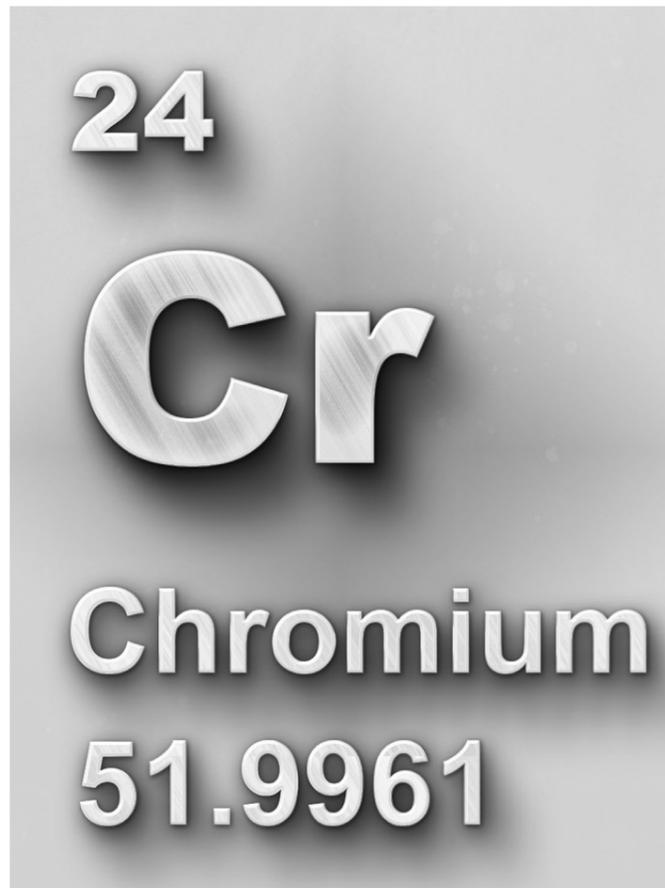
SAI, Valves & Fittings of Sweden, is an industry organization formed in 1961. It represents Sweden in CEIR, the European association for the Taps and Valves Industry. Our member companies offer products that meet the demand for modern, high-quality bathrooms, kitchens, real estate, and industrial fixtures. They produce products that reduce water and energy consumption in buildings and industries. Since 2018, SAI has been incorporated into VVS Fabrikanternas Råd, Plumbing Manufacturers of Sweden, with 103 member companies.

Bengt Henricson, Valves & Fittings of Sweden

Notes:

1. Durability of the non-dezincification resistant CuZn40Pb2 brass in Scandinavian waters.
2. T. Rydberg, IVL Svenska Miljöinstitutet, 2021.
3. MaiD, Report1, Nordic drinking water quality, 2017.
4. Livsmedelsverket, Report on the quality of Sweden's drinking water 2017 – 2019.

Chromium VI Update



The European Commission has changed its approach to the regulation of hexavalent chromium (Cr(VI)) for surface treatment.

ECHA has received a mandate from the European Commission to prepare a report on Annex XV for a possible restriction of at least those chromium(VI) substances currently included in entries 16 and 17 of the REACH authorisation list (Annex XIV). ECHA will submit the proposal by 4 October 2024.

The restriction proposal aims to address the challenges posed by the current and potential future workload of ECHA and the Commission resulting from the high number of applications for authorisation of the use of these substances that have already been submitted or potentially will come from hundreds of companies.

Due to its carcinogenic properties, hexavalent chromium - or Cr(VI) - can no longer be used in Europe unless an authorisation under REACH is applied for.

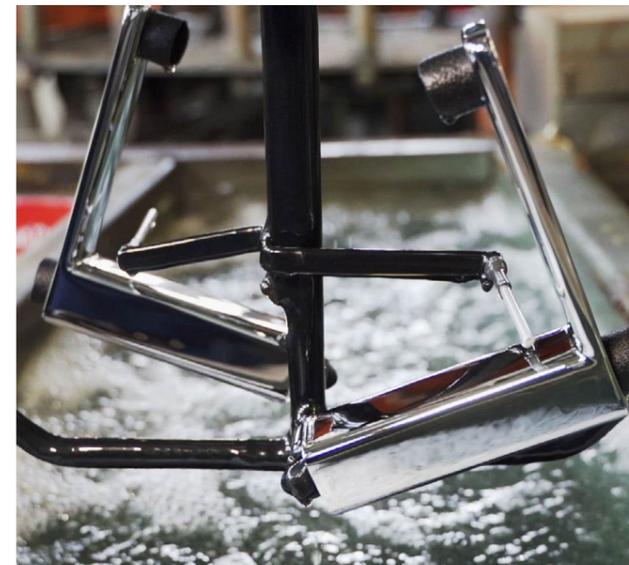
While the authorisation process has

undoubtedly led to significant reductions in workplace exposure, it has placed an impossible burden on the authorities.

Therefore, after many years of discussions on the best way forward, EUCOM made a significant U-turn on how it intends to regulate Cr(VI) in the future. Instead of continuing with the REACH authorisation system, it has asked ECHA to develop different REACH restriction options to find the most appropriate measure to control the risk from Cr(VI), while also encouraging substitution.

Eng. Daniela Lionetti, AVR TC

New project to replace Chromium VI



There are still no sustainable alternatives available for Cr(VI)-based processes when applying metallic coatings on brass. New solutions need to be developed on an EU level as the value chain expands beyond national borders. A new project, aiming to find sustainable alternatives that fulfill the industry's requirements, is a promising step forward.

Cr(VI)-based coating processes are still used to apply metallic coatings on brass, but there are no sustainable alternatives available that meet the industry's requirements. As the value chain for the plumbing fixtures industry expands beyond national borders, new solutions that adhere to both functionality requirements and legislation need to be developed on an EU level.



RISE (Research Institute of Sweden) is an independent, state-owned institute and innovation partner with 3,000 employees that offers unique expertise and over 100 test beds and demonstration environments for future-proof technologies, products, and services. RISE has formed a consortium with two Swedish plumbing and fixtures manufacturers: Villeroy & Boch Gustavsberg and FM Mattsson Group.

The project aims to replace Cr(VI) in two ways: developing new and existing alternatives to match the industry's requirements and improving the test methods used to evaluate coatings to better indicate performance in real life. Today's accelerated testing of plumbing fixtures poorly corresponds to actual wear and poorly predicts the functionality and lifetime of the coating.

RISE is aiming to apply for funding from SMART Eureka during spring. The project, if granted, starts in September 2024 with a duration of 3 years. RISE is open for additional partners among brass/plastic plumbing fixtures manufacturers, coating solution providers and chemical suppliers in the electroplating industry. Replacing Cr(VI) processes with more environmentally friendly, less hazardous processes will help the European plumbing fixture industry transition to a sustainable economy. By ensuring that this is done without compromising on quality and costs, the industry's competitiveness will increase.

For more information, contact: erik.ekstrom@ri.se or karin.b.torne@ri.se

Bengt Henricson, Valves & Fittings of Sweden

PFAS Ban Update

Following the discussion on the Board Meeting and the dedicated Webinar in June, the PFAS taskforce consisting of experts from the two Technical Committees, members representatives and supported by the CEIR Technical Secretariat has developed the CEIR position on PFAS ban proposal in the framework of REACH regulation, approved by The Board in August.

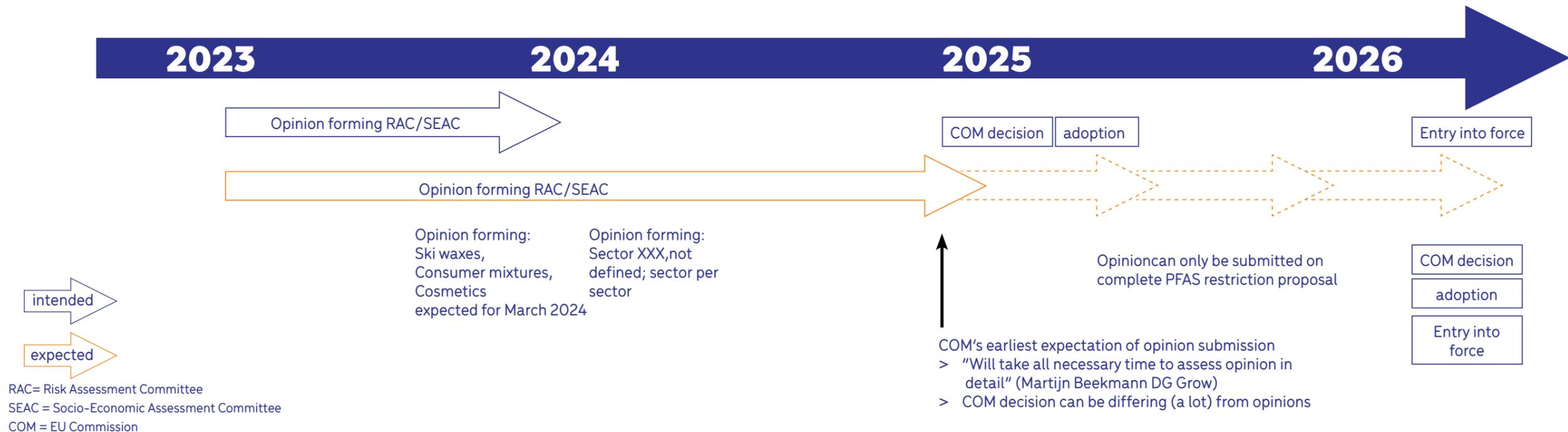
In this position, CEIR calls:

- upon the Commission and the co-legislators to amend the REACH Regulation in force in order to significantly extend the stakeholder consultation for a minimum of 36 months,
- for a realistic risk and impact analysis and assessment in order to ban what really needs to be banned and let time to improve the current processes along the supply chain (including end of life and actual research of potential alternatives),
- for a minimum five years' transition period and a general exemption from the ban of the fluoropolymers "of low concern" that are proven to be non-hazardous,
- for a stronger regulation on PFAS emissions during fluoropolymers production and a ban of importation in Europe of fluoropolymers coming from regions without PFAS emissions regulations,
- for an End-of-Life regulation concerning fluoropolymers guarantying a complete collection and treatment including all the supply and users' chain,
- fair trade thanks to an effective market surveillance based in technical means to assure adequate and effective controls.

CEIR opinion was also submitted to the ECHA public consultation, and it was published on the CEIR website (www.ceir.eu), in particular here.

Since then, the following is a report on the state of the debate on PFAS in Europe in April 2024.

As part of the public consultation launched by the European Commission on 25 September, ECHA received over 5,600 comments from more than 4,400 organisations, companies and individuals.



The European Chemicals Agency's (ECHA) Scientific Committees for Risk Assessment (RAC) and Socio-economic Analysis (SEAC) are currently evaluating the proposed restriction and the comments received from the batch consultation, focusing on the different sectors likely to be affected.

At the same time, the five national authorities that prepared the proposal are updating their initial report to take into account the comments from the consultation.

This report will be updated, probably in June 2024, and will then be assessed by the Committees and used to finalise their opinions.

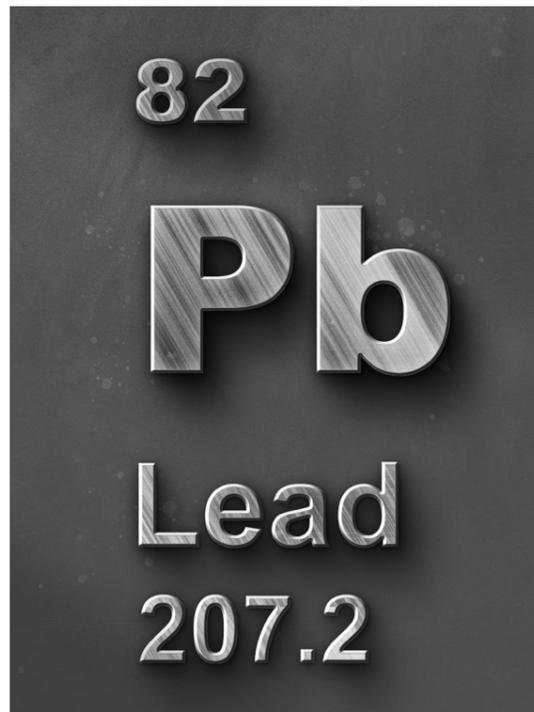
By way of example, the sectors and elements that have been and will be discussed at the forthcoming committee meetings are as follows

- March 2024 meetings:
 - o Mixtures for consumer products, cosmetics and ski waxes;
 - o PFAS hazards (RAC only); and
 - o General approach (SEAC only).
- June 2024 meetings:
 - o Metal plating and manufacture of metal products; and
 - o Additional hazard discussion (RAC only).
- September 2024 meetings:
 - o Textiles, upholstery, leather, garments, carpets;
 - o Food contact materials and packaging; and
 - o Oil and mining.

Due to the large number of comments received, ECHA's work plan can only be indicative (source EDW).

Lorenzo Maurizio Ferrero | EVOLIS Fluid Equipment Technical Manager

Lead Update



The inclusion of lead in the draft recommendation published on 2 February 2022 generated many comments during the consultation. It led to an active discussion in the Echa Member State Committee about the best timing, its combination with other ongoing or planned regulatory activities and the expected workload for industry and authorities in the next phase.

Ofelia Bercaru, Director for Priorities and Integration, said: "This recommendation brings lead metal to the same regulatory status as other lead compounds with similar uses already recommended for inclusion on the Authorisation List. We are aware of the challenges and felt that balancing the risks posed by lead to workers and the environment and its continued use requires a political decision by the Commission and EU Member States."

It is recalled that ECHA regularly recommends to the Commission to include some of the substances from the candidate list (SVHC) in the authorisation list (Annex XIV of REACH). The draft recommendation is

based on an evaluation of the data in the registration dossiers and other available information and an initial discussion with the Member State Committee.

The Member State Committee will prepare an opinion on ECHA's draft recommendation taking into account the comments received during this consultation. Based on the opinion of the committee and the consultation, ECHA will forward its final recommendation to the European Commission. This is ECHA's eleventh recommendation. The Commission will decide which of the substances to include in the authorisation list and the respective conditions applicable to each substance.

Eng. Daniela Lionetti, AVR TC



Industrial and Building Valves



THREE CEIR COMMITTEES

Marketing and Communication



Sanitary Valves



The Carbon Border Adjustment Mechanism: You Very Urgently Need To Understand Its Consequences!



The European Union (EU) has set itself ambitious targets in the fight against global warming, which should not be called into question. However, the EU's ecological transition must not lead to further relocations and a weakening of European industrial activity; nor must it result in the carbon production avoided in Europe being transferred to countries outside Europe.

Industries that emit large quantities of CO² in Europe (steel, aluminium, fertiliser, cement and electricity producers) are being called on to decarbonise their manufacturing processes in order to meet the 2050 carbon neutrality target. This will require very substantial investment in production equipment and will therefore lead to price increases for the products manufactured.

To protect these industries from the risk of relocation, the European governing bodies have set up, with some difficulty, a new Carbon Border Adjustment Mechanism (CBAM) which imposes a carbon tax on imports of the aforementioned materials and products (defined with a list of customs codes) manufactured outside Europe.

These developments will lead to a significant increase in the selling prices of steel (in the broadest sense) and aluminium in Europe, for sectors that consume these materials

and products, such as the mechanical engineering industry, while their competitors outside Europe will not have the same financial burden. Mechanical products manufactured in the EU, and therefore decarbonised, will be more expensive and therefore less competitive than the same products manufactured outside Europe, without any decarbonisation effort.

European customers of mechanical products (mechanical components, production equipment, robots, boilermaking equipment for the chemical, pharmaceutical, nuclear and energy industries, equipment for agriculture, the food industry, hospitals, health, catering and tableware, etc.) will therefore buy at the best price from suppliers based outside Europe, in the knowledge that these finished mechanical products will not be affected by a carbon tax when they enter Europe.

European manufacturers of these mechanical products will find it extremely difficult to export products outside Europe that they have made using decarbonised metals, and which are therefore more expensive than those of their competitors outside Europe...

The situation is easy to understand: fewer customers in Europe, fewer customers outside Europe, and therefore less production in Europe:

- relocations outside Europe for companies large enough to do so and retain their customer base,
- closure for the smallest companies, which will not be able to produce outside Europe.

The exact opposite of the European policy of reindustrialisation and reinforcement of industrial sovereignty that has been announced!

What's more, the environmental impact of this mechanism will be negative, due to the massive importation of finished products with a higher carbon content than European products...

When public authorities are questioned about the proven risks of relocation (known as "carbon leakage" in technocratic language), they reply that once the mechanism has been implemented, they will have to check whether the predicted consequences actually occur... But this ignores the fact that...

- lost markets are very difficult to regain over time, even if CBAM is corrected in the future,
- companies (particularly SMEs) that have closed their doors will not reopen them to please the technocracy.

The mechanical engineering industries in Europe account for millions of direct jobs. To date, no one can predict the scale of direct job losses linked to CBAM ...

The objective of CBAM and decarbonisation are not open to criticism.

But the decarbonisation of upstream sectors must not be allowed to destroy downstream sectors, particularly the mechanical engineering sector, which is not protected by the carbon adjustment mechanism at borders.

Please note that the CBAM applies from the 4^{ème} quarter of 2023, for which manufacturers will have to register, during the 1^{er} quarter of 2024, the carbon emissions of their supply chain for inputs in Europe. Admittedly, this is only an observation phase without tax until the end of 2025, but the reporting process is extremely complex.

Find out more!

Pascal Vinzio – Evolis

With support of French Federation of Mechanic

Relations Between The Taps and Valve Industry and Other Sectors



Taps and valves are frequently used in our daily lives as devices that mobilize fluids such as water, oil and air, adjust their quantities and stop them. In pump lines, valves act as flow control devices and adjust or stop the flow rate of the fluid. The article discusses the multifaceted relationship between the taps and valves industry and various sectors, emphasizing their critical roles in fluid control across different applications.

- 1. Agricultural Sector:** Valves, alongside pumps, play a crucial role in precision irrigation systems, aiding sustainable agriculture practices.
- 2. Energy Sector:** Valves are extensively used in thermal power plants, including nuclear ones, emphasizing the importance of safety and reliability in design. They're also vital in hydroelectric and geothermal energy systems.
- 3. Construction Industry:** From heating/cooling systems to firefighting, valves are integral components in building infrastructure.

In building installations, taps and faucets types such as bathroom, sink and washbasin faucets that provide controlled flow at the end point of the pipes are also used.



- 4. Environmental Technologies:** In wastewater treatment and water conservation projects, high-quality valves are essential for efficient operations and resource preservation.
- 5. Automotive Sector:** Valves are pivotal in fuel, lubrication, and cooling systems, ensuring the smooth operation of vehicles.
- 6. Aviation and Space Studies:** The valves industry contributes to the design and production of control systems for liquid fuel and oxygen in rockets and plays a crucial role in hydraulic control applications in aviation.
- 7. Defense Industry:** Valves are extensively used in fluid movement systems within defense applications, highlighting the importance of innovation and R&D in this sector.
- 8. Healthcare Sector:** Valves play vital roles in controlling fluid movement within healthcare facilities, with expectations for further contributions in designing systems to meet healthcare demands.
- 9. Chemical, Petrochemical, Pharmaceutical, and Food Sectors:** Valves are essential for moving fluids in harsh conditions, facilitating processes and bringing products to market in various industries.
- 10. Mining Sector:** Specialized valves are employed in mining operations, requiring robust designs to withstand abrasive materials.
- 11. Maritime Sector:** Taps and valves are crucial in marine vehicles' engine and control systems, as well as in fuel tankers and firefighting equipment.
- 12. Machinery Manufacturing Sector:** Valves are integral in machines utilizing hydraulic and pneumatic equipment, with manufacturers providing customized solutions for diverse applications.

Overall, the taps and valves industry plays a foundational role across numerous sectors, enabling fluid control in various applications, from agriculture to aerospace. No fluidic line without valves, no pump without many valves, no fluid control without valves!

Gökhan S. Türktan, POMSAD Secretary General



NEWS FROM MEMBERS AND

LIAISONS

Organizational Change in EVOLIS



In a fast-moving world, EVOLIS has changed its organisation in order to structure it in sectoral pillars linked by transversal activities and opportunities. Our professional organisation is now divided into 8 sectors that meet the expectations and needs of our French manufacturer members, including a Fluidic Equipment Group (pumps, valves, mixers, compressors) led by Mélanie Emzivat, Lorenzo Ferrero and Rudolph Ganzel.

The strategic challenges facing the Group are many and varied:

- Anticipate new regulatory requirements (e.g. PFAS, DWD, ESPR) and adapt the product offering accordingly,
- Supporting the fluid power industry in developing an innovative offering that meets today's challenges: decarbonisation, digitalisation, etc,
- Raise the profile of the industry, particularly with public authorities, for example as part of the government's water plan,
- Promoting fluid power equipment to key customer sectors,
- Monitoring the European "Blue Deal" project,

In addition, a meeting of the Fluidic Equipment Group will be held on 10-11 October. We hope that the President and Secretary General of CEIR will be participating to make the French manufacturers aware that their commitment is essential to defend their interests.

In the light of current events, we thought it appropriate to invite the hydrologist Charlene Descollonges to speak about the water cycle with a view to protecting water resources. We have also invited the chairwoman of Suez, Madame Soussan, to contribute to the discussions.

NKBA State of the Industry and Association – 2023



Bill Darcy, NKBA Chief Executive Officer

The National Kitchen and Bath Association (NKBA), the leading association for kitchen and bath professionals across all market segments in North America, has continued to experience solid growth despite softer economic conditions in 2023.

The year began with the association celebrating its 60th anniversary during an impressive Kitchen and Bath Industry Show (NKBA owns the event) in February 2023, where, as part of Design and Construction Week, over 100,000 design and construction professionals walked approximately 100,000 net sq meters of exhibit space and visited over 1000 exhibitors. As the single largest revenue and member driver for the association, KBIS set the pace for a strong year.

The NKBA membership comprises a mix of almost 50,000 trade professionals including designers, dealers, showrooms, distributors, retailers, manufacturers, media, sales and marketing firms. Our members receive access to proprietary research, education and certification, as well as networking events nationally and through our 70 chapters across North America.

The NKBA mission is to "inspire, lead and empower the kitchen and bath industry through the creation of certifications, marketplaces and networks, allowing us to envision a world where everyone can enjoy safe, beautiful and functional kitchen and bath spaces."

Despite a somewhat challenging 2023 where our industry experienced inflation, shaky consumer sentiment and an uncertain economy, our association had one of its most successful years. We're pleased to report that NKBA's financials are robust, giving us the ability to weather any challenges in the coming years and maintain a strong balance sheet with no debt, allowing us the ability to fund operating expenditures for at least two-years if needed.

NKBA's income statement shows growth in the following key areas:

- Membership dues revenue has increased 9%
- Member retention remains high at 92 percent in 2023
- New membership revenue growth was nearly 50% percent in 2023, with much of that coming from our new online sign up at NKBA.org
- Total KBIS revenue grew an additional 26% in 2023

Our financial success has allowed us to reinvest in our NKBA member programs, introduce new initiatives and events that increase member value, as well as help to build our brand and our community.

We are especially pleased about our international engagement and evolution of our Global Connect business development initiatives. We have increased international membership by 23% and at the 2024 edition of KBIS, welcomed over 40 Global Connect exhibiting members - many of whom participated in international pavilions from the UK, Germany and Brazil.

Looking ahead, our recent 2024 NKBA Kitchen and Bath Market Outlook report, forecasts residential kitchen and bath spending at \$173 Billion, a modest year-over-year decline of 3% that is still above pre-pandemic levels, suggesting that the North American kitchen and bath industry is fundamentally strong.

The report indicates there are significant factors inspiring optimism for the remodeling segment, notably:

- Once mortgage rates moderate to around 5%, the number of existing homes for sale will return to normal levels, spurring interest by both buyers and sellers to remodel.
- Homeowners are still sitting on record levels of home equity they can utilize once rates stabilize.
- Remodeling projects deferred in early 2024 will fuel demand in the coming years.
- The number of homes in prime remodeling years will grow by 2.2 million by 2027, reaching a total of 24 million.

We remain excited about the future of our association, our industry and our collaborations with our international strategic alliance partners, and importantly the growth opportunity North America presents to manufacturers and suppliers in Europe, the Middle East and South America.

CEIR-Taps & Valves Europe: Strengthening Water Resilience in Europe



Strategic Focus on Water

At CEIR - Taps & Valves Europe, water is more than a resource—it flows through every product of our industry. With its reliable and responsible expertise, CEIR actively shapes discussions with European policymakers to prioritize water management and resilience in the taps and valves sector.

Addressing Water Scarcity

The looming threat of a 56% shortfall in water supply by 2030 underscores the urgency for strategic water management. Initiatives like the new Drinking Water Directive are critical, setting rigorous standards for water quality and accessibility that directly impact our industry. It's imperative that we together with all stakeholders shape a regulatory framework that is sustainable and safeguard the future of our industry, our society and of our planet.

Collaboration for Innovation

CEIR's proactive stance is exemplified through the funding and partnerships with organizations such as the Unified Water Label Association, which champions water and energy efficiency. Our involvement with the European Drinking Water Association, along with collaborations with Orgalim, Europump and WaterEurope enhances our influence and commitment to advancing water management practices across the industry.

Influencing EU Policy - Advocacy for the Water Resilience Initiative

Water Resilience Initiative is key for CEIR-Taps & Valves Europe. CEIR leverages its collective expertise and partnerships to ensure that water remains a top policy priority. On March 12th a diverse coalition of European organisations has joined forces to call upon the European Commission to deliver the Water Resilience Initiative as soon as possible, marking a crucial first step towards an ambitious water strategy for Europe.

In an open letter co-signed by CEIR- Taps & Valves Europe addressed to the European Commission, the coalition emphasises the indispensable need for a water-resilient Europe in light of the escalating pressures on the continent's freshwater resources, intensified by the impacts of climate change. The coalition stresses that water stands at the centre of the economic, societal, and environmental sustainability of Europe. As such, the Water Resilience Initiative is seen as imperative to provide European socio-economic actors with a competitive edge, while ensuring the availability of water resources of the highest quality at the right time.

Commitment to Future-Proofing the Industry

Our goal is clear: to ensure the efficient and sustainable management of water resources. This aligns with the broader European objective of enhancing economic stability and environmental protection. CEIR's leadership in promoting initiatives like the Unified Water Labelling and Water Resilience Initiative not only addresses current industry needs but also sets the stage for long-term sustainability.

Through strategic partnerships and continuous advocacy, CEIR is committed to leading the charge in Europe's journey towards a resilient water future, ensuring our industry remains at the forefront of global water management and sustainability efforts.

The joint letter sent to the Commission

CEIR- Taps & Valves Europe has joined a diverse coalition of European organisations to call upon the European Commission to deliver the Water Resilience Initiative as soon as possible.

The joint letter emphasizes the importance of the Water Resilience Initiative in light of the pressures on the continent's freshwater resources.

Our coalition calls upon the European Commission to uphold its commitment and deliver the Water Resilience Initiative, making water a top priority for the next mandate of the European Commission.

Ursula von der Leyen, President
 Maroš Šefčovič, Vice President
 Virginijus Sinkevičius, Commissioner

Brussels, 12th March 2024

Subject: Call on the European Commission to deliver the Water Resilience Initiative to pave the way for an ambitious water strategy

Honourable President,
 Honourable Vice President,
 Honourable Commissioner,

There is no resilience in Europe without a water-resilient Europe.

We, a broad coalition of European organisations, call on the European Commission to deliver the Water Resilience Initiative as soon as possible as a first step towards an ambitious water strategy for Europe.

Europe's freshwater resources are under increasing pressure, intensified by climate change effects putting society, ecosystems, and economic development at risk¹.

Water is a critical resource to ensure economic, societal, and environmental sustainability of Europe. The Water Resilience Initiative would provide a framework that reduces the risks of competition over this strategic resource among European socio-economic actors thus securing enough water of the right quality at the right time. In addition, water efficiency is a key asset for European competitiveness and strategic autonomy. Even if the steps are gradual, they need to be steady and consistent to unlock the potential and establish an environment that enables water resilience, sustainability, and security. During the last five years, the European institutions have proactively updated the European water acquis to align with the new challenges that we are facing.

A broad consensus between the different European Member States and institutions has emerged to highlight the need of a coherent and comprehensive water strategy. The European Council in two resolutions in 2021 and 2023 highlighted the "strategic importance of water and the need to act". The European Council also voted on comprehensive and bold water commitments and submitted them to the UN 2023 Water Conference.

This strategy cannot be delivered without the Water Resilience Initiative that was announced in the State of the Union speech in September 2023. We are concerned about the Commission's decision to put on hold this priority communication.

¹ According to your administration, over 14,000 areas in the EU are at significant risk of flooding while 19.6% of the EU-27 territory is in warning condition for drought in the first half of February 2024.

Now, it's time to leverage and coordinate synergies with all the social and economic sectors.

As Europe proposes to be the frontrunner, we call on the European Commission to urgently deliver the Water Resilience Initiative, as committed, and make water a top priority for the next mandate of the European Commission.

Yours sincerely,

Signatories



11th Pump - Valve Congress Organised by POMSAD



The 11th Pump and Valve Congress was held in Ankara, METU Congress and Culture Center on 14-15 December 2023. The Congress was held this year with the theme of "Water and Human 5.0"; was organized by METU Mechanical Engineering Department, ITU Faculty of Mechanical Engineering and POMSAD (Turkish Pump and Valve Industrialists Association). The Congress which was supported by many local and foreign sectoral associations and federations; While being supported by Turkey's Mechanics, AUMA, Duyar Vana and Mas-Daf companies as Main Sponsors, Alarko, Asteknik Vana, Doğuş Vana, Eagle Burgmann, KSB, Layne Bowler, Göksan Pompa, Samsun Makina Sanayi and Standart Pompa supported as Gold Sponsors. Many sectoral magazines and press groups also took part in the Congress as Press Sponsors.

The congress was opened on December 14 with the speeches of Prof. Dr. Mr. Erkan Ayder (İ.T.Ü), POMSAD and CEIR President Dear Madam Nurdan Yücel, TİM Deputy Chairman Mr. Kutlu Karavelioğlu, Deputy Minister of the Ministry

of Industry and Technology of Turkish Republic, Prof. Dr. Mr. Ahmet Yozgatlıgil. After the opening speeches Prof. Dr. Mr. Ahmet Şevket Üçer from METU took part with his speech on "Technology Development and Management" and Prof. Dr. Mr. Mehmet Efe Biresselioğlu, from Izmir University of Economics also took part in the Congress with his speech on "The Increasing Impact of Energy Security and Climate Change Concepts in Energy Policy Determination Processes". After the lunch brake, the Conference Session of the Congress started. Firstly Mr. Ömür Demir Kızılarlan, MAİB Sustainability Project Consultant made his speech on "Quo Vadis - Sustainability", subsequently, the Vice President of the Climate Change Directorate, Mr. Assoc. Dr. Abdülkadir Bektaş took part in the congress with his speech on "Carbon Border Adjustment and the Situation in Turkey". In the conference session, Prof. Dr. Mr. Haluk Karadoğan from I.T.U. came third and took part with his speech on "Istanbul, Importunate for Water". After Prof. Dr. Haluk Karadoğan, Prof. Dr. Y. Onur Devres, with his speech on "Hygienic Food Pumps and Valves" and Assoc. Dr. Mr. Tarkan Gürbüz, from O.D.T.U. with his speech on "A People-Oriented Approach Towards Sustainable Development Goals: Transformation in Education" took part in the congress. Following the break given after the conference session, "Commemoration Session for Our Lost Values" was realized with the Presidency of Prof. Dr. Mr. Erkan Ayder. At the commemoration session, after the screening of a short film about the estimable industrialists and academicians who served our sectors for many years and whom we lost; General Manager of Mas-Daf Türkiye Mr. Vahdettin Yırtmaç, Prof. Dr. Mr. Haluk Karadoğan from I.T.U. and Prof. Dr. Mr. Kahraman Albayrak from O.D.T.Ü. shared their memories with the participants about the estimable people we lost. Following the Commemoration Session, The panel session on "Water and Human 5.0" moderated by Prof. Dr. Mr. Erkan Ayder started. In the panel, General Manager of KSB Türkiye Mr. Sinan Özgür, General Secretary of MAKFED Mr. Zühtü Bakır and State Hydraulic Works Survey,



Planning and Pensioners Department Head Mr. Nazmi Kağncıoğlu took part as panelists; the theme of "Water and Human 5.0" was discussed from different aspects.

On December 15, the congress continued simultaneously in three halls with invited speakers and paper presentations, as well as technical training. On the 2nd day of the Congress, where a total of 21 papers were presented; Member Relations Representative of Electric Motors Industrialists Association (EMOSAD) Mr. Tunç İçcan on "Transformation of Systems in the Field from the Perspective of Energy Efficiency and Sustainability", Chairman of the Sector Board of the Digital Transformation in Industry, Dr. Mr. Adem Kayar from the Industrial Automation Manufacturers Association's (ENOSAD) on "Digital Transformation and Smart Pump Applications in Industry" and Nuclear Industry Procurement Consultant, Mr. Korcan Kayrın on Nuclear Power Plants and Pumps-Valves" gave their speeches and addressed the participants.

Two of the technical trainings given to students and participants from various companies were given by Mr. Cem Aydoğan and İbrahimşah Zengin from the Navist Company, one by Mr. Altan Ongun from the DESICA Engineering Company On December 15. While Navist Company trainings were given on the subjects: Pipe Systems with Flowmaster – Network Analysis, Pump Sizing etc. Modeling Analysis, Pump and Valve Design and Optimization with CAESSES and STAR-CCM+ Software, the subject of DESICA Engineering Company training was focused on Conceptual Design of Centrifugal and Mixedflow Pumps with CFturbo Conceptual Turbomachine Design Platform, Parametric Decomposition of Stock Designs with Reverse Engineering Interface / Fast, Integrated CFD Solution with Cf Turbo Blade Runner.

Closing speech of the Congress was made by Prof. Dr. Seyhan Uygur Onbaşıoğlu from I.T.U. After Onbaşıoğlu's speech on "Hydrogen and Society in Engineering Perspective", the Congress ended with the awards presented to the sponsors and session moderators, and the gifts given to one person as a result of the draw held among the congress participants and presenters.

During the congress, the photo exhibition "Pumps and Valves in the 100th Anniversary of the Republic" also hosted its visitors in the exhibition hall. The exhibition included historical and current photographs showing the current situation of our member companies from past to present.

The two-day Congress was visited by more than 600 people and was held successfully with the participation of water administration officials of various provinces, State Hydraulic Works officials ministries and, as well as many public institutions and organizations and company officials from many different sectors, faculty members and students.

11

NATIONAL ASSOCIATIONS

Representing major and smaller manufacturers

VELTEK

DENMARK
VELTEK – AVA
(The Danish Association of Manufacturers and Suppliers of Plumbing, Electrical, Heating and Ventilation Material)
Smedeholm

www.veltek.dk



TEKNINEN KAUPPA

FINLAND
Teknisen Kaupan Liitto Ry
(The Association of Finnish Technical Traders)
Helsinki

www.tekninen.fi



FRANCE
EVOLIS
(French Professional Organisation for Capital Goods)
Courbevoie

www.evolis.org



VALVOLE E RUBINETTI

ITALY
AVR
(Italian Valve and Fitting Manufacturers' Association)
Milano

www.assoziazioneavr.it



SPAIN
AGRIVAL
(Spanish National Association for Taps and Valves)
Valencia

www.agrival.es



SPAIN
FLUIDEX
(Spanish association for Fluid Handling Solutions & Process Technologies)
Bilbao

www.fluidexspain.com



SWEDEN
VVS Fabrikanternas Råd AB
(The Swedish association for manufacturers of heating, plumbing, sanitation and metering products and equipment)
Stockholm

www.vvsfabrikanterna.se



SWITZERLAND
URS Verband
Schweizerischer Armaturenfabriken
(Union De Fabriques Suisses De Robinetterie)
Bern

www.urs-verband.ch



TURKIYE
POMSAD
(Turkish Pump & Valve Manufacturers' Association)
Ankara

www.pomsad.org.tr



UNITED KINGDOM
BEAMA
(Water Safety and Hygiene Group)
London

www.beama.org



UNITED KINGDOM
BMA
(The Bathroom Manufacturers Association)
Staffordshire

www.bathroom-association.org



LIST OF ASSOCIATE MEMBERS COMPANIES



GERMANY

AUMA
Grohe
Hansa
Hansgrohe SE
Ideal Standard GmbH
Neoperl GmbH



SWITZERLAND

IMI Hydronic Engineering
Taconova



SPAIN

SEDAL



TURKIYE

Valfisel

ORGANIZATIONS



UNITED KINGDOM





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