

ETAs in Global Markets: a data-based analysis

Final Report – Summary
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Executive Summary

Objectives

EOTA has long-standing experience with collecting data on its core activities, i.e., the development of European Assessment Documents (EADs) and the Europe-wide coordination of European Technical Assessments (ETAs) issuance. EOTA data has also been enriched with quantitative and qualitative data from stakeholder surveys on several occasions.

This study constituted an exercise to assess the feasibility and potential benefits of systematic collection and analysis of ETA-related data from external sources on a regular basis. The focus was on collecting and **combining data from EOTA's internal monitoring system and data from publicly available, regularly updated sources**. The objective was to gather data at a sufficient degree of disaggregation to allow analyses at the product area level defined in Annex IV of the Construction Products Regulation (Regulation (EU) No. 305/2011). The ultimate goal of the exercise was to gain knowledge about the **role of the ETA route in global trade** and to investigate how to increase the relevance and visibility of ETAs worldwide.

The main report provides an analysis of the information that could be gained based on linking EOTA's internal information system with general trade and economic relevance data, e.g., on production, number of companies, covering the global construction industry. This summary presents the key results.

Main findings

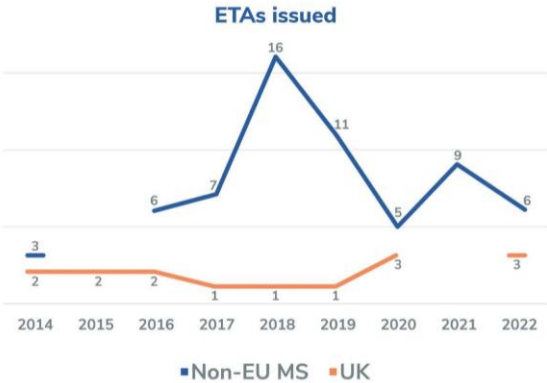
- An increasing number of manufacturers around the world are showing interest in the ETA route by requesting ETAs. Between 2013 and 2022, **1,347 ETAs** were **issued to non-EU manufacturers, representing 12% of the total number of ETAs** issued at the global level. These figures suggest that ETAs are relevant for manufacturers outside the European Union (EU).
- The number of **ETAs issued in non-EU countries varies widely across countries and product areas**. This finding suggests that strengthening the ETA route outside the EU will require an internationalisation strategy diversified by country and product area.
- At the **PAC level**, most ETAs were requested by non-EU manufacturers producing **fixings** (PAC 33) and **fire stopping, fire sealing, fire protective or retardant products** (PAC 35). Evidence also shows that more ETAs for fixed firefighting equipment (PAC 10) and geotextile, geomembranes, and related products (PAC 8) were issued to manufacturers outside the EU than among the EU27 Member States. **Reinforcing and pre-stressing steel for concrete and ancillaries, post-tensioning kits** (PAC 16) and **structural metallic products and ancillaries** (PAC 20) are product areas **showing increasing demand for ETAs from non-EU manufacturers**.
- At the **country level**, most ETAs issued in non-EU countries were requested by manufacturers located in **Australia** (81 ETAs) as well as in **Asian countries** such as China (73 ETAs), Taiwan (63 ETAs), and India (53 ETAs), and in the **United States** (50 ETAs). Moreover, manufacturers in **China** and **Brazil** have requested an **increasing number of ETAs**, and to a lesser extent, so have manufacturers in **India** and the **United Arab Emirates**.

- Outside the EU, ETAs are usually requested by manufacturers located in countries characterised by **large product markets** and **strong trade relationships** with EU Member States. This finding suggests that the more a country plays a key role in the global market or trades with EU Member States, the more likely it is that ETAs are requested by manufacturers from this country.
- Regarding PAC 4 – Thermal insulation, PAC 9 – External cladding, PAC 13 – Structural timber products, PAC 33 – Fixings, and PAC 35 – Fire-stopping products, **China**, the **United Kingdom**, and the **United States** represent the **main non-EU players** in terms both of market size and the strength of existing trade relationships with EU Member States. Manufacturers in these countries have also requested a significant number of ETAs.
- **Egypt** shows **growth rates in the total production** of PAC 4 – Thermal insulation, PAC 9 – External cladding, PAC 13 – Structural timber products, and PAC 35 – Fire stopping products, and a steadily rising number of **active companies**. **Morocco, Saudi Arabia, South Korea, and Vietnam** show growth rates in their **trade relationships** with the EU Member States. Therefore, manufacturers operating in these countries might become interested in requesting ETAs to access the EU market so as to increase their market shares in EU Member States and in their home markets.
- Some countries are also known to look to the **ETA route as a best practice** (e.g., Australia), which leads to a higher number of ETA requests than can be explained by indicators such as product market size or trade volumes.

FACT SHEET

PAC 4 – Thermal insulation products

78 ETAs (4%) requested by non-EU manufacturers



26% ETAs issued to manufacturers in Serbia



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5,067 billion USD in thermal insulation products (all sectors) produced worldwide

86% produced outside the EU

85% of extra-EU production concentrated in:

- China (69%)
- United States (16%)

Emerging country: Egypt



2019

834,000+ thermal insulation companies active worldwide

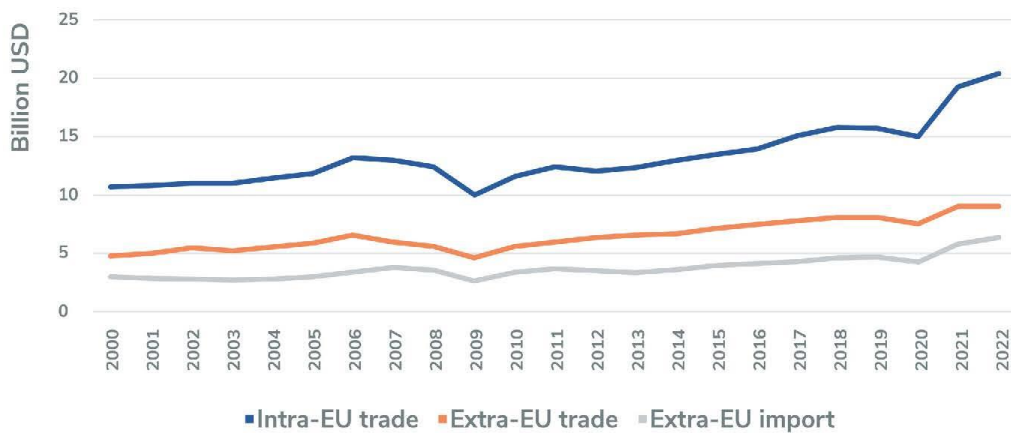
31% located outside the EU

48% of the extra-EU companies concentrated in:

- Thailand (24%)
- China (12%)

Emerging country: Egypt





EU cross-border trade of thermal insulation products has steadily **increased** internally and with extra-EU countries.

2022

7.36 billion USD in thermal insulation products **exported outside the EU**, accounting for **25%** of total EU exports.

26% of the **extra-EU exports** concentrated in:

- United States (21%)
- China (5%)



2022

5.41 billion USD in thermal insulation products **imported from outside the EU**, accounting for **21%** of total EU imports.

37% of **extra-EU imports** came from:

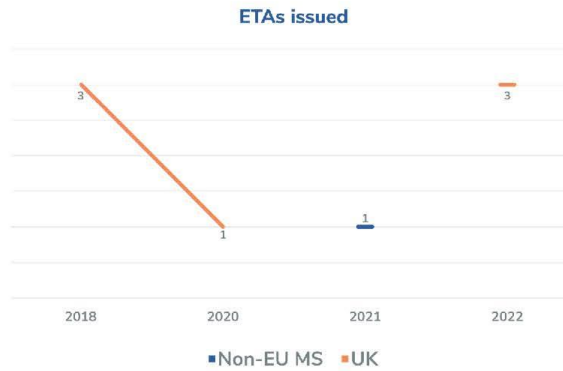
- China (27%)
- Russia (10%)



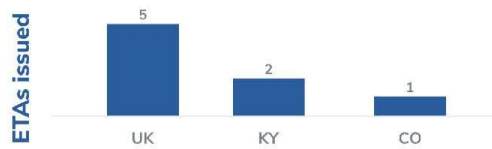
FACT SHEET

PAC 9 – Curtain walling products

8 ETAs (4%) requested by non-EU manufacturers



ETAs issued to manufacturers in UK, Cayman Islands and Colombia



2019

2,698 billion USD in curtain walling, claddings and structural sealant glazing (all sectors) produced worldwide

79% produced outside the EU

78% of **extra-EU production** concentrated in:

- China (59%)
- United States (19%)

Emerging countries: Philippines and Egypt



2019

766,000+ curtain walling **companies** active worldwide

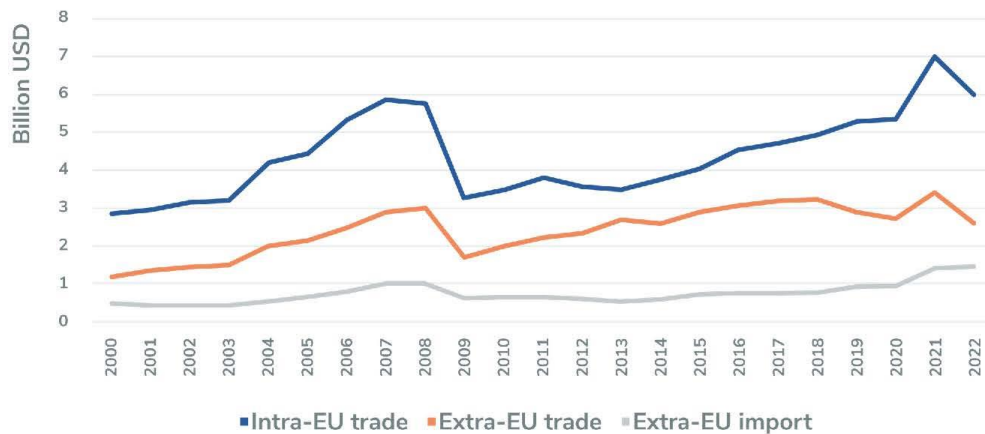
41% located outside the EU

28% of **extra-EU companies** concentrated in:

- Mexico (15%)
- China (12%)

Emerging countries: Egypt and Nepal





EU cross-border trade of curtain walling products has steadily **increased** internally and with extra-EU countries until 2021 and dropped in 2022.

2022

1.50 billion USD in curtain walling products **exported outside the EU**, accounting for **17%** of total EU exports.

52% of **extra-EU exports** concentrated in:

- United Kingdom (41%)
- United States (11%)



2022

1.26 billion USD in curtain walling products **imported from outside the EU**, accounting for 21% of total EU imports.

53% of the **extra-EU imports** came from:

- China (39%)
- United Kingdom (14%)

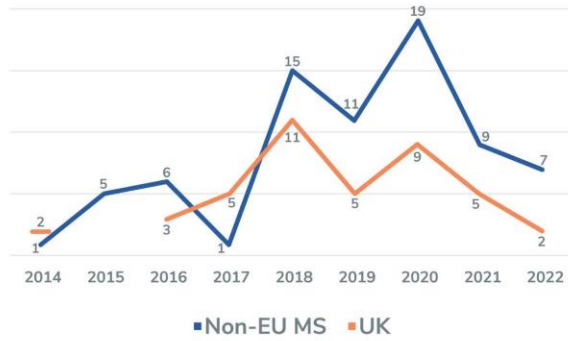


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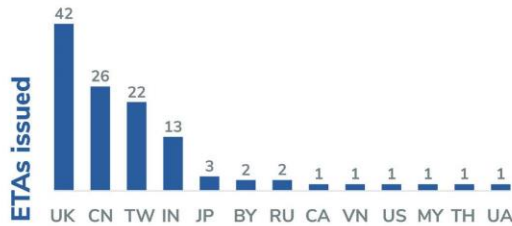
PAC 13 – Structural timber

ETAs issued

116 ETAs (15%) requested by non-EU manufacturers



81% ETAs issued to manufacturers in UK, China and Taiwan



2019

895 billion USD in structural timber products (all sectors) produced worldwide

87% produced outside the EU

90% of extra-EU production concentrated in:

- China (79%)
- United States (11%)

Emerging countries: Egypt and Kyrgyzstan



2019

165,000+ structural timber companies active worldwide

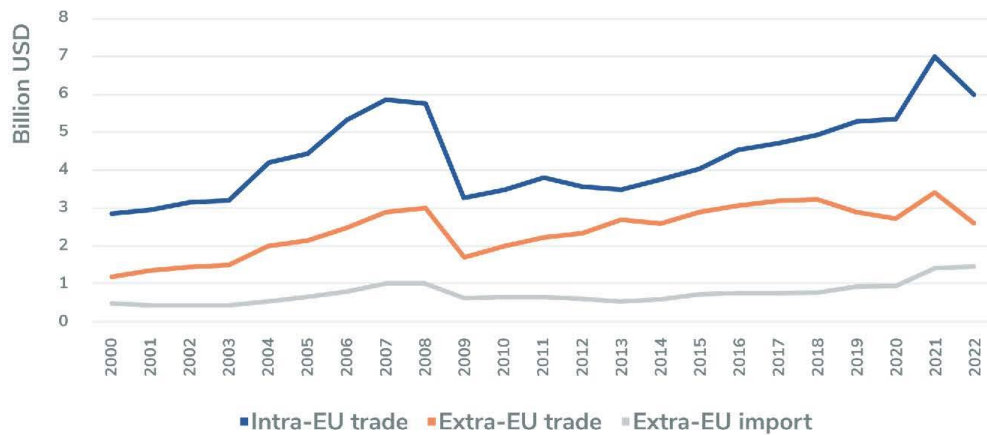
55% located outside the EU

36% of extra-EU companies concentrated in:

- China (22%)
- United Kingdom (14%)

Emerging countries: Egypt and Nepal





EU cross-border trade of curtain walling products has steadily increased internally and with extra-EU countries until 2021 and dropped in 2022.

2022

1.50 billion USD in curtain walling products **exported outside the EU**, accounting for **17%** of total EU exports.

52% of **extra-EU exports** concentrated in:

- United Kingdom (41%)
- United States (11%)



2022

1.26 billion USD in curtain walling products **imported from outside the EU**, accounting for 21% of total EU imports.

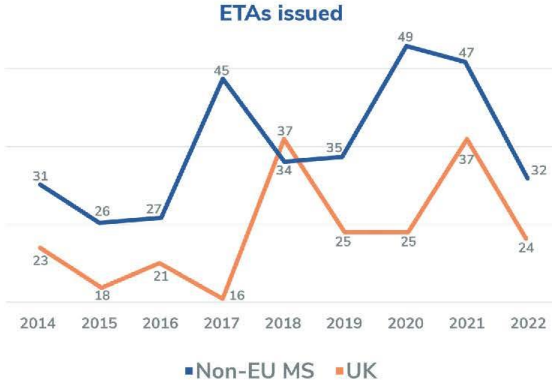
53% of the **extra-EU imports** came from:

- China (39%)
- United Kingdom (14%)



FACT SHEET PAC 33 – Fixings

552 ETAs (14%) requested by non-EU manufacturers



56% ETAs issued to manufacturers in UK and Australia



2019

4,170 billion USD in fixings (all sectors) produced worldwide

63% produced outside the EU

86% of extra-EU production concentrated in:

- China (71%)
- United States (11%)
- India (4%)

Emerging countries: Philippines and Iran



2019

506,000+ fixings companies active worldwide

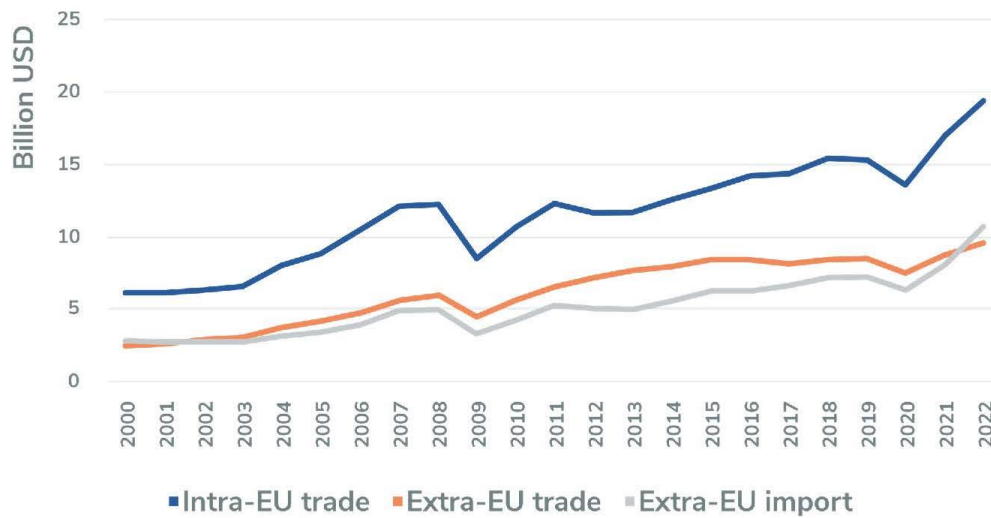
35% located outside the EU

47% of the extra-EU companies concentrated in:

- Mexico (20%)
- United States (15%)
- China (12%)

Emerging countries: Egypt and Peru





EU cross-border trade of fixings has steadily **increased** internally and with extra-EU countries.

2022

7.68 billion USD in fixings **exported outside the EU**, accounting for **27%** of total EU exports.

53% of **extra-EU exports** concentrated in:

- United States (22%)
- China (16%)
- United Kingdom (15%)



2022

9.03 billion USD in fixings **imported from outside the EU**, accounting for **31%** of total EU imports.

65% of **extra-EU imports** came from:

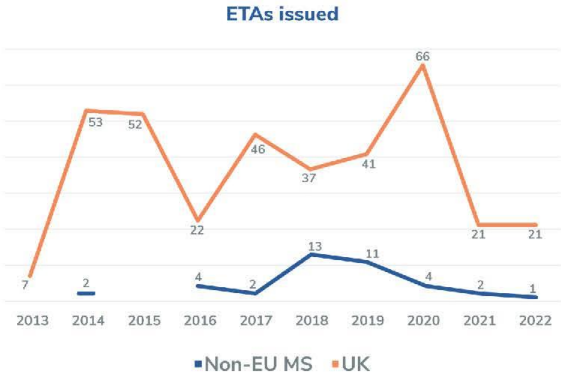
- China (33%)
- Taiwan (22%)
- United States (10%)



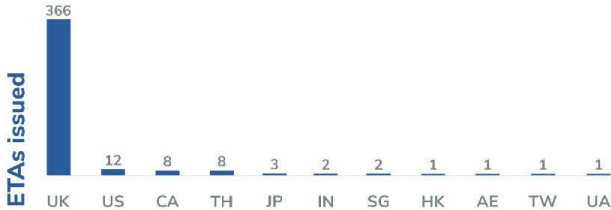
FACT SHEET

PAC 35 - Fire-stopping products

405 ETAs (23%) requested by non-EU manufacturers



90% ETAs issued to manufacturers in UK



2019
10,581 billion USD in fire-stopping products **produced worldwide**
87% produced outside the EU
83% of **extra-EU production** concentrated in:

- China (70%)
- United States (13%)

Emerging country: Philippines

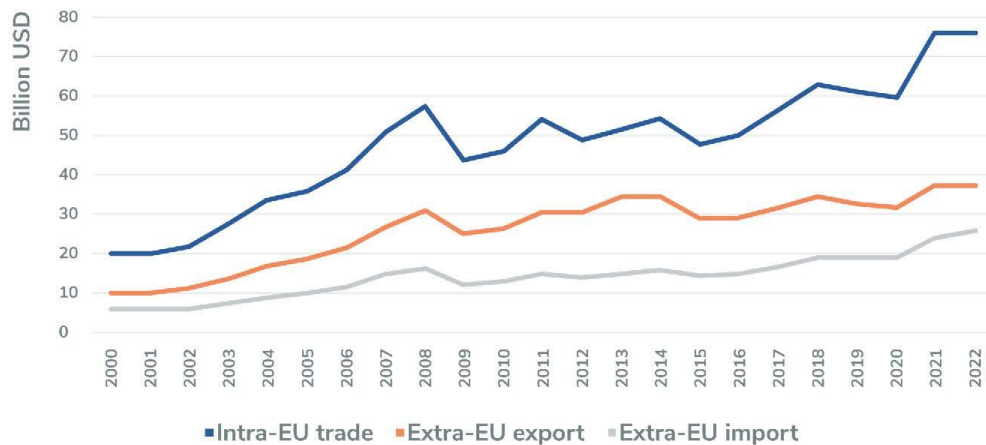


2019
1,180,000+ fire-stopping **companies** active worldwide
35% located outside the EU
29% of **extra-EU companies** concentrated in:

- China (18%)
- United States (11%)

Emerging country: Egypt





EU cross-border trade of fire-stopping products has steadily increased internally and with extra-EU countries.

2022

27 billion USD in fire-stopping products **exported outside the EU**, accounting for **26%** of total EU exports.

43% of the **extra-EU exports** concentrated in:

- United States (18%)
- United Kingdom (16%)
- China (9%)



2022

21 billion USD in fire-stopping products **imported from outside the EU**, accounting for **21%** of total EU imports.

71% of the **extra-EU imports** came from:

- China (41%)
- United Kingdom (17%)
- United States (13%)





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