

SURFACE TREATMENT OF METALS:

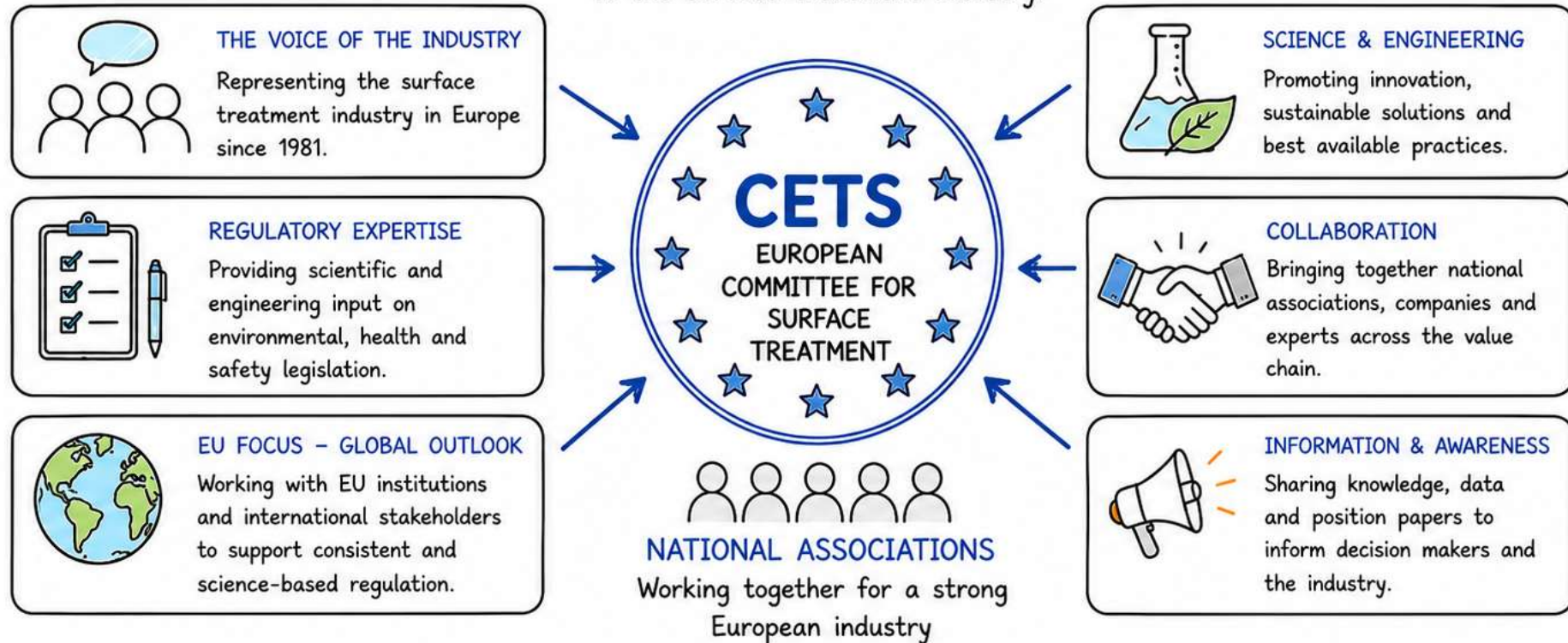
THE ROLE OF CETS

BUILDING A REALISTIC, SUSTAINABLE FUTURE

WHO IS CETS?

European Committee for Surface Treatment

CETS is the international federation of national associations engaged in the supply of technology, chemicals and paint products to the surface treatment industry.



OUR PURPOSE: to support consistent and objective science-based regulation.



FUTURE - The vision we aim for



Future is the direction we want to move towards:

clean, advanced and ambitious - but still a vision until it meets industrial reality.

U P E R I O D E X D V X R C S N B A C G
H Q T A R G W U W P R A C T I C A L Z F
A W A R E N E S S C M D L L T I Z B X O
R D M C R J T H I N G S C B V H Y J C H
D M A S U L F T H E Y I W V A R E U F R
X H F O M I U W R H V K Y Y B H B Z K M
I C G S D E V E L O P M E N T H X R R I
X S N S M E E T S P C N E E D S F Z V C
T C M M T O P R E S E N T V R Y I Y U O
D J N W I T H O U T Y F Q D U J U Q T N
E C O M P R O M I S I N G L Z J H B H S
C C X P C Y R F U T U R E F I Q T N G T
G E N E R A T I O N S Q O D H H C K A R
R H S H A C W U T I M E K C Q H I T O A
R E X S S P H Z P Z C O M E V N L N N I
X B P O S S I B L E Z D P A T H O E N N
I M E E T I N G B U R A C Y H F N P P T
W H I L E M I P R O T E C T I N G W P S
F U T U R E R C A P A C I T Y Q A N D C
A C C E P T I N G H R E A L C W O R L D

The power of membership www.cets-eu.be

THE FUTURE OF SURFACE TREATMENT

CLEAN. SMART. SUSTAINABLE.
BEYOND HAZARDOUS SUBSTANCES.



ADVANCED TECHNOLOGY. RESPONSIBLE BY DESIGN.
BUILDING A BETTER FUTURE FOR INDUSTRY AND SOCIETY.



UTOPIA

The power of membership www.cets-eu.be

SUSTAINABLE - Not only greener, but also viable, safe and resilient

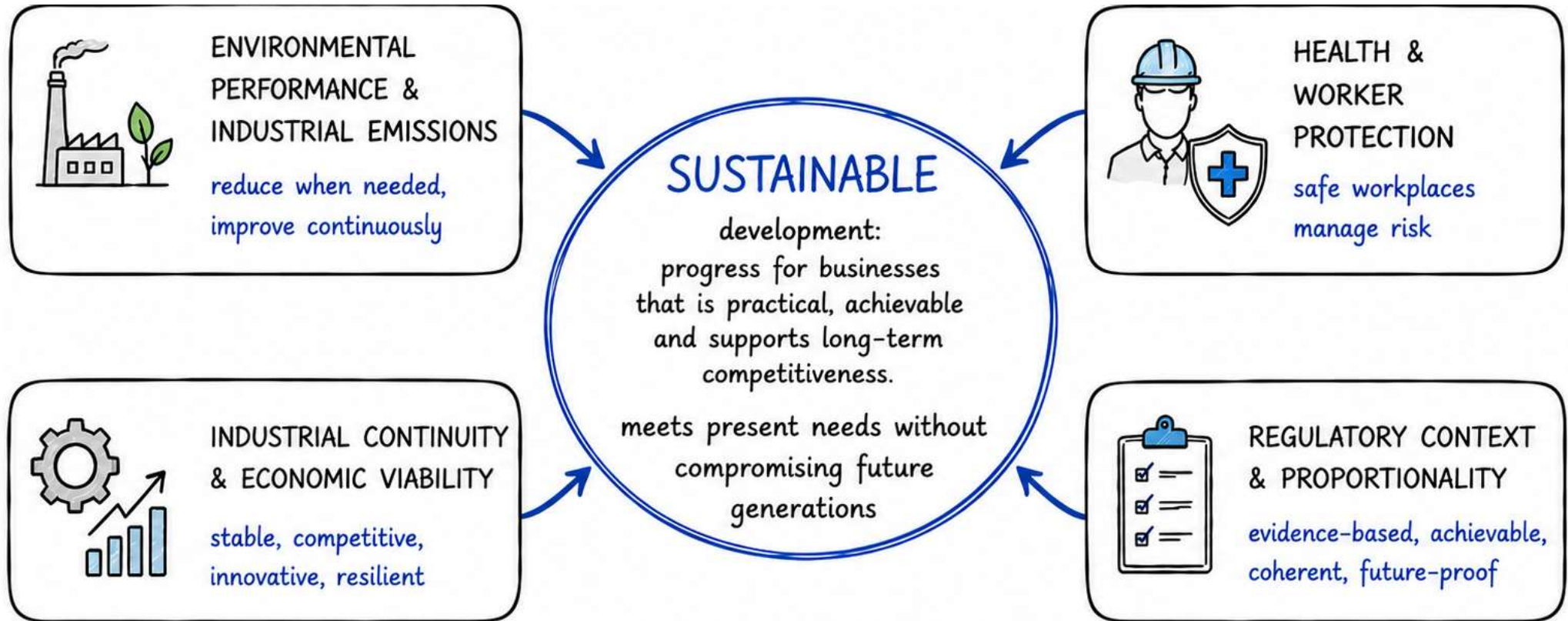


Sustainable means meeting present needs without compromising future generations - including environmental protection, worker safety, industrial continuity and economic viability.

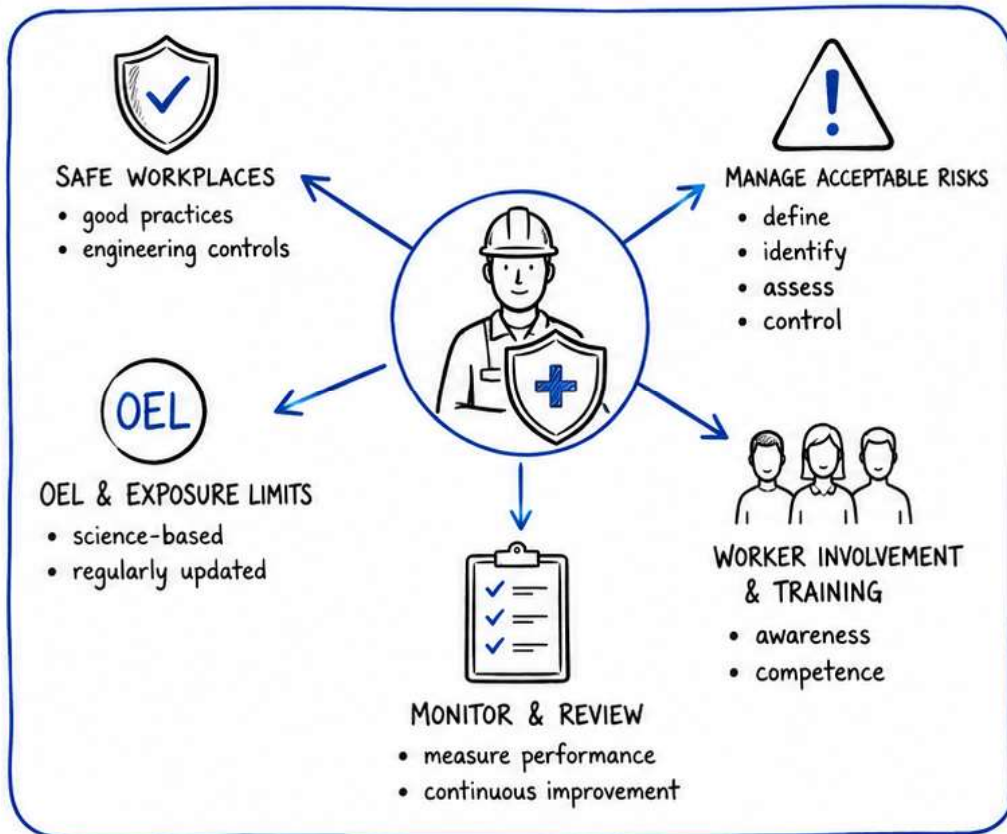
Balanced sustainability:
people + environment + industry + economy

U P E R I O D E X D V X R C S N B A C G
H Q T A R G W U W P R A C T I C A L Z F
A W A R E N E S S C M D L L T I Z B X O
R D M C R J T H I N G S C B V H Y J C H
D M A S U L F T H E Y I W V A R E U F R
X H F O M I U W R H V K Y Y B H B Z K M
I C G S **D E V E L O P M E N T** H X R R I
X S N S **M E E T S** P C **N E E D S** F Z V C
T C M M T O **P R E S E N T** V R Y I Y U O
D J N **W I T H O U T** Y F Q D U J U Q T N
E **C O M P R O M I S I N G** L Z J H B H S
C C X P C Y R **F U T U R E** F I Q T N G T
G E N E R A T I O N S Q O D H H C K A R
R H S H A C W U T I M E K C Q H I T O A
R E X S S P H Z P Z C O M E V N L N N I
X B P O S S I B L E Z D P A T H O E N N
I M E E T I N G B U R A C Y H F N P P T
W H I L E M I P R O T E C T I N G W P S
F U T U R E R C A P A C I T Y Q A N D C
A C C E P T I N G H R E A L C W O R L D

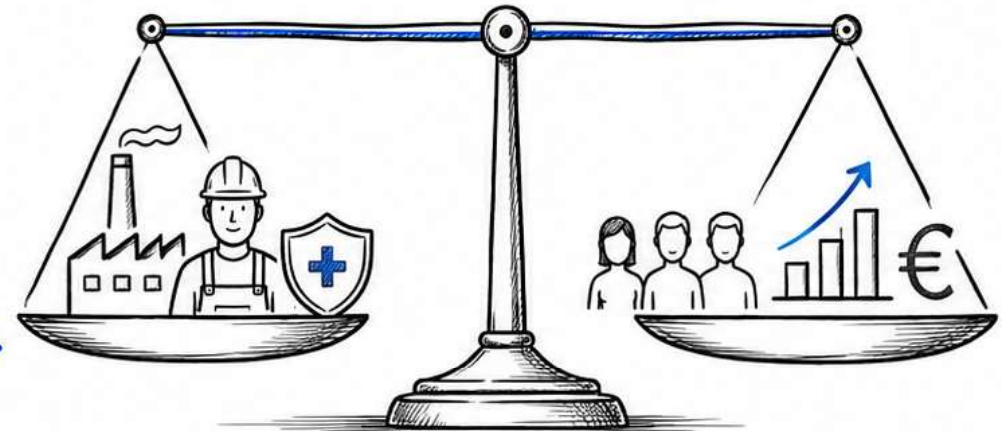
The power of membership www.cets-eu.be



2. HEALTH & WORKER PROTECTION



BALANCED SUSTAINABILITY



BALANCING FOUR PILLARS FOR THE LONG TERM

- | | |
|--|---|
| ✓ Protect people and the environment | ✓ Consider all potential future needs |
| ✓ Ensure a viable and competitive industry | ✓ Make decisions that are effective, proportionate and achievable |



ACTIONS THAT MAKE THE REAL WORLD WORK, TODAY AND TOMORROW

REALISTIC - What can actually work in industrial practice

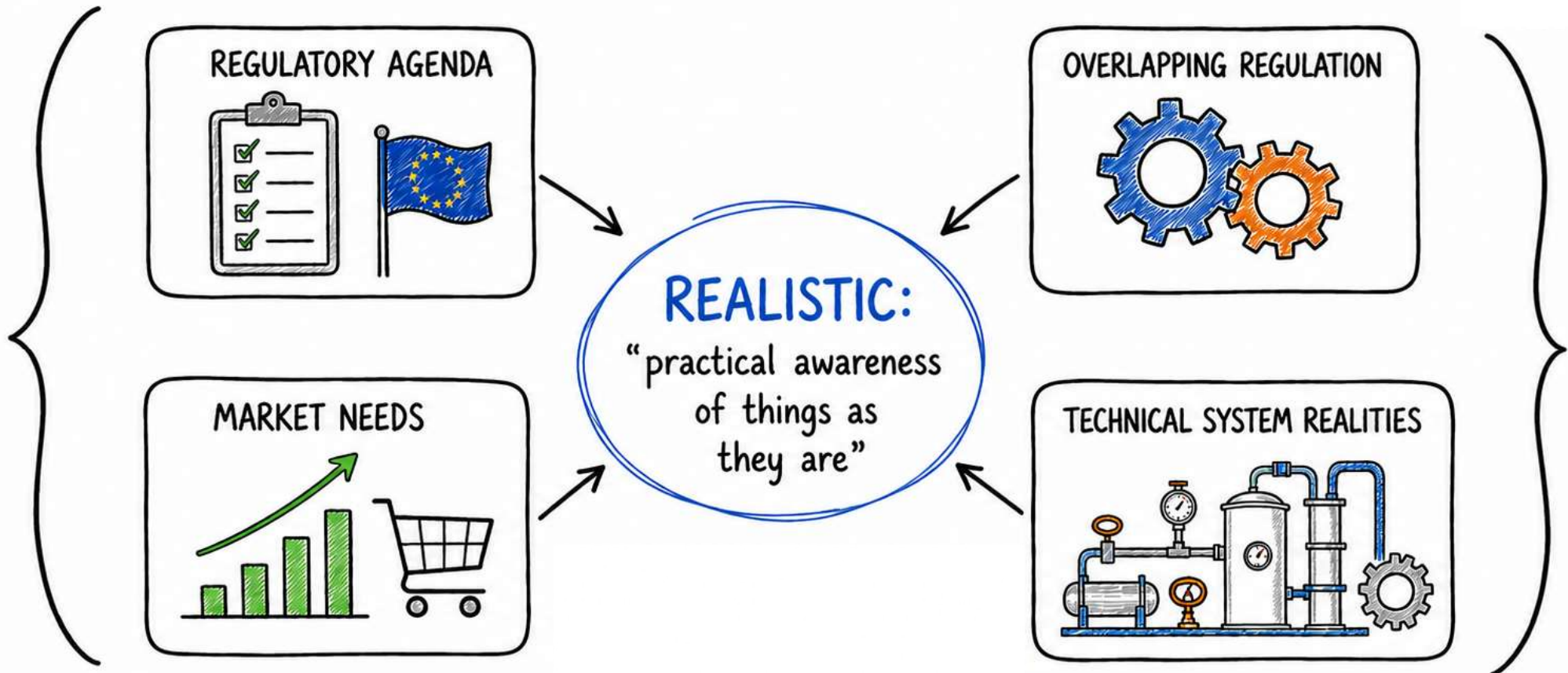
Realistic means practical awareness of things as they are: real processes, real constraints, real risks, real costs and real implementation timelines.

Key idea:

Good in theory is not always easy in practice.

U P E R I O D E X D V X R C S N B A C G
H Q T A R G W U W **P R A C T I C A L** Z F
A W A R E N E S S C M D L L T I Z B X O
R D M C R J **T H I N G S** C B V H Y J C H
D M **A S U L F T H E Y** I W V **A R E** U F R
X H F O M I U W R H V K Y Y B H B Z K M
I C G S D E V E L O P M E N T H X R R I
X S N S M E E T S P C N E E D S F Z V C
T C M M T O P R E S E N T V R Y I Y U O
D J N W I T H O U T Y F Q D U J U Q T N
E C O M P R O M I S I N G L Z J H B H S
C C X P C Y R F U T U R E F I Q T N G T
G E N E R A T I O N S Q O D H H C K A R
R H S H A C W U T I M E K C Q H I T O A
R E X S S P H Z P Z C O M E V N L N N I
X B P O S S I B L E Z D P A T H O E N N
I M E E T I N G B U R A C Y H F N P P T
W H I L E M I P R O T E C T I N G W P S
F U T U R E R C A P A C I T Y Q A N D C
A C C E P T I N G H R E A L C W O R L D

WHAT REALLY MATTERS



Lord, grant me the the strenght to change the things I
can change, the serenity to accept the things I cannot
change, and the wisdom to know the difference



REGULATORY AGENDA (2026)



● REACH / CLP

Substances, authorisations, restrictions, SVHC and CMR classifications.



● IED

Permits, emissions, monitoring, resource efficiency and EMS obligations.



● STM-BREF

BAT, BAT-AEL/BAT-AEPL, applicability and environmental performance.



● OSH / OEL

Worker exposure, engineering controls, monitoring and operating procedures.



● Customer specs

Qualification, technical performance and supply-chain approvals.

MARKET NEEDS



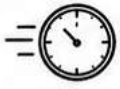
① CUSTOMER SPECIFICATION



② TECHNICAL NEEDS



③ PRODUCTION CAPACITY



④ PRODUCTION TIME



⑤ RELIABILITY OF THE PROCESS



⑥ AFFORDABLE PRICE



⑦ RESEARCH & DEVELOPMENT

GEOPOLITICAL SCENARIO



① Political tensions



② Supply issues



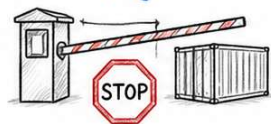
③ Raw material crisis



④ Energy cost volatility

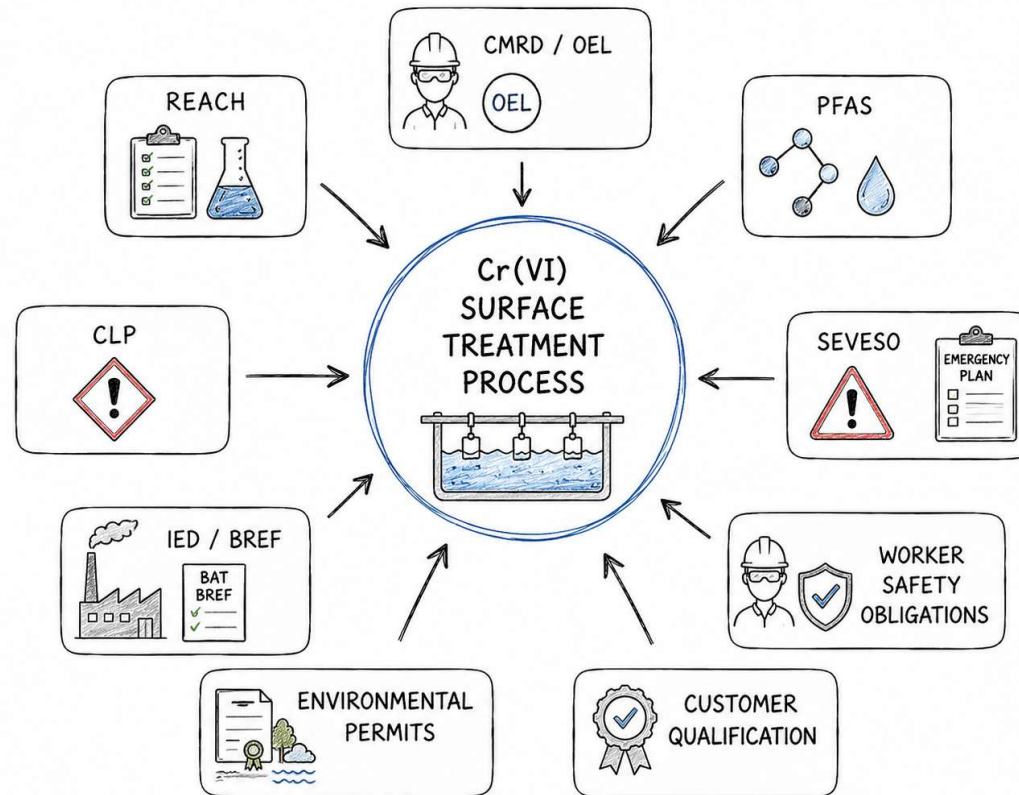
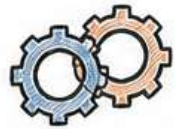


⑤ Strategic autonomy

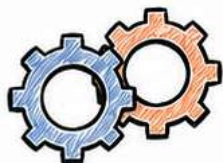


⑥ Trade barriers

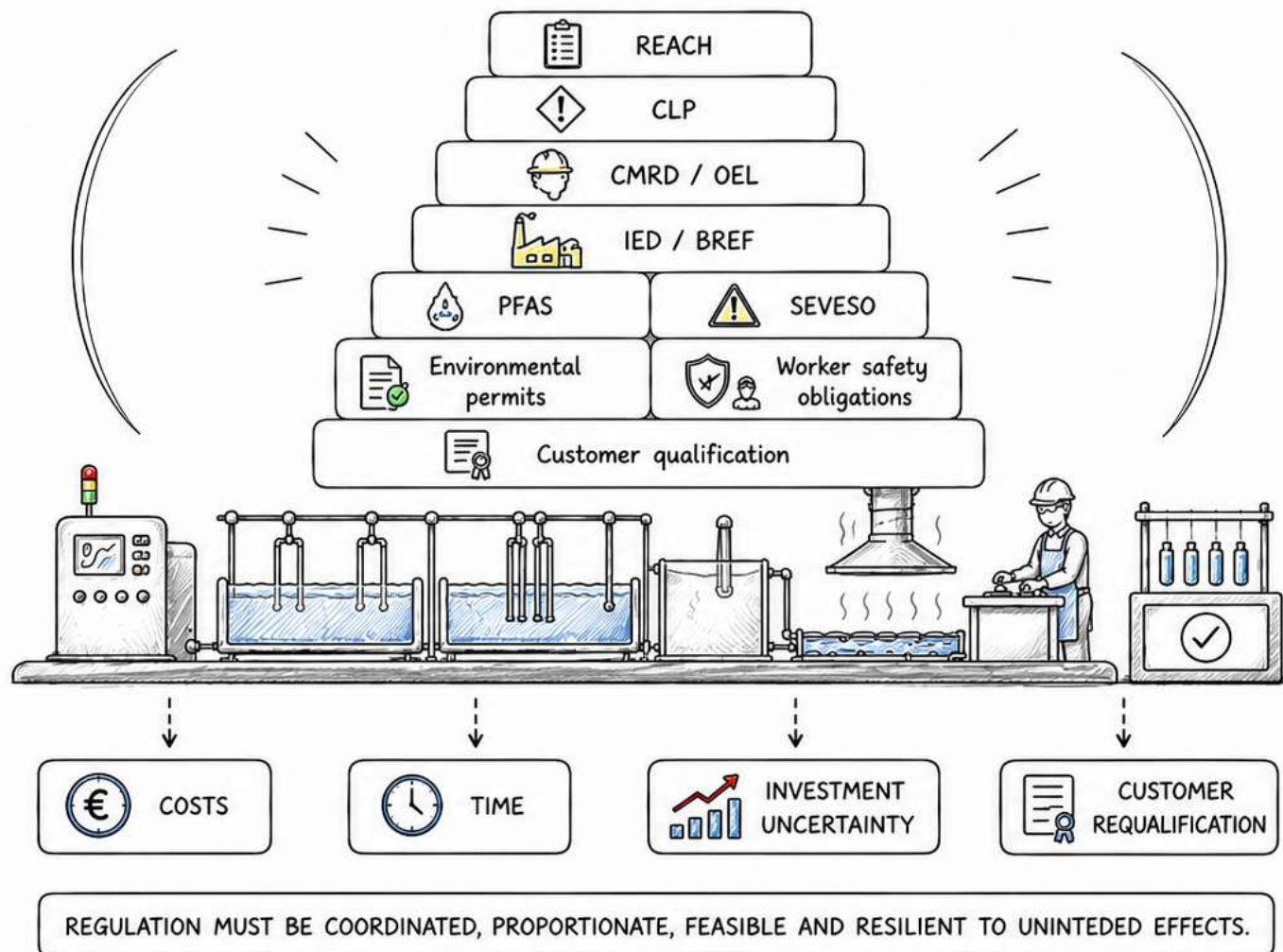
OVERLAPPING REGULATION



OVERLAPPING
REGULATION



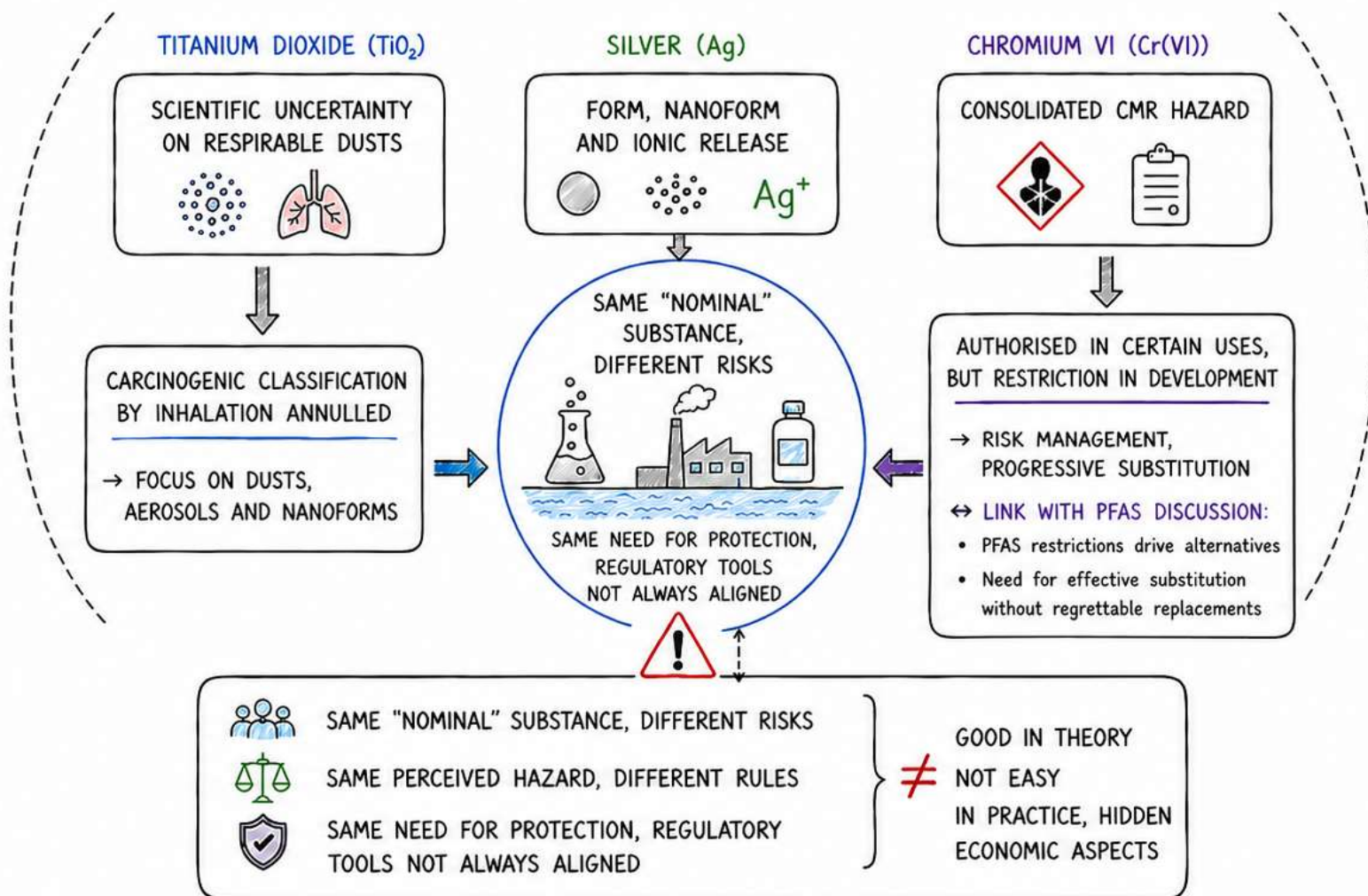
CUMULATIVE COMPLIANCE BURDEN



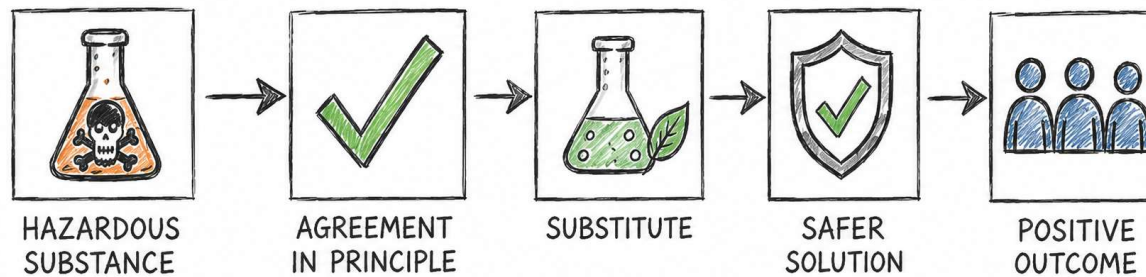
OVERLAPPING REGULATIONS



SAME REGULATORY TENSION, DIFFERENT RISKS



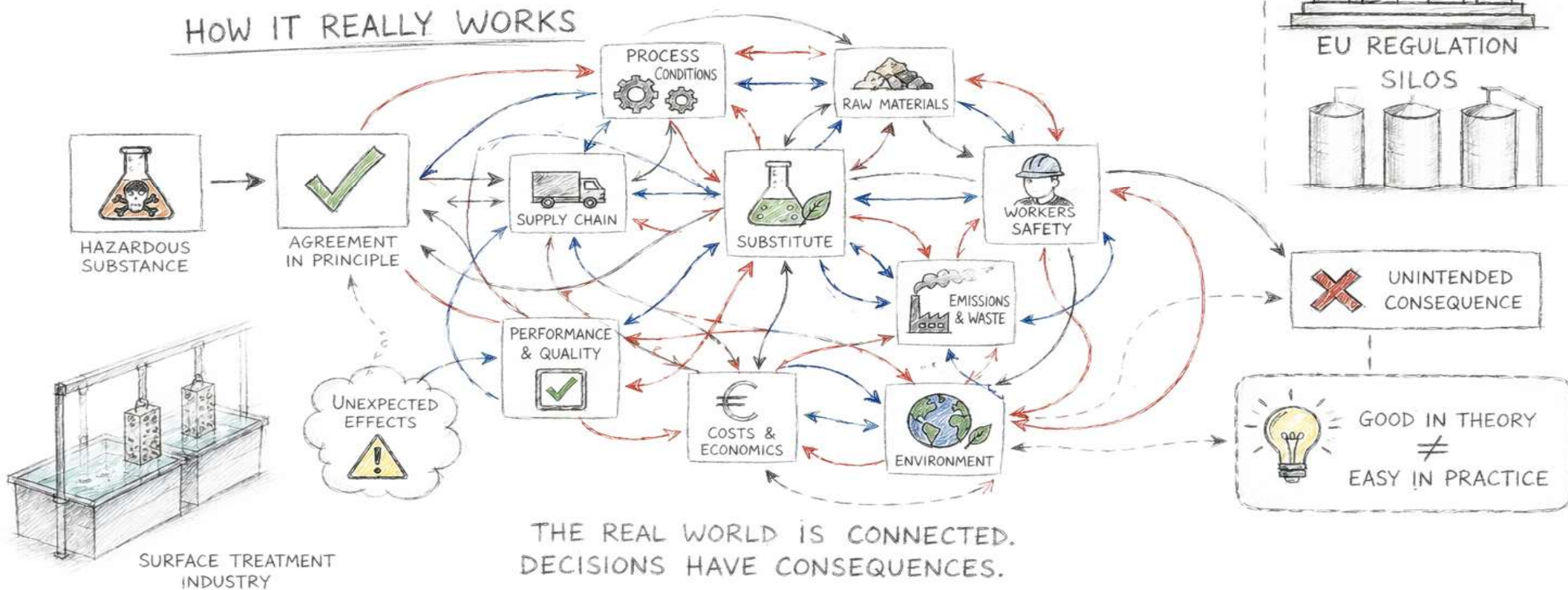
HOW DECISION MAKING IS IMAGINED



HOW DECISION MAKING IS IMAGINED



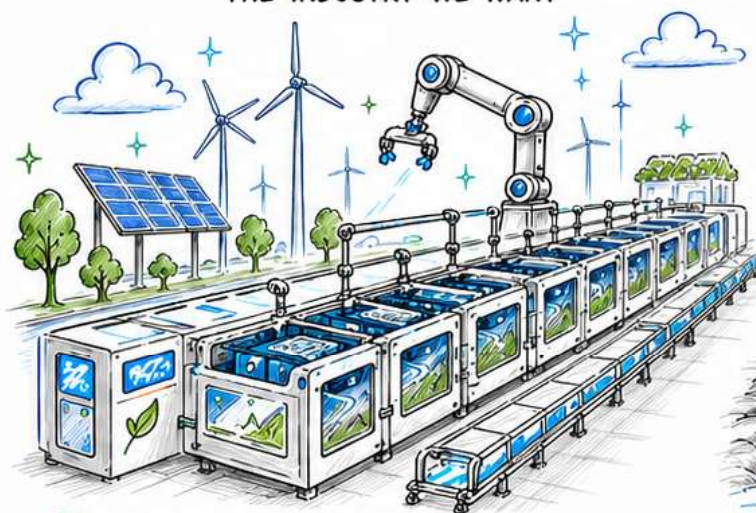
HOW IT REALLY WORKS



FROM FUTURE VISION TO INDUSTRIAL REALITY

FUTURE VISION

THE INDUSTRY WE WANT



- ✓ NO HAZARDOUS SUBSTANCES
- ✓ ZERO EMISSIONS
- ✓ CLEAN TECHNOLOGY
- ✓ FULLY AUTOMATED
- ✓ RESOURCE EFFICIENT



EVIDENCE-BASED AMBITION
FOR BETTER POLICIES

AMBITION NEEDS
IMPLEMENTATION

CETS

POLITICAL-INDUSTRIAL
REPRESENTATION



TRANSITION MUST BE
DELIVERABLE

CETS CONNECTS AMBITION
WITH REAL-WORLD IMPLEMENTATION

INDUSTRIAL REALITY

THE REALITY WE OPERATE IN



- ✓ PROCESS CONSTRAINTS
- ✓ EMISSIONS & WASTE
- ✓ ENERGY & RESOURCES
- ✓ INVESTMENT & TIME
- ✓ CUSTOMER REQUIREMENTS



INFORMED INPUT
TO EU DECISION-MAKING

- CO₂ EMISSIONS
- ENERGY
- WASTE & EFFLUENTS
- INVESTMENT & COSTS
- REGULATORY COMPLIANCE
- PROCESS CONSTRAINTS
- SKILLED PEOPLE

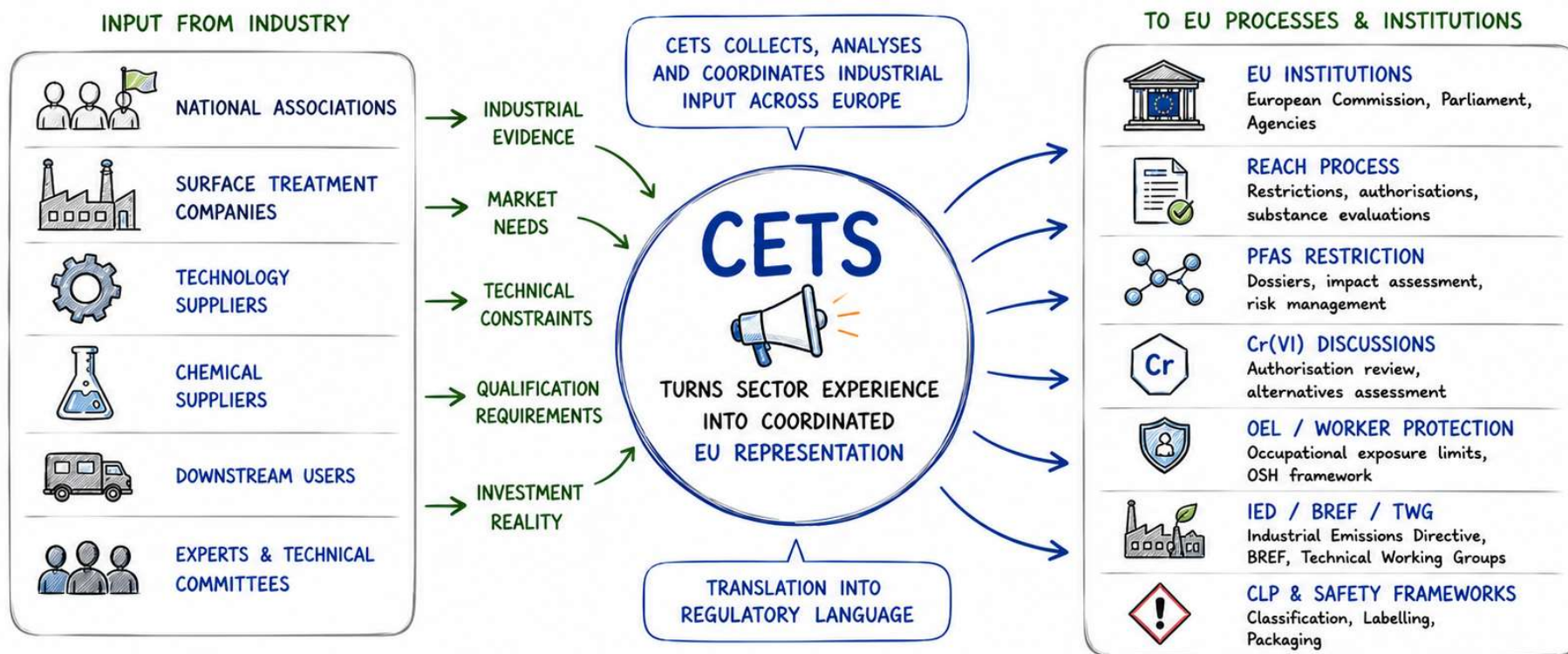
Lord, grant me
the the strenght
to change the
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serenity to
accept the things
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and the wisdom
to know the
difference



CETS: coordinating evidence, industry needs and regulatory ambition
for a realistic sustainable transition.



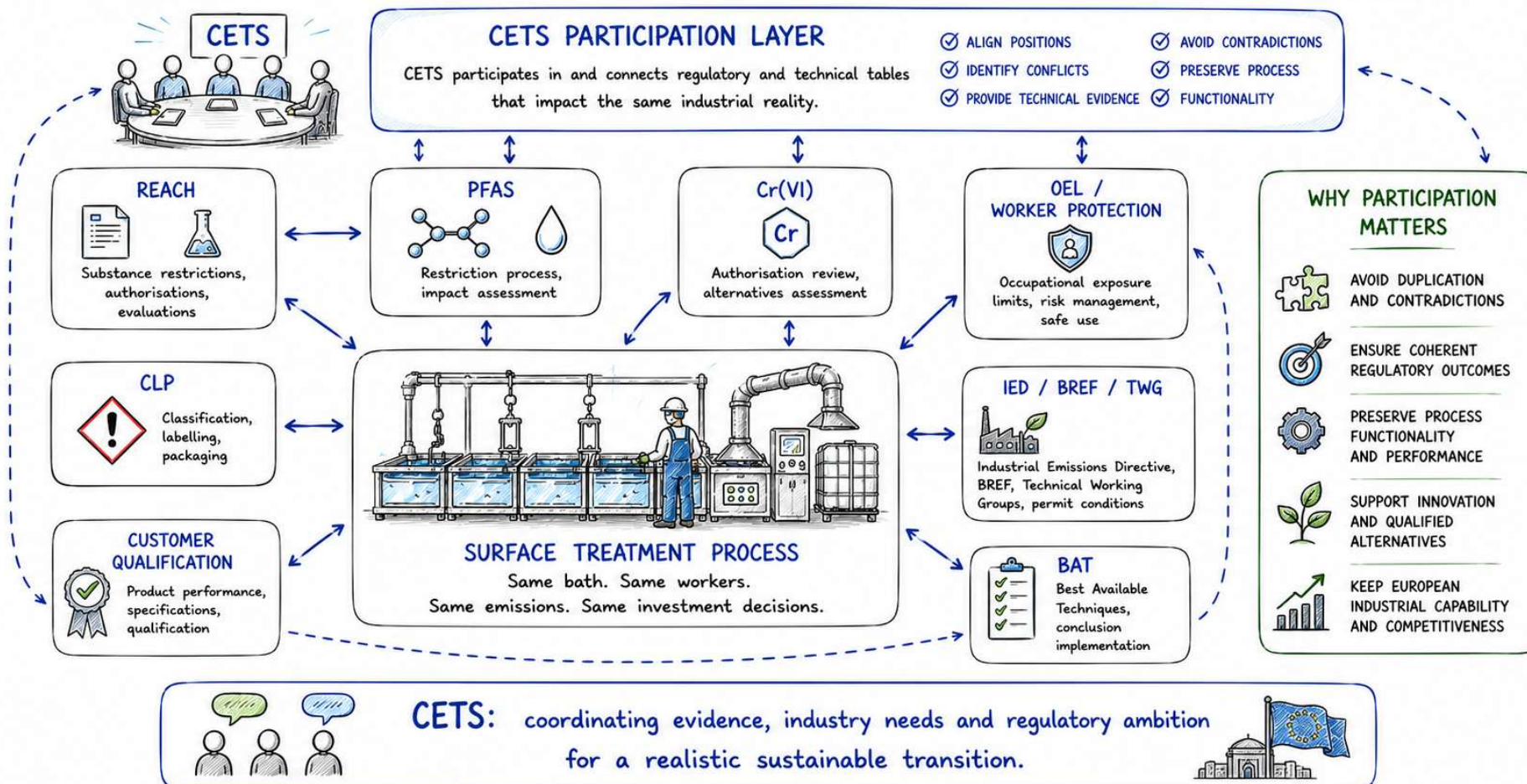
CETS: THE INDUSTRIAL VOICE OF SURFACE TREATMENT



CETS: coordinating evidence, industry needs and regulatory ambition for a realistic sustainable transition.



PARTICIPATING THE TABLES THAT SHAPE THE TRANSITION



A THREE-YEAR PROCESS TO MAKE CETS GROW



OUR OBJECTIVE



Build the evidence, coherence and solutions needed for CETS to grow stronger and more influential in Europe.

OUR WORKSTREAMS



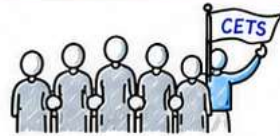
TECHNICAL EVIDENCE



REGULATORY COHERENCE



INDUSTRIAL FEASIBILITY



CETS: INDUSTRIAL POLITICAL REPRESENTATION AND COORDINATION

We gather evidence, align the sector and provide a strong voice in EU regulatory processes.



2026 ————— 2027 ————— 2028 —————>

CONNECT

Build a solid Network



- Stakeholders mapping



- Participate in RAC and SEAC



- Communication infrastructure

ENGAGE

Make companies participate



- Participation and early engagement with stakeholders



- Risk vs benefit
- Environmental impact
- Worker protection
- Lifecycle perspective



- Technical feasibility
- Best BAT availability
- Implementation timing
- Cost-benefit analysis

TRANSFORM & STRENGTHEN

Deliver coordinated solutions



- Practical, fair EU Labels (Biocides, PFAS, Cr(VI), TiO₂, Batteries, CLP...)
- Data-backed impact evidence



- Value Paper 2030
- Connecting & proposals
- Proportionality approach
- Coherent messaging



- Implementation guidance and realistic solutions
- Ready to prepare 2029/2031 Strategy plan
- Continuous improvement

OUTCOME: CETS GROWS



STRONGER VOICE

A recognised and credible partner in EU processes.



REAL IMPACT

Science-based solutions that improve society and ensure environmental impact effectively.



INDUSTRIAL RESILIENCE

Competitive, innovative and capable industry in Europe.



SUSTAINABLE GROWTH

Clear rules, investment certainty and long-term industrial success.

WE PARTICIPATE IN KEY EU PROCESSES



REACH
Authorisation
& Restriction



PFAS
Restriction
Dossier



Cr(VI)
Authorisation
Review



OEL
Worker
Protection



BAT / BREF
Best
BAT



CLP
Classification
& Labelling



European
Commission
& Members

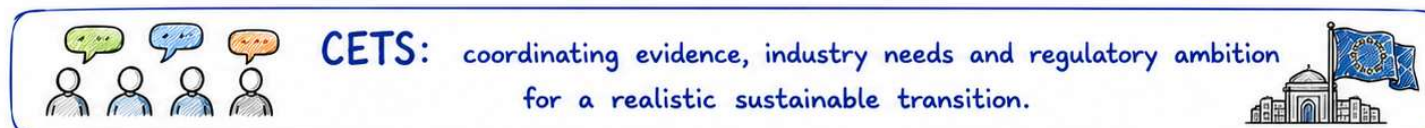
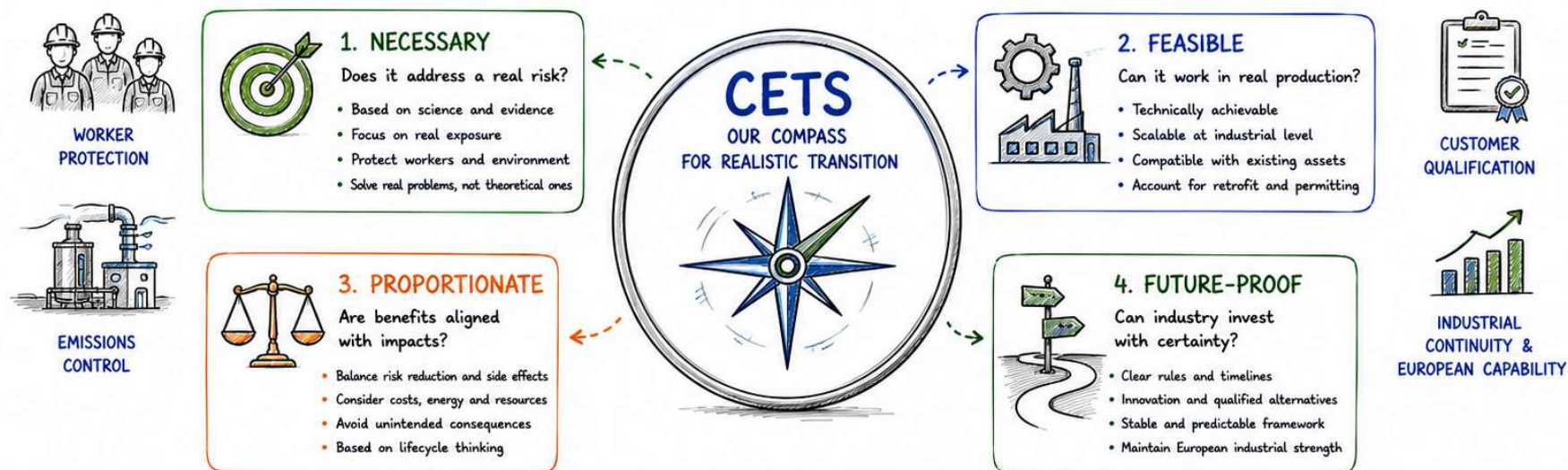


CETS: coordinating evidence, industry needs and regulatory ambition for a realistic sustainable transition.



WHAT IS REALLY NECESSARY, FEASIBLE AND PROPORTIONATE

CETS helps distinguish between what looks good in theory and what works in real industrial practice.

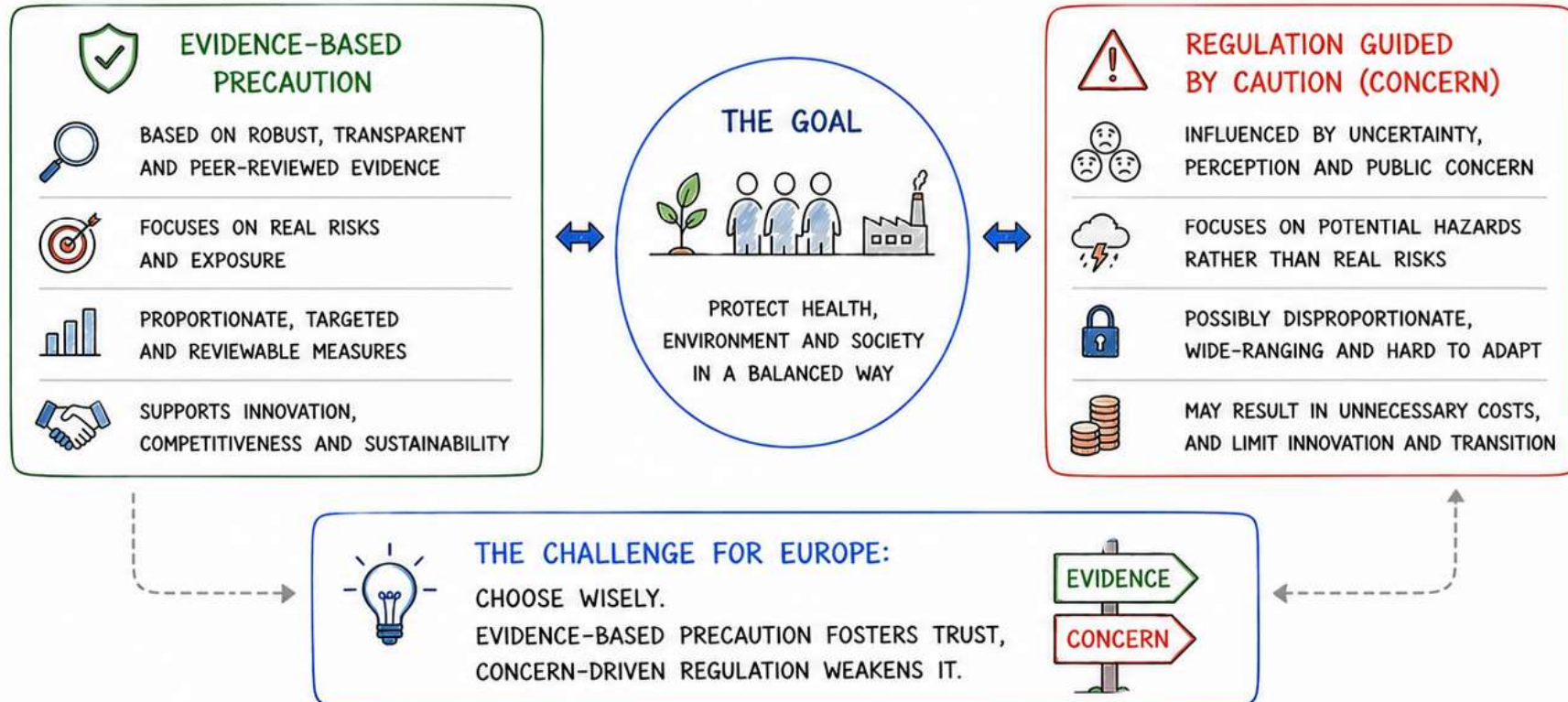


U P E R I O D E X D V X R C S N B A C G
H Q T A R G W U W P R A C T I C A L Z F
A W A R E N E S S C M D L L T I Z B X O
R D M C R J T H I N G S C B V H Y J C H
D M A S U L F T H E Y I W V A R E U F R
X H F O M I U W R H V K Y Y B H B Z K M
I C G S D E V E L O P M E N T H X R R I
X S N S M E E T S P C **N E E D S** F Z V C
T C M M T O **P R E S E N T** V R Y I Y U O
D J N W I T H O U T Y F Q D U J U Q T N
E C O M P R O M I S I N G L Z J H B H S
C C X P C Y R F U T U R E F I Q T N G T
G E N E R A T I O N S Q O D H H C K A R
R H S H A C W U T I M E K C Q H I T O A
R E X S S P H Z P Z C O M E V N L N N I
X B **P O S S I B L E** Z D **P A T H** O E N N
I **M E E T I N G** B U R A C Y H F N P P T
W H I L E M I **P R O T E C T I N G** W P S
F U T U R E R C A P A C I T Y Q A N D C
A C C E P T I N G H R E A L C W O R L D

EVIDENCE-BASED PRECAUTION VS REGULATION GUIDED BY CAUTION (CONCERN)



GOOD REGULATION PROTECTS PEOPLE AND THE ENVIRONMENT
WITH AN APPROPRIATE BALANCE OF BENEFITS AND RISKS.



THANK YOU