

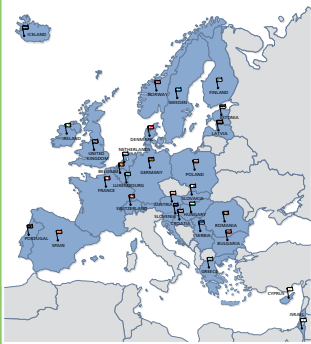
EUROPEAN AGGREGATES ASSOCIATION

A Sustainable Industry for a Sustainable Europe



A n n u a l R e v i e w
2012-2013

UEPG in a Nutshell



- UEPG represents the European Aggregates Industry in Brussels, now with Members in 29 Countries.
- It provides early warning to Members on European legislative initiatives that may affect the industry.
- It then lobbies the European Institutions and other stakeholders on issues key to the Industry.
- It provides advisory support to its national Members and seeks to further improve the industry Image.

- Some 3 billion tonnes a year of aggregates, that is crushed stone, sand & gravel, are produced by 15,000 companies (mostly SMEs) at 26,000 quarries and pits across Europe, employing 238,000 people directly and indirectly .
- The Aggregates Industry is by far the largest non-energy extractive sector.
- It is committed to Resource Efficiency, the main industry focus being good Access to Local Resources.
- The industry has been significantly impacted by the economic crisis in the last 5 years and therefore it urges political measures to stimulate growth.



- UEPG's Vision is a Sustainable Industry for a Sustainable Europe.
- Its Mission is to be the Industry Champion and a Trusted Partner.
- Its Core Values are to be Open, Transparent and Honest.
- Its Objectives include European Economic Recovery, Excellence in Social, Health and Safety Responsibility as also in Environmental and Biodiversity Stewardship.





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President's Overview

A year of contrast

Thanks to the continued drive by my predecessor, Past-President Jim O'Brien and the dynamic and highly-efficient Brussels based team, UEPG could further improve its services to Members across 29 countries.

UEPG needs to mobilise its members and network to proactively shape EU legislation such as the proposed revision of Directive on Environmental Impact Assessments which clashes partly with the pragmatic view of smarter regulation that we promote. This effort also focuses on cross-cutting issues such as the compatibility between aggregates extraction and Natura 2000 and biodiversity, mitigation and the development of biodiversity indicators, successfully guided by François Petry as Chair of the UEPG Environment Committee.

UEPG needs to promote and spread a culture of health and safety. Thanks to the commitment of UEPG Members, the voluntary Social Dialogue Agreement on Respirable Crystalline Silica (NEPSI) is the intangible foundation of our Health Policy. Let us demonstrate that this voluntary initiative can be successfully driven forward by industry while fulfilling the aim of a respective Directive in preparation. Martin Isle as Chair of the Health and Safety Committee promotes a health and safety culture in all aggregates extraction sites by encouraging each country to continuously prioritise health and safety, to ensure regular monitoring and analysis of accidents with reliable indicators to provide recommendations and good practices by leveraging the success wherever and whenever it is possible. It remains a challenge to implement and mobilise Members in all 29 countries.

It is with a great sorrow that we lost our friend and colleague Prof. Dr. Ulrich Hahn, Managing Director of the German Aggregates Federation (MIRO). His professional and technical expertise and his professional network were a valuable contribution to the European Aggregates Association which he shaped significantly. His constructive, scientifically based, reliable and diplomatic manner was of great asset. I had the honour to call Ulrich Hahn a friend and can ensure you that his death is a severe loss to me.

UEPG needs to build on consistent standards with a broad consensus incorporating an innovative approach to recycling of construction and demolition waste as an essential component of our profession. This is the result of the leadership and technical expertise of Jean-Marc Vanbelle as Chair of the Technical Committee and the members of this Committee also strongly involved in the work of CEN/TC.

UEPG needs to affirm our true conviction that our industrial activities do contribute to the local community and the development of the European landscape. More specifically, how to improve sustainable access to resources and the recognition of deposits in land-use planning, how to reduce the time of permitting procedures and how to cut red tape while avoiding additional financial burden through resource taxation? Such is the purpose of the Economic Committee ably headed by Hans-Peter Braus.

UEPG needs to carry a message of influencing EU decisions and legislation with clear and reliable Position Papers for the European Parliament, European Commission and EU Council. It is also the ethic responsibility of an industry association to combat illegal extraction and operations which harm the environment, social protection and damage the much improved image of the European Aggregates Industry. This is also a concern for UEPG.

UEPG needs to draw a vision of the industry in 2030 based on a common reflection on the objectives and ways to implement them. Better use

of modern media, the direct relationship with the European Parliament, pro-active meetings with the European Commission and a code of ethics might be part of this vision. In this regard, the UEPG Sustainable Development Awards 2013 with an independent and international Jury provides the showcase of the excellence that needs to be communicated. UEPG continues to support national initiatives on better communication of the positive contribution of the European Aggregates Industry, building-up expertise and cooperating with NGOs.

UEPG needs to continue this outstanding team work. My visits to different countries of Europe show the great potential of our industry and the major role played by each country in the development and implementation of EU legislation. UEPG is based on the individual contribution of experts from Member Associations across Europe attending meetings in the European Commission or in the European Parliament on behalf of UEPG.

Conclusion

The 2014 European elections might refresh EU Institutions and its leadership. The air package policy review, the water blue print, initiatives on waste, recycling and resource efficiency ... are our upcoming challenges. We expect that growth will slowly return in which the European Aggregates Industry will play an important role. I would like to thank my predecessor, Past-President Jim O'Brien, for his outstanding leadership and contributions to UEPG, the Brussels based UEPG team, namely our Secretary General Dirk Fincke, Miette Dechelle and Sandrine Devos as Public Affairs Managers, the Committee Chairs Hans-Peter Braus, Martin Isles, François Petry and Jean-Marc Vanbelle and foremost the Members of UEPG, the Members of Committee, Task Forces and Working Groups. Without their hard work, UEPG might not enroll in a sustainable way.

Arnaud Colson
President UEPG 2012-2015



Management Tool

UEPG **pro-actively** identifies EU initiatives and policies that are likely to impact on European Aggregates Producers. It provides Members with brief and concise information through regular publications and ad-hoc updates, and ensures UEPG positions are considered by EU decision makers.

Presidencies, UEPG works on 23 live issues. These live issues are classified from highest to lowest priorities. UEPG actions closely correlate with live issues and are explained comprehensively in this Annual Report under the Committees.

2012-2013: Beyond the European Commission work programme, the European Parliament's activities, and, the driving agendas of the Cypriot and Irish EU

To improve the live issues management, the UEPG Issue Matrix assists both members and the UEPG General Secretariat to keep track of implications and current status.

Indicates the title of the EU Directive or any other relevant document	Gives background to the issue and updated information	Lists activities and important events attended by UEPG	
HIGH PRIORITY***			
ISSUE	IMPLICATIONS	UEPG ACTION	NEXT STEPS
Environmental Impact Assessment (Review of Directive)	Revision of current Directive; enlarging scope of EIAs; environmental monitoring; smart regulation Additional obligations through scoping and monitoring; obligation to use certified external experts	24 April - EMF debate with key decision-makers around the table NEEIP & UEPG Position Face to face meetings with key decision-makers Legislative amendments Close Cooperation with NEEIP and all stakeholders	11 July - Vote in Parliamentary Environment Committee September/October: First reading in Plenary - European Parliament. UEPG will follow closely the debates in the European Parliament and in the EU Council and will table amendments.

Provides the foreseen or planned dates and activities for the issue

States the importance for the industry:

- Red *** = High Priority
- Yellow ** = Normal Priority
- Green * = Low Priority

NEEIP: Non-Energy Extractive Industry Panel

Issue Tracker: one-page document which provides the background, key points, UEPG actions and next steps

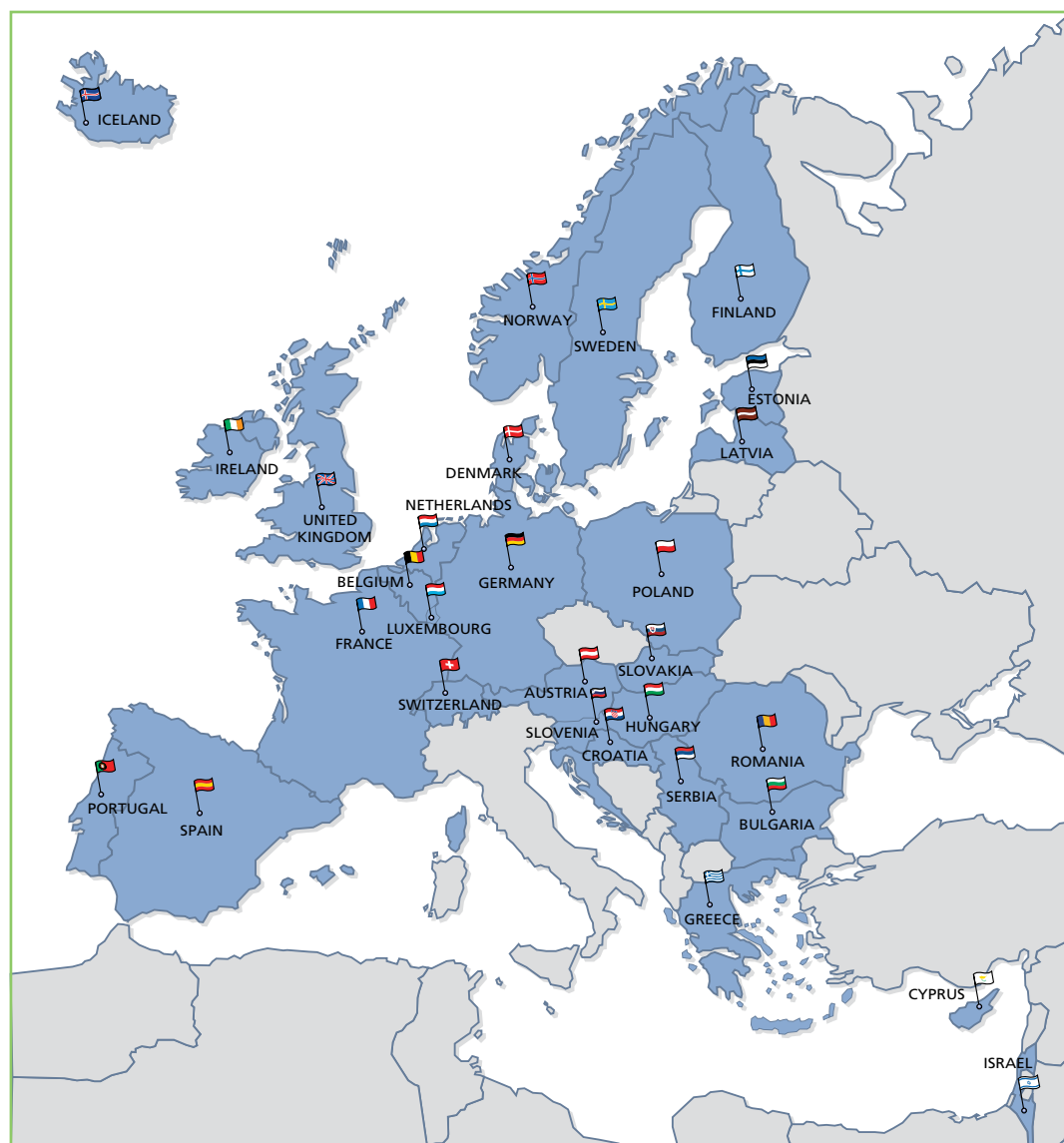


Introduction to UEPG and Aggregates

What is UEPG?

UEPG stands for "Union Européenne des Producteurs de Granulats" (European Aggregates Association). Since 1987, UEPG has strongly promoted the interests of the European Aggregates Industry by representing its National Member Associations on economic, technical, environmental and health & safety policy.

UEPG pro-actively identifies EU initiatives and policies that are likely to impact on European Aggregates Producers. It provides Members with brief and concise information through regular publications and ad-hoc updates, and ensures UEPG positions are considered by EU decision-makers. UEPG also positively promotes the profile of the European Aggregates Industry.



In Summary

- UEPG has Members in 29 European countries (see map)
- The European aggregates production is 3 billion tonnes/year, representing an annual turnover of 20 billion €
- The aggregates sector is by far the largest amongst the non-energy extractive industries
- The average aggregates demand in Europe is just under 5.8 tonnes per capita per year
- Some 91% of all aggregates produced are from natural resources
- The remaining 9% comes from recycled aggregates (5%), and marine & manufactured aggregates (2% each)
- The European Aggregates Industry comprises some 15,000 companies (mostly SMEs), producing at some 26,000 sites with 238,000 people employed (including contractors)

UEPG Membership 2013

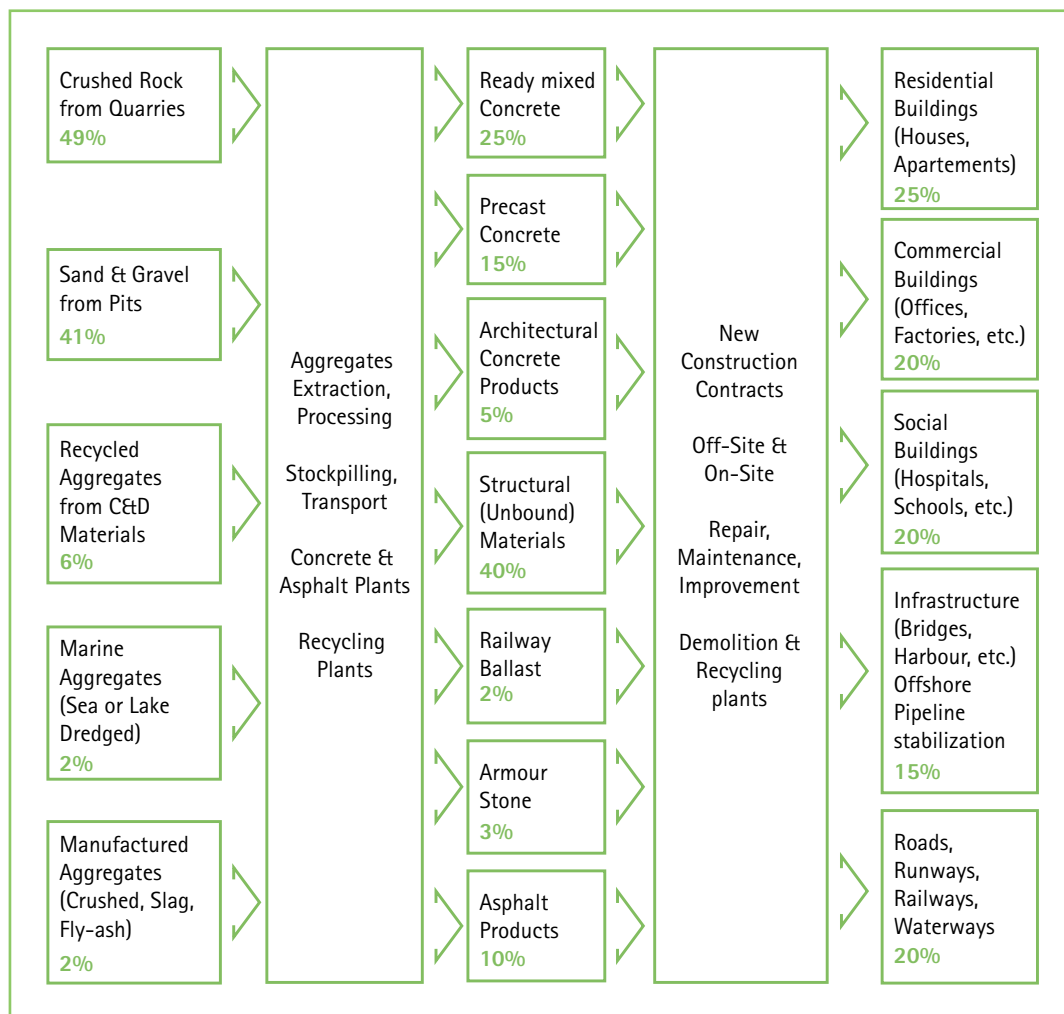
In May 2013, UEPG saddened to note the termination of Lithuanian and Russian Membership. This leaves the total number of UEPG member countries at 29, demonstrating its pan-European representation in front of the European institutions. UEPG will actively seek further new members in the years ahead.



Aggregates – the Fundamental Building Material

Aggregates are a granular material used in construction. The most common natural aggregates of mineral origin are sand, gravel and crushed rock.

The diagram below illustrates the sources, intermediate and end uses of aggregates:



Did you know that?

- Aggregates are indeed the core building material in all our homes, offices, social buildings and infrastructure: without aggregates these would literally fall apart
- Every new home typically requires up to 400 tonnes of aggregates
- Every new school typically requires some 3,000 tonnes of aggregates
- A new sports stadium may require up to 300,000 tonnes of aggregates
- Every new 1km of roadway requires up to 30,000 tonnes of aggregates
- Every new 1km of high-speed railway typically requires 9,000 tonnes of aggregates
- Every different application requires a different technical specification of aggregates, some with extremely demanding requirements in respect of shape, durability, abrasion, frost resistance and other factors

Aggregates are produced from natural sources extracted from quarries and gravel pits and in some countries from sea-dredged materials (marine aggregates). Recycled aggregates derive from reprocessed materials previously used in construction, including construction and demolition residues. Manufactured aggregates are sourced from industrial processes, for example from blast or electric furnace slags or china clay residues.



Our Vision, Mission, Core Values and Objectives

Our Vision is a Sustainable Industry for a Sustainable Europe

Our Mission is to be the Industry Champion and a Trusted Partner

Our Core Values are to be Open, Transparent and Honest

Our Objectives are as follows:

Economic Objectives

Economic Survival

Many UEPG members continue to suffer highly adverse market conditions. Drastic actions were necessary to survive economically. Economic recovery in Europe is elusive and huge uncertainty remains. UEPG exhorts EU and national politicians to create better economic conditions in Europe.

Supplying essential Building Materials

UEPG member companies supply materials vital for the residential, social, transport and commercial infrastructures of modern European society. Continued long-term access to local raw materials is a vital issue for the industry, and is central to its lobbying on the Raw Materials Strategy.

Retaining Jobs

Despite the current recession, UEPG member companies continue to be an important source of long-term local jobs, both direct and indirect, particularly in rural areas.

Contributing to Europe's Competitiveness

The Aggregates Industry is highly competitive. Its activities are a key pillar of the European Economy.

Social Objectives

Promoting Health & Safety

UEPG member companies are dedicated to ensuring the health and safety of their employees, contractors and visitors. UEPG has developed further partnerships with several health and safety initiatives such as EU-OSHA, SSDCEI and the NePSi Agreement.

On safety, the industry recognises that further improvement is much needed, and it is committed to actively addressing that challenge.

Partnering with Local Stakeholders

UEPG member companies aim to engage with all relevant stakeholders. Their quarry and pit operations are an integral part of regional and local communities.

The industry is committed to Open-Door communications with its neighbours and other key stakeholders.

Contributing to Europe's Heritage

UEPG members acknowledge the importance of the common natural and built European heritage and will continue to promote best practices in its extractive and restoration activities.

Environmental Objectives

Promoting Biodiversity

UEPG members are strongly committed to promoting Biodiversity both during its extractive activities and subsequent restoration. UEPG is convinced that quarries and pits are Biodiversity havens.

UEPG has established a database of impressive Biodiversity case studies across Europe and has developed leading partnerships with IUCN, the EC B@B Platform and with local NGOs.

Sustainable Production

UEPG actively promotes the recycling of construction and demolition materials, and is strongly committed to Resource Efficiency.

UEPG also promotes the further development of marine aggregates in order to conserve land-based resources.

In all activities, the highest standards of environmental stewardship are set as an operational imperative of the Aggregates Industry

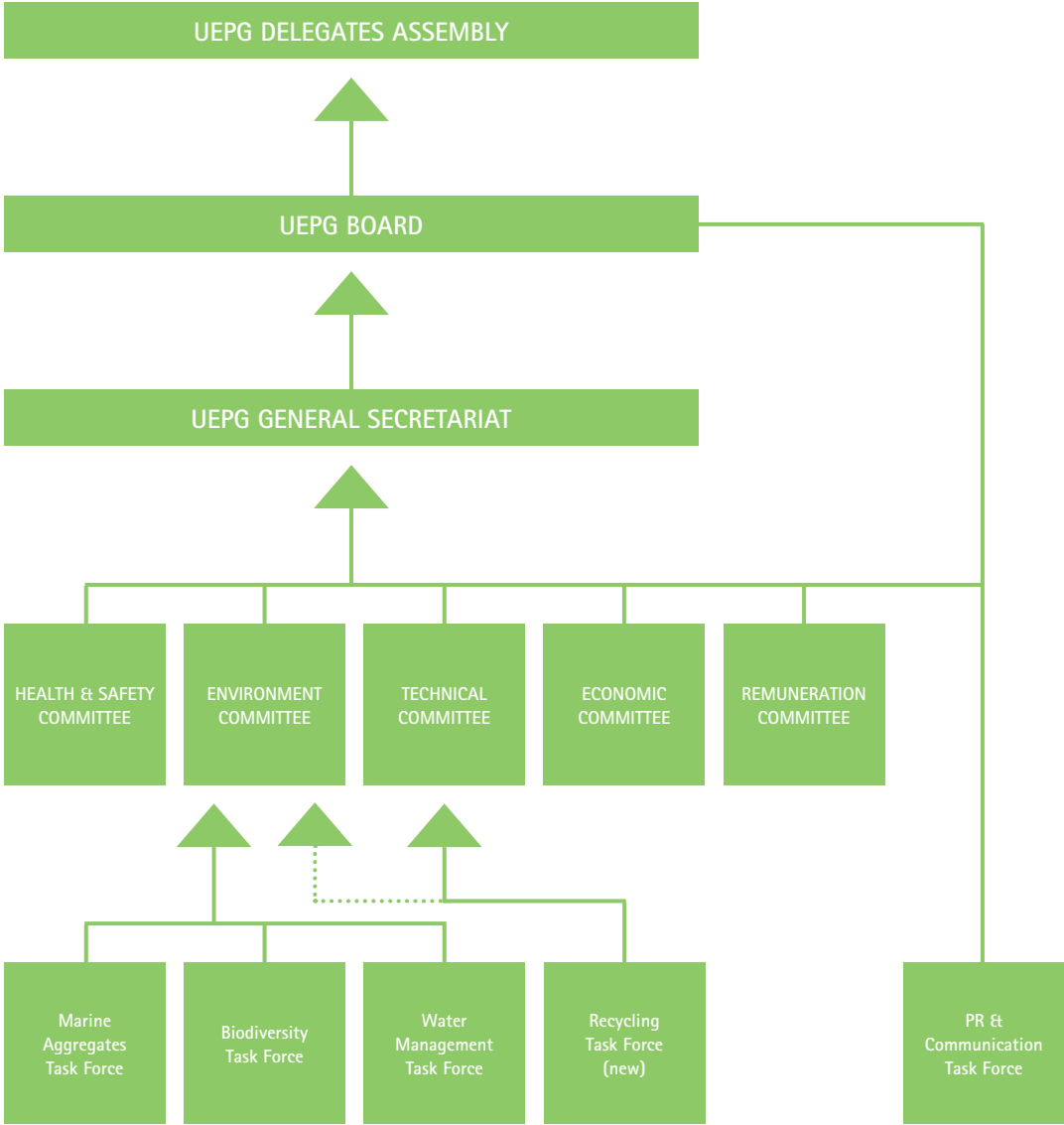
Awards

UEPG promotes triennial Sustainable Development Awards in order to recognise and further promote excellence in the Industry, the next being planned for 2013.



Our Organisational Structure

The Health & Safety, Environment, Technical and Economic Committees and their associated Task Forces are the "engine-room" of UEPG activities. These Committees meet twice yearly and report to the Board. The Board reviews progress and strategy twice yearly. The highest level meeting is the Delegates Assembly, held in May or June each year, where all Members debate and decide on UEPG activities and the way forward.





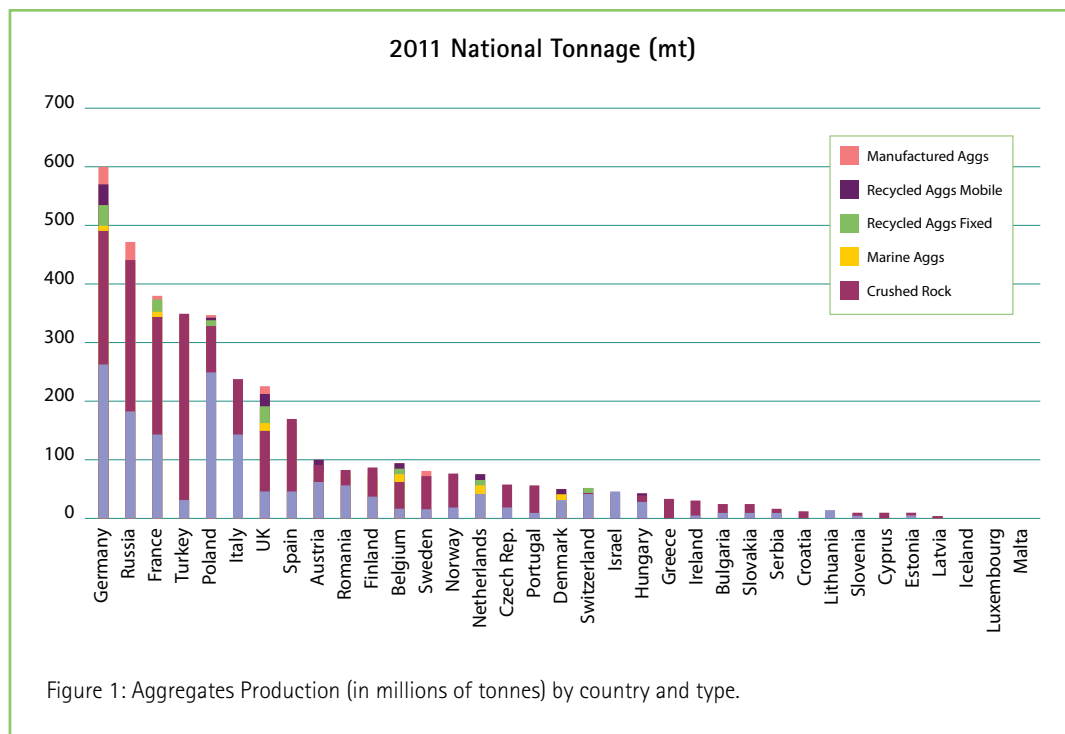
European Economic Developments

Current Trends in the European Aggregates Industry

Best available estimates of European 2011 aggregates production are given in Table 1 overleaf. It summarises the data for 35 countries, and also gives the totals on a like-for-like basis with the previous Annual Review, the totals for the EU27 plus EFTA countries, and finally for the EU27 countries only.

Focusing on the EU27 plus EFTA data, the total production for 2011 was just on 3 billion tonnes. It was 3.1% up on the previous year, mainly due to growth in Germany and Poland, partly offset by declines in Spain and some other countries. This tonnage came from 26,000 quarries and pits, operated by 15,000 companies (most of which are SMEs), with 238,000 employed. The industry annual turnover is in the order of €20 billion, testament to its economic importance.

This production data may be summarised in Figure 1 below, which also illustrates the breakdown between the various sources of aggregates in each country. Overall, 51% is crushed stone, 40% is sand & gravel, recycled is 5%, and the remaining 4% is marine and manufactured aggregates.

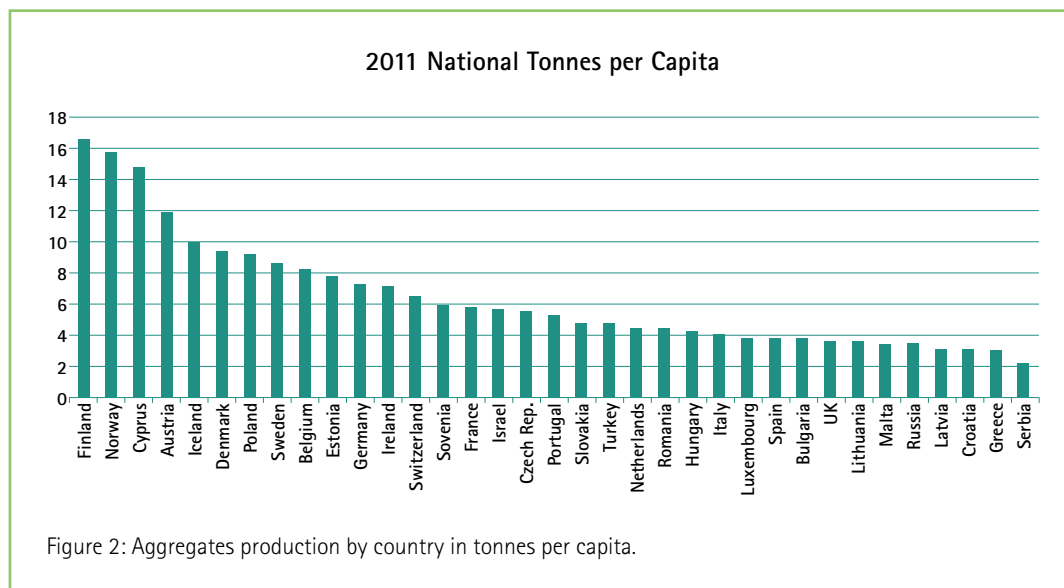


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Figure 1: Aggregates Production (in millions of tonnes) by country and type.



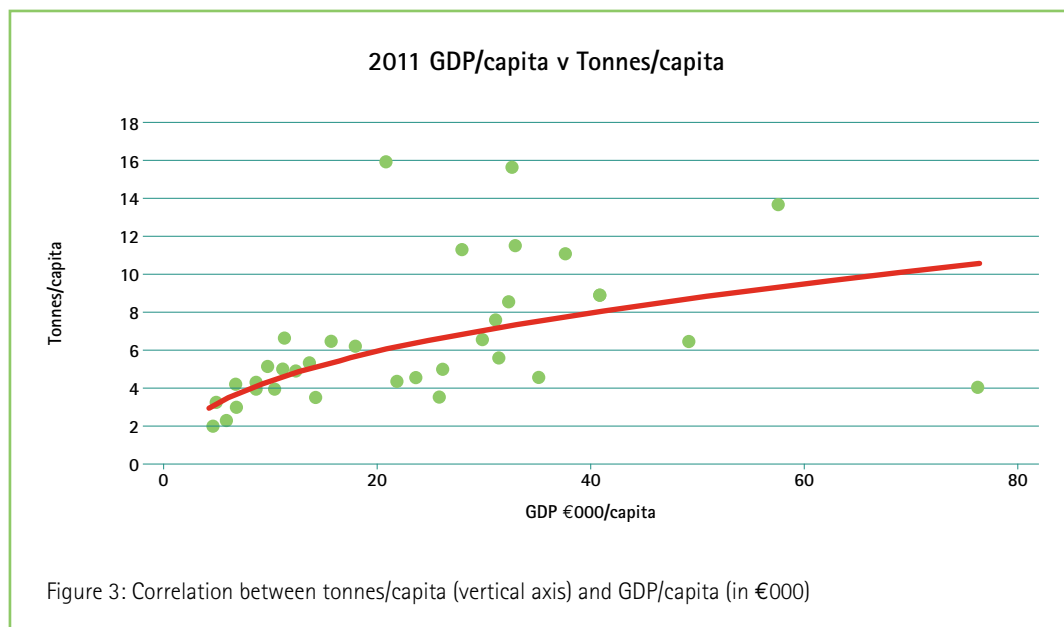
This production data is then depicted by tonnes/capita for each country in Figure 2 below. These figures relate to the level of economic development in each country, as well as to local climatic conditions and building traditions. The average for the EU27 plus EFTA countries was 5.8 tonnes/capita, down significantly from the average of 7 tonnes/capita in 2006/2007.



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Figure 2: Aggregates production by country in tonnes per capita.

The correlation between aggregates production in tonnes/capita and economic development, as expressed in GDP/capita, is illustrated clearly in Figure 3. Each point represents a country, and the red line shows the overall trend. This demonstrates that the need for aggregates grows as an economy grows, and conversely that aggregates are indeed key to the very infrastructure of economic growth.



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Figure 3: Correlation between tonnes/capita (vertical axis) and GDP/capita (in €000)



However the estimates of national production trends for 2012 (as indeed also the outlook for 2013) are generally negative, as illustrated in Figure 4 below. In total, these predict an overall further total 2012 production decline of the order of -9.7% for the EU27 plus EFTA countries, driven mainly by severe declines in Poland, Spain, Portugal, Greece and Cyprus.

This outlook unfortunately points to a continuing bleak picture for the aggregates industry in Europe.

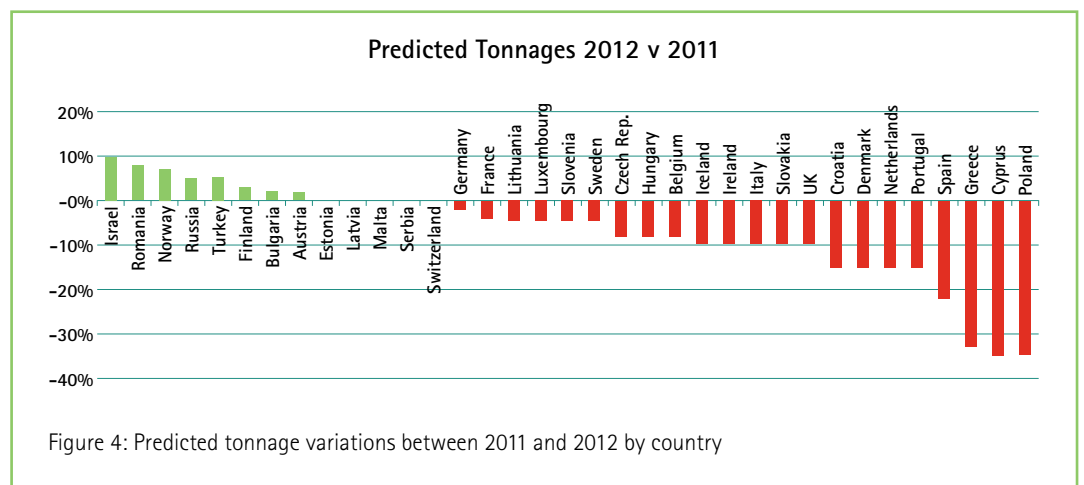


Figure 4: Predicted tonnage variations between 2011 and 2012 by country

This outlook unfortunately points to a continuing bleak picture for the aggregates industry in Europe. As shown in Figure 5, the EU27 plus EFTA aggregates output is predicted to continue to decline from its peak in 2006/2007, the estimated 2012 figure being shown in orange. UEPG advocates that European economic policy must urgently rebalance away from austerity measures towards aggressively aiming to stimulate economic growth.

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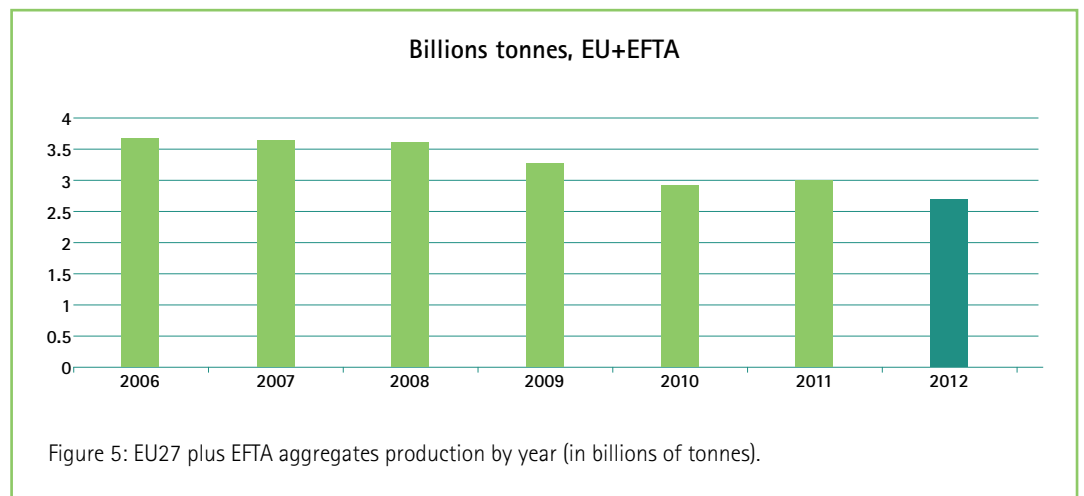


Figure 5: EU27 plus EFTA aggregates production by year (in billions of tonnes).



European construction industry: no speedy recovery in sight

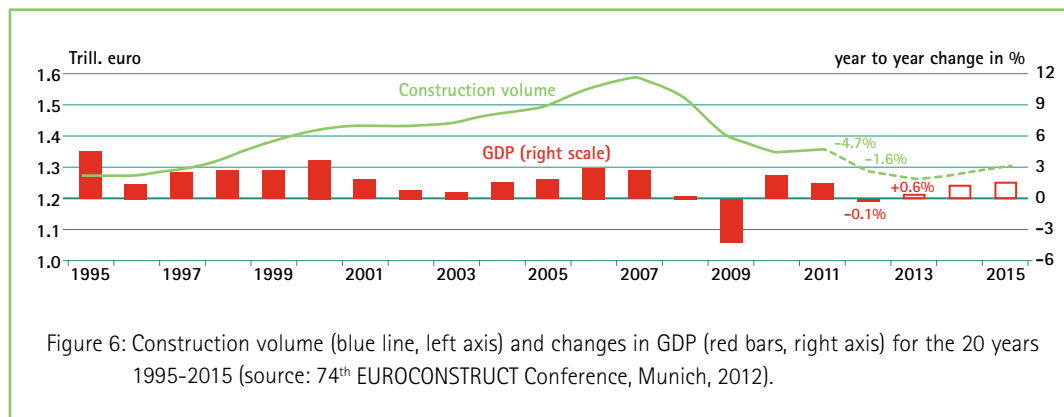
According to the most recent Euroconstruct outlook, hopes of a speedy recovery for the European construction industry have been dashed. In several of the 19 Euroconstruct countries, the euro crisis is continuing to hold construction activity in check. This trend is exacerbated by the situation of the world economy, which remains difficult.

Last June, Euroconstruct construction experts expected construction activity to decline by 2% during 2012, but they have now revised this forecast to a 4.7% decline. Contrary to their original forecasts, experts now predict further losses of around 1.5% for 2013. Any recovery by the end of the forecasting period in 2015 is only expected to be moderate.

High unemployment, stagnant economic growth or even economic downturns in many places, as well as the strained financial situation of the public sector are curbing construction demand in all three construction segments, civil engineering, residential and non-residential.

In 2012, civil engineering looks set to be the most heavily affected with a decline of around 7.5%. Caution on the part of the public contracting authorities in Spain is once again very notable in this segment. Downturns in the residential and non-residential construction segments of around 3.5% and a good 4% respectively are not quite as severe. All three sub-segments will likely also shrink in 2013.

The cycle of construction activity and economic growth in Europe, for the twenty years 1995-2015, all at 2011 prices, is illustrated in the Figure 6 below.



The euro crisis is continuing to hold construction activity in check.

The soaring growth in construction demand seen between 1997 and 2007 has therefore been cancelled out in the six years since 2008.

With construction work forecast to be worth a total of €1.27 trillion (in 2011 prices) for 2013, construction in the 19 member countries would fall just short of the level reached in the mid-1990s. The soaring growth in construction demand seen between 1997 and 2007 has therefore been cancelled out in the six years since 2008.

Following the decision to introduce the euro, especially the interest rates in the Southern European countries fell considerably, making it much cheaper to take out loans. This marked the beginning of the 'golden years' for the European construction industry, which were ultimately characterised by market excesses. The international financial crisis, the global economic crisis and, in the end, the euro crisis have had, and are still having, a devastating effect on construction activity in Europe. Compared to its 1996 level, the European construction industry will hopefully be 'starting from scratch' again in 2014.



Best Estimates of Aggregates Production Data for 2011

	Membership	Total Number of Producers (Companies)	Total Number of Extraction Sites (Quarries and Pits)	Sand & Gravel (millions tonnes)	Crushed Rock (millions tonnes)	Marine Aggregates (millions tonnes)	Recycled Aggregates (millions tonnes)	Manufactured Aggregates (millions tonnes)	Total Production (millions tonnes)
Austria	FM	1069	1362	62	32	0	4	2	100
Belgium	FM	84	112	15	49	8	15	1	88
Bulgaria	AM	190	295	10	18	0	0	0	28
Croatia	AM	170	261	3	11	0	0	0	14
Cyprus	FM	24	24	0	12	0	0	0	12
Czech Rep	NM	212	379	21	37	0	0	0	58
Denmark	FM	400	500	31	0	13	6	2	51
Estonia	AM	31	291	6	4	0	0	0	10
Finland	FM	430	2500	36	53	0	0	0	89
France	FM	1388	2461	142	205	7	19	6	379
Germany	FM	1530	3160	263	229	10	65	31	598
Greece	AM	149	164	0	32	0	0	0	32
Hungary	AM	290	589	26	15	0	2	0	43
Iceland	AM	28	56	2	1	1	0	0	3
Israel	AFM	17	35	46	0	0	0	0	46
Ireland	FM	110	450	7	25	0	0	0	32
Italy	NM	1300	2000	144	96	0	0	0	240
Latvia	FM	30	60	2	5	0	0	0	7
Lithuania	AM	30	407	10	2	0	0	0	12
Luxembourg	AM	7	10	1	1	0	0	0	2
Malta	NM	15	16	1	0	0	0	0	1
Netherlands	FM	135	250	40	0	15	18	0	73
Norway	FM	844	949	13	64	0	0	0	77
Poland	AM	1875	3018	248	85	0	8	4	345
Portugal	FM	240	284	8	49	0	0	0	56
Romania	FM	963	1600	56	38	0	0	0	94
Russia	AM	1181	1485	183	262	0	0	28	473
Serbia	AM	20	70	12	8	0	0	0	19
Slovakia	AM	305	459	9	15	n/a	1	0	26
Slovenia	AM	30	50	5	7	0	0	0	12
Spain	FM	1340	1382	43	129	0	0	0	173
Sweden	FM	985	1575	17	58	0	1	6	81
Switzerland	FM	538	531	40	5	0	5	0	51
Turkey	NM	770	770	30	321	0	0	0	351
UK	FM	510	1107	49	103	11	50	12	225
35 Countries		17240	28662	1580	1968	64	194*	92	3898

Like-for-Like = Same 26 countries as for 2009 data

Like-for-Like	15871	26252	1325	1687	63	194	64	3333
EU-27 + EFTA	15082	26041	1308	1367	64	194	64	2996
EU-27 only	13672	24505	1252	1297	63	189	64	2865

FM = Full Member, AM = Associate Member, AFM = Affiliate Member, NM = Non-Member



Economic Committee

Chaired by Hans-Peter Braus (MIRO, Germany) with Jerry McLaughlin (MPA, UK) as Vice-Chairman, the Economic Committee focuses and lobbies on all key economic challenges facing the industry, to ensure that it can perform competitively and sustainably in the economic sense as well as environmental and socially-friendly. Its activities are particularly important in the context of continuing severe recession in many European countries, increasingly difficult access to raw materials and the political and operational drives to improve resource efficiency.

The main focus of the Economic Committee has been on the implementation of the EU Raw Materials Strategy, in particular supporting the European Commission on improving the legal framework conditions for sustainable access to resources within Europe. The Initiatives on Resource Efficiency, developing indicators, opposing associated taxation proposals, seeking to improve transport efficiency as well as possibly amending the Eurostat data collection categories are among the priorities.

EU Raw Materials Strategy

UEPG has contributed to the development and implementation of the EU Raw Materials Initiative since it was launched in 2007, and subsequently to the 2010 Raw Materials Strategy, which latter is based on three pillars, the second and third being of direct concern to UEPG:

Pillar 1: Fair and sustainable supply of raw materials from international markets

Pillar 2: Fostering sustainable supply within the EU

Pillar 3: Boosting resource efficiency and promoting recycling

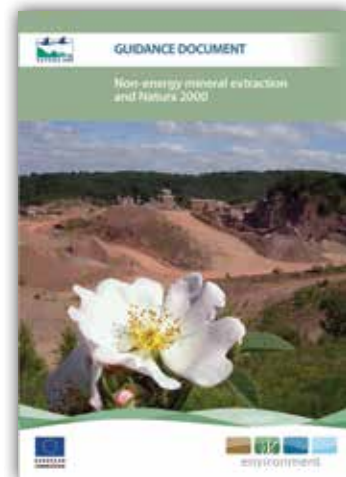
UEPG supports strongly the development of national land use planning systems and simplified, time-efficient and cost-effective permitting procedures to ensure good access to aggregates deposits, particularly for SMEs. While UEPG appreciates the fact that land-use planning and permitting lies in the competence of EU Member States (under the Subsidiarity Principle) much can be improved at European level.

To better ensure aggregates are well considered when implementing the EU Raw Materials Strategy, UEPG suggests the following action points:

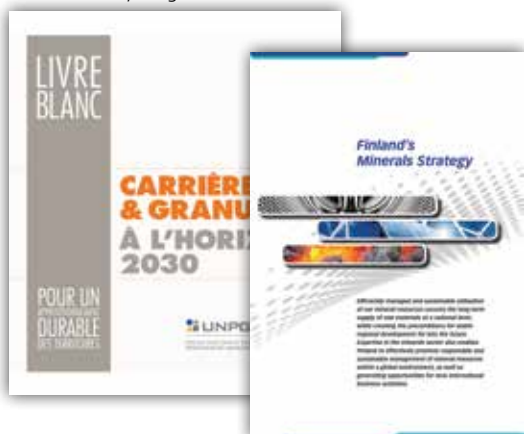
- Streamline environmental legislation to ensure sustainable access to resources including the promotion of the Natura 2000 Guidelines for the Extractive Industry and to invite representatives of DG Environment working on relevant environmental legislation to the Raw Materials Supply Group (RMSG) meetings;
- RMSG to comment on the European Innovation Partnership Strategic Implementation Plan (EIP SIP), in particular on the legal framework (OG3) & recycling (OG4) recommendations;
- Reactivate RMSG-WG on land use planning, permitting and geological knowledge as it has been done for critical raw materials;
- Continue progress on DG Enterprise & Industry land-use indicators and report back to RMSG;
- Promote European Minerals Day (EMD) as public communication tool and European Minerals Fora (EMF) as high-level public affairs tool to shape the debate on EU legislation relevant to the non-energy extractive industries.

Resource Efficiency

In 2011 the European Commission published a Communication on Resource Efficiency, together with a Roadmap. The main target of the Communication is to stimulate ways of producing goods with less primary resources (so-called economic decoupling). UEPG advocates that for aggregates, resource efficiency must be achieved through ensuring good national and regional planning policies with efficient permitting systems, providing access to raw material resources close to the major markets, thereby also optimising transport efficiency.



Supporting the European Commission on improving the legal framework conditions for sustainable access to resources within Europe.





"Tax on mineral resources is not an adequate (or appropriate - UEPG) fiscal tool for increasing resource efficiency."

European Parliament 2011
Raw Materials Report



Resource efficiency means also using modern technology to ensure the most efficient extraction, crushing and screening, minimising its land footprint, using deposits to the full extent feasible, minimising environmental impact including water usage, preserving and fostering biodiversity in both operating and restored quarries and pits, many of which are in or near Natura 2000 areas. The industry maintains local employment, aims for the highest standards of health and safety, while regularly liaising with neighbours and local communities.

UEPG particularly aims at improving resource efficiency through promoting recycling of construction and demolition (C&D) materials where technically, economically and environmentally viable, thus reducing usage of natural aggregates, simultaneously minimising the amount of C&D materials going to be landfill. Several countries already recycle all suitable construction and demolition materials, and the resulting recycled aggregates typically comprise 15-25% of those national markets. Other countries are developing recycling strategies, though progress is often hindered through unnecessary permitting bureaucracy and unclear end-of-waste criteria.

Resource Efficiency is a cross-cutting policy involving other UEPG policy areas such as access to local resources, ecosystem services and biodiversity, water management, as well as good stewardship of air, land and soil and marine resources and the work of the European Commission under the European Innovation Partnership.

Aggregates taxation

UEPG supports the European Parliament Report on an effective raw materials strategy for Europe in its belief 'that a tax on mineral resources is not an adequate (or appropriate - UEPG) fiscal tool for increasing resource

efficiency'. Analysing the impact of taxation in selected countries (European Environment Agency Report 2/2008), there was no clear evidence to show that the objective of reducing environmental externalities had been achieved. UEPG opposes resource taxation in principle, and believes that industry-positive policies are far more effective. In this regard, UEPG and other non-energy extractive industry sectors have agreed on a common Position Paper against resource taxation and developed arguments against taxation for national associations.

Transport Efficiency

The European Aggregates Industry with its production of 3 billion tonnes a year is the largest bulk solids logistics business in Europe. Aggregates are transported 88% by road, 7% by rail and 5% by barges and ships.

UEPG advocates greater future use of rail and water transportation of aggregates where the networks so permit. Therefore, national aggregates planning policies should be integrated with rail and water transport development strategies to ensure the optimal aggregates supply and transport solutions for governments, the aggregates industry, transport operators and society.

Minimising road transport distances also minimises associated CO₂ emissions and energy consumption, as well as reducing environmental impact and transport congestion. Where national maximum axle loads so permit, use of larger payload trucks will further reduce the number of truck movements, fuel usage and CO₂ emissions.

Economic SDIs

A sound statistical data base is crucial to demonstrate the impact of the economic crisis as well as demonstrating industry progress. The UEPG General Secretariat started many years ago a thorough data collection using a simplified questionnaire covering the three pillars of sustainable development. Thanks to the work of UEPG Past-President Jim O'Brien and UEPG members strongly contributing to deliver best available data, UEPG is now able to produce good data on the European Aggregates Industry. The SDIs for 2011 are the result of entries from 35 countries and analysed separately for EU 27 and EU 27 + EFTA for better comparison with prior years.

The figures underline the political imperative to now stimulate economic growth and employment, and thereby also promote the economic sustainability of the Aggregates Industry in Europe.





Technical Committee

With the perseverance of Brian James (EPRA Chair) and the combined dedication of John B-Bullock (Secretary), Markus Schumacher (Vice-Chair) and Jean-Marc Vanbelle (Chair), the UEPG Technical Committee continued working in 2012-2013 on all technical key topics relevant for the Aggregate Industry: Recycling, Construction Products Regulation, Release of Dangerous Substances, Environmental Product Declarations and European Aggregates Standards.

UEPG Technical Committee mourned Ulrich Hahn, a key member of the Committee, who passed away at the beginning of 2013.

The network of UEPG Technical Committee continued to address the same key technical issues as in the past years, with the objective of maintaining a truly open, competitive and sustainable European market for natural, recycled, marine and secondary aggregates.

Recycled Aggregates

The European Platform for Recycled Aggregates (EPRA) was created in 2007. It includes EAPA (European Asphalt and Pavement Association), ERMCO (European Ready Mixed Concrete Organisation) and representatives of the ECP (European Concrete Platform) alongside founder members FIR (the International Recycling Federation) and UEPG. Under the chairmanship of Brian James, it promotes good practices and an adequate legislative framework (including the development of reasonable end of waste criteria) in order to support further development of the recycled aggregates industry.

Recycling is a key issue in a resource efficient economy, and members of the TC agreed to set up a dedicated UEPG Task Force, chaired by Brian James, in order to speed up progress in the best interest of aggregates producers.

Construction Products Regulation (CPR)

Thanks to a close liaison with CEPMC (Council of European Producers of Materials for Construction) - now CPE (Construction Products Europe), the UEPG TC maintained its monitoring of the implementation of CPR as its replacement of the Construction Product Directive (CPD).

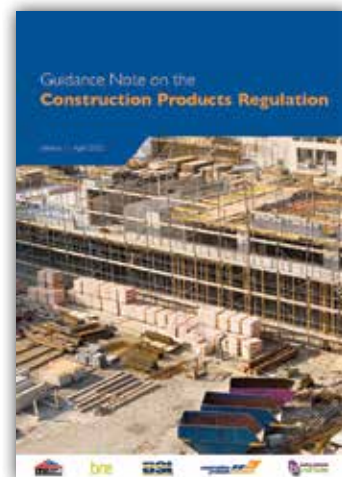
The general objectives and main instruments of the CPD have not changed in the CPR. The CPR is implemented in two phases:

- **Preparation phase:** Establishing the organisational framework and preparing technical framework documents (**till 30 June 2013**)
- **Operation phase:** Declaration of Performance by manufacturers, CE marking under the CPR, **starting on 1 July 2013**

The Declaration of Performance (DoP) is the key concept in the Construction Products Regulation (CPR). Each manufacturer delivers through the DoP the information about the essential characteristics of the product he wants to place on the market. The **essential characteristics are specified in the harmonised product standards (hEN) covering the product use.** The CE marking shall be affixed to those construction products for which the manufacturer has drawn up a DoP. The manufacturer, by affixing the CE marking, takes **the responsibility for the conformity of the construction product** with the declared performance. The DoP shall be drawn up following the model set out in Annex III of the CPR.

The Commission has been authorised in the CPR to adopt **delegated acts** in eight different fields (cf. esp. *Article 60*). It should be noted that the respective provisions shall become applicable first from 1 July 2013. The most urgent of such delegated acts would relate to the **electronic supply of the declaration of performance** (Article 7(3)). Formal consultations of all stakeholders, including experts from all Members States, is to be arranged for early July 2013, which would enable the progress towards adoption of the delegated act forthwith and its delivery to the European Parliament and the Council by early September 2013. A swift and fluent process in these Institutions would thus allow for the publication in Official Journal of the European Union and the entry into force already in October.

Annexes III (DoP model) and V (Assessment and verification of constancy of performance) would be amended over consultations in 2013.



"Making waste a resource."

Janez Potočnik, European Commissioner for Environment





"The Communication on Sustainable Buildings will address resource use and related environmental impacts all along the life-cycle of buildings, from the extraction of building materials to the demolition and recycling of materials (end of life)."

<http://www.wastetargetsreview.eu/>

The package of the revised aggregate standards plus the meanwhile approved conformity standard EN 12620 had been sent to CEN-CENELEC Management Center (CEN CMC) and the European Commission. The official availability was forecasted from April 2013 (English Language Version). As the revised versions were prepared under CPD, an early and formal adjustment to CPR after 1 July might be indicated.

Environmental Products Declaration (EPD) for aggregates

A Model EPD for aggregates, has been approved for general use, and may whenever desired be adapted to local conditions by individual users. This model is on a cradle to gate basis. It includes all natural aggregates, that is sand & gravel, crushed rock and marine aggregates as well as recycled aggregates. It has been stated that EPDs will not automatically become obligatory after CPR implementation, but they may become "the common tool" if requested by national regulators and/or customers or decided by the Commission through delegated act.

Release of Dangerous Substances (RDS)

On RDS, the UEPG WG has started to refine a geological/ petrographic description approach for crushed rock and to collate existing data for sand and gravel. The purpose of this geological description is to enable the drafting of criteria such that repeated, potentially expensive, testing is unnecessary (WFT) and to enable the formation of clusters of producers.

Robustness testing of the CEN/TC 351 Draft Leaching Test Methods is completed. Based on the results of this study, CEN/TC 351 WG1 has proposed two percolation tests. This possibility of choice has been rejected by CEN/TC 351 and the Commission. New testings are underway to compare the two options. The UEPG WG will continue to monitor CEN/TC 351 WG1 work in order to propose some simplifications of the test methods for aggregates for presentation to CEN/TC 154 SC6 and WG 13 which will decide on how to implement the CEN/TC 351 tests for aggregates. Limits would have to be or could be set up by EU Members States individually.

European Aggregate Standards

The Technical Committee has been very active in this area and gave a detailed report of the updates, including:

- Revision of harmonised product standards CEN/TC 154: The package of the revised aggregate standards plus the meanwhile approved conformity standard EN 12620 have now been sent to CEN CMC and EC. The Date of Announcement of the package of standards is 31 August 2013.





Health & Safety Committee

Under the Chairmanship of Martin Isles (MPA, UK) and Vice-Chair César Luaces Frades (FdA, Spain), the UEPG Health & Safety Committee's mission is to actively promote better Health and Safety in the Industry through improving awareness and knowledge sharing, acting as an industry leader in voluntary initiatives and lobbying on key policy Health & Safety issues at European level. During 2012-2013, the Health & Safety Committee has actively addressed a number of key areas with considerable success.

Health

UEPG, together with other NePSi partners, aims at promoting the European Social Dialogue Agreement (ESDA) via NePSi reporting guidelines, promoting presentations at Social Partners meetings, IT tools, website and campaigns to demonstrate the increasing success of the Agreement in protecting the occupational health of workers. In 2012, despite the financial recession, UEPG Members' NePSi reporting demonstrated a significant increase in the number of enrolled sites and continued positive progress on exposure reduction and control measures. Furthermore, the UEPG strategy is to encourage additional industries to join NePSi, for instance the construction sector. UEPG believes that ongoing implementation of the ESDA is, by far, the best driver for further exposure reduction and hence of occupational illness prevention, rather than inappropriate inclusion in the imminent revision of the EU Carcinogens & Mutagens Directive with its inevitably adverse consequences for the European Aggregates Industry.

UEPG is a Member of the International Social Security Association, Mining section (ISSA-Mining), an EU Social Partner in the European Commission's Sectoral Social Dialogue Committee for the Extractive Industry (SSDCEI). UEPG is also part of the Standing Working Party for the Mining and Other Extractive Industries (SWPEI). UEPG became an EU official partner of the Healthy Workplaces Campaign 2012-13 on Working Together. After the successful 2012 Chairmanship in proposing the agenda and coordinating meetings with the European Commission and Social Partners, UEPG was offered to assume the SSDCEI Vice-Chairmanship for 2013. In a year where UEPG is promoting "Safer by Design" at European level, UEPG is delighted that Martin Isles from the UK Mineral Products Association and UEPG Health & Safety Committee Chair had accepted to be the Chair of the Sectoral Social Dialogue Committee for the Extractive Industry in 2012 and Vice-Chair in 2013.

Safety

The "Safer by Design" project is originally a UK Mineral Products Association (MPA) initiative. The aim of this project is to convince mobile plant suppliers to include all essential safety features in new equipment as standard and preferably without additional costs to eliminate design-related injuries and occupational ill-health. This voluntary guidance is clearly set out on the "Safe Quarry" website http://www.safequarry.com/safer_by_design.aspx (see inset).

Since 2010, this successful project has received top recognition at European and International level. In 2011, the "Safer by Design" initiative continued to be promoted successfully through several EU/EC channels including, Machinery Directive Working Group, CEN/TC151, Strategic Advisory Body for Occupational Health and Safety (SAB OHS), MACHEX (a network to exchange information on problems encountered in the application of Community legislation on worker protection and internal market) and the Sectoral Social Dialogue. The links with the parallel Australian Earth Moving Equipment Safety Round Table (EMESRT) strengthen wider implementation by plant purchasers. Dr. Jost-Peter Sonnenberg, from BG Rohstoffe und chemische Industrie, represented UEPG at the CEN/TC 151 Plenary Session in November, presenting "Safer by Design" increasing the will of Members to work together.

In 2012, the new Administration and Cooperation (ADCO) task force on earth moving to machinery invited UEPG to participate to meetings and to present the "Safer by Design" project. Raphaël Bodet (UNPG, France) and Walter Nelles (MIRO, Germany) promoted the project which was broadly welcomed. The working group focused on the visibility. It was advised that users should be more involved in the standardisation process to ensure that "Safer by Design" criteria are included. This is 'win-win' for both suppliers and the industry through ensuring consistently higher safety standards in plant specification and consequently significantly reducing industry workplace risks. In July 2013, UEPG was represented by Martin Isles at an EC workshop on machinery noise emissions after the Noise Machinery Directive, 'NOMAD' - pre-market surveillance survey, revealed that 80% of 1,500 instruction manuals did not comply with the EU machinery Directive.



UEPG believes that ongoing implementation of the European Social Dialogue Agreement is, by far, the best driver for further exposure reduction and hence of occupational illness prevention.





Safe storage, handling and use of explosives for civil use

UEPG supports the 2008/43/EC Directive, pursuant to the Directive 93/15/EEC, dedicated to setting up a harmonised system for the identification and traceability of explosives for civil use. UEPG campaigned strongly in collaboration with the Federation of European Explosives Manufacturers (FEEM), explosives suppliers, companies and national administrations for a postponement of the Directive with the aim of better implementing the Directive and ensuring 'one unique code system for the complete chain'. UEPG advocacy campaigns on the "Explosive Working Group" dealing with the implementation of the Directive were a success as the Directive has been officially postponed with the obligations for the supply chain on data collection and record keeping for 10 years will therefore now apply from April 2015. This allows manufacturers and users more time to develop secure, reliable and cost-effective European-wide harmonised systems as well as to train everyone in their use. A Task Force chaired by César Luaces Frades (UEPG), involving the Federation of Explosives Manufacturers (FEEM), several Non-Energy extractive industry sectors, EURACOAL, and the European Commission prepared recommendations for a common action plan and a first guidance document for the whole supply chain and a second one for users only. Members States supported this pro-active initiative and are informed on the step by step work. Other partners have been informed and welcomed to contribute to the ongoing work.

Better implementation of the Explosives Directive.

UEPG Sustainable Development Indicators (SDIs)

UEPG is committed to reporting Sustainable Developments Indicators in order to measure industry progress under Economic, Environmental and Social Pillars. Health and safety performance is the primary indicator under the Social Pillar, and UEPG is promoting industry-wide consistent reporting of fatalities and injuries for its employees and contractors, both on-site and off-site, in the conviction that such data will induce further improvement in industry health and safety performance. The European Aggregates Industry sector has a strong focus on fatality prevention, however the limited 2011 data available indicating a totally unacceptable 36 fatalities. Representing best practice, the Cement Sustainability Initiative (CSI) fatality prevention guidance documents for Contractors and Drivers were again promoted to UEPG members. The 2011 results also showed the need for better reporting on Lost-Time Injuries, as well as stronger Health and Safety commitment from UEPG members. All UEPG members are now urged to form national Safety Committees, if these do not already exist. Some members rely on Eurostat safety reporting, but this does not provide a clear picture for the Aggregates Industry. Hence a UEPG re-categorisation proposals to be discussed with NEEIP members with the outcome to be agreed and presented at the UN Economic Commission for Europe (UNECE) and Eurostat.





Environment Committee

Chaired by François Petry (Holcim, France) and vice-chaired by Jim Rushworth (Lafarge, Greece), the UEPG Environment Committee continued to actively address and represent the environmental interests of the Aggregates Industry on key EU and wider stakeholder issues. It draws on the considerable professional shared expertise of its members while ensuring well-coordinated advocacy actions across Europe, in parallel growing liaison with NGOs. Its workload is shared by three Task Forces focused on Biodiversity, Water Management and Marine Aggregates respectively which report to the Environment Committee, the activities of each being summarised below in sequence.

Biodiversity Task Force

As one of the few industry sectors represented among major actors on the EU biodiversity policy, the European Aggregates Industry is now widely recognised as a trusted partner in biodiversity by EU Institutions and a growing number of NGOs. Now chaired by François Petry, the UEPG Biodiversity Task Force is focusing its efforts towards three areas:

In May 2012, IUCN and UEPG signed a Letter of Intent, with the objective to facilitate biannual meetings between UEPG and IUCN, seeking to develop specific biodiversity projects. One of the key items for IUCN was to develop stronger links with biodiversity practitioners, particularly with SMEs. In this framework, UEPG has been encouraging its members to work more closely with IUCN, and IUCN is contributing to the development of biodiversity indicators.

The development of biodiversity indicators suitable for the Aggregates Industry is one of the key activities of the Task Force, carried by a dedicated working group chaired by Jim Rushworth (Lafarge, Greece).

Biodiversity Indicators need to be such that they can be determined by SMEs using clear guidelines without the need to possess a strong knowledge of biodiversity/ecology and ideally should be applicable to a wide range of sectors.

It has been agreed by both external experts and the industry to focus on a habitats approach, feasible for SMEs, considered as the most credible one. With the concern to ensure an approach which was practically feasible, cost-efficient and giving flexibility for methodologies already in place at national level, two

categories of indicators have been adopted and will be implemented as from 2013.

Ecological offsets and the European Commission's No Net Loss initiative are still closely monitored. It should be recognised that aggregates-producing companies already invest millions of Euros annually in environmental restoration, biodiversity and ecosystems, and UEPG actively promotes pragmatic solutions on a case by case basis.

The Task Force is still encouraging UEPG Members to develop and implement biodiversity promotional initiatives in their own countries.

The next UEPG Awards are taking place in 2013 and will again have a strong focus on biodiversity, with 13 entries out of 52 entries received.

Water Management Task Force

Chaired by César Luaces Frades (FdA, Spain), the Water Management Task Force aims at exchanging good practice in groundwater management in quarries and pits, ensuring that the Aggregates Industry maintains water quality.

Water is an increasingly important topic for the Aggregates Industry, which needs to be able to get a permit when extracting below the water table and to be able to compete with other sectors for access to water and consumption. Taxes are as well a concern for the industry, which requires a balance between what the industry can do and the state of water and consistency in the legislation.

The UEPG Water Management Task Force is now monitoring the developments of the EU Water Blueprint and developing water indicators for internal use as a management tool. Members are as well reviewing its position paper and Guidelines in order to both promote the positive contribution of the industry and to advocate for smart and reasonable water policies.

Marine Aggregates Task Force

The Marine Aggregates Task Force, chaired by Jeffrey Thompson (OAM Baustoffe GmbH, Germany) has expanded its membership to new countries, and is developing further key contacts with the European Commission, the European Parliament but as well other European sea bed users.

In developing Biodiversity Indicators, UEPG has adopted a methodology which is both credible and scientifically robust, feasible and cost-effective for the whole European Aggregates Industry.





Non-energy mineral extraction and Natura 2000



New mineral extraction plans or projects can be undertaken in Natura 2000 sites as long as they do not adversely affect the integrity of the site.

New EC guidance on Natura 2000 for the non-energy extractive industry

- The non-energy extractive industry provides many of the basic raw materials for Europe's manufacturing and construction industries.
- As old quarries become exhausted, new extraction sites need to be developed in order to meet continuing demand. Some of these sites may be located in or near areas of high nature value, such as Natura 2000 sites.
- To assist the non-energy extractive industry, the European Commission has published new guidance on how to ensure extraction plans and projects are in line with the requirements of EU nature legislation.
- The guidance document seeks to promote a better understanding on how to avoid or minimise potential effects on Natura 2000 sites in particular and on how to carry out an Appropriate Assessment under Article 6 of the Habitats Directive.
- The guidance document aims to give the economic operators and authorities concerned the clarity they need to ensure that the drive for further development,

The Task Force is involved in the implementation of the Marine Strategy Framework Directive, with a particular focus on the definition of "good environmental status" and the associated three key indicators for biodiversity, sea floor integrity and underwater noise. Another essential task will be to monitor the implementation of Natura 2000 in the marine context.

A proposal of Directive on Maritime Spatial Planning and Integrated Coastal Management has been published in March 2013. This will be a priority for the Marine Aggregates Task Force, as it could display an example on how the European Commission would create policies on land-use planning, a competence of EU Member States.

Other Environment Committee Activities

Review of the Environmental Impact Assessment Directive

Adopted 25 years ago, the Environmental Impact Assessment Directive (known as the EIA Directive) was codified in 2011 and is now under revision.

The objective of the review is to take into account the changes in the policy, legal and technical context since 25 years; correct three identified shortcomings (the screening procedure; the quality and analysis of the EIA; the risk of inconsistencies with other legislations); and to simplify the EIA process.

UEPG welcomes the review of the Environmental Impact Assessment Directive as an opportunity to streamline existing provisions and as a potential instrument for



simplification in the context of better regulation as stated under point 1 in the Commission proposal. But the European Commission proposal goes far against simplification as the scope has been much broadened and the current text is too complex and based on undefined legal terms at EU level. This results in uncertainty for companies in their long-term investments and weakens competitiveness of the industry.

Other Environmental Work Areas

UEPG continues to follow very closely developments on key items: the proposed 7th Environmental Action Programme; the mining legislation; soil protection; the review of the EU Air Quality policies and legislation; the review of the EU Waste policies and legislation; the review of environmental inspections; sustainable construction and the use of natural resources; and the implementation of Natura 2000.

"The Directive on the assessment of the effects of certain public and private projects on the environment is actually the 'jewel in the crown' of EU environmental policy."

Andrea Zanoni MEP (ALDE, Italy)





PR & Communications Task Force

Chaired by Robert Wasserbacher (Forum Rohstoffe, Austria), this Task Force continues to do trail-blazing work towards improving PR (Public Relations) and Communications in the Aggregates Industry. Its work is based on the conviction that the industry has a really good story to tell on its dedication to environmental stewardship, biodiversity and the economic importance of raw materials supply, to continuously improving health & safety, and to being socially responsible.

The Industry is aiming for high standards of sustainability in all its activities in line with its vision of a 'Sustainable Industry for a Sustainable Europe'. The industry focus is on continuous improvement. The Task Force is a platform dedicated to advising UEPG Members on an ongoing strategy for achieving the better image it truly deserves.

The aim of the UEPG Task Force is to share National Good Practices in terms of PR and Communications, to work on current and new PR and Communications tools and targets, and to prepare for the next Events in terms of PR Strategy.

Exchanging Good Practices

At recent Task Force meetings, participants have shared many outstanding national examples of PR and Communications best practices, which often then get adopted for use in other Member countries. These include for example:

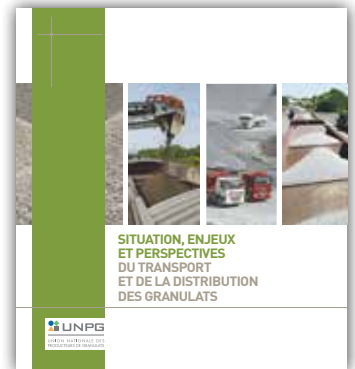
Austria: In 2012, the Association supported the European Mineral Resources Conference held in the University of Leoben. The event was focused on the availability of resources for economy and society, as well as, new strategies and technologies in extraction, processing and recycling of mineral raw materials. WKÖ Forum Rohstoffe launched a new website, an Annual Report and Newsletter for stakeholders. In 2013, Forum Rohstoffe organised its National Sustainable Developments Awards Ceremony with the participation of member companies, authorities, politicians, NGOs and media.

Finland: a new website with all mineral sectors was in preparation. A work with the authorities was made to publish a booklet - guidance document on Environment Impact Assessment for Finland. The booklet would be soon published.

France: UNPG published its Annual Report and guidance documents on ecological land use planning and biodiversity. A study on transport of aggregates was made to develop acceptability to the sector community. UNPG organised open door events in cooperation with all sectors of UNICEM (Quarry products and construction materials Association). The operation opened for guided visits approx. 100 sites. The topics were on life cycle, biodiversity and mineral resources' quality. The Association also organised their National Sustainable Developments Awards Ceremony.

Norway: A common media plan and guiding documents were in preparation for companies' support and especially for SMEs. A brochure was published for all members with a focused message on Industry being 'Essential for our everyday life', prospect for the industry and presentation of end products' results. The Sustainability Report of a member Company highlighted the aggregates sectors' challenges.

Spain: In 2012, The Spanish Aggregates Federation (FdA) organised a National Aggregates Congress with 600 participants, Representatives from the Administration, 30 journalists, 300 articles in media. The main purpose of the Congress was to present a National Strategy for the sector and an occasion to celebrate its 35th anniversary. FdA created a new website with a Newsletter in online format. In 2013, FdA worked on its annual public event 'the day of the Trees'





The Industry is aiming for high standards of sustainability in all its activities in line with its vision of a 'Sustainable Industry for a Sustainable Europe'!

covering 50 extraction sites and expecting more than 3,000 participants. The FdA member ANEFA has prepared a brochure on 'public relation and communication' for operators providing methodology, examples, templates, a glossary and images.

Industry PR & Communications Initiatives

In 2012, UEPG has begun preparations for the UEPG 2013 Sustainable Development Awards (SDA); which are the proud showcase of the European Aggregates Industry. These awards have been made every 2-3 years since 1997, and have gained excellence with each event. In 2013, UEPG General Secretariat received 52 applications from 14 countries all over Europe, all entries being of truly outstanding quality. UEPG is very honoured to have an independent Jury, each of the four members being internationally distinguished experts in the fields of biodiversity, conservation, health & safety and mining engineering. UEPG provided a Biodiversity Award category, in addition to the categories of Environmental, Health & Safety, Operational, Recycling and Restoration Best Practice, Community Relations and Contribution to Society. The Jury members will deliberate on June 2013 and the Awards will be presented on 27 November 2013 in Brussels.



UK: The Mineral Products Association (MPA) launched in 2012 a new Campaign 'Make the Link'. The aim of the campaign was to raise awareness of the sector and its essential contribution to the UK economy and quality of life; to influence policy development/implementation in Government, notably to ensure reasonable and proportionate regulation and to encourage investment in construction; to create opportunities for dialogue between industry and external audiences/organisations. MPA has created a new Internal Newsletter for its members. The website information and hyperlinks were sent to 2300 people.



UEPG promoted the importance of the European Social Dialogue Agreement on Respirable Crystalline Silica (ESDA) via an intense campaign to its members and partners; and maintained its close partnership with the Occupational Safety and Health European Agency (EU-OSHA) 2012-2013 Healthy workplace campaign with the project "Safer by Design".

UEPG strongly supported the European Minerals Foundation Forum on 28 November 2012 on 'Towards a resource efficient industry' and, Debate event on 24 April 2013 on 'Smarter Regulation and Environmental Impact Assessments'. Both panel discussions with key policy and decision makers allowed debates on crucial Industry issues and a platform for Industry to be heard.



General Secretariat

The General Secretariat, its location and activities

Dirk Fincke, Secretary-General, is ably supported by Sandrine Devos and Miette Dechelle, both Public Affairs Managers. Direct contact details and a list of live issues covered by each team member can be found on the UEPG website – Members' Only Section.

The small General Secretariat office is located at Rue d'Arlon 21 in Brussels, close to the European Parliament, within easy distance of the Commission and the many other European Institutions. The UEPG General Secretariat is therefore very well placed to regularly attend and participate in Commission Stakeholder consultation meetings, Committee meetings in the European Parliament and other external fora.

The UEPG General Secretariat works closely with European Union legislators to contribute to all stages of the policy-making process on behalf of the European Aggregates Industry. The General Secretariat is also available to support Member Association activities in Brussels or in their respective countries, and invites extra support from staff in Member Associations where they have particular expertise.

Providing EU intelligence and industry good practice

The UEPG General Secretariat's first mission is to provide UEPG Members with advance notification of policy initiatives that may impact on the European Aggregates Industry. Its small and highly dedicated team keeps UEPG Members informed of any relevant EU policy developments at all stages of the legislative process through timely and concise email reports and issue trackers available online.

The UEPG General Secretariat offers full members the Issue Tracker System, which is an essential tool to monitor latest developments on live issues having an impact on the European Aggregates Industry. An Issue Tracker is a one-page document which presents, in a precise and concise way, Communications, Directives, Regulations and EU initiatives. Each paper – classified by high, normal and low priority – provides the background, key points, UEPG actions and next steps.

The Issue Matrix offers the user an overview of all UEPG Live Issues leading via hyperlink directly to the Issue Tracker. Available on the new UEPG website, these monitoring tools give UEPG members the opportunity to be briefed on all important EU legislation related to our industry in a precise and effective way, whenever needed.

The new UEPG website www.uepg.eu was launched beginning of March 2012. The Members-only section is now accessible by UEPG full Members. The public section offers UEPG Position Papers in a new format delivering a clear industry message and databases for biodiversity case studies and water management good practices.

The UEPG General Secretariat's first mission is to provide UEPG Members with advance notification of policy initiatives that may impact on the European Aggregates Industry.





Providing regular news updates

Since its inception in 2003, the monthly e-newsletter EU Insight has proved a popular tool which offers a succinct summary of recent policy developments. In June 2012, the 100th edition of EU Insight had been published. It outlines the next steps, so that UEPG Members can anticipate future developments on any EU initiative and provide constructive inputs to influence the outcome. The newsletter is available on the UEPG website in English (as EU Insight), in French (as Bulletin Europe), and in German (as Bericht aus Brüssel).

Involving the Aggregates Industry in EU Policy Making

The physical proximity to the EU Institutions and day-to-day contact with policy-makers allows the UEPG General Secretariat to identify "early-bird" opportunities to become involved in the policy making process. UEPG Past-President Jim O'Brien was invited to become a member of the Steering Committee of the European Commission Business and Biodiversity Platform, providing an exceptional opportunity to contribute to the EU policy on biodiversity.

groups and promoting 'Safer by Design' through CEN and DG Employment with the support of the EU Sectoral Social Dialogue Committee for the Extractive Industry.

UEPG works closely with other European Industry Associations of the Non-Energy Extractive Industry Panel (NEEIP) and with the International Union for Conservation of Nature (IUCN). UEPG is a member of Construction Products Europe (CPE), of ISSA-Mining (International Social Security Association), and of the European Platform for Recycled Aggregates (EPRA) in cooperation with the International Federation for Recycling (FIR). Where there are common issues, UEPG also contributes to joint advocacy work with the World Business Council Cement Sustainability Initiative, the European Concrete Platform and EuroGeoSurveys.

Raising the industry's profile

The General Secretariat continues to promote the achievements of the European Aggregates Industry by making keynote speeches in international conferences. It also developed and coordinated targeted events. A successful example was the close cooperation with the European Minerals Foundation (EMF) in organising the European Minerals Forum Debate 2013 in a new and well received format of roundtable sessions. The theme was "Smarter Regulation and Environmental Impact Assessments". The debate was moderated by the Chair of the EMF Antony Fell with all relevant EU decision makers on the EIA Directive review participating. The event concluded with industry policy recommendations to EU decision-makers.



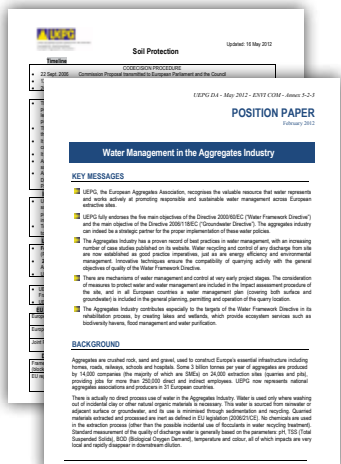
UEPG has continuously strengthened its network of key contacts within the European Commission, European Parliament, EU Council working groups, EU Agencies, Academia and NGOs. Useful platforms are the UEPG Board Policy Dinners, Debates in the European Parliament and the European Minerals Foundation events where open and informal discussions with key EU policy-makers take place. In November 2012, key note speakers at the European Minerals Foundation Forum were Pia Bucella, Director Nature, Biodiversity & Land Use, DG Environment and Gwenole Cozigou, Director Metals, Mechanical, Electrical and Construction Industries; Raw Materials, DG Enterprise and Industry. Such occasions provide valuable networking opportunities.

Coordinating EU lobbying campaigns

UEPG targets advocacy strategies and acts as a coordinator in their implementation. Examples include ensuring the sustainable supply of aggregates in Europe; influencing the Raw Materials Strategy by commissioning a study by the Leoben University and presenting UEPG positions at the Raw Materials Supply Group; contributing to the EC Biodiversity Strategy by ensuring representation in the Green Infrastructure and No-Net-Loss working

Governance

Over recent years, UEPG has grown into a highly-representative and respected association, representing the largest non-energy extractive sector, also the largest sector in numbers of locations and tonnages. Through its small but highly-dedicated Brussels based Secretariat, despite its very tight budget, it has achieved tangible results for the industry, now enjoying high visibility and trust amongst its many stakeholders. UEPG sets great value on maintaining its reputation, its accounts are audited to the highest standards and key Secretariat staff are members of the Society of the European Affairs Professionals (SEAP).





International and European Networks

UEPG maintains very constructive network links with counterpart international aggregates associations, driven by the conviction that the sharing of experience and best practice promotes a stronger and more sustainable industry globally. Its main links currently are with the Global Aggregates Information Network (GAIN) and the Sustainable Aggregates Planning in South Eastern Europe (SNAP-SEE) project.



Exchanges on production and safety trends, environmental and biodiversity management and recycling.

Country	Association	Website
Australia	CCAA	http://www.ccaa.com.au/
Brazil	ANEPAC	http://anepac.org.br
Canada	APABC ASGA OSSGA	http://www.gravelbc.ca/ http://www.asga.ab.ca/ http://www.ossga.com/
China	CAA	http://www.zgss.org.cn/index.html
Columbia	ASOGRAVAS	http://www.asogravas.org/
Iberoamericana	FIPA	http://www.fiparidos.info/
New Zealand	AQA	http://www.aqa.org.nz/
South Africa	ASPASA	http://www.aspasa.co.za/
USA	NSSGA	http://www.nssga.org/



The Global Aggregates Information Network (GAIN)

UEPG has established excellent communication links with international aggregates associations as listed below, designated as the Global Aggregates Information Network (GAIN), these together representing some 50% of the global aggregates production of around 30 billion tonnes.

Due to the travel distances involved, meetings are held only every 2-3 years, the most recent meeting being in Charlotte, NC, USA, in March 2012. Between meetings, there are regular exchanges of newsletters. During the past year there were also several exchanges on production and safety trends, environmental and biodiversity management and recycling. These ongoing exchanges hugely benefit those involved.

Sustainable Aggregates Planning in South Eastern Europe (SNAP-SEE)

This 2-year European Regional Development Fund-supported project follows on the SARMA project, and is focused on implementation of Sustainable Aggregates Planning in South-Eastern Europe. Past-President Jim O'Brien is providing active industry support on behalf of UEPG to the Leoben University team.

The goal of this landmark project is to help establish and grow a truly sustainable aggregates industry in South-East Europe that produces quality products with high standards of environmental stewardship, health and safety, community and stakeholder liaison. The project involves an impressive 27 partners from 14 countries.

National stakeholder meetings are now being organised in the countries and regions involved in order to kick-start the development of Aggregates Plans throughout the Balkan region, also involving local UEPG members. The project will strengthen the existing UEPG memberships, and will also hopefully stimulate the formation of new national aggregates associations, creating new UEPG members in the region. See website at <http://www.snapsee.eu/>.

Help establish and grow a truly sustainable aggregates industry in South-East Europe.





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2012-2015
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Secretary	John B-Bullock, MPA, UK

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Water Management

Chair	César Luaces Frades, FdA, Spain
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Recycling

Chair	Brian James, MPA, UK
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<u>Global Aggregates Information Network (GAIN)</u>	Jim O'Brien
<u>Sustainable Aggregates Planning in South Eastern Europe (SNAP-SEE)</u>	Jim O'Brien
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<u>Raw Materials Supply Group (RMSG)</u>	César Luaces Frades
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Secretary General

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 Right: *James Sorri, Eija Ehrukainen, UEPG Committee Meetings Santiago de Compostela, Photograph by UEPG*

Left: *Lasse Møller Vollesen, Jensen Søren Ewald, Bjarne Overgaard, Jette Rohde, UEPG Internship in Denmark, Photograph by UEPG*
 Centre: *Jacques Grob, André Renggli, UEPG Delegates Assembly Helsinki, Photograph by UEPG*
 Right: *César Luaces Frades, Jaume Puig i Canal, UEPG Delegates Assembly Helsinki, Photograph by UEPG*

Board, Committees, Task Forces, Portfolios and General Secretariat

Left: *Alain Pasquier, UEPG Delegates Assembly Helsinki, Photograph by UEPG*
 Centre left: *Denis Mertens, Jim O'Brien, UEPG Delegates Assembly Helsinki, Photograph by UEPG*
 Centre right: *Pertti Peltomaa, UEPG Committee Meetings Brussels, Photograph by UEPG*
 Right: *Niklas Skoog, UEPG Delegates Assembly Limassol, Photograph by UEPG*

Left: *Jorge Mira Amaral, Photograph by ANIET*
 Centre left: *Jesus Ortis, UEPG Board Policy Dinner Brussels, Photograph by UEPG*
 Centre right: *Robert Wasserbacher, UEPG Delegates Assembly Helsinki, Photograph by UEPG*
 Right: *Michael Schulz, Hermann Reifenscheid, UEPG Delegates Assembly Helsinki, Photograph by UEPG*

Left: *Walter Nelles, Steffen Wiedenfeld, UEPG Committee Meetings Santiago de Compostela, Photograph by UEPG*
 Centre left: *Michel Buzot, UEPG Committee Meetings Santiago de Compostela, Photograph by UEPG*
 Centre right: *Tomasz Skibinski, UEPG Delegates Assembly Helsinki, Photograph by UEPG*
 Right: *Adam Paczoska, UEPG Delegates Assembly Helsinki, Photograph by UEPG*

Left: *Alicia Ruiz, Leonie van der Voort, Biodiversity Meeting Brussels, Photograph UEPG*
 Centre left: *Olivier Bertrand, UEPG Delegates Assembly Helsinki, Photograph by UEPG*
 Centre right: *Benoit Lussis, Jean-Marc Vanbelle, UEPG Committee Meetings Brussels, Photograph by UEPG*
 Right: *Riho Iskü, UEPG Delegates Assembly Helsinki, Photograph by UEPG*

Left: *Jeffrey Thompson, Spyros Danellis MEP, Photograph by UEPG*
 Centre: *Monica Soldinger Almfelt, Brynjar Lund-Andersen, Svein Tonnessen, UEPG Committee Meetings Brussels, Photograph by UEPG*
 Right: *Monika Wosik, Michał Padusinski, UEPG Committee Meetings Brussels, Photograph by UEPG*

Left: *Meir Bar-El, UEPG Committee Meetings Brussels, Photograph by UEPG*
 Centre: *Leonie van der Voort, Ionel Ureche, Andrieta Petcu, UEPG Delegates Assembly Helsinki, Photograph by UEPG*
 Right: *Serge Schmidt, UEPG Delegates Assembly Helsinki, Photograph by UEPG*

Large: *Site visit, UEPG Delegates Assembly Helsinki, Photograph by UEPG*

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