



Annual Review  
2017-2018

# EUROPEAN AGGREGATES ASSOCIATION

A Sustainable Industry for a Sustainable Europe



# List of Contents

<b>What is UEPG and What are Aggregates?</b> Infographic – 'UEPG in a Nutshell'	04
<b>Editorial</b> Message from the President	06
<b>UEPG Achievements in 2017–2018</b>	07
<b>Our Values</b> Our Vision, Mission, Core Values and Ambitions	08
<b>Our Organisational Structure</b> Designed to ensure optimal efficiency and effectiveness in all UEPG activities	09
<b>European Economic Developments</b> An overview of European 2016 production data and economic trends	10
<b>Economic Committee</b> Industry4Europe - for an ambitious EU industrial Strategy, Implementing the Raw Materials Strategy - Access to resources within EU, Circular Economy Package, Better Implementation and Regulatory Enforcement	13
<b>Technical Committee</b> European Aggregates Standards, Construction Products Regulation, Recycled Aggregates, Regulated Dangerous Substances & Environmental Product Declaration	15

<b>Health &amp; Safety Committee</b> Respirable Crystalline Silica and NEPSI, Evaluation of the EU Occupational Safety and Health Directives, Accident and Ill-health Prevention	17
<b>Environment Committee</b> Biodiversity, EU Action Plan for Nature, People and the Economy, Water Management, Air Quality, Mining Waste BREF, Marine Aggregates	19
<b>PR &amp; Communications Task Force</b> Enhancing the Industry Image: Exchange of good practices and promotion of public events and other initiatives 1 <sup>st</sup> EU Presidency Conference on Aggregates The Global Aggregates Information Network (GAIN)	21
<b>General Secretariat</b> Your team – Your Brussels office; providing EU Intelligence and exchanging examples of good practice	23
<b>UEPG Members</b> Get in contact, keep in touch	26
<b>Board, Committee &amp; Task Force Chairs, Portfolios and Secretariat</b> Profiting from the UEPG network	27
<b>Photo captions and credits</b>	30

## WHAT IS UEPG?



Rue d'Arlon 21 ▲ 1050 Brussels ▲ Belgium  
+32 2 233 53 00 ▲ secretariat@uepg.eu ▲ www.uepg.eu  
EU Transparency Register: 15340821653-49

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 Members on economic, technical, environmental and health & safety policies.

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.



UEPG has Members in  
**26 countries.**



The aggregates sector is by far **the largest** amongst the non-energy extractive industries in numbers of sites, companies, numbers employed and tonnages produced.

The demand for aggregates demand is just over **5 tonnes** per capita per year.

The European [EU28+EFTA, 2016] aggregates demand is **2.7 billion tonnes per year**, representing an annual turnover of an estimated €15-€20 billion.

The Aggregates Industry comprises **15,000** companies (mostly SMEs),

producing at **26,000** sites across Europe,

with just over **220,000** people employed (including contractors).

## THE AGGREGATES SECTOR IS BY FAR THE LARGEST AMONGST THE NON-ENERGY EXTRACTIVE INDUSTRIES

Aggregates are a granular material used in construction. Aggregates are sand, gravel (including marine aggregates), crushed rock, recycled and manufactured aggregates. The diagram below illustrates the sources, intermediate and end uses of aggregates:



Aggregates are produced from natural sources extracted from quarries and from sand and gravel extraction sites 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.

### 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

# Editorial

Message from  
the President



*It is of critical importance for continuing building a better Europe to enhance the compatibility and in many cases the positive net contribution of the aggregates industry to EU biodiversity whilst working actively with all our stakeholders for long term access to resources. This requires a stronger and continuous engagement of the whole EU Aggregates Industry and its 26 associated countries in support to UEPG actions and values.*

Jesús Ortiz,  
UEPG President 2015-2018

## UEPG Achievements in 2017-2018

A smart, innovative and sustainable Europe is synonym of growth, jobs and welfare for EU citizen based on responsible governance combining social and environment friendly businesses conditions. The European Aggregates Industry supplies the materials for building our homes and roads in a responsible and sustainable manner. Too often, the role and importance of our Industry is not appreciated, as it fair value, neither its essential correlation with local access to resources. It is crucial to underline the irrevocable link between more and better housing and infrastructure, needed by EU citizens, and the raw material supply chain that enables them to be delivered. In fact, our economy could not function without raw and secondary minerals which are part of every aspect of our lives - in housing, schools, hospitals, roads, rail, power stations, airports, and ports. To meet that societal demand, 2.700 million tons of aggregates need to be produced every year from 25,000 aggregates extraction sites by 16,000 companies across Europe. The European Aggregates Industry will have to reply to new challenges such as higher population density, political uncertainty and enhanced environmental standards in order to continue supporting infrastructures' demand and future economic growth in Europe.

In November 2017, UEPG co-organised with the Estonian EU Council Presidency the first *EU Presidency Conference on Aggregates* in Tallinn. UEPG and the Estonian Government issued for this occasion the "Tallinn Declaration on sustainable supply of aggregates in the European Union" addressing the local and regional NIMBY.

In addition, UEPG joined the *Industry4Europe Coalition*, supported by more than 130 European Industry Associations, calling for a *comprehensive and ambitious industrial strategy for Europe*, which is a pre-condition for a wealthy society and for access to resources. In 2017-2018, UEPG co-drafted several Joint Papers and

attended numerous high-level meetings to hand-over the Joint Reaction Papers to EU decision makers such as Industry Commissioner Elżbieta Bieńkowska, European Parliament President Antonio Tajani, and the Estonian Minister of Economy Kadri Simson, during the 2017 Estonian EU Presidency.

The development of the Industry can only be considered with the continuous improvement of safer and healthier occupational conditions for all our employees. With the active support of UEPG and its Members, NEPSI 2018 reporting kept improving. NEPSI also succeeded in obtaining the recognition of its members' good practices on Respirable Crystalline Silica (RCS) generated by a work process on site. It complements the proper implementation of the revised Carcinogens and Mutagens at Work Directive (1<sup>st</sup> batch revision), as well as, a proportionate and feasible threshold limit value.

The EU recognition of the Industry for its environmental stewardship and contribution to biodiversity was further highlighted by the European Commission within the context of the *EU Nature Action Plan* and the new *European Commission initiative on Pollinators*. UEPG was asked to share its expertise and case studies on both issues.

In May 2018, I concluded my third year of Presidency at UEPG with a number of achievements which made me proud of our Association collective potential and had the pleasure to hand over to Thilo Juchem, newly elected President of UEPG for 2018-2021.

**JESÚS ORTIZ,**  
UEPG President 2015-2018

**THILO JUCHEM,**  
UEPG President 2018-2021

The Trilogue negotiations on the review of the **Waste Framework Directive** were finalised. Over the legislative process, UEPG sharpened its profile towards EU decision makers as the Industry Association representing producers of natural and recycled aggregates. UEPG is recognising the need for recycling while underling the technical, environmental and economic limitations of recycling and the urgent need for maintaining the extraction of natural aggregates making around 80% of the total demand. UEPG partnered with the European Demolition Association and their DDR EXPO event offering several workshops to deliver UEPG key messages to EU and national policymakers. UEPG President Jesús Ortiz has been invited for the 5<sup>th</sup> Annual High-Level Conference of the European Innovation Partnership on Raw Materials to present UEPG's policy on raw materials in the construction sector.

The Industry4Europe Coalition is now composed of more than 130 European Industry Associations calling with its Joint Reaction Paper for the need of an **ambitious European Industrial Strategy**. UEPG is an active stakeholder and was nominated rapporteur of several joint papers and attended numerous high-level meetings to hand-over the Joint Reaction Paper to EU decision makers. At the first EU Presidency Conference on Aggregates in Tallinn in November 2017, UEPG President Jesús Ortiz handed over the Industry4Europe Joint Reaction Paper to the Minister of Economic Affairs Kadri Simson. UEPG was also part of a panel discussion during the prestigious "EU Industry Day" providing high visibility for the sector.

UEPG Members have finalised their **NEPSI 2018 reporting** improving again their data. A continuous improvement of the indicators is key for EU Institutions to illustrate the sector's responsibility in terms of prevention and good practices to control Respirable Crystalline Silica (RCS) on site. With the active support of UEPG and its Members, NEPSI succeeded to be recognised within the revision of the Carcinogens and Mutagens at work Directive (1<sup>st</sup> batch) and in keeping a proportionate and feasible threshold value of 0.1 mg/m<sup>3</sup> for RCS generated by a work process.

UEPG contributed actively to the **Mining Waste BREF Review process**. It is to be noted that the final document underlined the key achievements of the process such as the definition of backfilling, the application of the proportionality principle and the Best Available Techniques' (BATs) applicability (risk based approach). The document took also into account the sector's particularities and distinctions.

After the publication of the **EU Nature Action Plan** in April 2017, UEPG was invited to stakeholder consultations to provide input for the revision of current guidance documents. UEPG provided not only good practice examples but also promoted a more evolutionary approach towards biodiversity management by including references to new concepts such as dynamic management of biodiversity and temporary nature. In December 2017, the European Commission published a [Roadmap](#) to launch a new initiative on Pollinators. UEPG contributed to the consultation and it was deemed of high importance to provide examples of good practice.



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.



## Vision, Mission, Core Values and Ambitions

To place excellence in health & safety at the centre of our activities with an objective of “Zero Harm” for all Industry’s employees, contractors, sub-contractors and visitors.

To ensure sustainable access to primary local resources, optimising transport, with the aim of land-use for extraction to be recognised as an activity of public interest similar to agriculture, forestry, water and nature protection, which should receive the same priority.

To develop the “circular economy” through resource efficiency, recycling and restoration of extraction sites, to demonstrate the contribution of the Aggregates Industry to the Circular Economy. To assist in improving a streamlined national land-use planning and permitting policy to encourage and assist all UEPG Members to have a national aggregates planning policy in place.

To create and maintain a level-playing-field through consistent implementation of EU law, if necessary through law enforcement of existing EU/ national legislation.

To promote the compatibility of aggregates extraction with environment, with the objective to assist its Members in achieving responsible aggregates extraction and to address automatically prohibitions due to environmental reasons.

To improve public awareness of aggregates extraction as beneficial to society for every UEPG Member to have a national public relations campaign in place to ensure positive appreciation of the benefits of the sector to society.

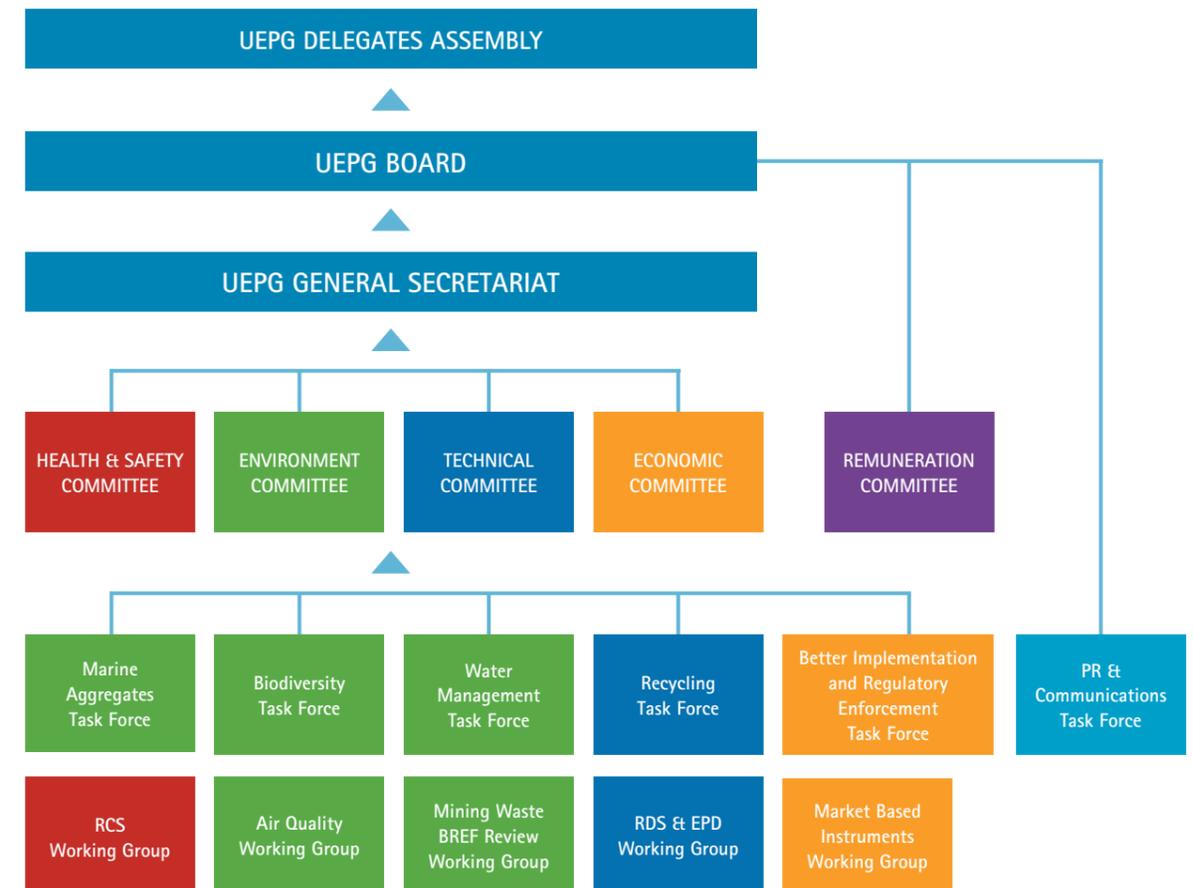
To promote the added value of the Aggregates Industry for local communities, with the objective to encourage UEPG Members to undertake public events, develop communication tools and PR training.

To showcase the Industry offering attractive career opportunities, in particular for young people, and to encourage UEPG Members to raise awareness in public relations, job agencies and educational institutions about jobs for both genders.

To ensure responsible sourcing and excellence in customer service and satisfaction to get Industry recognised as a trusted and responsible supplier of goods and services with all its customers in the downstream sectors, particularly the concrete and asphalt industries.

## Our Organisational Structure

The Health & Safety, Environment, Technical and Economic Committees and their associated Task Forces and Working Groups are the “engine-room” of UEPG activities. These Committees meet twice yearly and report with the General Secretariat 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 strategies.



# European Economic Developments

The 2016 EUROCONSTRUCT report is highlighting a recovery of the European Construction after the financial and Euro crisis. Construction declined for six years since the peak in 2007 to the trough of 2013: over 25% in total. Contraction

varied a lot by sectors: new housing construction fell the most, nearly 50% while renovation contracted the least at 6%. Construction volume in the EUROCONSTRUCT area was expected to grow by 3.5% in 2017. The strongest stimuli will once again come from residential construction. For more information see [2017 Press Release](#) and [2016 Briefing](#) on [www.euroconstruct.org](http://www.euroconstruct.org).

2016 National Production by Country (in million of tonnes)

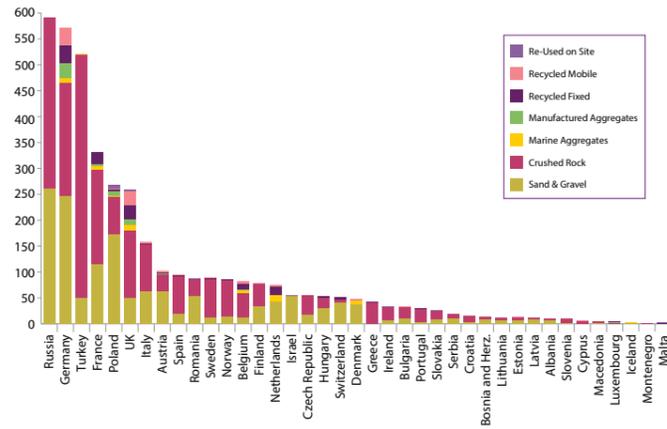


Figure 1 Aggregates Production (in million of tonnes by country and type)

2016 National Production in Tonnes per Capita

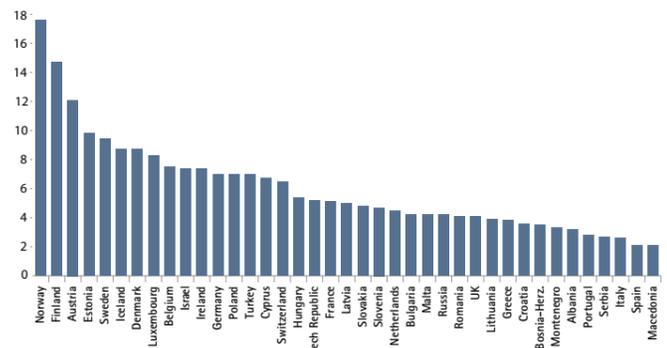


Figure 2 National Production per country in Tonnes per Capita

2016 GDP/Capita versus Tonnes/Capita

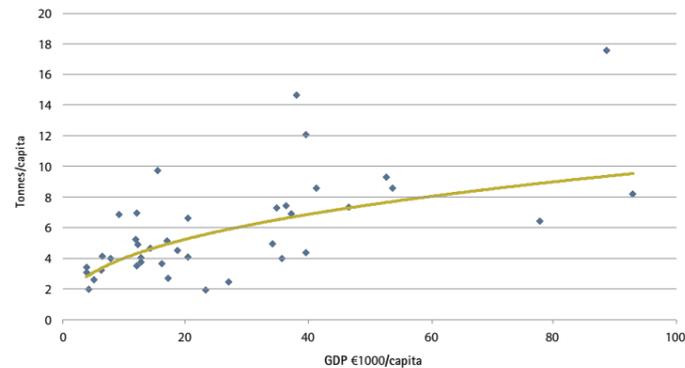


Figure 3 Correlation between Tonnes per Capita (vertical axis) and GDP in €1000 per Capita

This state of play is translated into UEPG 2016 Sustainable Development Indicators (SDIs). Each year, UEPG gathers and collates best available aggregates production data from all over Europe. The data for 2016 for 39 countries is presented on page 12 of this Annual Review, together with the subtotals for the EU28 plus EFTA countries as well as for the EU28 countries only. While UEPG data quality improves year-by-year, it is still based for some smaller countries on best estimates; overall it is believed to be the most authoritative data available for the European Aggregates Industry.

In 2016, the production of aggregates in the EU28 plus EFTA countries was 2.73 billion tonnes (bnt). This indicates an increase of 2.6% in 2016 compared to 2015, continuing the very modest growth trend since the post-crisis trough of 2013.

Figure 1 summarises the 2016 national production tonnages by country and by type of aggregates for all 39 countries. In 2016, Russia was the largest, producing 592 million tonnes (mt), followed by Germany with 572 mt and Turkey at 522 mt; the next three were France, Poland and UK. At the other end of the scale are the small countries, namely Macedonia, Luxembourg, Iceland, Montenegro and Malta, with a production less than 5mt each.

Figure 2 shows the national 2016 production data expressed in tonnes/capita (t/c) across Europe, which includes exports (mainly from Norway) but excludes imports. This data varies by national climate, terrain, state of economy and building tradition, being highest in Norway at over 17 t/c, and lowest in Macedonia, Spain and Italy at less than 3 t/c. The EU28 plus EFTA average is 5.2 t/c versus the 7.2t/c enjoyed in pre-crisis 2006. The data for Portugal, Italy and Spain points to continuing post-crisis national underinvestment, which may lead to future infrastructural deficits.

Figure 3, presents the interesting relationship between economic developments, expressed at GDP/capita, and aggregates production in tonnes/capita. In this graph, the data for each country is represented by a blue dot, and the green trend line illustrates the best fit curve. The graph illustrates very clearly that the production in tonnes per



capita increases almost linearly as the GDP per capita increases. This is good news for the aggregates industry as Europe slowly returns to economic growth.

Taking the EU28 plus EFTA countries, over the last 6 years, the percentage of sand and gravel has declined modestly out of 2.73 bnt of total production. 2016 saw a further slight decline in sand and gravel to 40.3% in comparison with crushed stone which increased slightly to 47.4%. Manufactured aggregates declined slightly to 2.3%, marine aggregates remained at 2% and recycled & re-used (backfill) aggregates remained at 8%. The total of secondary aggregates (recycled + manufactured) at 281mt equals 10.3%, though the percentage was much higher in Luxembourg, UK, Netherlands and Malta in particular.

Production of recycled aggregates (including reused aggregates as backfill) increased to 220mt. This represents 8% of the total output of 2.73bnt, relatively static in recent years. Germany leads with 68mt of recycled materials, next is UK at 54mt. Production of manufactured aggregates decreased to 61mt in 2016 and demonstrates an irregular trend. Eleven countries produce manufactured aggregates, the largest being Germany, followed by UK and Poland. The production of marine aggregates remained fairly static at 57mt, led by Netherlands, UK and Germany.

In 2016 the number of EU+EFTA companies rose slightly to 15,500. The number of extraction sites in EU+EFTA in 2016 decreased slightly to 26,400. These figures indicate an average of only 1.7 sites per company, illustrating the predominance of SMEs in the industry. The total EU+EFTA numbers employed (calculated as employees plus contractors) in 2016 was just over 220,000.

In Figure 4, it is very welcomed to see that for the first time in a decade every one of the 39 countries predicted a zero or positive increase in production in 2017 compared to 2016. Overall a 3.9% growth on 2016 is predicted, indicating an EU28+EFTA total tonnage of just 2.83bnt in 2017. If European economic growth can be maintained, the EU+EFTA total aggregates production could reach the milestone of 3bnt by 2019, but this would be still much below the pre-crisis 3.7bnt of 2006.

Predicted Changes in Tonnages 2017 v 2016

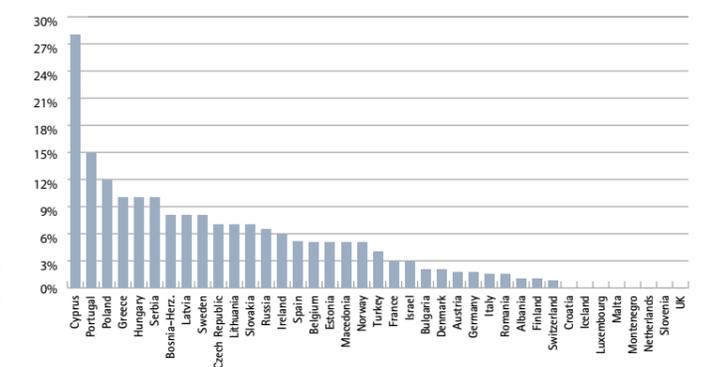


Figure 4 Predicted variation in 2017 Tonnages versus 2016 by Country

EU + EFTA Trend in Production in Billion Tonnes

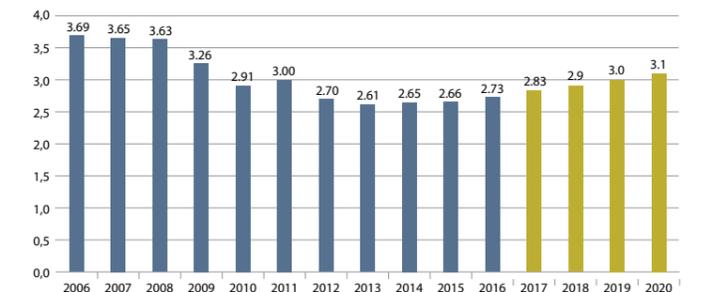


Figure 5 Trend in total EU + EFTA Tonnages (in billion of tonnes)

Provisional Estimates of  
Aggregates Production Data  
for 2016



	UEPG Status	Total Number of Producers (Companies)	Total Number of Extraction Sites (Quarries and sand & gravel sites)	Sand & Gravel (million tonnes)	Crushed Rock (million tonnes)	Marine Aggregates (million tonnes)	Manufactured Aggregates (million tonnes)	Recycled Aggregates (million tonnes)	Re-Used on Site (million tonnes)	Total Production (million tonnes)
Albania	NM	215	425	7.5	2.8	0.0	0.0	0.0	0.0	10
Austria	FM	1068	1362	63.0	33.0	0.0	2.0	4.0	0.0	102
Belgium	FM	84	112	13.0	46.0	6.5	1.0	15.0	0.0	82
Bosnia-Herzegovina	NM	15	30	9.7	3.7	0.0	0.0	0.0	0.0	13
Bulgaria	NM	217	295	11.5	20.0	0.0	0.0	1.5	0.0	33
Croatia	AM	138	225	3.9	12.5	0.0	0.0	0.0	0.0	16
Cyprus	FM	24	24	0.0	5.5	0.0	0.0	0.3	0.0	6
Czech Republic	NM	177	382	18.0	37.0	0.0	0.0	0.0	0.0	55
Denmark	FM	164	432	38.0	0.2	6.6	0.4	2.5	0.0	48
Estonia	AM	190	280	6.5	6.0	0.0	0.0	0.3	0.0	13
Finland	FM	1700	2530	34.5	42.8	0.0	0.0	2.0	0.0	79
France	FM	1683	2684	114	184	7.0	3.8	21.8	n/a	331
Germany	FM	1350	2660	247	218	10.0	29.0	68.0	0.0	572
Greece	AM	109	198	0.1	42.1	0.0	0.0	0.5	0.0	43
Hungary	AM	388	511	30.0	21.0	0.0	0.0	2.0	0.0	53
Iceland	AM	28	56	1.8	0.4	0.4	0.0	0.0	0.0	3
Israel	AFM	15	29	55.0	0.0	0.0	0.0	0.0	1.0	56
Ireland	FM	104	430	7.0	26.0	0.0	0.0	0.3	0.3	34
Italy	AM	1120	2800	64.0	89.0	0.0	0.0	4.0	0.0	157
Latvia	NM	55	105	9.0	2.0	0.0	0.0	0.0	0.0	11
Lithuania	NM	70	205	7.9	4.9	0.0	0.0	0.0	0.0	13
Luxembourg	AM	7	13	0.2	0.9	0.0	3.0	0.0	0.0	4
Macedonia (FYROM)	NM	8	15	1.2	3.0	0.0	0.0	0.0	0.0	4
Malta	NM	5	10	0.4	1.0	0.0	0.0	0.2	0.2	2
Montenegro	NM	28	36	0.5	1.5	0.0	0.0	0.0	0.0	2
Netherlands	FM	243	288	43.4	0.0	12.5	0.0	18.6	0.0	75
Norway	FM	864	1170	15.0	70.0	0.0	0.0	1.2	0.0	86
Poland	AM	1588	2746	173	73.0	0.5	10.0	6.0	6.0	269
Portugal	FM	150	247	3.9	25.6	0.0	0.0	0.2	0.0	30
Romania	AM	995	1115	53.5	34.0	0.0	0.0	0.0	1.0	89
Russia	NM	1181	1485	262	330	0.0	0.0	0.0	0.0	592
Serbia	NM	20	65	11.0	9.0	0.0	0.0	0.0	0.0	20
Slovakia	AM	181	260	9.4	15.6	0.0	0.1	0.2	0.5	26
Slovenia	NM	111	138	1.8	7.5	0.0	0.0	0.0	0.0	9
Spain	FM	1040	1795	20.0	72.0	0.0	0.4	2.2	0.0	95
Sweden	FM	497	1391	12.0	74.0	0.0	1.7	0.5	0.0	88
Switzerland	FM	530	529	41.0	5.1	0.0	0.0	4.9	0.0	51
Turkey	NM	756	785	50.0	470	1.6	0.0	0.0	0.0	522
UK	FM	648	1389	50.2	130	11.9	10.0	54.0	2.8	259
<b>39 Countries</b>		<b>17766</b>	<b>29252</b>	<b>1490</b>	<b>2119</b>	<b>57</b>	<b>61</b>	<b>210</b>	<b>12</b>	<b>3949</b>
<b>EU28 + EFTA</b>		<b>15528</b>	<b>26382</b>	<b>1093</b>	<b>1299</b>	<b>55</b>	<b>61</b>	<b>210</b>	<b>11</b>	<b>2730</b>
<b>EU28 only</b>		<b>14106</b>	<b>24627</b>	<b>1036</b>	<b>1223</b>	<b>55</b>	<b>61</b>	<b>204</b>	<b>11</b>	<b>2590</b>

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



## Economic Committee

In 2017–2018, Members of the UEPG Economic Committee monitored the policies and events under the Circular Economy Package, in particular the proposed amendments for the Waste Framework Directive and the Landfill Directive with a focus on the potential use of economic incentives, definitions and targets. Land-use planning, permitting and resource taxation remained areas of continued interest. The Task Force on 'Better Implementation and Regulatory Enforcement' adopted an Action Plan with detailed recommendations for the EU and national level. A new item is the increased mis information on the availability, extraction and use of sand in social media, making the collection of production data by UEPG ever more important.

The UEPG Economic Committee is led by its Chair, Jerry McLaughlin (MPA, UK), assisted by Vice-Chair, Christian Haeser (MIRO, Germany) and by its Secretary Dirk Fincke (UEPG). The Economic Committee receives reports from the Task Force on 'Better Implementation and Regulatory Enforcement', chaired by César Luaces Frades (FdA, Spain) and from the Working Group on 'Market Based Instruments', chaired by Jerry McLaughlin (MPA, UK).

### Industry4Europe – for an ambitious EU Industrial Strategy

The European Union has numerous policies and initiatives for Industry in place spread over several European Commission Directorates-General. A comprehensive and ambitious industrial strategy does not exist unlike in other regions of the world such as China, India and the United States of America.

The Industry4Europe Coalition, run by the European Railway Association (UNIFE) and strongly supported by UEPG and more than 130 other European Industry Associations, is calling with its Joint Reaction Paper

for a recognition that a striving industry is the pre-condition for a wealthy society and that industry needs access to resources. UEPG, as Co-Rapporteur of the first section on business-friendly environment, emphasised calls such as "re-establishing the positive link between industry and society" and the demand for a "coherent medium to long-term industrial strategy" which is "vital for ensuring policies on sustainable access to resources and energy at a competitive price. Specifically, balanced climate, energy and raw materials policies, informed by European industrial needs and objectives, are essential for competitiveness, sustainable growth and employment, supporting innovation and investment by modern and traditional industries".



In line with the UEPG Task Force on Better Implementation and Regulatory Enforcement, the Joint Reaction Paper acknowledges that “the better regulation agenda to reduce red tape and improve effectiveness has been a step in the right direction. Nevertheless, the implementation of existing legislation for business certainty” should be reinforced.

UEPG attended several high-level meetings to hand-over the Joint Reaction Paper to EU decision makers such as Industry Commissioner Elżbieta Bieńkowska, European Parliament President Antonio Tajani and to the 2017 EU Presidency of Estonia, Minister of Economic Affairs Kadri Simson. UEPG was also part of a panel discussion during the prestigious Conference “EU Industry Day” providing high visibility for the sector.

### Implementing the Raw Materials Strategy – Access to resources within EU

Linked with the EU Industrial Strategy and the circular economy package, sustainable access to resources is one of UEPG’s highest priorities for more than 10 years with milestones achieved and more challenges to overcome. The EU Raw Materials Strategy and its second pillar on sustainable access to resources from within the EU enabled the European Commission, EU Member States representatives and industry stakeholders to identify bottlenecks in permitting procedures and land-use planning policies. It allowed setting up an ad-hoc Working Group in the European Commission Raw Materials Supply Group – in which UEPG has a seat – producing an expert Report providing the needed long-term improvements to ensure a sustainable (local) supply of aggregates and other non-energy minerals.

While EU Member States are currently implementing a Maritime Spatial Planning Framework Directive, it seems that land-based spatial planning remains at the level of spreading good-practice examples.

The recent debates at EU level in 2017/2018 and the focus on the first (critical raw materials) and third pillar (recycling and resource efficiency) of the EU Raw Materials Strategy bear the risk that the policy on access to resources might lose high-level political interest. In that context, the 1<sup>st</sup> EU Presidency Conference exclusively addressing aggregates and the constructive debate on the EU Raw Materials Strategy and its second pillar on access to resources in the EU were very much of added value.

### Circular Economy Package

The Trilogue negotiations on the review of the Waste Framework Directive were finalised with the European Parliament Environment Committee approving the compromise text. EU Member States will have to report data on an annual basis. They shall report this data electronically within 18 months of the end of the reporting year for which the data is collected.

The amount of waste used for backfilling and other material recovery operations shall be reported separately from the amount of waste prepared for re-use or recycled. The reprocessing of waste into materials that are to be used for backfilling operations shall be reported as backfilling, providing a new definition of this term. The amount of waste prepared for re-use shall be reported separately from the amount of waste recycled.

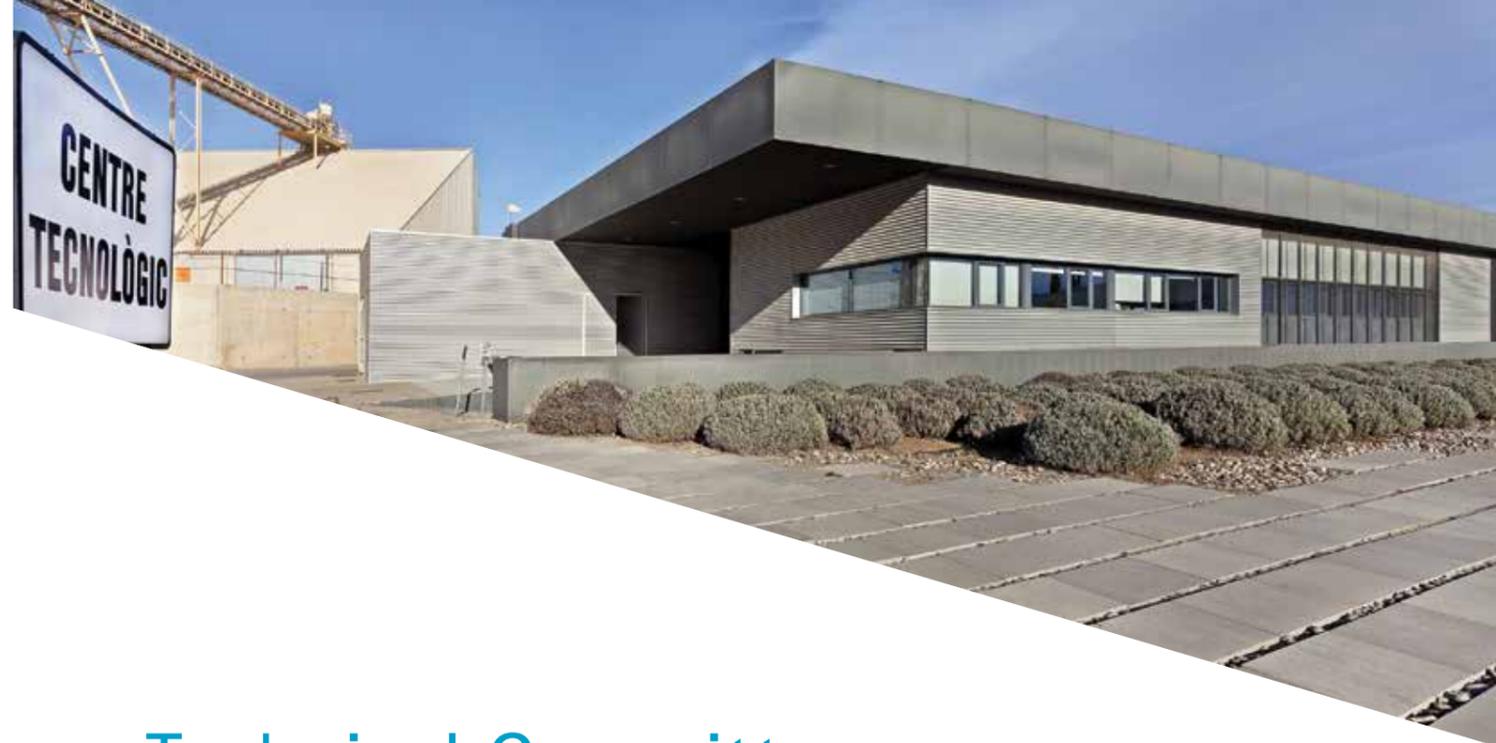
The Commission may develop guidelines for the interpretation of the requirements set out in this Directive, including on the definition of: waste, prevention, re-use, preparation for re-use, recovery, recycling, backfilling, disposal, and on the application of the calculation rules.

Accompanying the call for better access to resources, several policymakers and stakeholders are giving the impression that high recycling rates and resource efficiency could result in closing down extraction sites or at least sharply reduce the production of natural aggregates. UEPG had sharpened its profile as the Industry Association representing producers of natural and recycled aggregates, recognising the need for recycling while underling the technical, environmental and economic limitations of recycling and the urgent need for maintaining the extraction of natural aggregates making around 80% of the total demand.

### Better Implementation and Regulatory Enforcement

The UEPG Task Force on “Better Implementation and Regulatory Enforcement” under its Chair César Luaces Frades has conducted a survey on the nature and extent of activities impacting on the competitiveness of the Aggregates Industry.

During the last Economic Committee meeting in Milan (Italy), the policy areas with the highest significance were presented and addressed with a dedicated UEPG Action Plan including EU and national policy tools.



## Technical Committee

In 2017–2018, the UEPG Technical Committee and its Members devoted their expertise to technical procedures and policies including the Construction Products Regulation, the European Aggregates Standards, recycling of aggregates, Environmental Product Declaration (EPD) and Regulated Dangerous Substances (RDS).

The UEPG Technical Committee was chaired by Jean-Marc Vanbelle (FEDIEX, Belgium) and assisted by its Vice-Chair Stefan Janssen (MIRO, Germany) and Committee Secretary John Bradshaw-Bullock (MPA, UK). The Technical Committee received reports from the Recycling Task Force, the RDS and EPD Working Group, and from its members contributing to the European Committees for Standardisation namely CEN/TC 154 on “Aggregates”, CEN/TC 227 on “Road Materials” and CEN/TC 351 on “Construction Products – Assessment of release of dangerous substances”.

### European Aggregates Standards

European Standards are a key instrument to establish a common technical language, enabling the declaration of performance of aggregates regarding the basic works requirement of the Construction Product Regulation. They facilitate cross-border trade and consolidate the Single Market. They are valuable tools to create the conditions for economic growth and competitiveness of companies. They are developed by technical groups of experts, to which UEPG Technical Committee members contribute actively to work on performance requirements, sampling and test methods for aggregates.

In that respect, UEPG Members pursued their active contribution to the revision of Aggregates Products Standards within the CEN/TC 154 on “Aggregates”, for which the vote is planned in 2018, with a possible publication in the Official Journal of the European Union by 2019.

### Construction Products Regulation (CPR)

In 2017 and 2018, the European Commission raised its concerns on the functioning of the CPR (Construction Products Regulation) and conducted a number of consultations with Member States and Stakeholders to address the issues and define the future of the CPR. The three possible scenarios for the future of CPR foreseen in the consultations were:

- No regulatory changes: soft law approach to improve the implementation of the CPR.
- Revision of the existing framework of the CPR on only targeted articles.
- Repeal of the CPR: a complete distancing from the current principles of harmonisation in the CPR field and a complete overhaul of the legislative framework for construction products.



The UEPG Position was not to repeal the CPR but to have a flexible interpretation of Article 9.2 for CE marking. The wider construction industry, in line with the current Construction Products' approach, supported the UEPG position, not to repeal the CPR which is perceived as a regressive step.

The UEPG & CPE positions were voiced into guidance documents for Members, and common replies both to the consultations and at meetings organised by the European Commission.

The conclusion on the on-going work is that a better and wider communication on the importance of CPR and standardisation for and from our sector and companies is still required.

### Recycled Aggregates

The UEPG Recycling Task Force, chaired by Brian James (MPA, UK), became a pioneer in delocalised Task Force meetings, giving a taste of opportunities and challenges linked to the recycling experience across Europe. Task Force members shared their experience on the ground and exchange views on good practices and innovative projects, while bringing their expertise where recycling practices need to be further developed. Therein, the September 2017 meeting of the Recycling Task Force took place in Stavanger, Norway, hosted by Norsk Bergindustri (Norwegian Mineral



Industry Association) and the company Velde. Members had the opportunity to visit Velde's site and discover their innovative projects, integrating sustainable production of aggregates and recycling activities.

Representing both primary and secondary aggregates, UEPG supports the circular economy approach for a resource efficient, resilient and sustainable industry. In that respect, the Task Force followed the legislative process of the Waste Framework Directive and promoted

the industry's contribution to circular economy, while bringing a realistic approach on its technical, environmental and economic feasibility. This message was also conveyed within the Conclusions of the Conference on the "Sustainable Supply of Aggregates in the European Union", co-organised with the EU Presidency on 17 November 2017 in Tallinn, Estonia.

After the endorsement of the EU Construction and Demolition Waste Management Protocol, UEPG supported the European Commission in its campaign to promote the application of the Protocol in targeted UEPG members' countries. In February 2018, the Task Force meeting was hosted by the Spanish Aggregates Federation (FdA) in Barcelona, Spain. The Task Force met for this occasion representatives from the Catalan Waste Agency to discuss the evolution of the waste management policy in the region, sectorial agreements and the promotion of recycled aggregates via public subsidies. These exchanges enable better cooperation between industry and administration, with fruitful discussions to identify the right policies to increase recycling rates.

### Regulated Dangerous Substances (RDS) & Environmental Products Declaration (EPD)

The RDS and EPD Working Group, chaired by Brian Bone (MPA, UK), focused this year on the review and update of the Work Programme of the CEN/TC 351 on "Construction Products - Assessment of release of dangerous substances", which included Technical Specifications. The Working Group works also on drafting a guidance document on how to introduce the Regulated Dangerous Substances covered by Technical Standards requirements into the European Standards for Aggregates.

A rising issue addressed at the RDS and EPD Working Group is the European and National debates on End-of-Waste Criteria. UEPG will address the increasing environmental test requirements which are at times conflicting with the European Circular Economy policy, and the increase of the use of secondary aggregates, while respecting the environmental and technical quality standards.



## Health & Safety Committee

In 2017-2018, the Members of UEPG Health & Safety Committee promoted a Health and Safety culture working towards Zero Harm in each member country. Within this assignment, the Committee contributed to the continuous improvement of control of Respirable Crystalline Silica on site as part of the Social Dialogue Agreement NEPSI, the evaluation of 24 Occupational Safety and Health Directives and the prevention of accidents and ill health at work.

The UEPG Health & Safety Committee was driven by the Chair, César Luaces Frades (FdA, Spain), the Vice-Chair, Walter Nelles (MIRO, Germany) and actively supported by its Committee Secretary Miette Dechelle (UEPG).

### Respirable Crystalline Silica and NEPSI

Together with NEPSI Employers' Signatories, UEPG actively contributed to campaigns on the recognition of NEPSI within the revision of the Carcinogens and Mutagens at work Directive (1<sup>st</sup> and 2<sup>nd</sup> batches of substances, mixtures and processes) to ensure the continued added value of NEPSI for companies and their employees.

NEPSI Signatories, among them UEPG, positively welcomed the recognition of NEPSI good practices within the recital of the revised (1<sup>st</sup> batch) of the Carcinogens and Mutagens at work Directive and its role as instrument to complement regulatory measures, in particular, to support the effective implementation of a proportionate and feasible limit value of 0.1 mg/m<sup>3</sup> for Respirable Crystalline Silica (fraction) generated by a work process at workplace. The Directive

(1<sup>st</sup> batch) was published within the Official Journal in December 2017 and entered into force in January 2018, allowing two years for Members States to transpose it by 17 January 2020.

A compromise amendment for a stronger recognition of the social dialogue agreement (NEPSI) within the Directive was introduced by the Rapporteur of the CMD (2<sup>nd</sup> batch), MEP Claude Rolin (EPP, Belgium), and approved in March 2018 by the Employment and Social Affairs Committee of the European Parliament. NEPSI acknowledged in a position its support to the European Parliament's amendment.

UEPG Members have finalised their NEPSI 2018 reporting further improving their data in comparison with NEPSI



2016 Reporting. A continuous improvement of the indicators is key for EU Institutions to illustrate the sector's responsibility in terms of prevention and good practices to control RCS on site. UEPG Members will monitor the CMD transposition and promotion of NEPSI at National level.

NEPSI Signatories agreed on 2018-2021 measures to foster the development and extension of the Social Dialogue Agreement and adapt it to changes in employment, new legislation, and in work-related new emerging risks. Guidance and tools for companies, and especially SMEs, will be provided for a better understanding of new workplace challenges.

UEPG reactivated its RCS Working Group to support NEPSI proposed initiatives in addition with an active contribution to NEPSI current actions. The first meeting of the Working Group took place on 18 April 2018.

### Evaluation of the EU Occupational Safety and Health Directives

In 2017, the European Commission published its communication on new initiatives to improve health and safety at work called "Safer and Healthier Work for All - Modernisation of the EU Occupational Safety and Health Legislation Policy". This communication was the final outcome of the REFIT evaluation of the OSH Framework Directive 89/391/EEC and 23 related Directives, which UEPG has monitored and contributed at different stages since 2014.

The overall structure of the EU-OSH acquis was considered generally as effective and fit-for-purpose. However, some individual Directives became outdated or obsolete. The European Commission started the review of targeted Occupational Safety and Health (OSH) directives to remove or update provisions in each. The Personal Protection Equipment Directive (89/686/EEC), which has indirect impacts on our industry, is one of them. Members States experts already exchanged on this issue with

Employers and Employees Representatives at the Advisory Committee on Safety and Health (ACSH) meetings in December 2017 and in May 2018. At this stage, the European Commission is only planning technical and non-essential amendments to some of the annexes. This is likely to be done by end of 2018 through delegated acts. UEPG is closely monitoring the exchanges offering expertise and contributions when needed.

### Accident and Ill-health Prevention

While prevention of accidents is one of the overarching objectives of UEPG, data on Fatalities and Lost Time Injuries still need to be further collected and improved. A simplified questionnaire was proposed to facilitate the collection of data and it was underlined that only data from the Aggregates Industry should be provided and that estimated figures were better than no indication.

UEPG monitors OSH initiatives, contributes to the Sectoral Social Dialogue Committee of the Extractive Industries (SSDCEI) and the Standing Working Party for the Extractive Industries (SWPEI) and raises awareness on the EU Agencies EU-OSHA and EUROFOUND's initiatives, and closely liaises with BusinessEurope, and the trade union IndustriAll.

The Health & Safety Tool Box on Vibration and Noise has been distributed to several networks and considered as a role model. A list of priorities for upcoming Thematic Health & Safety Tool Boxes and Presentations on promotion of National good practices have been produced and, started with the promotion of National good practices on Transportation on site.

UEPG is planning to further work with its Members on how to better improve the safety of machines through standards. UEPG is member of the European Commission Machinery Working Group, has liaison status in CEN/TC 151 and is represented in CEN/TC 151 WG 9 by Raphaël Bodet (UNPG, France). Company experts are called upon for support and the Global Aggregates Information Network (GAIN) was asked to influence safer provision in International Standards (ISO).



## Environment Committee

In 2017-2018, the UEPG Environment Committee and its Members addressed key EU environmental policies and continued their efforts to increase cooperation areas with other stakeholders, environmental NGOs and authorities, while conveying the message of compatibility between sustainable aggregates extraction and nature conservation objectives. The Environment Committee carries-out its work via five Task Forces and Working Groups dedicated respectively to Biodiversity, Water Management, Air Quality, Mining Waste and Marine Aggregates.

The UEPG Environment Committee was chaired by Alain Boisselon (UNPG, France) and supported by Vice-Chair Benoit Lussis (FEDIEX, Belgium), succeeded by Paolo Zambianchi (ANEPLA, Italy), and Committee Secretary Alev Somer (UEPG).

### Biodiversity

The UEPG Biodiversity Task Force was chaired by Benoit Lussis (FEDIEX, Belgium), who delegated his role to Petra Gradischnig (FVSK, Austria) in the course of the year. The Task Force focused essentially on four areas. These included the implementation of the EU Nature Action Plan, the review of UEPG Sustainable Development Indicators for the Environmental Pillar and the legal and practical advances of innovative concepts such as *dynamic management of biodiversity* and *temporary nature*. The fourth and continuous work of the Task Force is raising awareness on ecosystem services and natural capital, with a particular focus on the new EU initiative on Pollinators. In that respect, the UEPG General Secretariat has been collecting examples of good practices and initiatives

fostering biodiversity and pollinators, disseminating them to its members and promoting them at EU level. Good practices and innovative approaches developed by the sector have gained recognition and were co-funded by the EU, such as the LIFE in Quarries (FEDIEX, Belgium) and *LIFE IP Delfstofwinning en Natuur* project (Cascade, Netherlands). As one of the few industrial sectors represented among major actors on the EU Biodiversity Policy, UEPG gained its place at the European Commission Co-ordination Group for Nature and Biodiversity (CGBN). The European Aggregates Industry is now widely recognised as a trusted partner for nature conservation by EU institutions and a growing number of NGOs and academic researchers.



## EU Action Plan for Nature, People and the Economy

On 27 April 2017, the European Commission published the *EU Action Plan for Nature, People and the Economy* (Nature Action Plan). This planned series of actions focus on four priority areas to be carried-out by the end of 2019. These priorities include the improvement of guidance documents, strengthening investment in Natura 2000 areas, improving use of EU Funding mechanisms, as well as better communication and outreach to stakeholders and communities.

Following the publication of the Action Plan, members of the UEPG Biodiversity Task Force and the UEPG General Secretariat remained in active contact with the European Commission to contribute to the implementation of these actions, particularly to the review process of relevant EU Guidance documents and to ensure they integrate the novel concepts of *Temporary Nature* and *Dynamic Management of Biodiversity*, supporting a population-based approach towards species protection. These efforts would help bridging the gap between strict protection duties tied to nature conservation areas and economic activities.

## Water Management

The UEPG Water Management Task Force, chaired by César Luaces Frades (FdA, Spain) has been focusing on the evaluation of the Water Framework Directive, its daughter Directives (Groundwater & Environmental Quality Standards), and the Floods Directive. In parallel, the UEPG General Secretariat monitors the developments regarding the River Basin Management Plans and the implementation of the Water Framework Directive, participating to the European Commission Strategic Coordination Group for the Water Framework Directive (SCG). The UEPG Task Force worked on the development of water management indicators and collecting good practice examples, as well as scientific studies demonstrating the good water quality in aggregates extraction sites and its potential to enhance biodiversity.

## Air Quality

The UEPG Air Quality Working Group, chaired by Walter Nelles (MIRO, Germany), addresses the rising importance of the air quality issue at European level.

The Working Group aims at raising awareness on dust emissions and prevention measures in the sector, further improving the management of environmental dust in quarries and supporting the communication with local communities. The Working Group supports the exchange of good practices, research projects and feedbacks from national experiences to gain a better understanding of different challenges arising from climate and geographic conditions.

## Mining Waste BREF

During the last quarter of 2017, UEPG coordinated a common response and position on the final draft of the Mining Waste BREF, with the contribution of other stakeholders involved in the scope of the document. UEPG experts contributed to the Final Technical Working Group meeting conducted by the European Commission Joint Research Centre, which resulted in mostly satisfactory conclusions. The Chair of the Working Group, Benoit Lussis (FEDIEX, Belgium), reported to the Environment Committee the key actions undertaken over the past four years, highlighting the achievements and referring to remaining challenges. The UEPG Working Group ensured the definition of backfilling was clarified, the application of the proportionality principle and the Best Available Techniques' (BATs) applicability (risk based approach) was taken into account, together with the sector's particularities distinguishing quarrying/aggregates extraction from mining. The review process being finalised, the document would be published in the course of 2018, thus, marking the end of the mandate of the UEPG Mining Waste BREF Working Group.

## Marine Aggregates

The UEPG Marine Aggregates Task Force, is chaired by Ingo Hammwöhner (MIRO, Germany). The priorities of this Task Force continue to be on Natura 2000 at sea, better implementation of the European Commission Nature Action Plan, the Marine Strategy Framework and the Maritime Spatial Planning Framework Directives and adds a new area of interest: The perception of marine aggregates extraction by the public and by decision makers and its image in social media.

The UEPG Marine Aggregates Task Force praised valuable research projects such as TILES – a newly developed decision support system guiding long-term sand exploitation in the Belgian and southern Netherlands part of the North Sea.

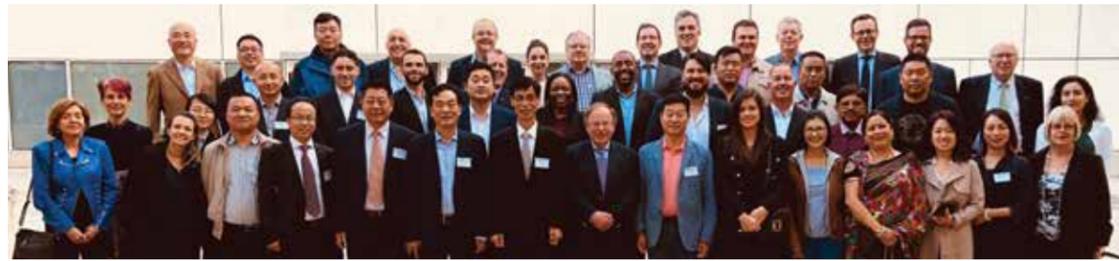


# PR & Communications Task Force

The UEPG PR & Communications Task Force aims at improving the image of the European Aggregates Industry. Its work is based on the conviction that the Industry has genuinely good stories to tell on resource efficient operations, local access to resources, dedication to biodiversity and environmental stewardship, excellence in health & safety, all hallmarks of a sustainable industry. The aim of this Task Force is to share examples of National PR & Communications Good Practice, to work on current and new PR and Communications tools, initiatives and targets in liaison with UEPG Committees and other Task Forces, and to prepare for future events. The Task Force is also a platform for exchange of information on EU News, institutional work, structure and policies, thereby, to better communicate to targeted audiences, UEPG priorities, initiatives and events. The work is led by Robert Wasserbacher (FVSK, Austria), Chair of the Task Force.

## Some examples of PR & Communications good practices at National level:

- ▲ **FdA, Spain** hosted this year the 2018 GAIN and UEPG Delegates Assembly meetings. FdA is also organising its National Congress in October 2018. This year's edition of the "Days of Trees" opened 240 sites to the public. The Association organised its Sustainable Development Awards. FdA is working on a National pollinators and rare species strategy to demonstrate the industry's contribution. 
- ▲ **FEDIEX, Belgium:** is currently working on the second phase of its ["Life in Quarries"](#) EU co-funded project and produced a series of films on the project. 
- ▲ **FVSK, Austria:** concentrated its actions on communications towards local decision makers and stakeholders promoting the sector. The Association had launched its own National Sustainable Development Awards and is preparing a Raw Materials Conference in May 2019. 
- ▲ **INFRA ry, Finland:** focused on data collection on recycling materials. The Association organised a 2 days National Conference for companies in January 2018 and a security day for Employees and Students in May 2018. 
- ▲ **MIRO, Germany:** introduced the German Aggregates Federation to the new German Government and national MPs. MIRO is working on a biodiversity database and has launched its Sustainable Development Awards. A positive campaign was made in Germany on the demand for aggregates. 



▲ **MPA, UK:** organised a series of conferences addressing "Quarries and Nature" "MPA campaigns on H&S Target Zero", "Productivity and New Technologies in Mineral Products Industry" and "Living with materials". The Association had a stand at the [Hillhead 2018 exhibition](#). MPA also developed e-passport for contractors, new handbook for vulnerable drivers and new Apps.



▲ **Norsk Bergindustri, Norway:** produced a [video on the use of resources in everyday life](#) and celebrated its [10 years anniversary](#).

▲ **UNPG, France:** has launched a series of new websites from a library of [Health and Safety Tool Boxes](#) to the valorisation to local authorities and stakeholders of recycling materials called [materrio.construction](#) and of marine aggregates named [sablesetgraviersdemer.com](#) and the presentation of [National sustainable development awards](#). The Association also set a new Social Responsibility Charter for companies with a new label.



## 1<sup>st</sup> EU Presidency Conference on Aggregates

The Estonian EU Presidency chairing the EU Council during the second half of 2017, in close cooperation with UEPG, hosted and organised the first EU Presidency Conference on 17 November in Tallinn addressing the sustainable supply of aggregates within the European Union. At this occasion, UEPG held its Board meeting and Board Policy Dinner in the beautiful Estonian capital. During the Presidency Conference, UEPG was honoured by the key note speech of Kadri Simson, Minister of Economic Affairs and Infrastructure of Estonia and by Gwenole Cozigou, Director in DG Growth of the European Commission. UEPG President Jesús Ortiz addressed the key note speakers and the audience from industry, NGOs, governments, Geological Surveys and Universities by providing a 10-year outlook on the investment programmes, projects and the demand for aggregates.

The major event concluded with precise recommendations agreed during the Conference and published by the Estonian Government and UEPG together which became a reference for further campaigns on sustainable access to resources.

## The Global Aggregates Information Network (GAIN)

GAIN was founded by UEPG in 2010, driven by the conviction that international sharing of experience and best practice promotes a more efficient and sustainable

aggregates industry globally. GAIN meetings were held in Brussels in October 2010, in Charlotte, NC, USA in March 2012, in Brussels in October 2014, in Cape Town, South Africa in April 2016 and in Barcelona, Spain in May 2018. GAIN Members currently represent an impressive 60% of the global aggregates production estimated at 45 billion tonnes. Many valuable insights and experiences were shared on common health & safety, environmental, economic, technical and public relations challenges. The discussions revealed that the industry faces similar challenges across the globe, but the various regions have devised different approaches and solutions. There are ongoing contacts between these associations, providing valuable support on specific industry challenges as they arise.

The 5<sup>th</sup> GAIN meeting, kindly hosted by the Spanish Aggregates Federation (FdA) took place back to back with the UEPG Delegates Assembly in May 2018 in Barcelona, Spain. Representatives from Argentina, Australia, Brazil, Canada, China, Columbia, India, Japan, Latin America, South Africa, the United States of America and Europe attended the meeting, with further input from other regions of the world. Over the two meeting days, all aspects of the aggregates industry were openly discussed. Quarry visits were arranged for the third day demonstrating good practice examples. GAIN colleagues were equally invited to attend the FdA Entrepreneurs' Forum and the UEPG Delegates Assembly right after the GAIN meetings. The next GAIN meeting is suggested to take place in 2020 with a venue to be determined.



# General Secretariat

The multilingual UEPG Team is located in Brussels, close to the European Parliament, the European Commission and the many other European institutions. This is a perfect location which enables the UEPG General Secretariat to regularly attend and participate in stakeholder consultation meetings, committee meetings in the European Parliament and other external fora. The Brussels based Team is composed of Dirk Fincke, Secretary-General, Miette Dechelle, Public Affairs Manager and Alev Somer, Public Affairs Officer. Through its small but highly professional and dedicated Brussels based staff, it has achieved tangible results for the industry, continuously reinforcing its high visibility and trust amongst stakeholders.

The UEPG General Secretariat works closely with European Union legislators to contribute to all stages of the policymaking process on behalf of the European Aggregates Industry and at the service of its Members to represent their activities in Brussels, to support them in their respective countries, and invites staff of Member Associations and Companies to share their expertise. The UEPG Team is also organising specific meetings for its Members welcoming National Associations, Board Members and Members to interact with key EU decision makers from Commission, Parliament, Council, Committee of the Regions, European Economic and Social Committee, Academia and NGOs.

## Coordinating UEPG lobbying campaigns

UEPG develops targeted advocacy strategies and acts as a coordinator in their implementation. Examples include ensuring sustainable supply of aggregates in Europe, by supporting the implementation of the EU Raw Materials Strategy, contributing to the work of the European Commission Raw Materials Supply Group and engaging

in projects improving the European, national, regional and local legal framework conditions for sustainable access to resources within Europe, fully respecting the subsidiarity principle endorsed by the European Commission and EU Member States. UEPG produces Position Papers alone or with other stakeholders and joins alliances where a common interest exists.

UEPG shares with its Members good practices, guidance documents, tool boxes, indicators and campaigns. UEPG is campaigning to reduce the bureaucratic burden and especially the duplication of information provided to companies.

### Cooperation with stakeholders



UEPG cooperates closely with other stakeholders such as the European Demolition Association (EDA) and Bird Life Europe. UEPG works closely with European Industry Associations of the Non-Energy Extractive Industry Panel (NEEIP) and with the European Network for Sustainable Quarrying and Mining (ENSQM), a raw material commitment under the European Innovation Partnership to improve Europe's raw materials framework conditions and public awareness. UEPG is an associated member of Construction Products Europe (CPE) and of ISSA Mining (International Social Security Association). UEPG is recognised as an EU Social Partner in the NEPSI Social Dialogue on respirable crystalline silica and at the Sectoral Social Dialogue Committee of the Extractive Industries. UEPG



is also a partner of the EC Standing Working Party for Extractive Industries, of the EC Raw Materials Supply Group, the EC Business@Biodiversity Platform and an active partner of the #Industry4Europe Coalition currently, comprising of more than 130 European Associations calling for an ambitious industrial strategy for Europe.

### Providing EU intelligence and regular updates

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 alerts and policy briefings available online. The UEPG General Secretariat offers the Issue Tracker System, the UEPG Website and a Newsletter published in English, French and German as well as dedicated visits and presentations for UEPG Members in several EU languages.

### Raising excellence in sharing good practices

UEPG supports and promotes the dissemination of good practice by encouraging projects that go well beyond

what is required by planners or regulators, sets new standards of excellence and provides an inspirational example that others can follow. The UEPG tri-annual Sustainable Development Award is one illustration. More information can be found in this Annual Review at the PR and Communications section.



UEPG also provides guidance documents to operate with care and concern for the environment, for employees and neighbours, and for society in general. UEPG is promoting and disseminating good practice examples through H&S Tool Boxes on noise and vibration and through NEPSI, to control respirable crystalline silica.

Concrete examples and reviewed cases studies and brochures on biodiversity and water management are published on the UEPG website and promoted during key EU events, as well as through UEPG publications.



### Involving the Aggregates Industry in EU Policymaking

The physical proximity to EU Institutions and the day-to-day contact with policymakers allow the UEPG General Secretariat to identify "early-bird" opportunities to become involved in the policymaking process. UEPG has continuously strengthened its network of key contacts within the European Commission, European Parliament, EU Council working groups, Permanent Representations of EU Member States, EU Agencies, Academia and NGOs. Useful tools are the UEPG Board Policy Dinners, Debates, and Conferences, Awards and Exhibitions. UEPG Board Policy Dinner in November 2017 took the opportunity to brief the Estonian EU Presidency on access to resources just before the Presidency Conference in Tallinn.

### UEPG Missions to Members

The UEPG Team is at the service of its Members. To get out of the "Brussels EU bubble" the UEPG Team visits Members and gets into the field work of companies and national associations. It is a great opportunity to experience at first hand the daily business of aggregates producers including

the challenges they face and to learn about the impact of EU legislation on site. It allows also to refresh the technical knowledge of the Team and provides a better understanding of companies' needs when developing an EU lobby strategy for the Aggregates Industry.



### Raising the industry's profile

The General Secretariat continues to promote the achievements of the European Aggregates Industry by giving keynote speeches at international conferences. It also developed and coordinated targeted events. Some examples of successfully raising the profile of our Industry are the UEPG contribution to the NEPSI Campaign and Reporting, to the 2<sup>nd</sup> EU Raw Materials Week, the 2<sup>nd</sup> MIN-GUIDE Annual Conference and to the EU Industry Day in February 2017, participating as a key representative of the Industry4Europe Coalition. UEPG also attends European Commission Expert Groups such as the Coordination Group on Biodiversity and Nature (CGBN) addressing highly relevant environmental policies of the European Commission.



UEPG now makes use of social media and opened dedicated accounts on LinkedIn and Twitter, a YouTube channel, and currently works the renewal of its website.

### Governance

Over recent years, UEPG has grown into a highly representative and respected association, representing the largest non-energy extractive industry. UEPG sets great value on maintaining its reputation and its transparency

via the EU Transparency Register and high standard managed accounts. Each of the UEPG General Secretariat staff is a member of SEAP, the Society of European Affairs Professionals and bound by its code of conduct.



# UEPG MEMBERS

## Austria

Fachverband der Stein- und keramischen Industrie Österreich (FVSK)  
Phone: +43 590 900 35 31  
Email: steine@wko.at  
<http://www.baustoffindustrie.at>

## Belgium

Fédération des Industries Extractives et Transformatrices de Roches non Combustibles (FEDIEX SCRL)  
Phone: +32 2 511 61 73  
Email: info@fediex.be  
<http://www.FEDIEX.be>

## Croatia

PROMINS  
Phone: +385 (1) 49 21 886  
Email: info@promins.hr  
<http://www.promins.hr>

## Cyprus

Παγκύπριος Σύνδεσμος Σκαρροποιών  
Cyprus Aggregates Producers Association (CAPA)  
Phone: +357 222 66920  
Email: latouros@latouros.com  
<http://www.cyprusquarries.pro.cy>

## Denmark

Danske Råstoffer  
Phone: +45 72 16 02 69  
Email: lmv@danskbyggeri.dk  
<http://www.danskeraastoffer.dk>

## Estonia

AS Kunda Nordic  
Phone: +372 32 29 900  
Email: knc@knc.ee  
<http://www.knc.ee/en>

## Finland

INFRA ry  
Phone: +358 050 412 3637  
Email: juha.laurila@infra.fi  
<http://www.rakennusteollisuus.fi/en>

## France

Union Nationale des Producteurs de Granulats (UNPG)  
Phone: +33 1 44 01 47 01  
Email: unpg@unicem.fr  
<http://www.unicem.fr>

## Germany

Bundesverband Mineralische Rohstoffe e.V. (MIRO)  
Phone: +49 3022215660  
+49 2039923912  
Email: info@bv-miro.org  
<http://www.bv-miro.org>

## Greece

Halyps Building Materials S.A Greece  
Phone: +30 210 5518415  
Email: axel.conrads@heidelbergcement.com  
<http://www.halyps.gr/ENG>

## LafargeHolcim - Greece

Phone: +30 210 2898 111  
Email: info.gr@lafarge.com  
<http://www.lafarge.gr>

## Hungary

Magyar Bányászati Szövetség  
Phone: +36 06 1 336 7801  
Email: mbsz@mabsz.hu  
<http://www.mabsz.hu>

## Iceland

Hornsteinn ehf.  
Phone: +354 458 5015  
Email: larus@hornsteinn.is  
<http://www.hornsteinn.is>

## Ireland

Irish Concrete Federation (ICF)  
Phone: +353 1 4 64 00 82  
Email: info@irishconcrete.ie  
<http://www.irishconcrete.ie>

## Israel

הכירצו הייבב ירצומ תוישעת דוגי  
Israeli Aggregates Association (IAA)  
Phone: +972-3-5198846  
Email: irisg@industry.org.il  
<http://www.industry.org.il>

## Italy

Associazione Nazionale Estrattori Produttori Lapedei ed Affini (ANEPLA)  
Phone: +39 02 541 045 63  
Email: f.castagna@anepla.it  
<http://www.anepla.it>

## Luxembourg

CLOOS  
Phone: +352 57 03 73 1  
Email: info@cloos.lu  
<http://www.cloos.lu>

## Netherlands

Vereniging Zand en Grindproducenten (Cascade)  
Phone: +31 06 22892334  
Email: l.vandervoort@cascade-zandgrind.nl  
<http://www.cascade-zandgrind.nl>

## Norway

Norsk Bergindustri  
Phone: +47 23 08 88 40  
Email: epost@norskbergindustri.no  
<http://www.norskbergindustri.no>

## Poland

Polski Związek Producentów Kruszyw (PZPK)  
Phone: +48 41 344 66 88  
Email: biuro@kruzspol.pl  
<http://www.kruzspol.pl>

## Portugal

Associação Nacional da Indústria Extractiva e Transformadora (ANIET)  
Phone: +351 22 609 66 99  
Email: geral@aniet.pt  
<http://www.aniet.pt>

## Romania

Patronatul Producătorilor de Agregate Minerale din România (PPAM)  
Phone: +407 40111870  
Email: ionel.ureche@ro.crh.com  
<http://www.appa.org.ro>

## Slovakia

Slovenské združenie výrobcov kameniva (SZVK)  
Phone: +42155 726 12 16  
Email: kancelariaszvk@intas.sk  
<http://www.szvk.sk>

## Spain

Federación de Áridos (FdA)  
Phone: +34 915 522 526  
Email: secretariafda@aridos.info  
<http://www.aridos.info>

## Sweden

Sverige Bergmaterialindustri (SBMI)  
Phone: +46 8 76 26 225  
Email: kansliet@sbmi.se  
<http://www.sbmi.se>

## Switzerland

Fachverband der Schweizerischen Kies- und Betonindustrie (FSKB)  
Phone: +41 31 326 26 26  
Email: info@fskb.ch  
<http://www.fskb.ch>

## United Kingdom

Mineral Products Association (MPA)  
Phone: +44 207 963 8000  
Email: info@mineralproducts.org  
<http://www.mineralproducts.org>

# Board, Committee & Task Force Chairs, Portfolios and Secretariat

## UEPG BOARD MEMBERS (Over the period of May 2017 to May 2018)



Jesús Ortiz

President

FdA - Spain



Pertti Peltomaa

Infra ry - Finland



Arnaud Colson

Past President

UNPG - France



Hermann Reifenscheid

MIRO - Germany



Thilo Juchem

Vice-President

MIRO - Germany



Niklas Skoog

SBMI - Sweden



Nigel Jackson

Vice-President

MPA - UK



Leonie Van der Voort

Cascade - The Netherlands



Jean-Marc Vanbelle

Treasurer

FEDIEX - Belgium



Robert Wasserbacher

FVSK - Austria



Lionel Lathion

FSKB - Switzerland



Antonis Antoniou Latouros

CAPA - Cyprus



Jim O'Brien

Honorary President

ICF - Ireland



Jorge Manuel de Mira Amaral

ANIET - Portugal



Michael Schulz

Honorary President

MIRO - Germany

## UEPG Committees, TASK FORCES and WORKING GROUPS (Over the period of May 2017 to May 2018)

### COMMITTEES



#### ECONOMIC

**Chair** Jerry MCLAUGHLIN, MPA, UK  
**Vice-Chair** Christian HAESER, MIRO, Germany  
**Secretary** Dirk FINCKE, UEPG General Secretariat, Brussels



#### TECHNICAL

Jean-Marc VANBELLE, FEDIEX, Belgium  
 Stefan JANSSEN, MIRO, Germany  
 John BRADSHAW-BULLOCK, MPA, UK



#### HEALTH & SAFETY

**Chair** César LUACES FRADES, FdA, Spain  
**Vice-Chair** Walter NELLES, MIRO, Germany  
**Secretary** Miette DECHELLE, UEPG General Secretariat, Brussels



#### ENVIRONMENT

Alain BOISSELON, UNPG, France  
 Benoit LUSSIS, FEDIEX, Belgium  
 Paolo ZAMBIANCHI, ANEPLA, Italy  
 Alev SOMER, UEPG General Secretariat, Brussels

### TASK FORCES



#### BETTER IMPLEMENTATION AND REGULATORY ENFORCEMENT

**Chair:** César LUACES FRADES, FdA, Spain



#### BIODIVERSITY

**Chair:** Benoit LUSSIS, FEDIEX, Belgium  
 Petra GRADISCHNIG, FVSK, Austria



#### PR & COMMUNICATIONS

**Chair:** Robert WASSERBACHER, FVSK, Austria



#### WATER MANAGEMENT

**Chair:** César LUACES FRADES, FdA, Spain



#### MARINE AGGREGATES

**Chair:** Ingo HAMMWÖHNER, MIRO, Germany



#### RECYCLING

**Chair:** Brian JAMES, MPA, UK

### WORKING GROUPS



#### MARKET BASED INSTRUMENTS

**Chair:** Jerry MCLAUGHLIN, MPA, UK



#### RCS

**Chair:** César LUACES FRADES, FdA, Spain



#### AIR QUALITY

**Chair:** Walter NELLES, MIRO, Germany



#### MINING WASTE BREF REVIEW

**Chair:** Benoit LUSSIS, FEDIEX, Belgium



#### RDS&EPD

**Chair:** Brian BONE, MPA, UK

## UEPG PORTFOLIOS AND GENERAL SECRETARIAT

### Portfolios

#### CENT/TC 151

UEPG General Secretariat  
 Et Raphaël Bodet (UNPG, France)

#### CO-ORDINATION GROUP FOR BIODIVERSITY AND NATURE (CGBN)

UEPG General Secretariat

#### EU BUSINESS@BIODIVERSITY PLATFORM (B@B)

UEPG General Secretariat

#### EU MACHINERY DIRECTIVE WORKING GROUP

UEPG General Secretariat

#### EUROPEAN AGENCY FOR SAFETY AND HEALTH AT WORK (EU-OSHA)

César Luaces Frades (FdA, Spain)

#### EUROPEAN NETWORK FOR SUSTAINABLE QUARRYING AND MINING (ENSQM)

UEPG General Secretariat

#### GLOBAL AGGREGATES INFORMATION NETWORK (GAIN)

Jim O'Brien (ICF, Ireland)

#### INDUSTRY4EUROPE

UEPG General Secretariat

#### MINATURA 2020

Michael Schulz (MIRO, Germany)

#### MINERAL POLICY GUIDE (MIN-GUIDE)

Jim O'Brien (ICF, Ireland)

#### NEPSI

César Luaces Frades (FdA, Spain) Et UEPG General Secretariat

#### RAW MATERIALS SUPPLY GROUP (RMSG)

César Luaces Frades (FdA, Spain) Et UEPG General Secretariat

#### SECTORAL SOCIAL DIALOGUE COMMITTEE EXTRACTIVE INDUSTRY (SSDCEI)

UEPG General Secretariat

#### STANDING WORKING PARTY OF THE EXTRACTIVE INDUSTRY (SWPEI)

Walter Nelles (MIRO, Germany)

#### STRATEGIC CO-ORDINATION GROUP (SCG) FOR THE WATER FRAMEWORK

UEPG General Secretariat

#### SUSTAINABLE DEVELOPMENT INDICATORS (SDIs)

Jim O'Brien (ICF, Ireland)

### General Secretariat

#### SECRETARY GENERAL



Dirk Fincke

#### PUBLIC AFFAIRS MANAGER



Miette Dechelle

#### PUBLIC AFFAIRS OFFICER



Alev Somer

# Photo credits

## Cover

- ▲ UEPG, European Parliament, Station Europe, Brussels, Belgium
- ▲ Photo courtesy of Chartre Environnement, UNICEM, France
- ▲ Photo Courtesy of LafargeHolcim, Quarry Muelligen, Switzerland

## List of Content

- ▲ European Minerals Day (EMD) 2017, Kunda Nordic Tsement, Estonia
- ▲ Photo Courtesy of HeidelbergCement, Panoramica restoration of Iagos Velilla, Spain

## Bottom Page

- ▲ Photo Courtesy of FVSK, Smaragdeidechse@WWF, Austria

## Infographic

- ▲ Sand and Gravel: Photo courtesy of Eurovia, photothèque, Eurovia/Axel Heise, France
- ▲ Crushed rocks: Photo courtesy of Lafarge, Médiathèque Lafarge, Justin Creedy Smith
- ▲ Recycled Aggregates: Photo courtesy of Lafarge, Médiathèque Lafarge, Studio Luminescence
- ▲ Marine Aggregates: Photo courtesy of Lafarge, Médiathèque Lafarge, A. Détienne, CAPA Pictures
- ▲ Manufactured Aggregates: Photo courtesy of Lafarge, Médiathèque Lafarge, Ignus Gerber
- ▲ Armour Stone: Photo courtesy of Norsk Bergindustri, Norway
- ▲ Ready mixed concrete: Photo courtesy of Lafarge, Médiathèque Lafarge, Jean-Daniel Guilloux, LISEA
- ▲ Structural (unbound) materials: Photo courtesy of Lafarge, Médiathèque Lafarge, Erik Barros Pinto
- ▲ Railway Ballast: Photo courtesy of Lafarge, Médiathèque Lafarge, Mikolaj Katus
- ▲ Asphalt products: Photo courtesy of HeidelbergCement
- ▲ Precast Concrete: Photo courtesy of Lafarge, Médiathèque Lafarge, A. Barrière ©CAPA Pictures
- ▲ Architectural concrete products: Photo courtesy of Lafarge, Médiathèque, Ignus Gerber

## Editorial

- ▲ UEPG President, Jesús Ortiz hand over Industry4Europe Joint Reaction Paper to Kadri Simson, during the former Estonian EU Presidency, at the European Conference on Aggregates in Tallinn, Estonia

## Vision

- ▲ UEPG, *Templo de Debod*, Madrid, Spain

## Organisational structure

- ▲ UEPG Sustainable Development Award 2016, COLAS, Carrières de Sainte-Colombe, France

## Economic Development

- ▲ UEPG, BOZAR, Brussels, Belgium
- ▲ UEPG, Brussels, Belgium
- ▲ UEPG, *LIFE in Quarries*, Carrières Unies De Porphyre Site Visit, Rebecq, Belgium
- ▲ UEPG, European Commission, Brussels, Belgium
- ▲ UEPG, Barcelona, Spain

## Economic Committee

- ▲ Photo Courtesy of LafargeHolcim, Untervaz, Switzerland
- ▲ UEPG, Barcelona, Spain

## Technical Committee

- ▲ UEPG Sustainable Development Award 2013, SORRIGUE, Spain
- ▲ UEPG Mission, Makies, Switzerland
- ▲ UEPG Recycling Task Force Site Visit, Silvia Quarry, El Papiol, Spain

## Health and Safety Committee

- ▲ UEPG Sustainable Development Awards 2013, John Wainwright and Co, UK
- ▲ Photo Courtesy of LafargeHolcim, Untervaz, Switzerland

## Environment Committee

- ▲ UEPG Sustainable Development Award 2016, NCC, Finland
- ▲ UEPG, *LIFE in Quarries*, Carrières Unies De Porphyre Site Visit, Rebecq, Belgium
- ▲ UEPG Mission, Makies, Switzerland
- ▲ UEPG Sustainable Development Award 2016, Carrières du Boulonnais, France

## PR & Communications Task Force

- ▲ UEPG, *LIFE in Quarries*, Carrières Unies De Porphyre Site Visit, Rebecq, Belgium

## UEPG General Secretariat

- ▲ GAIN 2018 Meeting, Barcelona, Spain
- ▲ DDR EXPO - 14-16 June 2017 - Brussels, UEPG Team, John Bradshaw-Bullock (MPA, UK) and Secretary of the UEPG Technical Committee, David Holman (MPA, UK), Gunther Wolff, Directorate-General Environment of the European Commission
- ▲ UEPG Delegates Assembly 2018 Meeting, change of presidency, new elected President, Thilo Juchem and 1<sup>st</sup> and 2<sup>nd</sup> Vice-Presidents, Antonis Antoniou Latouros and Nigel Jackson and Past President, Jesús Ortiz.
- ▲ Industry4Europe hand-over to Industry Commissioner, Elżbieta Bieńkowska
- ▲ UEPG President, Jesús Ortiz, at the EU 2017 Raw Materials Week in Brussels, Belgium
- ▲ Cascade President, Michiel Dankers at the [Life IP ondertekening tijdens Deltacongres Leeuwarden](#)
- ▲ Industry4Europe hand-over to President of the European Parliament, Antonio Tajani
- ▲ Some UEPG Members PR & Communications Good Practices

## Inside of the back cover

- ▲ UEPG/GAIN 2018 Delegates Assembly Meeting and Site visit at LafargeHolcim, Barcelona, Spain

## Back cover

- ▲ Photo Courtesy of FVSK, Smaragdeidechse@WWF, Austria





Annual Review  
2017-2018

Find out more at  
**UEPG.EU**



UEPG\_Aggregates



UEPG (European Aggregates  
Association)



UEPG European Aggregates  
Association



**UEPG aisbl**

Rue d'Arlon 21 | 1050 Brussels | Belgium | Tel: +32 22 33 53 00  
secretariat@uepg.eu | [www.uepg.eu](http://www.uepg.eu)

EU Transparency Register: 15340821653-49