

Com o Alto Patrocínio
de Sua Excelência



O Presidente da República



XVII JORNADAS TÉCNICAS

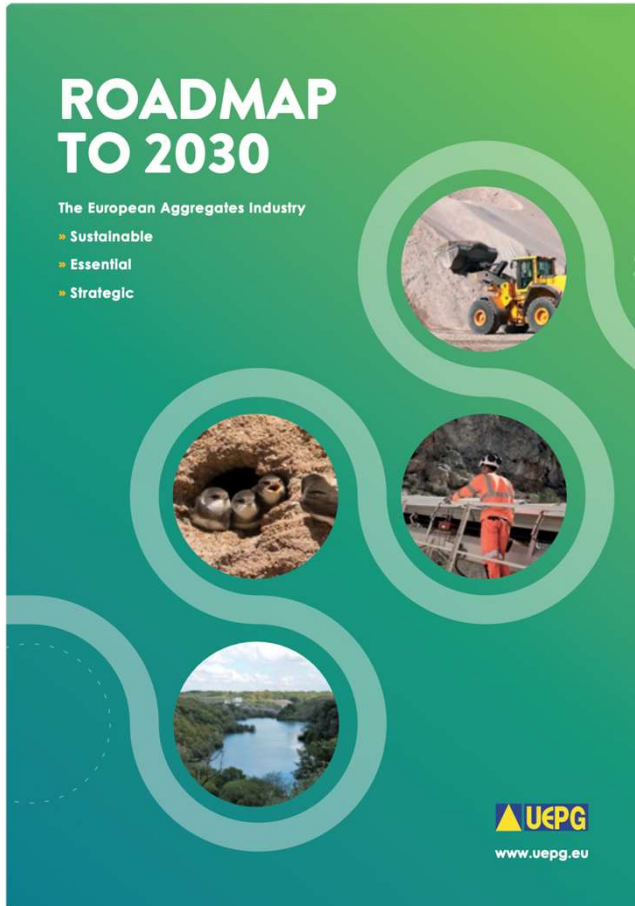
CELEBRAÇÃO DOS
50 ANOS DA ANIET



AGGREGATES EUROPE ROADMAP 2030: MIDWAY ASSESSMENT

Antonis Antoniou Latouros
President of Aggregates Europe

Setting the Scene



AE Roadmap asked:

“What do we need to play our part in the digital and green transition of the European economy to climate neutrality by 2050?”

KEY PROMISES

- Sustainability
- Biodiversity
- Circularity
- Climate Neutrality
- Safe Workplaces
- Community Value

A lot has changed since 2020 ...

- COVID-19 pandemic
- New European Commission & policies
- EU Green Deal & Fit for 55
- Clean Industrial Deal
- Critical Raw Materials → RM at centre of EU Policies
- USA New Administration
- USA and China → a race for industrial leadership





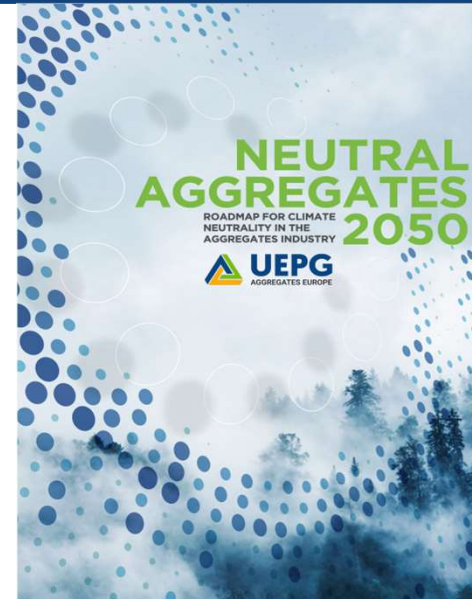
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The Roadmap Pillars

- Climate neutrality & adaptation
- Circular economy & recycling
- Biodiversity net gain
- Safe & healthy workplaces
- Community engagement
- Level playing field / enforcement

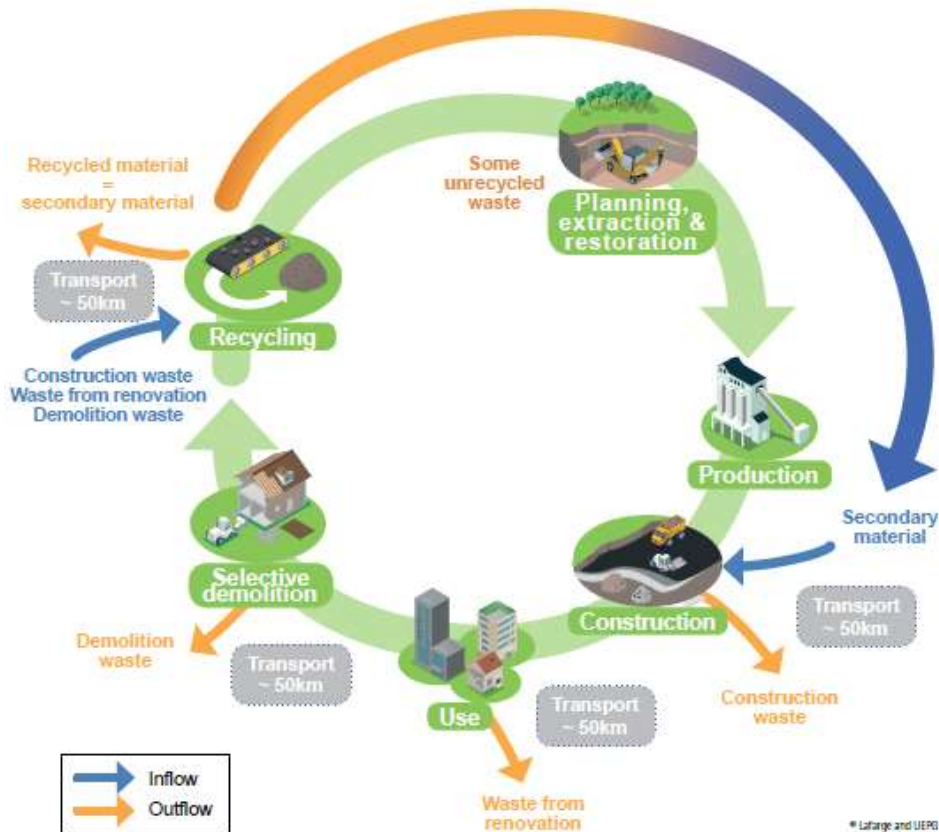
Progress on Climate Neutrality

- Aggregates footprint remains very low (3–5 kg CO₂/t)
- Progress on electrification, renewable energy use, efficiency
- But → machinery electrification not yet widely available/affordable for SMEs
- Transport emissions rising (permitting delays force longer distances)



Progress on Circular Economy

- Recycling rates increasing (C&D waste recovery >50% in several MS)
- End-of-waste criteria still fragmented
- By 2030, ~ 80% of demand still needs natural aggregates
- Circularity: strong, but substitution myths remain



Progress on Biodiversity

This is a quarry



...and this is a quarry



- Hundreds of best-practice case studies shared
- Quarry restoration delivers net biodiversity gain
- Good partnerships with NGOs, universities
- Challenge: Nature Restoration Law & protected areas – access vs. contribution



Progress on Workforce, Safety and Social Role

- Safety performance improving, fatalities reduced
- NePSi (Respirable Crystalline Silica) progress
- Still: ageing workforce, need to attract women & youth
- Local jobs & community investment remain strong



Where We Are On Track

- Recognized as essential & strategic raw material
- Circularity and recycling progress
- Biodiversity good practices & partnerships
- Stronger voice in Brussels and beyond
- Close collaboration with NGOs



Where We Are Lagging Behind

- Permitting remains the #1 bottleneck
- Electrification /hydrogen not market-ready
- Enforcement of EU law uneven (illegal quarrying, unfair competition)
- Public perception still weak → “not in my backyard” (NIMBY)



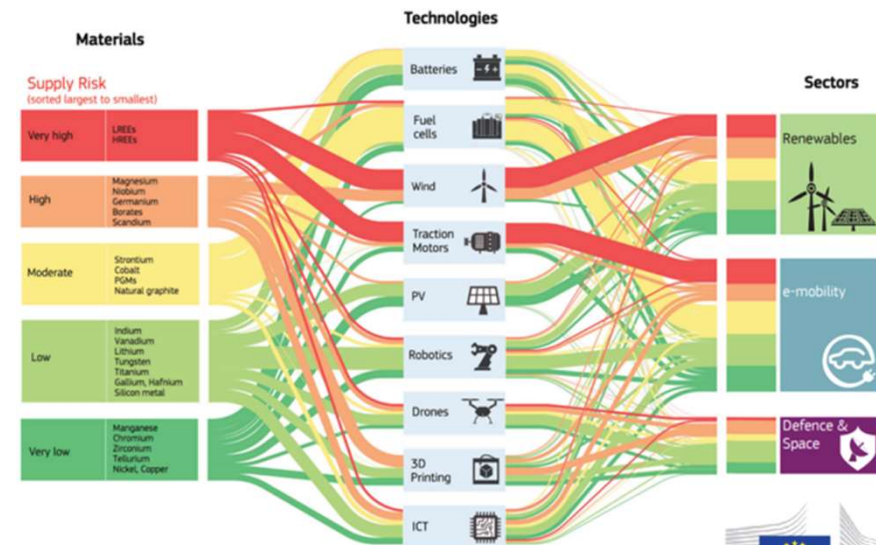
Stone is where
geology put it 

New Scenarios – New Pressures

- EU Nature Restoration Law
- Net-Zero Industry Act
- Critical Raw Materials Act (CRM)
- Climate adaptation needs (flood protection, dikes, resilient infrastructure)
- Global competition (USA vs China)



Critical raw materials and their supply risk



Source: Joint Research Centre



Do We Need To Refocus?

- Roadmap objectives remain valid.
- But → new emphasis required:
- Secure permitting & access to local resources
- Fast-track low-carbon technology roll-out
- Stronger recognition in EU taxonomy/finance
- Enhanced public awareness campaigns



What New Objectives Could Be Added?



- Measurable contribution to EU's Climate Adaptation Strategy (infrastructure, flood prevention)
- Aggregates in strategic autonomy → part of industrial resilience
- Clear biodiversity indicators linked to EU targets
- Skills strategy for green & digital workforce

Our Core Message



ACT
NOT
REACT

- Aggregates are sustainable, essential, strategic
- We are halfway through the roadmap – progress is real but fragile
- Industry has completed its part → Now politicians and policymakers must do theirs (permitting, recognition, enforcement)

THANK YOU!

Essential Industry for an Essential Product!

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ANIET
ASSOCIAÇÃO NACIONAL DA INDÚSTRIA
EXTRACTIVA E TRANSFORMADORA

