

EUROPEAN AGGREGATES ASSOCIATION

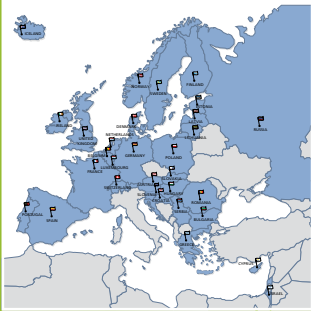
A Sustainable Industry for a Sustainable Europe



Annual Review
2011-2012



UEPG in a Nutshell



- UEPG represents the European Aggregates Industry in Brussels, now with Members in 31 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 14,000 companies (mostly SMEs) at 24,000 quarries and pits across Europe, employing 250,000 people directly and indirectly.
- The aggregates industry is by far the largest non-energy extractive industry.
- 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 Sustainable Industry for a Sustainable Europe"

The third year of my Presidency has been the busiest; we made progress on the many issues vital to our Industry. The backdrop was continued recession across most of Europe, probably the toughest economic conditions ever in UEPG's 25-year history. The outlook for 2012 continues to be very uncertain for many of our Members, though they face these challenges with determination and optimism.

Our current and ongoing Priorities, Achievement and Objectives

The table opposite summarises our key work areas, current priorities, achievements in the past year and objectives going into the future. The highlights are:

- The Economic Committee continued to focus on the Raw Materials Strategy to ensure the ongoing sustainability of our Industry in terms of future access to resources, promoting national aggregates planning policies, resource efficiency and recycling, while advocating that any tax on resources is not an appropriate fiscal tool for increasing resource efficiency. We continued to lobby at the highest levels, underlining the importance of our Industry and the criticality of our products to European society.
- The Technical Committee worked closely with EPRA (the European Platform for Recycled Aggregates) to address the main challenges of recycling, particularly on developing practicable End-of-Waste criteria. It also continued to work on the many issues associated the Construction Products Regulation (CPR); it developed a Model EPD (Environmental Product Declaration) for aggregates, and is now focussing on developing cost-effective testing regimes for RDS (Regulated Dangerous Substances).
- The Health & Safety Committee continued to strengthen the implementation of the European Social Dialogue Agreement (ESDA) on Respirable Crystalline Silica (RCS), and achieved a record level of reporting in 2012. Very significant progress was made in rolling out the Safer by

Design project to many more stakeholders. Very regretfully, industry fatalities and accidents continue at a totally unacceptable level; every UEPG Member was urged to form a national Health & Safety Committee if one does not already exist.

- The Environment Committee made progress on many fronts, particularly on biodiversity, which culminated in the recent milestone signature of the Letter of Intent with IUCN. UEPG is well recognised for its leading commitment on biodiversity, a unique strength of our Industry. Other key areas of progress were on water management guidelines and marine aggregates best practice, as well as addressing the multitude of environmental legislative initiatives that continue to emerge and challenge our industry.
- The Public Relations and Communications Task Force continued to promote the really positive messages of our industry, which already have done much to enhance our reputation and standing in front of the European institutions and many other stakeholders. The new UEPG website was launched, and it will be used to promote UEPG profile and activities even more in the future.

Strengthening our Membership

During the past year, we continued to actively support our existing Members, while in parallel seeking to recruit new Members:

- For existing Members, we continued to attend and support key national events. In my Presidency, visits were made to Austria, Belgium, Bulgaria, Cyprus, Denmark, Finland, France, Germany, Hungary, Ireland, Italy, Lithuania, Netherlands, Norway, Poland, Portugal, Romania, Slovakia, Slovenia, Spain and the UK. Up to 22 countries regularly attended our Committee Meetings, testament to ongoing very active engagement in UEPG activities.
- Our campaign to recruit new Members continued. At the Limassol Delegates Assembly, we welcomed Kunda Nordic as an Associate

Member for Estonia and the Israel Aggregates Association as an Affiliate Member. We were however greatly saddened by the resignation due to financial circumstances of our Members in Italy and the Czech Republic, and will continue to work with these countries to develop viable memberships, in order to maintain the pan-European representation of UEPG.

Celebrating our 25th Anniversary

In Limassol we celebrated the 25th Anniversary of the founding of UEPG. The visionary development of UEPG was a tribute to the dedication of the "founding fathers" with their ideal of a European association that would champion the aggregates industry. The success story continues and UEPG is now represented in 31 European countries. It has established a reputation second to none with the European institutions and its many other stakeholders, and despite being run on a very modest annual budget, provides a uniquely excellent service to its Members.

Some Final Words

I was hugely honoured to be the 9th UEPG President. I humbly acknowledge the very constructive support of the Board, particularly of my two Vice-Presidents, Alain Pasquier and Denis Mertens. I am hugely grateful to all the Committee and Task Force Chairs and Vice-Chairs for their enduring leadership and perennial commitment to those key activities which are the "engine-room" of UEPG. Above all, I thank the boundless dedication, support and friendship of the Secretariat, namely Dirk Fincke, Sandrine Devos, Miette Dechelle and Ivana Oceano; they make UEPG the success it really is.

It is with great confidence that I hand over to Arnaud Colson as the 10th UEPG President. He has already long served in UEPG activities. Therefore I am certain that he will bring renewed drive, vigour and vision to UEPG activities in the next 3 years, thus ensuring the continued success of UEPG into the future.

Jim O'Brien
President UEPG 2009-2012



UEPG Activity Areas, Priorities, Achievements and Objectives

Activity Area	Current Priorities	Achievements in 2011–2012	Objectives for 2012–2013	Strategic Objectives
Economic Committee	<p>Raw Materials Strategy (RMS)</p> <p>Resource Efficiency and 2020 Strategy Flagships</p> <p>Opposition to resource taxation</p>	<p>Ongoing engagement with the EC Raw Materials & Resource Efficiency Strategies</p> <p>Developed more accurate industry SDIs & proposed indicators for implementing RMS</p>	<p>Encourage development of more 20–30 year national aggregates strategies</p> <p>Continue to lobby on full implementation of 2nd and 3rd pillars of the Raw Materials Strategy</p>	<p>A well-resourced, resource-efficient and financially sustainable Aggregates Industry into the future, particularly for its many SMEs</p>
Technical Committee	<p>With EPRA, promotion of recycling</p> <p>Efficient implementation of the CPR</p> <p>Ensuring industry interests are protected in CEN technical standards</p>	<p>More awareness of the challenges & opportunities of recycling</p> <p>Model EPD for all natural aggregates, including marine aggregates</p> <p>Ongoing monitoring of developments in CEN standards</p>	<p>Promote recycling through best practice knowledge transfer, with realistic End-of-Waste Criteria</p> <p>Develop a reasonable cost-effective testing regime for RDS</p> <p>Ongoing monitoring of developments in CEN standards, including CPR implementation</p>	<p>A truly, open, competitive and sustainable European market for aggregates, with cost-effective standards and test methods</p> <p>Increased recycling as far as technically and sustainably feasible</p>
Health & Safety (H&S) Committee	<p>Fatality and accident prevention</p> <p>Developing the Safer by Design project</p> <p>Further promoting the ESDA on RCS as the best solution for the Industry</p>	<p>Best-ever 2012 NepSi reporting in scope and progress</p> <p>Safer by Design adopted by SSDCEI partners, TC151 and EC WG on Machinery</p> <p>Preparing to implement Directive on Explosives for Civil Use</p>	<p>Ensure every association has a national H&S committee, to achieve greater Industry safety</p> <p>Further promote ESDA and try to get construction sector included</p> <p>Implement Safer by Design project with SSDCEI partners</p>	<p>Wellbeing of all Industry employees and contractors, through fatality and accident elimination, better designed plant, safe blasting and minimisation of any workplace health exposures</p>
Environment Committee	<p>Monitoring of the many emerging EC initiatives</p> <p>Promoting Biodiversity & Natura 2000 aspects</p> <p>Best practice in Water Management</p> <p>Marine aggregates best practice</p>	<p>Signed Lol with IUCN, continued in B@B Platform, began work on biodiversity indicators</p> <p>Developed good practice guidelines on water management and case studies</p> <p>Strengthened marine aggregates Task Force</p>	<p>Implement Lol with IUCN, develop biodiversity indicators</p> <p>Further develop water management and marine aggregates best practices</p> <p>Lobby on emerging environmental initiatives, including 7th EAP</p>	<p>Excellence in environmental stewardship in all Industry locations, both during extraction and in restoration or after-use, with a particular dedication to fostering biodiversity, in cooperation with IUCN</p>
PR & Communications (PR&C) Task Force	<p>Continued sharing of good practice in PR&C exchanges</p> <p>Even better Industry Image & PR messages</p>	<p>Further developed good PR Practice exchanges</p> <p>Industry Image and messages</p> <p>Launched new website</p> <p>Launched 2013 Sustainable Development Awards</p>	<p>Further promote Industry image and reputation</p> <p>Further develop website for dissemination of PR&C best practice</p> <p>Ensure excellence in Sustainable Development Awards in 2013</p>	<p>Further enhanced Industry image and reputation in communication with all stakeholders, thereby ensuring a continued licence to operate for the Industry from Society</p>

Acronyms used:

EAP = Environmental Action Program
 EPD = Environmental Product Declaration
 EPRA = European Platform for Recycled Aggregates
 Lol = Declaration of Intent

NepSi = European Network for Silica
 RDS = Regulated Dangerous Substances
 RMS = Raw Materials Strategy
 SDI = Sustainable Development Indicator
 SSDCEI = Sectoral Social Dialogue Committee for the Extractive Industry



Introduction to UEPG and Aggregates

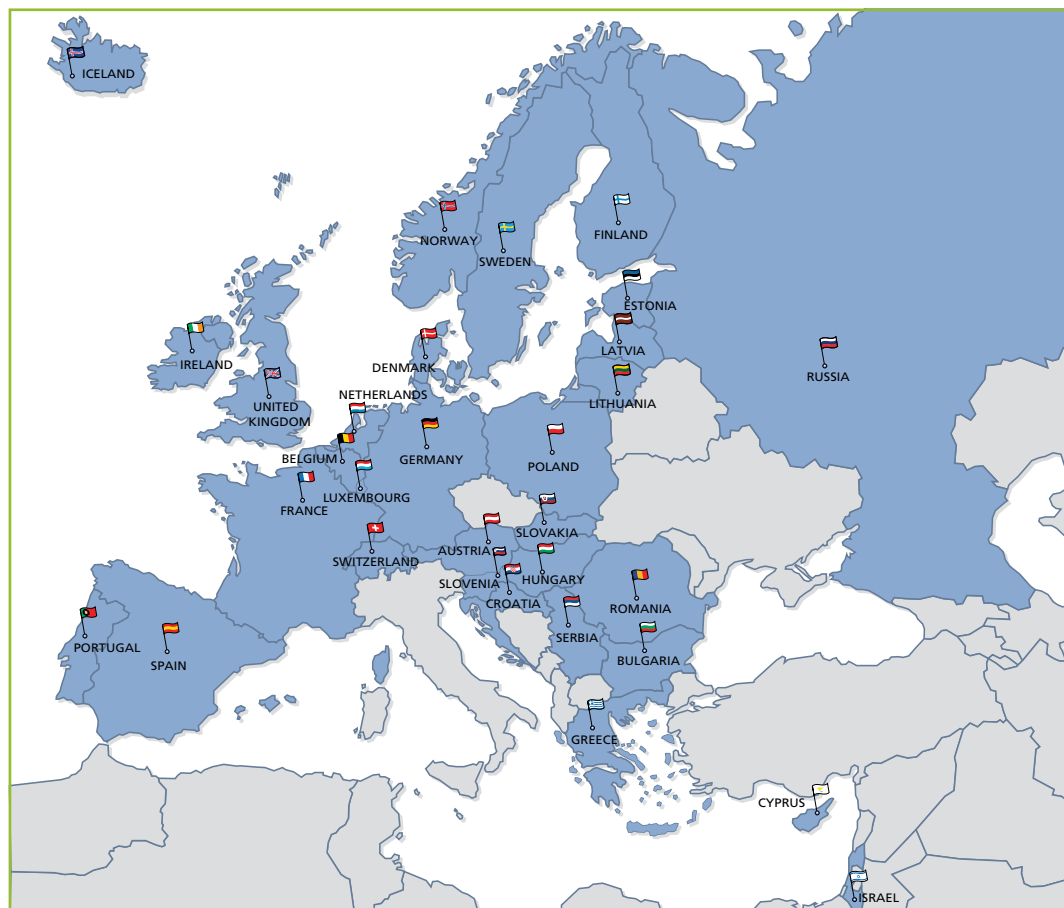
What is UEPG?

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. It celebrates its 25th anniversary in 2012.

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 Membership 2012

In May 2012, UEPG was delighted to welcome two new Members. Kunda Nordic joined as a company Associate Member for Estonia, and the Israel Aggregates Association joined as an Affiliate Member. We were saddened to note the termination of memberships for financial reasons of the Czech Republic and Italy, and will seek to assist them with new memberships. This leaves the total number of UEPG member countries at 31, demonstrating its pan-European representation in front of the European institutions. UEPG will actively seek further new members in the years ahead.



In Summary

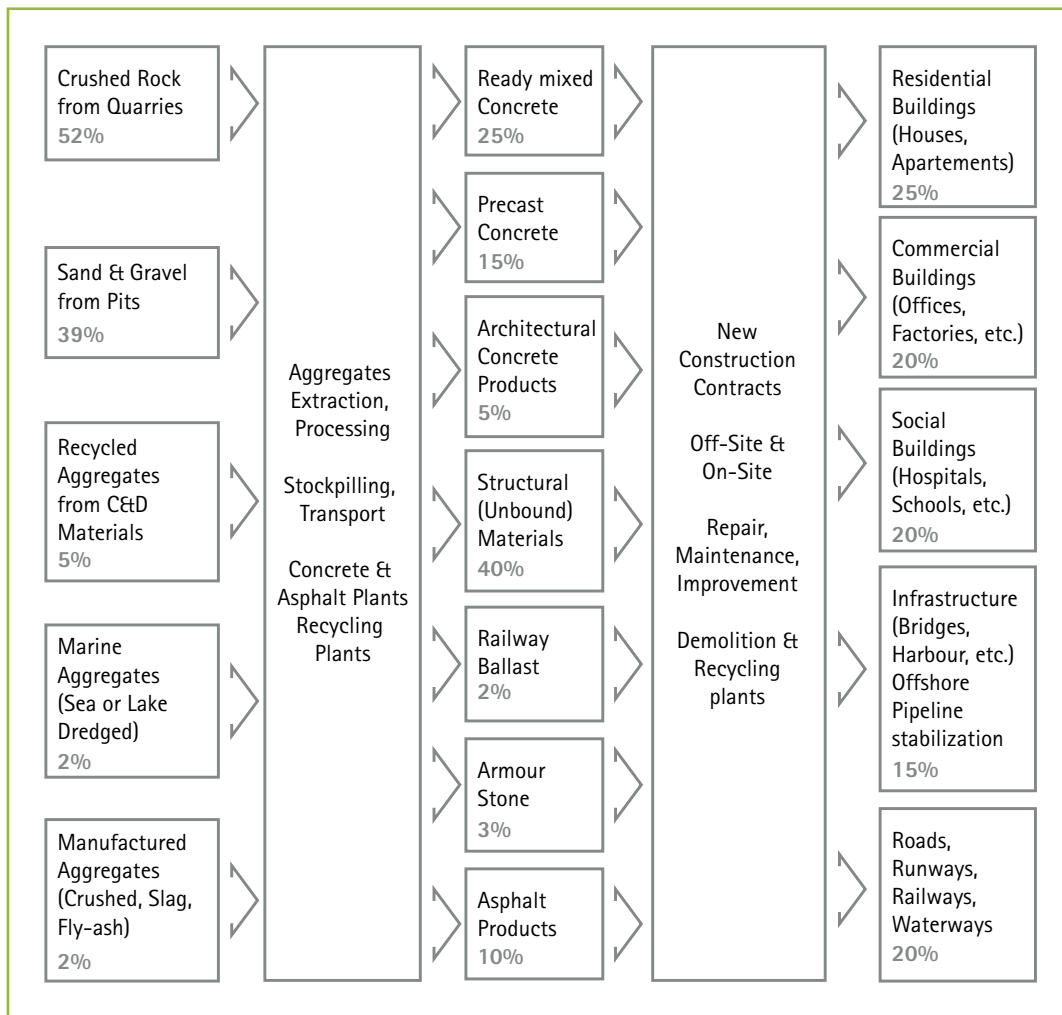
- UEPG has Members in 31 European countries (see map)
- The European aggregates production is 3 billion tonnes/year, representing an annual turnover of some €20 billion
- The aggregates sector is by far the largest amongst the non-energy extractive industries
- Aggregates demand is just under 5.5 tonnes 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 aggregates industry comprises some 14,000 companies (mostly SMEs), producing at some 24,000 sites with 250,000 people employed (including contractors)



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. European economic recovery 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 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.

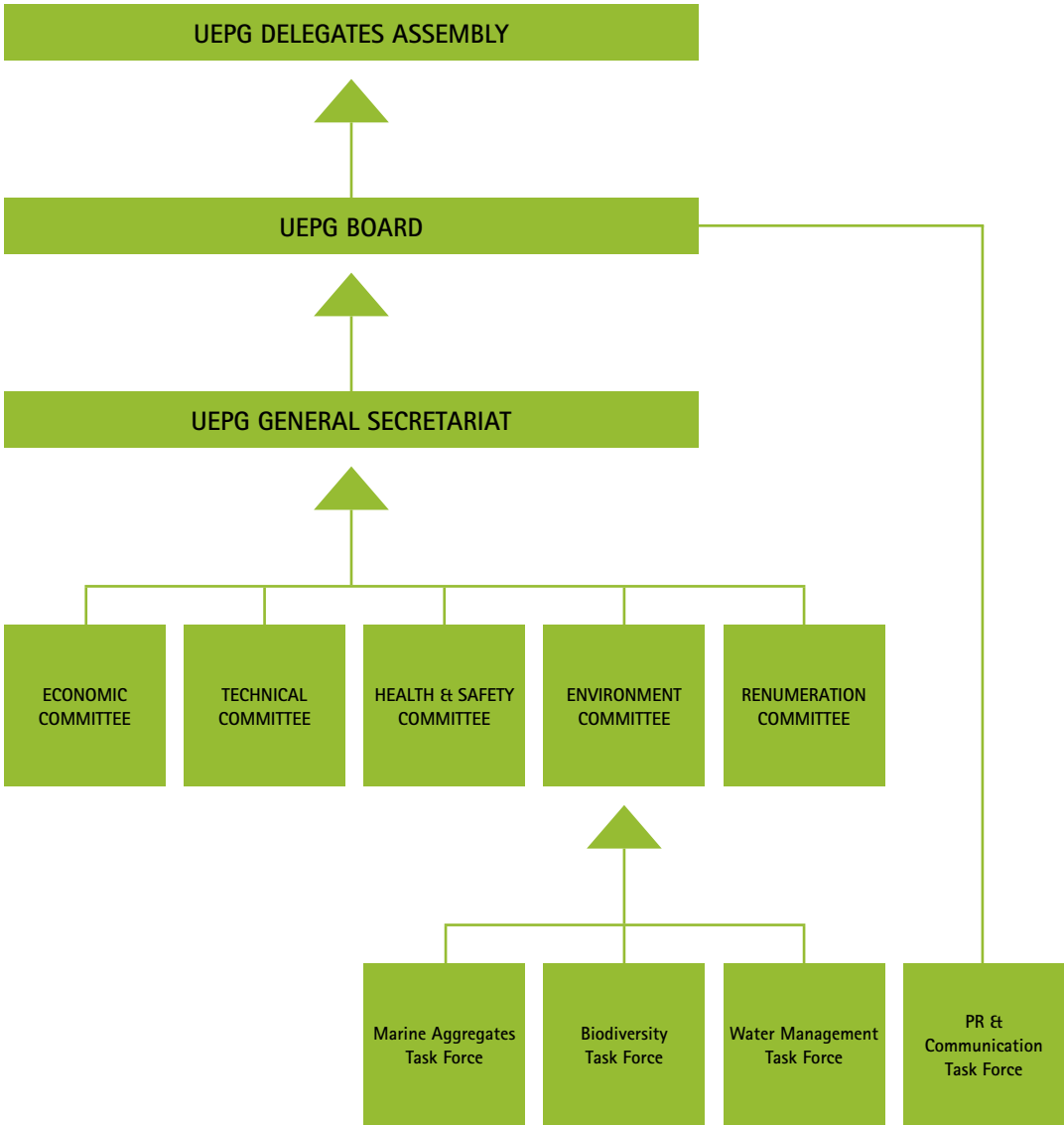
In all activities, the highest standards of environmental stewardship are set as an operational imperative of the Aggregates Industry

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 over two days and report with the General Secretariat to Board. The Board reviews progress and strategy twice yearly in April and November/December. The highest level meeting is the Delegates Assembly, held in May of each year, where all Members debate and decide ongoing UEPG budgets, administration, activities and strategy.



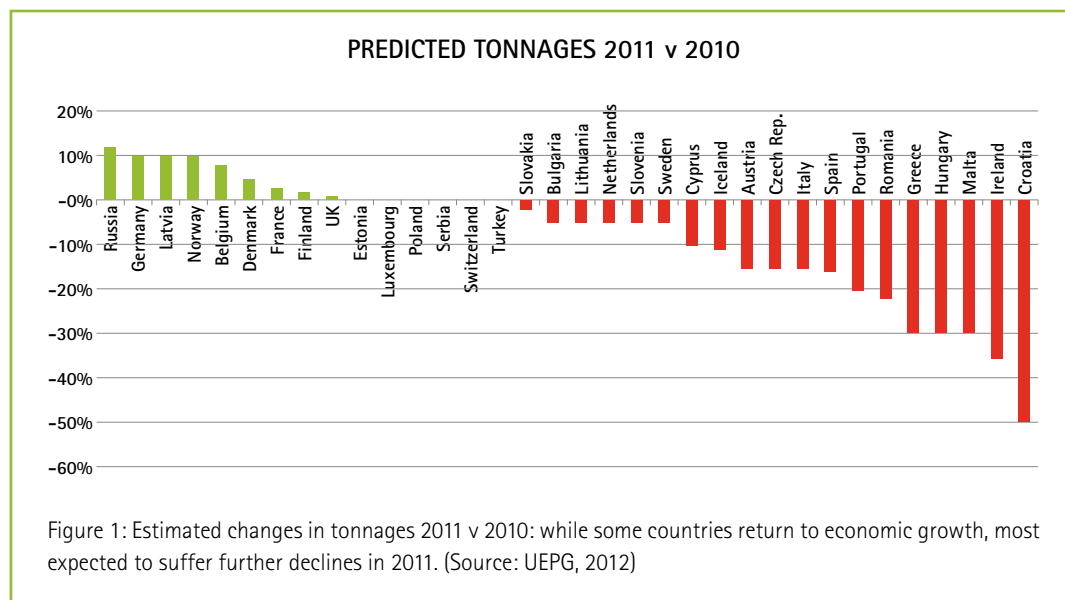
European Economic Developments

Current trends in the European Aggregates Industry

Taking Europe as the EU-27 plus the EFTA countries, as shown in Table 1, the total aggregates production is estimated almost 3 billion tonnes, supplied by over 14,000 producers (mainly SMEs) from 24,000 quarries and pits, employing some 250,000 people directly and indirectly. The total direct value of this production is estimated to be in the order of €20 billion. These figures demonstrate the economic importance of the European aggregates industry.

Analysis of the data over the last 5 years confirms the dramatic effects of the economic recession in Europe. Since 2006, tonnage has declined by 0.5 billion tonnes, 15,000 producers have either gone out of business or been consolidated, 5,000 quarries and pits have been closed, with a loss of some 150,000 jobs.

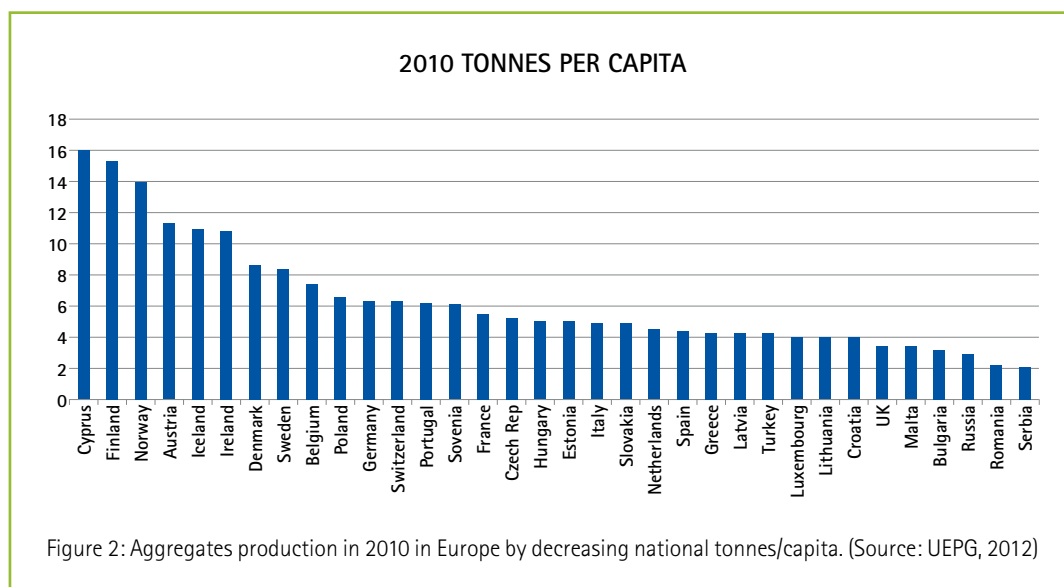
Perhaps the good news is that the rate of decline is slowing, in that the like-for-like 2010 decline in tonnage compared to 2009 was only -1.6%. However the predictions for 2011, as shown in Figure 1, indicate a similar decline compared to 2010. Some growth is now evident in Austria, Belgium, France, Germany, Poland, Russia and Switzerland. However, countries such as Greece, Ireland, Lithuania, Portugal, Spain and UK are still suffering a decline in production, some declines continuing to be extremely severe. The hoped-for return to European growth is proving extremely elusive. The verbally reported trends of early 2012 unfortunately also continue to be negative in many countries.



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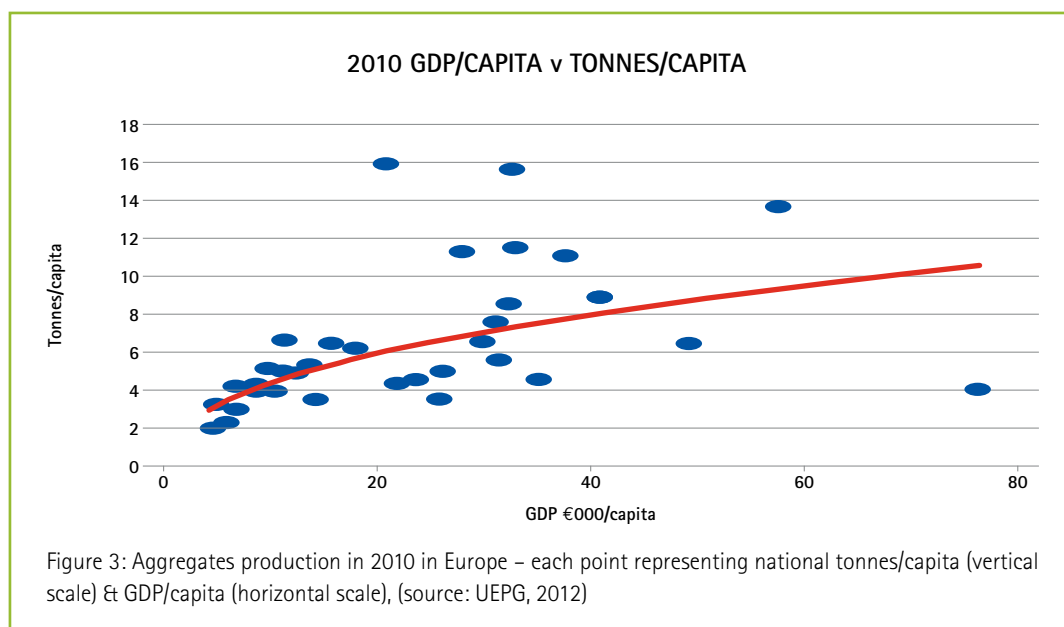


Figure 2 below shows the variation in tonnes/capita across the various countries. These figures are influenced by several factors, including state of economic development, population densities and climatic conditions. The European 2010 average was 5.5 tonnes/capita, down from 7 tonnes/capita in 2006, again dramatically confirming the extent of the economic crisis over the last 5 years.



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Figure 3 below demonstrates the relationship between tonnes/capita and Gross Domestic Product (GDP)/capita, each point representing a country. The key positive message from this graph is that tonnes/capita continue to increase as the GDP/capita increases. Therefore once the current economic crisis is over, the demand for aggregates across Europe will hopefully return to growth.



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During the last period of growth (1992-2007) the annual average construction output increase across the Euroconstruct network was 1.5% – applying this growth rate to the future suggests that activity will not return to 2008's level until around 2023.

The civil engineering sector is predicted to be the worst performing over the forecast period, with an annual average rate of decline of 1.4% over the three years to 2014...

Construction Activity in Europe

According to the latest Euroconstruct outlook, the European sovereign debt crisis has caused it to downgrade its construction forecasts, with no overall growth to 2014.

The worsening short-term economic prospects for the Euroconstruct network has led to a significant downward revision to the construction forecasts for this year and next, that is, from -0.3% to -2.1% in 2012 and +1.8% to +0.4% in 2013. Even with an improving growth rate of 1.7% in 2014, construction output across the Euroconstruct network will still be nearly 12% down on its 2008 outturn at the end of the current forecast period.

During the last period of growth (1992-2007) the annual average construction output increase across the Euroconstruct network was 1.5% – applying this growth rate to the future suggests that activity will not return to 2008's level until around 2023. Projected GDP growth for 2012 has dropped to close to zero (0.2%), from 1.1% predicted last November, with the forecast for 2013 down from 1.7% in November to 1.3% in June.

The civil engineering sector is predicted to be the worst performing over the forecast period, with an annual average rate of decline of 1.4% over the three years to 2014, compared with a smaller yearly fall of 0.4% for the non-residential sector and growth of 0.9% annually for residential construction. However, both the residential and non-residential sectors have seen much bigger falls (-13% and -14% respectively) than the civil engineering one (-7%) between 2008 and 2011, and are thus recovering from a lower base.

The idea of a 'north/south' divide has been around for many years in assessing regional economic structure and performance in certain countries, such as the UK and Italy, and to a certain extent in a global context dividing the 'developed north' and the 'developing south'. However, it has not been terminology that has been applied to European construction in the past.

Looking at the respective performance of the construction sector over the forecast period in the 19 Euroconstruct countries it does appear to now have some resonance. As with all generalisations it has exceptions, but there is to a degree evidence of a north/south pattern to projected construction performance over the next few years, with countries in the north of the continent performing substantially better than countries in the south. In terms of overall construction performance during the 2012 to 2014 period, the Euroconstruct network country predictions fall broadly into four categories:

- A small group of two – Denmark and Norway – that are projected to experience growth in excess of 2% per annum on average
- A much larger group of nine – Austria, France, Germany, Hungary, Poland Slovakia, Sweden, Switzerland and the UK – expected to see modest growth of between 0.1% and 2% a year over the forecast period
- A group of five countries – Belgium, the Czech Republic, Finland, Italy and the Netherlands – likely to see no growth to moderate decline (0% to -3% a year)
- Three countries – Ireland, Portugal, and Spain – in which construction activity is still in deep recession.



Table 1, Best Estimates of Production Data by Country for 2010

Best estimates of 2010 production are shown in Table 1. The "Like-for-Like" figures provide a comparison with the 26 countries included in the published 2009 data. The EFTA countries include Iceland, Norway and Switzerland.

	UEPG Status	Total Number of Producers	Total Number of Extraction Sites	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	1070	1362	61	31	0	4	2	97
Belgium	FM	84	112	14	44	8	15	1	82
Bulgaria	AM	190	280	11	14	0	0	0	24
Croatia	AM	175	299	4	14	0	0	0	18
Cyprus	FM	24	24	0	13	0	0	0	13
Czech Rep	NM	202	378	19	37	0	0	0	56
Denmark	FM	350	392	30	0	9	1	8	49
Estonia	AM	31	291	7	0	0	0	0	7
Finland	FM	400	2031	36	48	0	1	0	85
France	FM	1347	2468	135	201	6	17	6	365
Germany	FM	1400	2100	239	208	9	60	19	535
Greece	AM	171	186	1	47	0	0	0	48
Hungary	AM	305	589	30	18	0	3	0	51
Iceland	AM	28	56	2	1	1	0	0	3
Ireland	FM	130	500	10	40	0	0	0	50
Italy	NM	1470	2200	180	120	0	0	0	300
Latvia	FM	30	352	6	3	0	0	0	9
Lithuania	AM	30	427	11	3	0	0	0	14
Luxembourg	AM	7	10	1	1	0	0	0	2
Malta	NM	15	16	1	0	0	0	0	1
Netherlands	FM	145	250	40	0	17	20	0	76
Norway	FM	726	1043	13	54	0	0	0	67
Poland	AM	1542	2475	163	77	0	9	3	252
Portugal	FM	288	362	8	59	0	0	0	67
Romania	FM	430	735	34	15	0	0	0	49
Russia	AM	1181	1485	163	234	0	0	25	422
Serbia	AM	20	70	12	8	0	0	0	19
Slovakia	AM	185	299	8	18	0	0	0	26
Slovenia	AM	30	50	5	8	0	0	0	13
Spain	FM	1475	1520	52	155	0	0	0	208
Sweden	FM	985	1575	17	57	0	1	6	81
Switzerland	FM	537	530	40	5	0	5	0	51
Turkey	NM	770	770	25	290	0	0	0	315
UK	FM	885	1393	51	106	10	49	10	226
34 Countries		16658	26630	1426	1929	59	186	80	3680
Like-for-Like		15306	23943	1230	1680	58	185	55	3209
EU-27 + EFTA		14512	24006	1223	1383	59	186	55	2906
EU-27 only		13221	22377	1168	1323	58	180	55	2784

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



Economic Committee

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.

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 environmentally and socially. 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.

During 2011 – 2012 the main focus of the Economic Committee has been on the EU Raw Materials Strategy and the Resource Efficiency Communication, while in parallel opposing associated taxation proposals, seeking to improve transport efficiency, further developing sustainable development indicators (SDIs), as well as possibly amending the Eurostat data collection categories.

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 by exchanging Best Practice on land use planning and on permitting procedures. Another approach is using the competence of the Commission in streamlining EU environmental legislation, including the Natura 2000 Guidelines for the Extractive Industry.

The Leoben Review, specifically commissioned by UEPG in 2010, analysed Minerals Policies across Europe, and more specifically Aggregates Planning Policies, and is

still a central lobbying tool for the aggregates industry. It concluded that few Member States had a well-structured approach to address the future sustainable supply of aggregates. Aggregate supplies may therefore become critical in several regions, with associated inefficiencies in aggregates transport and energy usage. Hence it is vital to encourage the adoption of appropriate Aggregates Planning Policies across Europe. UEPG is therefore encouraging its members to promote 20-25 year national aggregates plans, the French *Livre Blanc* and the Finnish Minerals Plan being excellent examples.

DG Enterprise and Industry is currently studying ways of measuring progress of implementation the second pillar of the Raw Materials Strategy. UEPG proposed pro-actively a simplified and practicable approach through the Commission's Raw Materials Supply Group.

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). 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.

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.

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) 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.

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

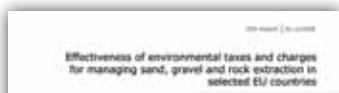
A sound statistical data base is crucial to demonstrate the impact of the economic crisis as well as demonstrating industry progress. The General Secretariat started many years ago a thorough data collection using a simplified

questionnaire covering the three pillars of sustainable development. Thanks to the work of UEPG 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 2010 are the result of entries from 34 countries and analysed separately for EU 27 and EU 27 + EFTA for better comparison with prior years.

For the fifth year running, the total production figures continue to decline, though at last the overall rate of decline is now slowing. 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.



UEPG particularly aims at improving resource efficiency through promoting recycling of construction and demolition (C&D) materials where technically, economically and environmentally viable... Several countries already recycle all suitable construction and demolition materials, and the resulting recycled aggregates typically comprise 15 - 25% of those national markets.





Technical Committee

The TC works with the objective of maintaining a truly open, competitive and sustainable European market for natural, recycled, marine and secondary aggregates.

Perseverance is the key word to summarize Technical Committee work in 2011-2012. 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.

Continuity is also a perennial characteristic of the network formed by aggregates technical experts. With the help of Brian James (EPRA Chair) and the combined dedication of Markus Schumacher (Secretary), John Lay (Vice-Chair) and Jean-Marc Vanbelle (Chair), the UEPG TC worked 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.

Recycled Aggregates

Under the chairmanship of Brian James, EPRA now includes EAPA, ERMCO and representatives of the European Concrete Platform alongside founder members FIR and UEPG. EPRA is preparing to organise Recycling workshops and has produced the Recycled Aggregates Brochure to publicize recycling. Thanks to examples provided by its members, EPRA has also started a database of best practice as a basis to promote further recycling.

But the most important objective is certainly the development of reasonable end of waste criteria (EoWC), for example based on those within the UK Quality Protocol. These EoWC will be proposed to the Commission Services and EPRA will monitor with perseverance any developments on EoWC made by the Commission.

Construction Products Regulation (CPR)

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

For some EU Member States, CE Marking will become obligatory for the first time under the new CPR. For producers in all Member States, a key benefit is that all products certified according to CPD are deemed to be certified for CPR. Nothing new will have to be done by those producers for the time being, and there will be no additional tests or auditing.

The CPR will introduce a new, seventh Basic Work Requirement (BWR): the need to preserve the sustainable use of natural resources. What this BWR means in practice is not yet clear. The UEPG TC will continue, together with CEPMC, close surveillance on this issue. The inclusion of provisions for an Environmental Product Declaration in harmonized product standards is one possibility, as suggested in the "Whereas" of the CPR. CEPMC has highlighted the fact that to include a provision on EPD in a harmonized standard, CEN will need a mandate from the Commission. Such a mandate is not currently under preparation.

UEPG TC learned that the Group of Notified Bodies (GNB = the group of accredited bodies giving the CE mark) will establish a position paper on how to declare product characteristics (DoP = Declaration of Performance) for CE marking under CPR. Consequently the UEPG TC has pushed CEN TC 154 to establish an official liaison with GNB to ensure consistency with the principles on which TC 154 standards are based.

Release of Dangerous Substances (RDS) & Environmental Products Declaration (EPD) for aggregates

To address the two issues RDS and EPD, the UEPG TC launched an ad hoc working group (WG). This WG delivered a Model EPD, on a cradle to gate basis to the TC and the Board. The current version includes all natural aggregates, that is, sand & gravel, crushed rock and marine aggregates. Recycled aggregates will be included later in the form of added comments. 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.

On RDS, the 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 underway, samples have been collated. Based on the results of this study, the WG will propose some simplifications of the test methods for presentation to TC 154 SC6, which will decide how to implement the TC351 tests for aggregates.





European Aggregate Standards

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

- Revision of harmonized standards TC 154: ongoing and detailed work on the editorial and general comments given on the draft product standards. Members were asked to support a positive (re-) vote on EN 16236 which covers evaluation of conformity. This standard is essential for the publication of the revised product standards.
- SC 6 Matters: the definition of a new common European reference for PSV (Polished Stone Value) control stone is proving to be challenging. And without any reference material, it will be impossible the test the PSV of an aggregate.
- TC 104 Categories selection: the table with minimum requirements, contained in the latest draft of revised EN 206 for concrete, would conflict with commonly used specifications and categories from hEN 12620 in several countries. UEPG had asked the Chairman of TC 154/SC2 by letter to communicate the UEPG objections and concerns about such requirements especially when becoming normative
- UEPG TC mourned Colin Loveday, CEN TC 154 Chairman and employee of an aggregate producer, who passed away this springtime. The committee will continue its deep involvement in CEN TC154 work.

Obviously a lot of work has still to be done on the key technical issues presented here. UEPG TC's achievements have been made possible thanks to the help of the UEPG Secretariat, and its role is crucial to future achievements. And last but not least, UEPG TC has to pay tribute to Jim O'Brien for his constant support on all technical issues. Jim has certainly adopted the words of one of his fellow-countryman George Bernard Shaw;

"You see things and you say: Why? But I dream things that never were, and I say Why not?"

(quoted from Back to Methuselah)

The UEPG TC can only answer with more of Shaw's words;

"The reasonable man adapts himself to the world; the unreasonable one persists in trying to adapt the world to himself. Therefore, all progress depends on the unreasonable man".

(quoted from Maxims for Revolutionists)

Therefore perseverance and continuity will remain the mottos of the UEPG TC for 2012-2013.



Health & Safety Committee

During 2011-2012, the Health & Safety Committee has actively addressed a number of key Health and Safety areas with considerable success.

UEPG believes that ongoing implementation of the ESDA is the best mode for further exposure reduction and hence of illness prevention rather than imposition of any regulatory exposure limits.

Under the Chairmanship of Martin Isles (Mineral Products Association, United Kingdom) and vice-chaired by César Luaces Frades (FdA, Spain), the UEPG Health & Safety Committee's mission is to actively promote better Health & 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 2011-2012, the Health & Safety Committee has actively addressed a number of key Health and Safety areas with considerable success.

Health:

Further implementing the Social Dialogue Agreement on Respirable Crystalline Silica

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 2011, continuous efforts with numerous awareness campaigns were made by UEPG Member Associations, for example, the successful NePSi Workshop on 7 April in Bulgaria, co-organised by BAPIM Association, on 14 April in Romania co-organised by APPA Association, on 18 October in Poland, where PZPK Association participated. In 2012, despite the financial recession, UEPG Member NePSi reporting demonstrated a significant increase in the number of enrolled sites and continued progress on exposure reduction measures. Furthermore, the UEPG strategy is to get new sector involvement, for instance the construction sector. UEPG believes that ongoing implementation of the ESDA is the best mode for further exposure reduction and hence of illness prevention rather than imposition of any regulatory exposure limits.

Liaison with European Commission on Safety-related Activities

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) and is 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 2010-11 on Safe Maintenance. In 2011, UEPG will soon present a 'Safer by Design' project to the SSDCEI to obtain agreements from the Committee members for

EC funding. UEPG was offered to assume the SSDCEI Chairmanship for 2012, a key role in proposing the agenda and coordinating meetings with the European Commission and Social Partners. 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 has accepted to be the Chair of the Sectoral Social Dialogue Committee for the Extractive Industry in 2012.

Safety:

UEPG "Safer by Design" project

The "Safer by Design" project is 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 accidents linked to design. This voluntary guidance document 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 Roundtable (EMESRT) initiative can strengthen wider implementation by plant purchasers. Dr. Jost-Peter Sonnenberg, 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 ADCO (Administration and Cooperation) task force on earth moving machinery invited UEPG to participate to a meeting and present the Safer by Design project to the group. Raphaël Bodet (UNPG) promoted the project which was broadly welcomed. 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.





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 an 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 on their use. A Task Force chaired by César Luaces Frades (UEPG), involving the Federation of Explosives Manufacturers (FEEM), NEEIP, EURACOAL, and the European Commission will prepare recommendations to common action plan from the all Supply Chain which will be sent and presented to Member States by October 2012.

has been discussed at UEPG Committee meetings, and changes are now proposed for further discussion with NEEIP members and then with Eurostat.



UEPG Sustainable Development Indicators

UEPG is committed to reporting Sustainable Developments Indicators in order to measure industry progress under Economic, Environmental and Social Pillars. Safety 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 EU aggregates sector has a strong focus on fatality prevention, however the limited 2010 data available indicating a totally unacceptable 24 fatalities. As best practices, the Cement Sustainability Initiative (CSI) fatality prevention guidance documents for Contractors and Drivers were again promoted to UEPG members. The 2010 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 the problem is that this does not provide a clear picture for the Aggregates sector. Hence a re-categorisation





Environment Committee

UEPG has become one of the industry leaders in biodiversity management. It is committed to quantifying and enhancing biodiversity before, during and after extraction takes place, demonstrating the creation of new nature conservation areas and habitats.

Chaired by Arnaud Colson (Lafarge, France) and vice-chaired by François Pétry (Holcim, France), 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

Biodiversity remains a top priority for UEPG. Since the beginning of its partnership with the IUCN project Countdown 2010 in May 2007, UEPG has become one of the industry leaders in biodiversity management. It is committed to quantifying and enhancing biodiversity before, during and after extraction takes place, demonstrating the creation of new nature conservation areas and habitats. UEPG makes every effort towards a net positive impact of the aggregates sector on biodiversity, and also promotes compatibility between extractive sites and Natura 2000 areas. Countdown 2010 came to completion in October 2010, and since then UEPG has been pursuing its cooperation with IUCN through the European Commission Business and Biodiversity Platform (the B@B Platform), which UEPG joined as the first industry association in April 2010. Our Past-President Jim O'Brien was nominated as a Steering Committee Member of the Platform. UEPG has recently signed a Letter of Intent with IUCN (see inset).

The Biodiversity Task Force, hitherto chaired by Robert Wasserbacher (FSKI, Austria), has established ambitious but realistic targets for the European Aggregates Industry. The new targets include both qualitative and quantitative items, such as encouraging UEPG Members (most of which are SMEs) to develop and implement biodiversity promotional initiatives in their own countries. 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.

In 2009, UEPG launched its online database of now 145 biodiversity case studies, promoting best practice of the

sector. Approximately half of these cases were reviewed in 2011, and the rest of the process is still ongoing. This showed very positive results, as biodiversity is still thriving at these sites. An inventory of biodiversity good practice guidelines has been compiled and is continuously expanded, in order to assist operators, particularly SMEs. The UEPG Sustainable Development Awards 2010, with special awards for Biodiversity, were the highlight of the International Year of Biodiversity for UEPG, and the brochure features many outstanding biodiversity case studies. The next UEPG Awards are planned for 2013 and will again have a strong focus on biodiversity.

UEPG is closely following the development of the study on "The Economics of Ecosystems and Biodiversity" (TEEB). This study is striving to put an economic value on ecosystem services. The European Commission is now building up on this study for two new initiatives: Green Infrastructure, which aims at creating green corridors; and No Net Loss, which aims at stopping biodiversity loss. UEPG is active in both European Commission Working Groups, and developed a position paper on Ecological Offsets. It should be recognized that aggregates-producing companies already invest millions of Euros annually in environmental restoration, biodiversity and ecosystems.

Any attempt to put an economic value on ecosystem services and to measure biodiversity actually requires biodiversity indicators. UEPG argues that any indicators must be scientifically-based, informative, cost-effective and easy to implement for SMEs, and has created a working group, chaired by Jim Rushworth (Lafarge, Greece), to tackle this important issue.

Water Management Task Force

Chaired by César Luaces Frades (FdA, Spain), the Water Management Task Force aims at exchanging good practice in ground and groundwater management in quarries and pits, ensuring that the aggregates industry maintains water quality. Water is an increasingly important topic. Following the good preparatory work of the Water Management Working Group, UEPG is now well prepared for its lobbying strategy. Water usage is under increasing focus under the Resource Efficiency Initiative, as well as in the context of the Blueprint for Europe. UEPG has published a Position Paper on Water Management and Summary Guidelines on Water Management Good Practices in Aggregates Sites. Water management case studies are now featured on the UEPG website.





In UEPG's view, a responsible water management programme is a win-win strategy for all players involved. Aggregate extraction companies' interest lies not only in good public image, but also in significant cost savings.

Marine Aggregates Task Force

The UEPG Marine Aggregates Task Force had been chaired by Arnaud Colson (UNPG, France) since its creation. Arnaud Colson wished to step down in view of workload commitments, and Jeffrey Thompson (OAM Baustoffe GmbH, Germany) took over. The Task Force has expanded its membership to new countries, and is developing further key contacts with both the European Commission and Parliament.

After an intense advocacy campaign on the Marine Strategy Framework Directive, the chapter on marine protected areas (originally stating that it should include areas of a sufficient size to be fully protected from all extractive uses) has rightly been removed. The Task Force is now involved in the implementation of the Marine 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. This work is essential, as it will help define whether a marine area is in good environmental status and which might impact on the requirements for marine aggregates extraction.

The Members of the Task Force recognise the need to further improve the knowledge of the minimal environmental impact of marine aggregates extraction.

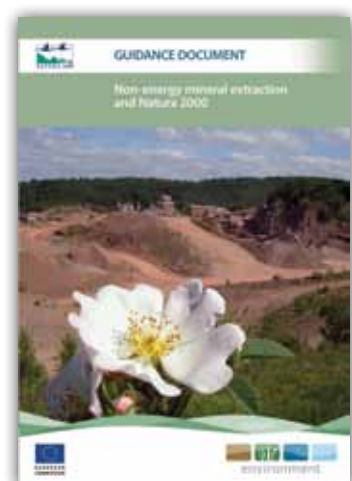
There is also a need to campaign for a better image of the industry, notably through involvement in research programs, better marine industry representation, improving the data on production, license areas and employment, as well as arranging site visits for EU decision makers. The next important fields of activity for this Task Force will be marine spatial planning and Natura 2000 in the marine context.

Other Environment Committee Activities

UEPG is developing a generic Environmental Product Declaration (EPD) for aggregates. It is believed that it would indeed be useful, both for the aggregates industry itself and for its customers (concrete and asphalt industries), to have harmonised methodology and to prepare a generic EPD which would demonstrate the very small ecological footprint of aggregates.

In view of the upcoming European Commission Communication on Land-Use, UEPG has developed a position paper on Land-Use.

UEPG continues to follow very closely developments on the proposed 7th Environmental Action Program, mining legislation, soil protection, dust emissions and implementation of Natura 2000.





IUCN and European Aggregates Association together to foster biodiversity

On 25 May at its Delegates Assembly, UEPG, the European Aggregates Association, signed a Letter of Intent with the Regional Office for Europe of IUCN (International Union for Conservation of Nature) towards the goal of working together to further foster biodiversity in quarries and pits across Europe.

The Letter of Intent commits both parties to organize a high-level meeting twice a year over the next three years to explore and develop joint projects in several specific areas of common interest which have already been identified.

UEPG represents the largest non-energy extractive industry in Europe. Over 3 billion tonnes of crushed stone, sand and gravel are extracted from 24,000 quarries and pits across Europe. These are operated by 14,000 companies most of which are SMEs (Small and Medium Enterprises), employing some 250,000 people directly and indirectly.

IUCN is the world's oldest and largest global environmental organization, with more than 1,200 government and NGO members and almost 11,000 volunteer experts in some 160 countries. IUCN's work is supported by over 1,000 staff in 45 offices and hundreds of partners in public, NGO and private sectors around the world. IUCN works on biodiversity, climate change, energy, human livelihoods and greening the world economy by supporting scientific research, managing field projects all over the world, and bringing governments, NGOs, the UN and companies together to develop policy, laws and best practice.

The outgoing UEPG President, Jim O'Brien, indicated that there was a long and positive history of cooperation between UEPG and IUCN and commented that

"In 2007, UEPG was the first industry association to sign up to IUCN's Countdown 2010 initiative, and in 2010 it was the first industry association to join the European Union Business and Biodiversity Platform which is implemented by IUCN and partners. UEPG has gathered case studies from its members which show how operating and restored quarries and pits can become biodiversity havens. The goal now is to develop an even closer cooperation with IUCN and thereby to further enhance our biodiversity performance".

Monica Jacobs, Head of IUCN Brussels Office, commented that

"IUCN welcomes the commitment of UEPG members who, in a time of economic challenges, understand the vital importance of conserving biodiversity and using resources sustainably for the future. I am pleased to see UEPG members' environmental sensitivity and awareness, and their efforts for sustainable operations. IUCN wishes to further support UEPG and its national members across Europe, and in particular its many SMEs, in their biodiversity-enhancing operational and restoration projects. The signing of the Letter of Intent builds on the already existing cooperation that exists between IUCN and UEPG, and takes our partnership one step further in conserving ecosystems and biodiversity in the aggregates industry".





PR & Communications Task Force

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 would not claim to be perfect; its focus is on continuous improvement.

The Task Force

Chaired by Carl Hennrich of the Austrian Association, FSKI, 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 and biodiversity, to improving health & safety, to being a good employer 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 would not claim to be perfect; its focus is on continuous improvement. The Task Force is a platform dedicated to advising the industry on an ongoing strategy for achieving the better image it truly deserves.

The aim of the Task Force is to exchange National Best Practices in terms of PR and Communications, to discuss current and new UEPG PR and Communications tools and targets, and to prepare for the next UEPG Events in terms of PR Strategy.

Exchanging Best 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: FSKI is preparing their PR Campaign, with the launch of a new website and press releases, as well as a new image of the Association internally; school brochures for 10 to 16 year-olds are now available; the Austrian mining and aggregates industry with the support of FSKI is organizing a Congress on 17-22 September 2012 in Leoben, Austria, entitled "Raw Materials are the future, supplying a modern society with mineral raw materials in the face of technology, growth and sustainability" www.eumicon.at/index.php/en/.

Spain: FdA is now communicating via Facebook and Twitter and is receiving a lot of good feedback; the Association is signing more new agreements with Universities which brings the number of agreements with Universities to twelve; the Association is planning its National Congress and will celebrate its 35th Anniversary from 3-6 September 2012 in Cáceres, Spain, will a focus on "New Time, New Strategy" as a Spanish Raw Materials Strategy for the coming 25 years; FdA started the National SDA competition as well as the preparation for the National Tree Day on 19 April 2012.

Germany: The official merger of MIRO-BKS to the new MIRO was celebrated; the Awards ceremony for MIRO photograph competition was organised, as well as a Biodiversity conference together with GNF with the recognition of positive contribution of extractive industries to biodiversity; sixteen press releases were issued since last year; in 2012 there will be the launch of a new website; FORUM MIRO will take place in Dresden, on 7-8 November 2012 with a focus on a technical conference & exhibition of equipment suppliers on Access to Resources & Raw Materials debate; inventory and development of tools, with brochures targeted at young people and school kids; improvement of positive recognition by the public and development of staff recruiting skills and strategies to attract new employees.

France: Following the success story of the UNPG "Livre Blanc", the French Association worked on media relations and developed even closer contacts; the conference and workshops in several French cities on the "Livre Blanc" allowed a real recognition of the sector changing its image in the eyes of the French Administration; open quarry days at regional level including all mineral French sectors were organized and were linked at national level with the European Minerals Day in 2011; an event was organized for members on Technical and Environmental issues. One of UNPG's members, Lafarge, produced in 2011 a guidance document on Biodiversity built on best practices; with an award competition in October 2012.

UK: Following the successful start to the Cycle Safe campaign, MPA created a wider direct support for their members to adopt this campaign; The Times newspaper launched a campaign called "Cities Fit for Cycling" to further promote cyclist safety, and its 8-point manifesto has raised large awareness and generated significant citizen interest on this notable MPA Campaign; one of MPA's members, QPA Northern Ireland published its newsletter, the QPANI 2012 Journal.

Norway: The Norwegian Association, Norskbergindustri, organized a half-day on Communications Skills with five lectures; an Annual Autumn Meeting on "Total Industry Commitment by International Owners"; mini seminar with the Ministry of Trade, Chamber of Commerce, NGOs and media coverage related with the new Mineral Strategy in Norway; the association produced a leaflet with 39 steps on "The Good Neighborhood" on good practice in dealing with your neighbours as an Extractive Industry.





A brand-new UEPG website was launched in 2012, being more comprehensive, dynamic and user friendly. It provides a better understanding of the world of Aggregates and, the key actions of the Association.



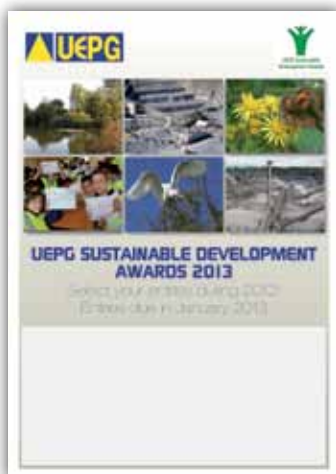
Ongoing Industry PR & Communications Strategy

A brand-new UEPG website (www.uepg.eu) was launched in 2012, being more comprehensive, dynamic and user friendly. It provides a better understanding of the world of Aggregates and, the key actions of the Association. It serves a better access and continuous updates to UEPG Members. Further feedback from members and all stakeholders is always welcome.

In 2011-2012, UEPG promoted the importance of the ESDA (European Social Dialogue Agreement on Respirable Crystalline Silica) via an intense campaign to its members and to the construction sector; and became a highly-recognised partner of the Occupational Safety and Health European Agency (EU-OSHA) 2010-2011 Healthy workplace campaign with the project Safer by Design.

In 2012, UEPG celebrates its 25th Anniversary. A special logo was created for the occasion. Founders, Past Presidents and Past General Secretaries were also invited to the Delegates Assembly in Limassol, Cyprus to celebrate the 25th Anniversary of the Association.

In 2012, as recommended by the PR and Communication Task Force, the UEPG Board agreed to revitalise the UEPG monthly newsletter format, as well as supporting the introduction of press releases targeting specific public audiences with the objective of further disseminating information on UEPG and its successes to all stakeholders.



In 2011-2012 UEPG has begun preparations for the UEPG 2013 Sustainable Development Awards (SDA). Part of the preparation was agreeing the Terms of Reference containing guidance and criteria for SDA for Members to prepare their national entry selection. A poster was created by UNPG for better advertising the event. It is hoped that all UEPG members will submit entries, as the SDA offers a unique opportunity to showcase best practice at both national and European levels, and also contributes greatly to enhancing industry image in front of all stakeholders.





General Secretariat

The General Secretariat, its location and activities

As of 1 September, 2011, Dirk Fincke took over as Secretary-General, ably supported by Sandrine Devos and Miette Dechelle, both Public Affairs Managers, and Ivana Oceano, as part-time Secretary. Direct contact details and a list of live issues covered by each team member can be found on the UEPG website – Members' Only Section. Antony Fell stepped down from his previous role as part-time Secretary-General after a long and dedicated service, and continued as a part-time EU Advisor to UEPG.

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.

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 will be 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), 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.

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 and Debates in the European Parliament where open and informal discussions with key EU policy-makers take place. In April 2012, key note speakers at the UEPG Board Policy Dinner 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.

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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.

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 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 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), identifying areas for cooperation. UEPG is a member of the European Council of Producers of Materials for Construction (CEPMC) 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 2011 in a new and well received format of roundtable sessions. The theme was "Addressing Key Challenges for a Resource Efficient Industry". The debate was moderated the Journalist Paul Ames, with Pia Bucella, Director Nature, Biodiversity & Land Use, DG Environment, Reinhard Bütikofer MEP (Greens, Germany), Rapporteur of the Parliamentary Raw Materials Report, Hans Friederich, Regional Director of the IUCN European Office and EU Member States



Representatives responsible for planning and permitting as panelists. The event concluded with industry policy recommendations to EU decision makers.

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 SEAP, the Society of European Affairs Professionals.

Fondation Européenne des Minéraux
European Minerals Foundation





The Global Aggregates Information Network (GAIN)

UEPG has now established good communication links with international aggregates associations as listed below, designated as the Global Aggregates Information Network (GAIN), representing over 50% of global aggregates production. Newsletters are regularly exchanged. Contacts are under development with Japan and India.

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



Several GAIN members actively participated in the sixth Atlantic Alliance Meeting in Brussels in October 2010. Past-President, Jim O'Brien, was invited to conferences hosted by AQA, CCAA, ASOGRAVAS and ANEPAC in 2011, and to events hosted by OSSGA and NSSGA in early 2012. At the lattermost event there was an International Roundtable, in which it was agreed that GAIN members could benefit greatly ongoing communications in the following areas and activities:

- Statistics: key production data, including recycling,
- Safety: fatality prevention, Safer by Design, RCS exposure reduction,
- Environment: biodiversity, water management, air quality, waste regulations,
- Technical: recycling best practice, technical standards & local geology,
- Economic: raw materials policies and planning, resource efficiency issues,
- PR and Communications: community relations, improving industry image.

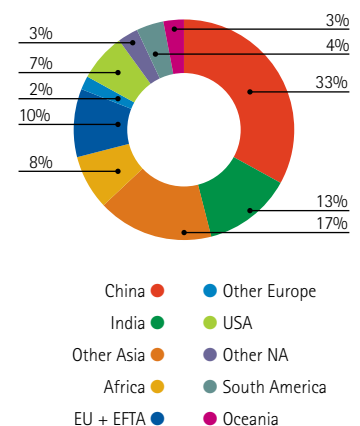
The GAIN network can also enhance the lobbying power of the aggregates industry globally as well as being very helpful in specific areas to its individual members.

Global aggregates production is estimated at 30 billion tonnes, the breakdown by region shown in tabular and graphical form below. Perhaps surprisingly, Asia including China and India comprises almost two-thirds of global production. Also possibly surprising is the fact that most regions apart from Europe and the USA are actually in positive growth; global production of aggregates is increasing by about 1 billion tonnes each year. Globally, the aggregates industry is still predominated by SMEs; the 10 largest producers represent only 5% of global aggregates production.

Global Aggregates Data

		Population (billions)	Estimated Tonnes (billions)
Asia	China	1.4	10.0
	India	1.2	4.0
	Others	1.6	5.0
Africa		1.0	2.5
Europe	EU + EFTA	0.5	3.0
	Others	0.2	0.5
North America	USA	0.3	2.0
	Others	0.2	1.0
South America		0.4	1.2
Oceania		0.2	0.8
Totals		7.0	30.0

Global Aggregates Production by Region (30bnt)





Celebrating UEPG's 25th Anniversary



On May 24, 2012, in Limassol, Cyprus, UEPG's 25th anniversary was celebrated. Carl Hennrich, who himself personified the entire history of UEPG, recalled the first proposal to form a European aggregates association in Dijon, France, in 1985. This led to a second formative meeting at Fuschl Castle in Austria in 1986 with 5 countries present. UEPG was then officially founded in 1987 in Paris, already with 9 countries involved, and Raymond Berger (RIP) was elected first President with Jean-Marie Gross as Secretary-General. In 1988, in London, the UEPG Technical Committee was formed, expecting to have harmonised aggregates standards ready in time for the Single European Market in 1992. The first UEPG Statutes were discussed at the Wiesbaden meeting in 1989, and signed at the 1990 meeting in Budapest.

In 1991, Erik Dam Hansen (RIP) took over as 2nd President, with Jürgen Reitzig as Secretary-General, based in Frankfurt. In 1992, at the Delegates Assembly in Geneva, UEPG membership expanded to 14 countries, testament to the continued determination of all to build a pan-European association.

In 1994, Tim Ross became the third President, with Antony Fell as Secretary-General, based in London. UEPG continued to grow in strength. Antony Fell spear-headed the foundation of the first European aggregates-focused magazine "European Aggregates", which featured high-quality articles in English, French and German.

In 1997, Michael Schulz became the fourth President, with Hans-Peter Braus as Secretary-General, based in Duisburg. At this stage, UEPG began to focus on lobbying the European institutions with success. In order to further promote the industry image, Restoration Awards were held in Strasbourg in 1997 and 1999.

In 2000, Cipriano Gomez Carrion became fifth President, with Rafael Fernández Aller as Secretary-General, based in Madrid. Further Restoration Awards were held in 2001, and the UEPG Health & Safety Committee was added in 2003. It was then decided that UEPG needed to have a permanent office in Brussels; Rue d'Arlon 21 is the UEPG office to this day.

In 2003, Manfred Asamer took over as sixth President, with Antony Fell as Secretary-General. The permanent office in Brussels gave UEPG a much stronger base for lobbying and professionally promoting the industry. Very successful Sustainable Development Awards were in 2005.

In 2005, Didier Audibert took over as seventh President, with Antony Fell continuing as Secretary-General, ably assisted by Gregoire Poisson. A well-defined growth strategy raised UEPG membership to 21 countries. Sustainable Development Awards, a Recycling Study, the UEPG-20 celebration and signature of 'Countdown 2010' with IUCN were all achieved by 2007.

In 2007, Denis Mertens took over as eighth President. Antony Fell continued as part-time Secretary-General, while Dirk Fincke, Sandrine Devos and Miette Dechelle were added as full-time staff, enabling UEPG to move to a still higher level of monitoring all legislative initiatives and professionally lobbying in the Commission and Parliament.

In 2009, Jim O'Brien took over as ninth President. Dirk Fincke became full-time Secretary-General in 2011, and Ivana Oceano was added as a part-time secretary. Sustainable Development Awards were held in 2010. UEPG work activity grew on all fronts and by 2012 membership had reached 31 countries. In that year, the Letter of Intent with IUCN was signed, and UEPG celebrated its 25th anniversary. Arnaud Colson took over as tenth President in 2012.





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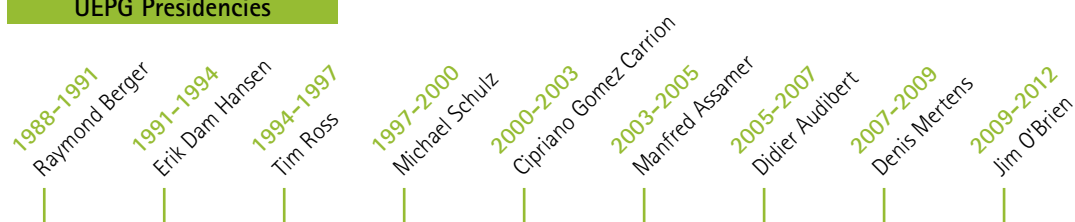
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Global Aggregates Information Network (GAIN)

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We would like to thank UEPG members for their contributions.

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Centre:	<i>Biodiversity on Montpouillan's Quarry, France, Lafarge DR Médiathèque</i>
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UEPG in a Nutshell

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Centre:	<i>Biodiversity Gamsheim, GSM Gamsheim, France, Gérard Schnell, Italcimenti Group</i>
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Left:	<i>R. Seeber, J. Potoc'nik, K. Falkenberg, Green Week, Photograph by UEPG</i>
Centre:	<i>Lovéns 2008 006, SBMI, Sweden</i>
Right:	<i>Le Tertre quarry, in Chaze-Henry, France, transport of material by truck, Franck Betermin – Abacapress, Lafarge DR Médiathèque</i>

President's Introduction

Left:	<i>Jim O'Brien, Steine Expo opening, MIRO, Germany</i>
Centre:	<i>Pia Bucella, Jim O'Brien, Gwenole Cozigou, UEPG Board Policy Dinner Brussels, Photograph by UEPG</i>
Right:	<i>LOL signature, Jim O'Brien (UEPG) and Monica Jacobs, UEPG Delegates Assembly Limasso, Cyprus, Photograph by UEPG</i>

UEPG Activities

Left:	<i>Aripresa-Almoguera, FdA, Spain</i>
Centre:	<i>EU-OSHA Launch campaign, Photograph by UEPG</i>
Right:	<i>Chartre Environnement, UNICEM, France</i>

Introduction to UEPG and Aggregates

Left:	<i>Besucherbergwerk, MIRO, Germany</i>
Centre:	<i>Meeting on Natura 2000, Christian Haeser, Fotios Papoulias, Jeffrey Thompson, DG Environment Brussels, Belgium, Photograph by UEPG</i>
Right:	<i>Innovative Mobiler Logistic, Asamer, Austria</i>
Left:	<i>Innovative Mobiler Logistic, Asamer, Austria</i>
Centre left:	<i>European Minerals Forum 2011, Hans Friederich & Pia Bucella, Photograph by UEPG</i>
Centre right:	<i>Sensuri quarry, Romania, lake converted to the aggregates cleaning, Creedy Smith Justin, Lafarge DR Médiathèque</i>
Right:	<i>Biodiversity, Kleiner Perlmutter, Asamer, Austria</i>

Core Values

Left:	<i>Redigerad, SBMI, Sweden</i>
Right:	<i>ANEPLA, Italy</i>

Organisational Structure

Left:	<i>Dirk Fincke, UEPG Delegates Assembly Limassol, Cyprus, Photograph by UEPG</i>
Centre:	<i>Biodiversity, ANEFA-FdA, Spain</i>
Right:	<i>Petros Kythreotis, Jim O'Brien, Sofoclis Aletraris, Entrepreneurs' Forum Limassol, Cyprus, CAPA, Cyprus</i>

European Economic Developments

Left:	<i>Final Use of Aggregates, ANEFA-FdA, Spain</i>
Centre:	<i>Heinz Zourek, Didier Herbert, Christian Haeser, DG Enterprise and Industry Brussels, Belgium, Photograph by UEPG</i>
Right:	<i>Final Use of Aggregates, ANEFA-FdA, Spain</i>



European Economic Developments (continued)

- Left: *Crushing-sorting installation, APPA, Romania*
 Centre: *Monica Soldinger, Brynjar Lund-Andersen, Svein Tonnessen, UEPG Environment Committee, Cracow, Poland, Photograph by UEPG*
 Right: *Pits, Mont-Saint-Guibert, Belgium, Fediex Quarry Visit, Photograph by UEPG*
- Left: *OAO Pavlovskgranit, Voronezh region, Russia*
 Centre: *Reinhard Bütikofer, Tom Harrison, Brian James, European Minerals Forum 2011 Brussels, Belgium, Photograph by UEPG*
 Right: *Natural restoration, GSM Pont à Mousson, France, Thierry Mamberti, Italcementi Group*
- Left: *Modernization of east part of breakwater in Świnoujście, aerial view, Katus Mikołaj, Lafarge DR Médiathèque*
 Centre: *SZVK Annual Conference, October, Stary Smokovec, SZVK, Slovakia*
 Right: *Poland, railway (railroad) E-65 Warszawa - Gdynia, in Tcew, Poland, Katus Mikołaj, Lafarge DR Médiathèque*

Economic Committee

- Left: *Quarries and activities, IAA, Israel*
 Centre: *César Luaces Frades, Carmen Ionescu, Julia Galanova, Victor Govorov, UEPG Committee Meetings Cracow, Poland, Photograph by UEPG*
 Right: *Marine Aggregates, André L / DTM Boat, Thierry Mamberti, Italcementi Group*
- Left: *Jim O'Brien, Luca Demicheli, Jerry McLaughlin, Dirk Fincke, Hans Peter Braus, UEPG Committee Meetings Cracow, Poland, Photograph by UEPG*
 Right: *Transport1_Innovative Mobiler Logistic, Asamer, Austria*

Technical Committee

- Left: *Jim O'Brien, Brian James, John Lay, Markus Schumacher, Jean-Marc Vanbelle, Aleksander Kabzinski, UEPG Committee Meetings Cracow, Poland, Photograph by UEPG*
 Centre: *Granulats recyclés Aggneo, France, Studio Luminescence, Lafarge DR Médiathèque*
 Right: *EPRA Meeting May 2012 Brussels, Belgium, chaired by Brian James, Photograph by UEPG*
- Left: *EPRA Meeting May 2012 Brussels, Belgium, chaired by Brian James, Photograph by UEPG*
 Centre right: *Ulrich Hahn, UEPG Committee Meetings Brussels, Belgium, Photograph by UEPG*
 Centre left: *Recyclage des matériaux de construction sur le site de Pontreaux (44). Une chargeuse réceptionne les granulats recyclés, Collonge Didier, Lafarge DR Médiathèque*
 Right: *Raphaël Bodet, UEPG Committee Meetings Brussels, Belgium, Photograph by UEPG*
- On side: *Xalups, Halyps, Greece*

Health & Safety Committee

- Left: *Walter Nelles, Manfred Dax, UEPG Committee Meetings Cracow, Poland, Photograph by UEPG*
 Centre: *Hillhead International Fair, Safer Machine, Photograph by UEPG*
 Right: *Jim O'Brien, César Luaces Frades, Miette Dechelle, Martin Isles, UEPG Committee Meetings Cracow, Poland, Photograph by UEPG*
- Left: *Hillhead International Fair, Safer Equipment, Exchange with Martin Isles and Machine and Equipment Manufacturers, Photograph by UEPG*
 Centre: *Michel Buzot, UEPG Committee Meetings Cracow, Poland, Photograph by UEPG*
 Right: *László Andor, César Luaces Frades, Christa Sedlatschek, EU-OSHA Campaign partnership Lisbon, Portugal, Photograph by EU-OSHA*

Environment Committee

- Left: *Biodiversity Task Force Meeting Brussels, Belgium, chaired by Robert Wasserbacher, Photograph by UEPG*
 Right: *Special UEPG Biodiversity Award 2010 for a small company, B_Rebhuhn, Josef Limberger, Welser Kieswerke Treul & Co Gmh*
- Left: *Jim Rushrowth, Endas Deinoraviciuos, UEPG Committee Meetings Cracow, Poland, Photograph by UEPG*
 Centre: *Chartre Environnement, UNICEM, France*
 Right: *Robert Wasserbacher, Arnaud Colson, François Pétry, UEPG Committee Meetings Cracow, Poland, Photograph by UEPG*
- Top page: *Hülskens GmbH & Co. KG, Wesel, Germany, co-winner of the Special Biodiversity Award 2010*
- Left: *LOL signature, Jim O'Brien (UEPG) and Monica Jacobs, UEPG Delegates Assembly, Photograph by UEPG*
 Centre: *SWSteinbr 1, T. Heinke, MIRO, Germany*
 Right: *Nicola Owen, UEPG Committee Meetings Cracow, Poland, Photograph by UEPG*



PR and Communication Task Force

- Left: *Together for Communities, the Centennial Initiative for Holcim Employees Holcim Aggregates Bulgaria volunteers, BAPIM, Bulgaria*
 Centre: *PR and Communication Task Force Meeting Brussels, Belgium, Chaired by Robert Wasserbacher, Photograph by UEPG*
 Right: *Carrières et Matériaux à Coeur ouvert, Open day Quarry visit in Paca and Corse, Unicem, France*
- Left: *Cycle Safe Campaign, MPA, UK*
 Centre: *Day of the Trees, ANEFA-FdA, Spain*
 Right: *Open Quarry Day, A&A Ruberte explicacion 6, ANEFA-FdA, Spain*

General Secretariat

- Left: *Dirk Fincke, UEPG Delegates Assembly Limassol, Cyprus, Photograph by UEPG*
 Centre: *UEPG Team, European Parliament, Brussels, Belgium, Photograph by UEPG*
 Right: *Sandrine Devos, UEPG Committee Meetings Brussels, Belgium, Photograph by UEPG*
- Left: *Miette Dechelle and Hilary Arrowsmith, UEPG PR and Communication Meetings Brussels, Belgium, Photograph by UEPG*
 Centre: *Biodiversity2_Bläuling, Asamer, Austria*
 Right: *Robert Wasserbacher and Ivana Oceano, UEPG Committee Meetings Brussels, Belgium, Photograph by UEPG*

Gain

- Left to Right: *Jim O'Brien participating to meeting organised by OSSGA, Canada, CCAA, Australia, ASOGRAVAS, Colombia*

UEPG 25th Anniversary

- Left: *UEPG Delegates Members Group, UEPG Delegates Assembly Meeting Limassol, Cyprus, Photograph by UEPG*
 Right: *UEPG Presidents and Vice-Presidents, General Secretaries, Founders, UEPG Delegates Assembly Meeting Limassol, Cyprus, Photograph by UEPG*

Members

- Left: *Carl Hennrich, Manfred Asamer, Robert Wasserbacher, UEPG Delegates Assembly Meeting, Limassol, Cyprus, Photograph by UEPG*
 Centre, left: *Gerry Farrell, UEPG Committee Meetings Brussels, Belgium, Photograph by UEPG*
 Left: *Ytzhak Bejerano, UEPG Delegates Assembly Meeting Limassol, Cyprus, Photograph by UEPG*
- Left: *Francelina Pinto, UEPG Delegates Assembly Meeting Limassol, Cyprus, Photograph by UEPG*
 Centre: *Oleg Poymanov, Julia Galanova, Vladimir Singatulin, UEPG Delegates Assembly Meeting Limassol, Cyprus, Photograph by UEPG*
 Right: *Niklas Skoog, UEPG Delegates Assembly Meeting Limassol, Cyprus, Photograph by UEPG*

Board, Committees, Task Forces, Portfolios and General Secretariat

- Left: *Manfred Asamer, UEPG 25th Anniversary, UEPG Delegates Assembly Meeting Limassol, Cyprus, Photograph by UEPG*
 Centre: *UEPG Board Meeting Brussels, Belgium, Photograph by UEPG*
 Right: *Denis Merten and Elisabeth Gammelsaeter, UEPG Board Dinner Brussels, Belgium, Photograph by UEPG*
- Left: *Nigel Jackson, Safer by Partnership Launch Initiative, Hillhead International Fair, Photograph by UEPG*
 Centre: *Alain Pasquier and Simon Van der Byl, UEPG Board Dinner Brussels, Belgium, Photograph by UEPG*
 Right: *Michael Schulz, Simon Van der Byl, Gwenole Cozigou and Martti Karkkainen, UEPG Board Dinner Brussels, Belgium, Photograph by UEPG*
- Left: *Michel Calozet, Olivier Bertrand, Jean-Marc Vanbelle, UEPG Delegates Assembly Meeting Limassol, Cyprus, Photograph by UEPG*
 Centre: *Barbara Kopczynska, UEPG Delegates Assembly Meeting Limassol, Cyprus, Photograph by UEPG*
 Right: *Pertti Peltomaa, Eija Ehrukainen and Martti Karkkainen, UEPG Delegates Assembly Meeting Limassol, Cyprus, Photograph by UEPG*
- Left: *Hermann Reifenscheid, Michael Schulz, Ulrich Hahn, Hans-peter Braus, UEPG Delegates Assembly Meeting Limassol, Cyprus, Photograph by UEPG*
 Centre: *Leonie van der Voort, UEPG Delegates Assembly Meeting Limassol, Cyprus, Photograph by UEPG*
 Right: *Ole Jakob Oanes and Elisabeth Gammelsaeter, UEPG Delegates Assembly Meeting Limassol, Cyprus, Photograph by UEPG*

Photo captions and credits

- Left: *François Pétry, Nicolas Vuillier, Michel Buzot, UEPG Delegates Assembly Meeting Limassol, Cyprus, Photograph by UEPG*
 Centre: *Andreia Pectu, UEPG Committee Meetings Brussels, Belgium, Photograph by UEPG*
 Right: *Lambros Georgiou, Antonis Antoniou Latouros, Petros Kythreotis, UEPG Delegates Assembly Meeting Limassol, Cyprus, Photograph by UEPG*
- Left: *Bjarne Overgaard, Kim Fynbo Nielsen, Simon Stig-Gylling, UEPG Delegates Assembly Meeting Limassol, Cyprus, Photograph by UEPG*
 Centre: *Jacques Grob, UEPG Delegates Assembly Meeting Limassol, Cyprus, Photograph by UEPG*
 Right: *César Luaces Frades and F. Javier Andrada Andrada, UEPG Delegates Assembly Meeting Limassol, Cyprus, Photograph by UEPG*



Photo captions and credits (continued)

- Left: *Demetris Vattis, UEPG Committee Meetings Cracow, Poland, Photograph by UEPG*
- Centre left: *Benoît Lussis, UEPG Committee Meetings Brussels, Belgium, Photograph by UEPG*
- Centre right: *Katarzyna Wasilewska, Jost-Peter Sonnenberg, UEPG Committee Meetings Cracow, Poland, Photograph by UEPG*
- Right: *Yves Adam, UEPG Committee Meetings Brussels, Belgium, Photograph by UEPG*
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- Left: *Mark Russell, UEPG Marine Aggregates Task Force Brussels, Photograph by UEPG*
- Centre left: *Björn Strokirk, UEPG Committee Meetings Brussels, Belgium, Photograph by UEPG*
- Centre right: *Ernst Honegger, UEPG Committee Meetings Cracow, Poland, Photograph by UEPG*
- Right: *Michael Rademacher, UEPG Biodiversity Task Force Brussels, Belgium, Photograph by UEPG*

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