



Annual Review  
2014-2015

# EUROPEAN AGGREGATES ASSOCIATION

A Sustainable Industry  
for a Sustainable Europe



# List of Contents

<b>What is UEPG and What are Aggregates?</b> Infographic	p. 04
<b>Editorial</b> A year of Change	p. 06
<b>UEPG Achievements in 2014-15</b>	p. 07
<b>Our Values</b> Our Vision, Mission, Core Values and Ambitions	p. 08
<b>Our Organisational Structure</b> Designed to ensure optimal efficiency and effectiveness in all UEPG activities	p. 09
<b>European Economic Developments</b> An overview of European 2013 production data and economic trends	p. 10
<b>Economic Committee</b> Raw Materials Strategy, Resource Efficiency, Market Based Instrument, SDIs	p. 13
<b>Technical Committee</b> Construction Products Regulation, Environmental Products Declaration and Release of Dangerous Substances, Recycled Aggregates, Standards	p. 15
<b>Health &amp; Safety Committee</b> Respirable Crystalline Silica and NePSi, Evaluation of 24 Occupational Safety and Health Directives, Prevention of Accidents, UEPG "Safer by Design" project, Implementation of the 'Track and Trace' Directive on explosives for civil uses	p. 18

## WHAT IS UEPG?



Rue d'Arlon 21 ▲ 1050 Brussels ▲ Belgium  
T +32 2 233 53 00 ▲ secretariat@uepg.eu ▲ www.uepg.eu  
EU Transparency Register: 15340821653-49

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

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



## **Environment Committee**

Review of the Environmental Impact Assessment Directive, Natura 2000 Fitness Check, Mining Waste BREF review, Biodiversity, Water Management and Marine Aggregates

p. 20

## **PR & Communications Task Force**

Exchanges of Best Practice, Promotion of the Industry image and initiatives, SDA Exhibition and Vision 2020

p. 22

## **General Secretariat**

Your team in the Brussels office

p. 24

## **International and European Network**

How UEPG benefits from international and European contacts with other aggregates associations

p. 27

## **UEPG Members**

Get in contact, keep in touch

p. 28

## **Board, Committees and Task Force Chairs, Portfolios and General Secretariat**

Profiting from the UEPG network

p. 29

## **Photo captions and credits**

p. 32

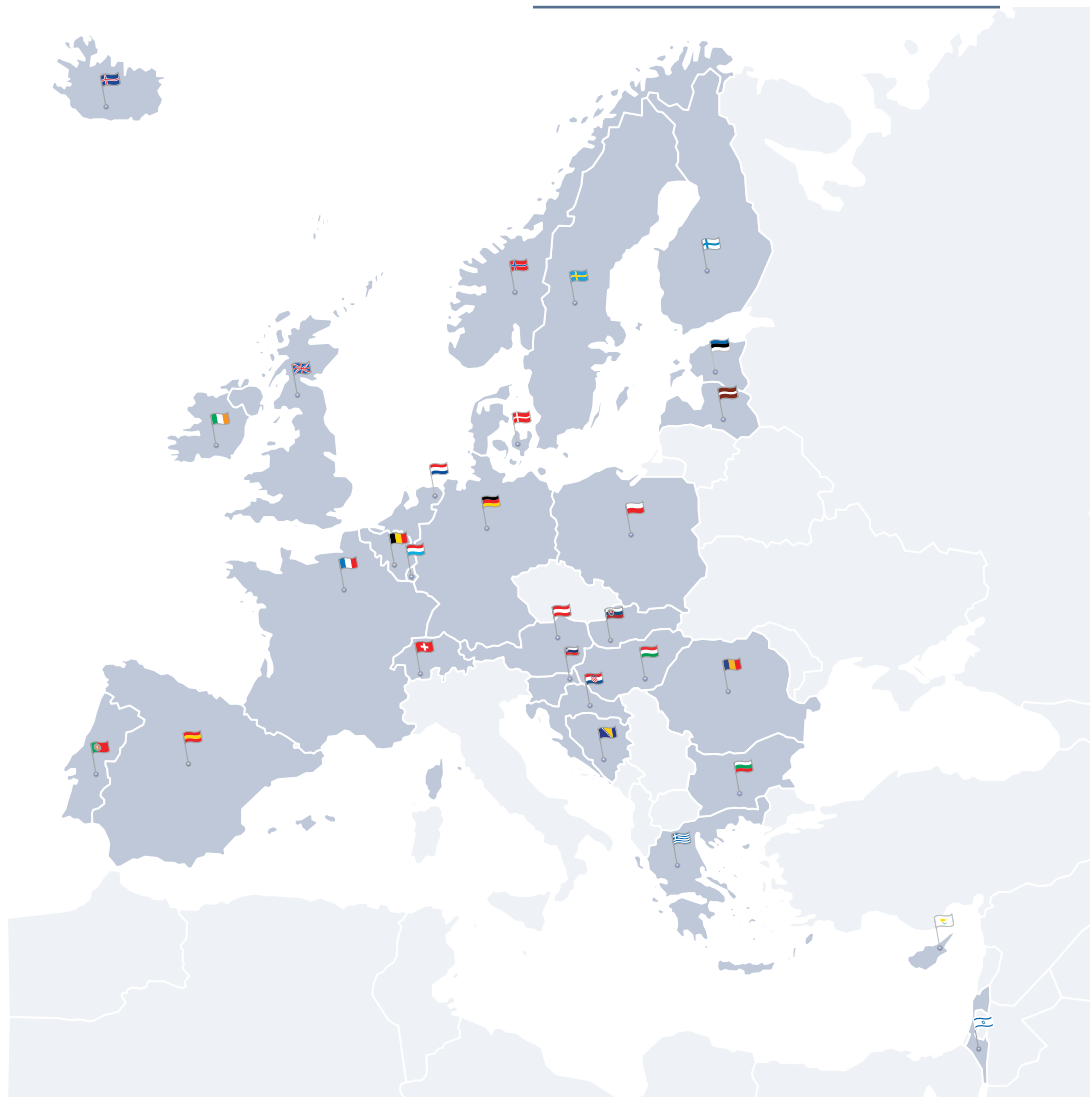
## **UEPG Network of Experts**

A network of experts in 29 Members countries

p. 34

# UEPG in a Nutshell

UEPG has Members in  
**29 countries.**



The European [EU28+EFTA, 2013] aggregates production is



**2.6 billion**  
tonnes/year,  
representing an annual turnover  
of an estimated €15 billion.

The aggregates industry comprises



**15,000**  
companies (mostly SMEs),

producing at



**25,000**  
sites (quarries and pits)

Aggregates demand is just on



**5 tonnes**  
per capita per year.

with just over



**200,000**  
people employed  
(including contractors).

The aggregates sector is by far



**the largest**  
amongst the non-energy  
extractive industries

in numbers of sites, companies, numbers  
employed and tonnages produced.

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

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



Aggregates are produced from natural sources extracted from quarries and 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.

## DID YOU KNOW THAT?

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



# Editorial

## A year of change

2014 was a year of political change with the European elections, new political groups appearing in the European Parliament, and the new European Commission taking office. The Juncker-Commission brought fresh wind and a new approach on being "big on big things and small on small things". With careful optimism, the Juncker-Investment Plan and better regulation cutting red-tape are initiatives in the right direction.

UEPG got in contact with new EU decision-makers to present the achievements and ambitions of the European Aggregates Industry. Despite the economic crisis, still heavily present in our sector, 2014/15 again demonstrated that aggregates producing companies relentlessly improve their performance in Environmental, Technical, Health and Safety and Economical aspects.

UEPG focused on contributing to the EU Raw Material Strategy, the Circular Economy and Resource Efficiency, the Natura 2000 Fitness Check and Biodiversity, Safer and Healthier Workplace, the evaluation of the Occupational Safety and Health Directives, technical standards and the implementation of the Construction Products Regulation. UEPG has achieved numerous benefits and savings for aggregates producers which are outlined in this Annual Review.

UEPG continues to aim for a sustainable supply of aggregates essential to society, to contribute to the recovery of the European Aggregates Industry, its competitiveness and growth, to enhance a Health and Safety culture and a European Social Dialogue, to contribute to the environment and biodiversity, and to build consistent operational standards for our sector. This work would not have been possible without continued close cooperation, shared responsibility and recognised trust of all UEPG Members.

A highlight was the UEPG Sustainable Development Awards Exhibition to present rewarded companies in Europe for their excellence. More than 50 entries of best practice on Social, Economical, Environmental and Biodiversity stewardship were showcased at several occasions in Brussels.

UEPG also published its Vision 2020 for a Sustainable Industry in a Sustainable Europe. The brochure is available on the UEPG website translated in several languages.

2015 is the pursuit of this ongoing activities on behalf of our industry to continue to be carried on by our highly efficient UEPG Team based in Brussels. Progress will be driven by our highly-dedicated Committees, Task Forces and Working Groups, relying on the support of all our Members to keep UEPG on its path of continuous improvement, leading initiatives and cooperation towards true sustainability and resource efficiency.



ARNAUD COLSON  
UEPG President 2012-2015

“ I wish my successor as President, Jesús Ortiz, the very best to carry on the great work and to strengthen UEPG with the support of our General Secretariat in Brussels and to deliver a message of cohesion to UEPG Members in 29 countries. ”

Arnaud Colson,  
UEPG President 2012-2015

## UEPG Achievements in 2014-2015



UEPG monitored closely the withdrawal of the **Circular economy** package and the opportunity to contribute to the new proposal in 2015. UEPG positioned clearly itself on Resource efficiency indicators. **Biodiversity** also remained a top priority. UEPG organised national workshops on Biodiversity with the support of its members. UEPG audited closely the ongoing process of the **Natura 2000** Fitness check. UEPG was part of the stakeholders' consultation process for the Mining BREF Review.



UEPG maintained its monitoring of the good implementation of the **Construction Product Regulation (CPR)**. UEPG strongly supported within the CPR implementation the reduction of the bureaucratic burden and especially to avoid the duplication of information provided with DoP and CE-marking. The Technical Committee kept monitoring and was actively involved in the drafting and revision of **standards**. A leaflet on key messages for **recycled aggregates** was produced.



UEPG Members further committed and acted to continuously improve prevention on site to reach **zero accidents** and a **health and safety culture**. UEPG contributed to the several consultations on the evaluation of **24 Occupational Safety and Health Directives**. UEPG lead the **Explosives** for civil uses Task Force to ensure a good implementation of the 'Track and Trace' Directive. UEPG promoted the EU-OSHA Campaign on **Stress at work** towards its Members.



UEPG Committee Meeting closely monitored the **Accounting Directive** and positioned clearly on resource **taxation** and other market based instruments. UEPG contributed to consultations, studies and questionnaires from the European Commission on **Raw Materials** Data, thanks to UEPG sustainable development indicators and UEPG members.



The positive aspects of the European Aggregates Industry became more visible due to the input from written positions and contributions to several high level meetings and conferences, including the Sustainable Development Awards Exhibition. UEPG also tighten its cooperation with NEEIP Members, organised the first **NEEIP Forum**, and other Platforms as **SNAP-SEE** and **GAIN**.

To know more on these above actions, take the time to read this report...

## Our Vision, Mission, Core Values and Ambitions

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 Ambitions are as follows:



1. **To place excellence in health and safety** at the centre of our activities with an objective of "Zero harm" to all Industry's employees, contractors and sub-contractors and visitors.
2. **To ensure sustainable access** to primary local resources, optimising transport, with the aim of land-use for extraction to be recognised as an activity of public interest similar to agriculture, forestry, water and nature which should receive the same priority.
3. **To develop the "circular economy"** through efficiency, recycling and restoration to demonstrate the contribution of the Aggregates Industry to the Circular Economy.
4. **To assist** in improving a streamlined national land-use planning and permitting policy to encourage and assist all UEPG Members to have a national aggregates planning policy in place.
5. **To create and maintain a level-playing-field** through consistent implementation of EU law with the aim of consistent implementation and enforcement of existing EU/national legislation.

6. **To promote the compatibility of aggregates extraction and the environment**, with the objective for UEPG to assist its Members in achieving that responsible aggregates extraction should not be automatically prohibited for environmental reasons.



7. **To improve public awareness of aggregates extraction** as beneficial to society for every UEPG Member to have a national public relations campaign in place to ensure positive appreciation of the benefits of the sector to society.
8. **To promote the added value of the Aggregates Industry** for local communities, with the objective to encourage UEPG Members to undertake public events, develop communication tools and PR training.

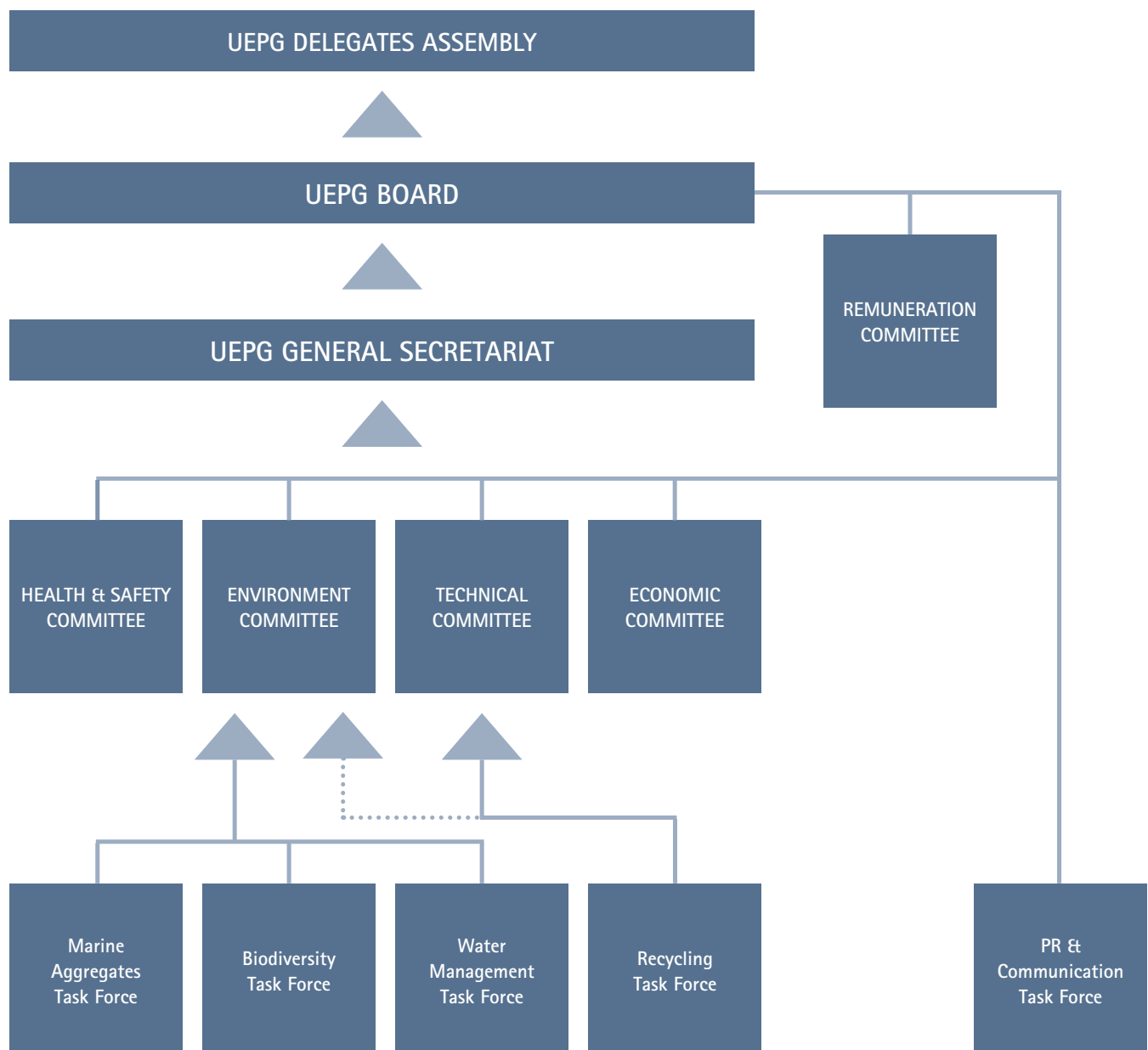


9. **To showcase the Industry** as an attractive career, in particular for young people and to encourage UEPG Members to raise awareness in public relations, job agencies and educational institutions about the career opportunities for both genders.
10. **To ensure responsible sourcing and excellence** in customer service and satisfaction to get Industry recognised as a trusted and responsible supplier of goods and services with all its customers in the downstream sectors, particularly the concrete and asphalt industries.

The 10 above ambitions are part of the Vision 2020 Brochure. More information is available at [www.uepg.eu/publications/special-editions](http://www.uepg.eu/publications/special-editions).



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



Each year, UEPG gathers and collates **best available aggregates production data** from right across Europe. The data for 2013 for 39 countries is presented in Table 1, together with the sub-totals for the EU 28 plus EFTA countries as well as for the EU28 countries only. Although data quality improves year by year, it is by no means perfect. However, UEPG data is now regarded as probably the most authoritative available. It remains challenging to assemble exact data for an industry that is comprised predominantly of SMEs.

**Figure 1** summarises the 2013 national production tonnages by country and by type of aggregates. Russia and Germany produce just on 550 million

tonnes (mt) each, followed by Turkey, France and Poland. At the other end of the scale are the smallest countries, namely Cyprus, Iceland, Montenegro, Luxembourg and Malta, with less than 5mt each.

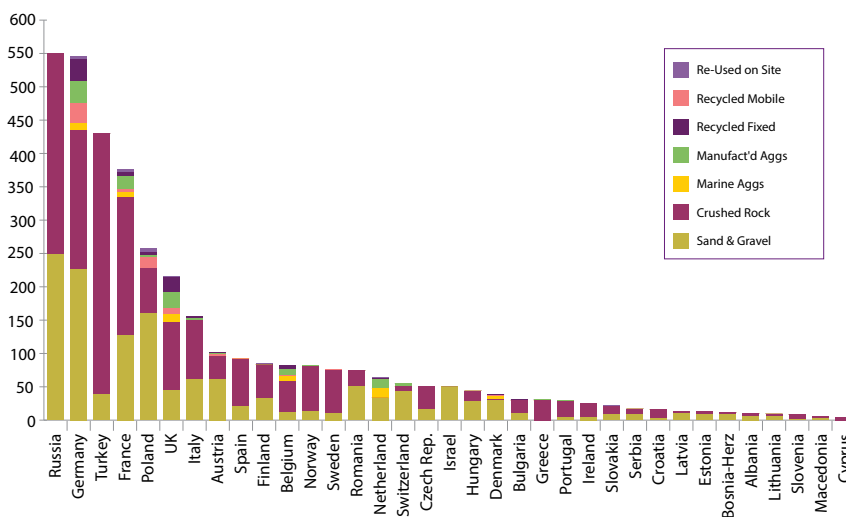
Taking the EU28 plus EFTA countries, 46% of all production remains as crushed stone; the sand & gravel component has declined by about 1% a year to 40% in 2013. In parallel, aggregates production from recycled and re-used materials has now risen to 8% of all production. The remaining 6% remains almost evenly split between marine and manufactured aggregates.

**The European Aggregates Industry is demonstrating its commitment to the Circular Economy** through producing no less than 286mt of secondary materials in 2013, including recycled, re-used and manufactured aggregates within that overall total, which now corresponds to an impressive 11% of all aggregates production. The leading countries are the UK, Netherlands and Malta, each with over 20% of national production comprised of secondary materials. These are followed by Belgium, Germany, Poland and Switzerland, with between 10% and 20% of their national productions comprised of secondary materials. Production of secondary materials in other countries is slowly increasing, though may not be as technically or commercially viable in countries of lower population density. It is likely that recycling is in many cases not fully reported, so that actual progress maybe greater.

**The 2013 total production of 2.6 billion tonnes (bnt)** for EU28 plus EFTA countries declined 3.4% versus the 2012 figure, again demonstrating the continued negative effect of recession across Europe. The overall 2013 tonnage was 30% below the 2007 peak of 3.7bnt; the worst-hit countries, like Cyprus, Ireland, Greece, Spain and Portugal suffered around 80% declines in their national markets.

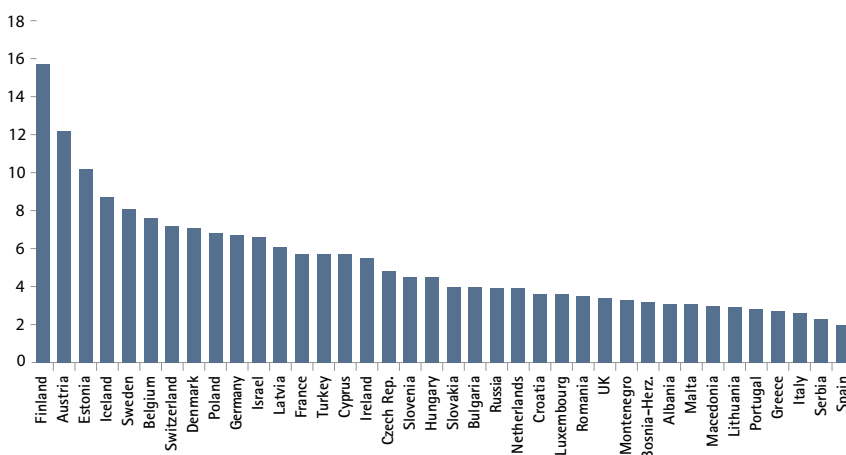
It is noteworthy that while aggregates production declined in Europe by 30% since 2007, the asphalt sector suffered a similar decline, while the cement and readymixed concrete sectors suffered declines of 40% and 45% respectively. It would appear that the relative resilience of the aggregates sector was assisted by the diversity of its markets and product end-uses.

**2013 National Tonnage (mt)**



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

**2013 National Tonnes per Capita**



**Figure 2** National Production per country in tonnes per Capita

Analysis also shows that, in EU plus EFTA, the number of companies has since 2007 declined by approximately 7,000 to 15,000 in 2013. Still more dramatic is the fact that the industry has lost over 50% of its workforce since 2007 to a figure of just over 200,000 employed in 2013. The total numbers of quarries and pits remained constant at just over 25,000, though many of these doubtless have been mothballed in recent years.

Figure 2 demonstrates the national productions of aggregates in tonnes per capita, again led by Norway and Finland with approximately 16 tonnes/capita, while recession-hit Spain was the lowest with an unsustainable 2 tonnes/capita. As before, national tonnages are noted to depend not only on economic strength, but also on geological availability of and access to deposits, national ambient climate, ruggedness of the terrain and local building traditions. The average 2013 production across the EU28 plus EFTA countries declined to 5.0 tonnes/capita compared to 7.2 tonnes/capita in 2007.

Figure 3 compares the 2013 data for national tonnes/capita to its GDP/capita. Each point on the graph represents individual countries, and the green line shows the overall trend. This graph demonstrates that the need for aggregates in tonnes/capita grows as an economy grows, which is hopefully good news for the aggregates industry, once the current prolonged and deep recession is ended.

Figure 4 demonstrates the anticipated tonnages in 2014 compared to 2013. The green bars represent those countries expecting some growth in 2014, most significantly Hungary and Turkey, while the countries with purple bars, particularly Cyprus and Estonia, had the most pessimistic outlook. The overall industry prediction is that for EU plus EFTA the overall 2014 tonnage will be another 1% down on 2013, to just under 2.6 bnt, though there is the hope, based on industry hearsay, that the actual outcome might be even just 1% positive after seven years of decline.

The latest Euroconstruct projections have been tempered in outlook to just under 2% growth in 2015, with maybe slightly over 2% growth in 2016 and 2017, with the corresponding outlook on aggregates production shown illustratively in:

### 2013 GDP/capita v Tonnes/capita

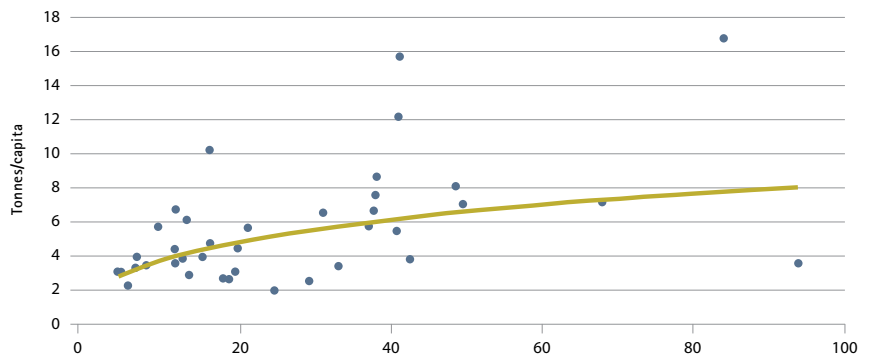


Figure 3 Correlation between tonnes per capita (vertical axis) and GDP per capita (in €1000)

### Predicted Tonnages 2014 v 2013

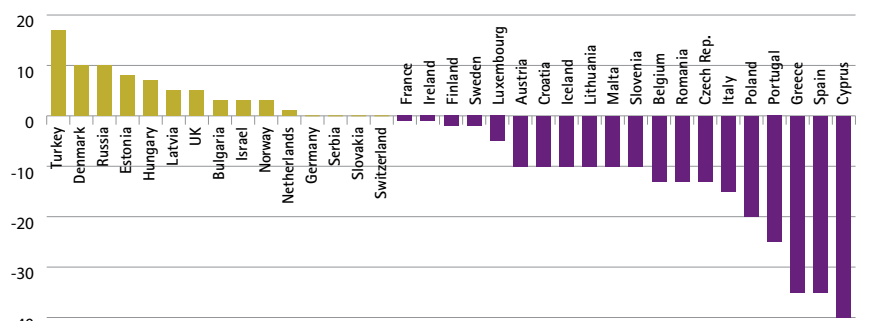


Figure 4 Predicted variation in tonnages between 2013 and 2014 by country

### Billions Tonnes EU+EFTA

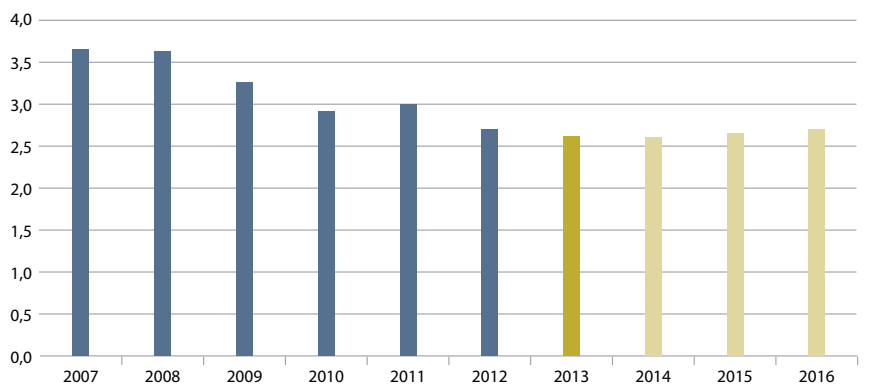


Figure 5 Trend in 28 EU plus EFTA tonnages by year (in billions of tonnes)

Figure 5. However, achieving such a continued return to growth assumes the political will and ability to stimulate the conditions for economic stability and revival in Europe. The European Aggregates Industry, now even leaner, greener and more sustainable than ever before, is ready to play its part in that much-awaited return to economic growth.

## Best Estimates of Aggregates Production Data for 2013



	UEPG Status	Total Number of Producers (Companies)	Total Number of Extraction Sites (Quarries and Pits)	Sand & Gravel (millions tonnes)	Crushed Rock (millions tonnes)	Marine Aggregates (millions tonnes)	Manufactured Aggregates (millions tonnes)	Recycled Aggregates (millions tonnes)	Re-Used on Site (millions tonnes)	Total Production (millions tonnes)
Albania	NM	15	30	6	4	0	0	0	0	10
Austria	FM	1068	1362	63	33	0	2	4	0	102
Belgium	FM	79	112	13	46	8	1	15	0	82
Bosnia-Herzegovina	AM	15	30	9	3	0	0	0	0	12
Bulgaria	AM	217	295	11	19	0	0	1	0	32
Croatia	AM	170	250	4	12	0	0	0	0	16
Cyprus	FM	24	24	0	5	0	0	0	0	5
Czech Rep.	NM	166	333	17	33	0	0	0	0	50
Denmark	FM	222	355	31	0	5	1	2	0	39
Estonia	AM	190	280	9	4	0	0	0	0	13
Finland	FM	567	2530	34	49	0	0	1	0	85
France	FM	1369,179	2656	128	206	8	5	25	5	376
Germany	FM	1527	3034	228	207	10	30	66	5	546
Greece	AM	138	190	0	30	0	0	0	0	30
Hungary	AM	461	760	30	15	0	0	0	0	44
Iceland	AM	28	56	2	0	0	0	0	0	3
Israel	AFM	34	69	50	0	0	0	0	0	50
Ireland	FM	105	440	5	20	0	0	0	0	25
Italy	NM	1120	1800	62	88	0	0	5	0	155
Latvia	FM	55	105	12	2	0	0	0	0	14
Lithuania	NM	30	205	7	3	0	0	0	0	10
Luxembourg	AM	7	10	1	1	0	0	0	0	2
Macedonia (FYROM)	NM	8	15	4	2	0	0	0	0	6
Malta	NM	15	16	1	1	0	0	0	0	2
Montenegro	NM	7	12	1	1	0	0	0	0	2
Netherlands	FM	235	212	33	0	15	0	16	0	64
Norway	FM	863	992	14	66	0	0	2	0	82
Poland	AM	1828	2791	161	66	0	17	8	5	257
Portugal	FM	240	261	6	23	0	0	0	0	29
Romania	FM	900	1050	52	23	0	0	0	0	75
Russia	NM	1181	1485	250	300	0	0	0	0	550
Serbia	NM	20	65	10	7	0	0	0	0	17
Slovakia	AM	259	267	9	12	n/a	0	0	0	22
Slovenia	AM	110	155	2	7	0	0	0	0	9
Spain	FM	1025	1080	22	70	0	0	1	1	93
Sweden	FM	481	1391	11	64	0	2	0	0	76
Switzerland	FM	537	526	44	6	0	0	5	1	56
Turkey	NM	750	780	40	390	1	0	0	0	431
UK	FM	717	1293	46	101	11	10	46	2	216
<b>39 Countries</b>		<b>16783</b>	<b>27317</b>	<b>1426</b>	<b>1917</b>	<b>57</b>	<b>68</b>	<b>198</b>	<b>20</b>	<b>3686</b>
<b>EU 28 + EFTA</b>		<b>14753</b>	<b>24831</b>	<b>1056</b>	<b>1210</b>	<b>57</b>	<b>68</b>	<b>198</b>	<b>20</b>	<b>2609</b>
<b>EU 28 only</b>		<b>13325</b>	<b>23257</b>	<b>996</b>	<b>1138</b>	<b>56</b>	<b>68</b>	<b>191</b>	<b>19</b>	<b>2468</b>

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

In 2014–2015, the UEPG Economic Committee focused mainly on the implementation of the EU Raw Materials Strategy for a transparent and consistent land-use planning and permitting policy to improve the legal framework conditions of sustainable access to resources in Europe. In the meantime, the Committee's attention was on the development of the Circular Economy Package and the Resource Efficiency's initiatives on developing indicators. Much debate took place on resource taxation and further developing sustainable development indicators (SDIs) for the whole Industry.

These activities are particularly important in the context of first signs of economic recovery in Europe, increasingly difficult access to raw materials and the need to improve resource efficiency and data on material flow.

### EU Raw Materials Strategy

UEPG has contributed to the development and implementation of the EU Raw Materials Initiative since it was launched in 2008, subsequently to the Communication in 2010



till now. The three pillars' approach of the Initiative addressing (1) critical raw materials, (2) improving the legal framework conditions to ensure access to resources within the EU and (3) resource efficiency and recycling remained. DG GROW (former DG Enterprise & Industry) used the European Commission Raw Materials Supply Group (RMSG) and the European Innovation Partnership (EIP) as the key tools to achieve progress. A Public Consultation on land-use planning and permitting in 2014 and the possibility of proposing a Framework Directive might not be followed up under the new European Commission. DG GROW currently identifies other policy areas and ways to **ensure sustainable access to resources** within the EU through a transparent and

consistent land-use planning and permitting policy. UEPG recommended to representatives of DG GROW to support non-energy extractive industries on the Natura 2000 Fitness Check as part of a better land-use planning policy.

### Resource Efficiency

In 2011, the European Commission published a Communication on Resource Efficiency, together with a Roadmap. The main target of the Communication was to stimulate ways of producing goods with less primary resources (economic decoupling). Consequently, DG Environment had set up a [European Resource Efficiency Platform \(EREP\)](#) comprised of high-level representatives from the European Commission, Members of the European Parliament, Environmental NGOs, Academia and Industry. EREP had recently presented policy recommendations including a weight-based and consumption-focused lead indicator without taking into account the environmental impact during extraction and long-term application of the raw material, i.e. the sustainable use in construction.

A number of additional indicators on land, water, soil, biodiversity and other areas intend to compensate the shortcomings of the lead indicator. UEPG and other Members of the Industry Delegation aligned their messages while still stressing the differences and varieties among the sectors, especially in the context of the ongoing work of the Circular Economy package and towards the new European Commission in charge of this dossier.

UEPG underlines that the **Aggregates Industry is a local Industry** with hardly any international trade. What matters to aggregates producers is local access to resources to reduce the **environmental and economic costs of transport**. This requires a coherent land-use planning and a simplified permitting procedure allowing



sufficiently long permits to extract the full economically viable deposit rather than closing a non-exhausted site. UEPG further expressed concerns that the proposed weight-based lead-indicator (GDP/tonne) would penalise the European Aggregates Industry under a one-fits-all approach. 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 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.

### Market Based Instruments

UEPG raised concerns on resource taxation which is addressed by some decision-makers and studies, which can content weaknesses and factual errors. Although, the general policy is to shift the cost burden from labour towards resource use, the implementation of any taxation policy would strictly remain with EU Member States respecting the subsidiarity principle. In 2014, the new UEPG Working Group on Market Based Instruments lead by Jerry McLaughlin (MPA, UK) produced a position paper on collecting arguments on why resource taxation would have negative side-effects and that resource efficiency and recycling can be achieved without taxation.

### SDIs

UEPG Members under the leadership of Jim O'Brien, UEPG Past President, provides each year Sustainable Development Indicators to know the state of play of the Industry in Europe and to be able to continuously improve efficiently and sustainably operations for the benefits of local economies, the environment and communities.

*Over this period, the work of the Economic Committee was led by Hans-Peter Braus (MIRO, Germany) and, Jerry McLaughlin (MPA, UK) as Vice-Chair, with the active support of UEPG Members.*



The UEPG Technical Committee continued working in 2014-2015 on Recycling, Construction Products Regulation, Release of Dangerous Substances, Environmental Products Declaration, and European Aggregates Standards, with the objective of maintaining a truly open, competitive and sustainable European market for natural, recycled, marine and secondary aggregates.

## Construction Products Regulation (CPR)

The 2011 EU Regulation, which replaced the Construction Product Directive, was designed to simplify and clarify the existing framework for placing construction products on the market.

In 2014-2015, the UEPG Technical Committee contributed to several initiatives of CPE (Construction Products Europe) for an efficient and sustainable application of the Regulation within the Aggregates Industry.

Among the many actions taken was the acute involvement of UEPG within the CPE Report on the application of the Regulation by Manufacturers, the reply to the online survey on both the positive and onerous aspects of the Regulation, the revision and proposals for the model of Annex ZA and the questioning and positioning on standardisation of CPR.

Within this process of application, UEPG was strongly campaigning for **reducing the bureaucratic burden and especially the duplication of information provided within the Declaration of Performance (DoP) and CE-marking.**

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

A Model EPD for aggregates had previously been approved for general use and may, whenever desired, be adapted to local conditions by individual users. **This model is on a cradle to gate basis.** It includes all natural aggregates, that is, sand, gravel, crushed rock, marine aggregates as well as recycled aggregates. It has been stated that EPDs will not automatically become obligatory after CPR implementation. They may become

"the common tool" if requested by national regulators and/or customers or regulated by the Commission through a delegated act.

Additionally, EPDs could be a way to address BWR7 (Sustainable Use of natural resources). In view of the latest developments, it became necessary to develop Product Category Rules (PCR) within CEN/TC 350.



The Regulated Dangerous Substance & Environmental Product Declaration (RDS & EPD) Working Group led by Brian Bone (MPA, UK) will continue the work initiated by Raphaël Bodet (UNPG, France) to prepare a draft on Product Category Rules.

The UEPG WG has started to refine a geological/ petrographic description approach for crushed rock and to collate existing data for sand and gravel. The purpose of this geological description is to enable the formation of clusters of aggregate sources to elaborate technical dossiers proving the absence of necessity for further testing of those aggregates.

Robustness testing of CEN TC 351 Draft Leaching Test Methods is completed. Based on the results of this study, CEN TC 351 WG1 has proposed two percolation tests. This possibility of choice has been rejected by TC351 and the European Commission. TC351 consequently drafted a proposal for a new compromise percolation test, different from the former two. The UEPG WG will continue to monitor the work of TC351 WG1

and apply pressure to validate the current compromise percolation test methodology. UEPG will also propose some simplifications of the test methods for aggregates for TC 154 SC6 and WG13 and decide how to implement the TC351 tests for aggregates. At the same time, the UEPG WG will also monitor the developments regarding radioactivity measurement in construction products under the Euratom Directive.



### Recycled Aggregates

The main deliverables of the UEPG Recycling Task Force, chaired by Brian James (MPA, UK) are to give clear definitions of recycled aggregates, to increase the level of reliability of data and statistics and to encourage the possible use of recycled aggregates for the most appropriate application at the place of use. The Task Force promotes good practices and an adequate legislative framework. **Recycling is a key issue in resource efficiency**, an important aspect of sustainable construction and features significantly in the circular economy proposals, all three being EU Initiatives.

In 2015, UEPG published a leaflet with key messages on Resource Efficiency, Recycling and End of Waste Criteria for Recycled Aggregates. This, together with a number of meetings and presentations to the European Commission, increased UEPG's visibility as a key stakeholder in the lively debate on recycling.

UEPG organised a site visit for the Consultants working on a European Commission contracted study to boost the recycled aggregates market. The site visit took place on 24 March, close to Lyon (France), with the objective to demonstrate that **recycling of aggregates could be a complementary activity to sustainable extraction of natural aggregates**. France and other EU Member States have achieved high recycling rates without a resource tax in place. A regional branch of the French Aggregates Association (UNICEM Rhône Alpes), with the help of its Secretary General Dominique Delorme, hosted several aggregates site visits, showing examples of extraction, recycling and restoration and demonstrating that the Aggregates Industry is part of the circular economy. Participants included Brian James, Chair of the Recycling Task Force, Michel Zablocki (UNPG, France) and Mark Tomlinson (Lafarge, Greece), members of the UEPG Recycled Aggregates Task Force, Sandrine Devos from the UEPG General Secretariat, and Jurgen Vermeulen, Consultant from Ecorys working on





a study commissioned by DG Internal Market, Industry, Entrepreneurship and SMEs (DG GROW, [ec.europa.eu/growth](http://ec.europa.eu/growth)) on "Analysis of certain waste streams and the potential of Industrial Symbiosis to promote waste as a resource for EU Industry". The visit allowed Mr. Jurgen Vermeulen to first-hand witness on the day-to-day challenges of the Aggregates Industry and the real potential of recycling, both to be reflected in his report.

### European Aggregate Standards

The main developments are related to the revision of harmonised product standards by TC 154.

In December 2013, the CEN Management Centre (CCMC) decided to withdraw some newly approved 2013 standards and reactivated the 2002 versions. This was a result of the situation surrounding the 2013 versions of EN 12620, EN 13043, EN 16236, EN 13139, EN 13242, EN 13383-1 and EN 13450. Indeed, the published standards contained some errors, which were to be addressed. It was planned that TC154 would have proceeded with a corrigendum to rectify editorials errors, followed by an amendment to correct technical matters. The French CEN-Member AFNOR considered these amendments as technical changes. As a result, the CEN Management Centre decided that a serious breach of CEN rules had taken place. The TC154 plenary meeting decided in July 2014 to present drafts for full CEN Enquiry, rather



than choosing the shorter and more risky UAP (Unique Acceptance Procedure). This enables all the technical changes to be made during the CEN Enquiry which would not be possible using the UAP route, thereby preventing the possibility of reproducing the same errors as in 2013. After CEN Enquiry and once amended, the draft standards will be presented to final vote for publication in 2016/2017 provided no country will block the process by introducing a formal objection against the standards.

Since the beginning of the procedure, the Technical Committee had been very active and expressed a strong disappointment in the delays encountered at CEN level for prEN 12620, 13043, 13139, 13242, 13383-1, 13450 and 16236.

*The Technical Committee is run by its Chair Jean-Marc Vanbelle (FEDIEX, Belgium), Vice-Chair, Markus Schumacher (MIRO, Germany) and Secretary John B-Bullock (MPA, UK).*





In 2014–2015, Health & Safety Committee Members promoted a Health and Safety culture working towards Zero Harm in each member country. Within this assignment, the Committee contributed to the control of Respirable Crystalline Silica on site as part of the Social Dialogue Agreement NePSi, the evaluation of 24 Occupational Safety and Health Directives, the prevention of accidents and the implementation of the 'Track and Trace' Directive on explosives for civil uses for the whole supply chain.

### Respirable Crystalline Silica (RCS) and NePSi



UEPG believes that prevention is crucial. The focus of the NePSi EU Social Dialogue Agreement on Respirable

Crystalline Silica lies with the **good handling and use which**, it is widely agreed, **provides adequate control measures and workers protection guidance**. In reality, the biennial NePSi Reporting provides unique incentives to companies to improve continuously the protection of workers.

In 2014, UEPG and the NePSi Secretariat met Construction Employer and Employee representatives to inform and advocate on the NePSi activities, good practices and advantages. The grant request to the European Commission for a NePSi didactic Communication Campaign was accepted. The kick-off meeting for this one-year project took place in May 2015. The European Commission Social Dialogue Unit of DG Employment hired the Brussels based Consultancy "Inner City Fund" (ICF) to evaluate the implementation of the Social Dialogue Agreement to which NePSi signatories would contribute. A new study of the German based Institute BIPRO, as a follow-up to the socio economic study, had been finalised. It analysed the exposure reduction of Respirable Crystalline Silica achieved through requirements laid down in the Carcinogens and Mutagens Directive (CMD) and Chemical Agents Directive (CAD) and undertook a cost comparison. The study concludes that the relatively inexpensive total costs under the CAD achieve similar exposure reduction (below 0.1 mg/m<sup>3</sup>) to that under the CMD. The full report of this study was presented to the European

Commission which showed interest to receive more information and data on RCS on site. In March 2015, Members of the Health & Safety Committee approved the creation of a UEPG RCS Working Group, chaired by Martin Isles (MPA, UK), to focus efforts via a small group of experts on collecting data, information and discussing actions needed.

### Evaluation of the 24 Occupational Safety and Health Directives

In 2014, COWI (IOM Consulting, Denmark) has been subcontracted to support the European Commission in evaluating 24 EU Occupational Safety and Health (OSH) Directives, including Directives on surface and underground mineral-extracting industries, Carcinogens and Mutagens at Work, Chemical Agents, Noise and Vibration, and the Framework Strategy. The findings of the evaluation were presented at the Advisory Committee Safety and Health (ACSH) of the European Commission by June 2015. Then, the European Commission would consider ACSH's opinion, the Members' States reports and an internal analysis with the aim of presenting proposals by the end of 2015. UEPG was selected as a **key stakeholder in the context of a consultation process and provided input to each step of the COWI evaluation process reports**. The Standing Working Party for Extractive Industries, to which UEPG is a Member, represented by Walter Nelles (MIRO, Germany), was also consulted through a questionnaire. UEPG Members were informed on the whole work of the Advisory Committee for Safety and Health of the European Commission and requested to contribute.



## Prevention of Accidents

Following the call of President, Arnaud Colson, the majority of UEPG Members now have **national Health & Safety Committees** in place. This should allow to address national challenges consistently and to follow-up European Initiatives more effectively. Only 17 Members provided 2013 SDI data on H&S. If the Aggregates Industry is to review progress on accident prevention, and all UEPG Members need to commit to provide data. UEPG became a **member of the EU-OSHA's 2014-2015 "Healthy Workplaces Campaign" on managing psycho-social risk**, informing, educating and disseminating information, material, activities and good practice examples of the campaign.

## UEPG "Safer by Design" project

UEPG cooperated with the Administrative Cooperation (ADCO) Working Group on Machines and Equipment to suggest Safer by Design recommendations to be considered for European standards. UEPG participated regularly



in the EC Machinery Working Group and the UK Mineral Products Association (MPA) continues to fund User participation in key meetings of Standardisation bodies. UEPG is a liaison observer of the Technical Standardisation Committee CEN/TC 151 on Construction Equipment and Building Materials Machinery Safety and working groups. A formal objection against the harmonised European standard EN 474-1 was issued in March 2014 and CEN/TC 151 was now working on a new standard to which UEPG was invited to contribute. UEPG Members were required to



provide evidence of progress on 'Safer by Design'. Some UEPG Members such as INFRA RY (Finland), MIRO (Germany), SBMI (Sweden) and UNPG (France) already met machinery manufacturers to promote the project 'Safer by Design' at National level. On several occasions, UEPG met CECE (Committee for European Construction Equipment Secretariat) in Brussels to brief them on 'Safer by Design' and offered cooperation.

## Implementation of the 'Track and Trace' Directive on explosives for civil uses

UEPG supports the 2008/43/EC Directive, pursuant to the Directive 93/15/EEC, amended by Directive 2012/4/EU dedicated to setting up a harmonised system for the identification and traceability of explosives for civil uses. To better accompany its implementation, **UEPG-led Task Force** on Explosives for civil uses was created, chaired by César Luaces Frades (FdA, Spain). This Task Force comprises experts from the European Commission, the Explosives Manufacturers and Engineering, IT experts and End Users from the Extraction Industries. The Task Force developed an Action Plan, Guidance documents for the whole supply chain and for end users only, available in 8 languages, FAQ, which all can be downloaded from the Task Force website at [www.explosives-for-civil-uses.eu](http://www.explosives-for-civil-uses.eu). EU Member States were informed about the tools and documents produced by the Task Force.



*Over this period the work of the Health & Safety Committee was driven by the Chair, Martin Isles (MPA, UK), the Vice-Chair, César Luaces Frades (FdA, Spain) and actively supported by all UEPG Members.*



The UEPG Environment Committee continued to address and represent the interests of the Aggregates Industry on key EU environmental policies. It draws on the considerable professional expertise of its members while ensuring well-coordinated advocacy actions across Europe, and 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.

### Review of the Environmental Impact Assessment Directive

Adopted 25 years ago, the Environmental Impact Assessment Directive (known as the EIA Directive) was codified in 2011 and underwent a revision in 2013-2014. This was an important revision for the Aggregates Industry as many sites have to undergo such an assessment or part of it before obtaining a permit or to obtain an extension. The EIA Directive revision ranked as one of the top priorities for UEPG for over a year in 2013-2014. The Revised Directive was approved by the European Parliament and Council in April 2014 and entered into force on 15 May 2014. The deadline for transposition at national level is 16 May 2017. The adopted text tries to balance environmental and economic imperatives. UEPG, through its intensive activities, achieved that there should be no change to Annexes I and II, the possibility of joint procedures remaining are time limits imposed on competent authorities, mineral exploration to stay out of the scope, the possibility to use in-house experts and the fact that the scoping should remain non-mandatory.



In 2014, the Fitness Check of Natura 2000 had been identified as a number one priority for UEPG. Indeed, UEPG welcomed very much the European Commission guidance document for the Non Energy Extractive Industry and Natura 2000. We have witnessed a great variety of situations from one country – or one region – to another, leading to uncertainties for business. We believe that there is potential for improvement, in particular with Natura 2000, often considered as “no go areas” and how to deal with protected species on-site.

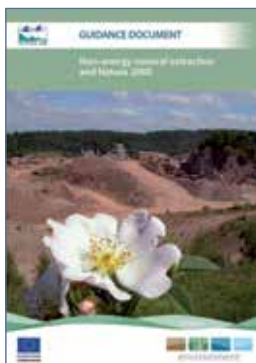
### Natura 2000 Fitness Check

As part of its evolution towards smarter regulation, the European Commission is reviewing a number of pieces of legislation, including the 1979 Directive on the conservation of wild birds (Birds Directive) and the 1992 Directive on the conservation of natural habitats and of wild fauna and flora (Habitats Directive). The Natura 2000 Directives are in this framework being assessed through a “Fitness Check”, which is a comprehensive policy evaluation assessing whether the regulatory framework for a policy sector is “fit for purpose”. The major question behind this exercise is whether the Natura 2000 Directives might or might not be revised, leading to many speculations on the opportunities and threats of such a decision.

UEPG and its Members contribute to the Fitness Check by providing sound replies to the “Evidence Gathering Questionnaire” and the Public Consultation, through involvement at national level and through extensive contacts with all the relevant stakeholders (European Institutions, NGOs).

### Mining Waste BREF review

The European Commission has launched the process of reviewing and adapting the Reference Document on Best Available Techniques (BREF) for the Management of Tailings and Waste-Rock in Mining Activities, to align it with the Mining Waste Directive. UEPG is part of the stakeholders’ consultation process. An ad-hoc UEPG Working Group led by Benoit Lussis (FEDIEX, Belgium) had been created to work on this priority.



### Biodiversity Task Force

As one of the few industry sectors represented among major actors on the EU biodiversity policy, the European Aggregates Industry is now widely recognised as a **trusted partner in biodiversity** by EU Institutions and a growing number of NGOs. The UEPG Biodiversity Task Force, chaired by Vanessa Ardouvin is focusing its efforts towards the development of biodiversity indicators suitable for the Aggregates Industry and its many SMEs. A **guideline** to assist companies was finalised in 2014. UEPG supported Biodiversity workshops in German hosted by MIRO (Germany) and in French hosted by UNPG (France) and FEDIEIX (Belgium) with the objective to help UEPG members in applying the biodiversity indicators.

The Task Force is closely monitoring ecological offsets and other initiatives related to financing nature, including the European Commission Business@Biodiversity Platform. It should be recognised that aggregates-producing companies already invest millions of Euros annually in environmental restoration, biodiversity and ecosystems. Furthermore, UEPG promotes pragmatic solutions on a case by case basis.

UEPG promotes the compatibility between the Aggregates Industry and nature protection with the production of a **Brochure**. The Task Force is still encouraging UEPG Members, most of which are SMEs, to develop and implement biodiversity promotional initiatives in their own countries.

### Water Management Task Force

The objective of the Task Force, chaired by César Luaces Frades (FdA, Spain), is to **exchange good practice for water and groundwater management in quarries and pits**, ensuring that the Aggregates Industry maintains **water quality**. Water is an increasingly important topic for our Industry, which needs to be able to obtain a permit when extracting below the water table and to compete with other sectors for access to water and its consumption.

UEPG has been supportive of the World Business Council for Sustainable Development – Cement Sustainability Initiative (WBCSD CSI) Water Protocol.

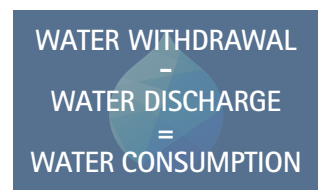
The Water Management Task Force had developed a document showing the positive contribution of the Aggregates Industry to water. It will now develop a professional leaflet in 2015.

### Marine Aggregates Task Force

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

The Directive on Maritime Spatial Planning and Integrated Coastal Management, which provides a legal framework for spatial planning at sea, has been a priority for the Marine Aggregates Task Force. The text was adopted and UEPG had managed to include marine aggregates extraction (extractive activities) as relevant economic activities listed in the Maritime Spatial Planning Framework Directive. The UEPG campaign also ensured that national maritime spatial plans and integrated coastal management strategies may aim to promote the sustainable extraction of raw materials.

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



wbcscd World Business Council for Sustainable Development – Cement Sustainability Initiative (WBCSD CSI) Water Protocol

*The 2014 UEPG Delegates Assembly approved the election of the Chair of the UEPG Environment Committee, Didier Petetin (Vicat, France) and Vice-Chair, Jim Rushworth (Lafarge, Greece).*



Aggregates are essential materials for sustainable construction in Europe. It is important to highlight the significant contribution our industry makes to local communities, circular economy and environment.

The UEPG PR & Communications Task Force continues to work towards improving Public Relations, Communication and the image of the European Aggregates Industry. Its work is based on the conviction that the Industry has genuinely good stories to tell on continued resource efficient operations, good local access to resources, dedication to environment and biodiversity stewardship,

excellence in health & safety, all hallmarks of a sustainable and socially responsible industry.

The aim of this UEPG Task Force is to share external an internal examples of National PR & Communications Good Practice, to work on current and new PR and Communications tools, initiatives and targets in liaison with the UEPG Committees and other Task Forces, and to prepare for future events. The Task Force is also a platform for exchange of information on EU News, institutional work, structure and policies, thereby, to better communicate to targeted audiences UEPG priorities, initiatives and events.

*This work is led by Robert Wasserbacher (FVSK, Austria), Chair of the Task Force.*

### Some examples of Good Practices in terms of PR and Communication at National level



UNICEM Charte de l'environnement celebrated its 10<sup>th</sup> year anniversary on Tuesday 9 December.  
<http://www.charte.unicem.fr/>

The French Quarrying Industry Environmental Charter specifically helps Signatories to adapt their operations in respect of biodiversity and of all environmental aspects. It represents:  
432 signatory companies,  
1080 committed sites,  
representing 57% of all aggregates producing sites,  
and nearly 4,000 people trained.

- ▲ **Austria:** **Fachverband der Stein- und keramischen Industrie Österreich (FVSK)** focused on the National Sustainable Development Awards, Roundtable consultations with stakeholders, a survey amongst citizens on using recycled aggregates (natural and artificial) in construction projects, a film promoting the industry and the Annual Report.
- ▲ **Belgium:** **FEDIEX** had a stand for 2 days at the 'Salon des Mandataires'. It was a unique opportunity to meet local and regional authorities.
- ▲ **France:** **UNPG** worked on a new study on recycling materials and its valorisation. A new magazine of the construction raw materials organisation UNICEM, internal newsletter, videos and other publications on the Federation were produced. UNPG organised a site event for journalists to discover a restored site and the contribution of the Industry to society, located nearby Paris.
- ▲ **Norway:** **Norsk Bergindustri** had several meetings with stakeholders and newly elected politicians. The Association prepared a new website. A survey on public perception of the sector had been undertaken.
- ▲ **Germany:** **MIRO** supported the Steinexpo 2014, the biggest fair in Europe demonstrating live Machinery and processing equipment in a quarry and a unique platform to present the Association, to establish new contacts and to maintain the network. Educative tools for children and schools were updated. A new Website and Blog of the Association were set up. The German Aggregates Federation recently focused on recruitment of young people in the industry and created a new Committee dealing with education and recruitment of workers.
- ▲ **Romania:** **PPAM** organised a workshop with Romanian authorities on water management. A new webpage was created and a new audit on Natura 2000 sites and extraction was undertaken from March to October 2015. According to this survey, 13% of the aggregates extraction took place in Natura 2000 sites (e.g. in the Carpathians) demonstrating once again the compatibility of nature protection and aggregates extraction.
- ▲ **UK:** **MPA** informed on its Biodiversity Strategy including a dedicated guidance document, the MPA Restoration and Biodiversity Awards, and a Map on MPA's NATIONAL Nature Park - former quarries and other former industrial locations returned to nature and with public access - <http://www.mineralproducts.org/sustainability/nature-map.php>. The Association published an Internal electronic Newsletter which was widely communicated.

## Promotion of the Industry image and initiatives

### The contribution of the Aggregates Industry to Sustainable Development of Regions in Europe

On 30 March 2015, marked with a special event after two weeks of showcasing winners of the UEPG Sustainable Development Awards at the Committee of the Regions (CoR) with hundreds of visitors. The event gathered participants from Permanent Representations, European Commission and Agencies, Regions and local authorities, Partners and Journalists.

The purpose of the Exhibition was to present the Best Practices of our sector in terms of Sustainable Development in Europe. The 19 awarded companies were presented with information, documents, presentations and video on their products, sector, activities and awards.



Participants were addressed by Sirpa Hertell, Member of the Committee of the Regions and Vice-Chair of the CoR Commission for Environment, Climate Change and Energy, by Nigel Jackson, UEPG Vice-President, and by Luc Bas, Director - European Union Representative Office, IUCN. The speeches highlighted the contribution of the Aggregates Industry to Sustainable Development of Regions in Europe for a better quality of life, the importance at the work of the Committee of the Regions and representations in Europe to make the link with the Industry, the compatibility of aggregates extraction with environmental management, social progress and economic excellence, and the impact and contribution of the sector towards biodiversity and ecosystems services.



UEPG and its Members are preparing for the upcoming 2016 Sustainable Development Awards and the Ceremony taking place on 16 November in Brussels.

### UEPG 2020 Vision

*'Aggregates are the most used bulk material on the planet. The question is not whether we need aggregates, but where and how to get the raw materials in the most sustainable way.'*

UEPG launched its Vision 2020 for a Sustainable Industry in a Sustainable Europe at its Delegates Assembly in Strasbourg on 20-21 May 2015. With the time horizon 2020, 10 key ambitions had been identified, to tackle them together with EU and National decision-makers and stakeholders. The 10 key ambitions are presented in this Annual Review in the chapter 'Our Values'.

At the occasion of the launch, UEPG President Arnaud Colson presented the UEPG Vision 2020 Brochure to Regional, National and European key stakeholders and decision-makers in Strasbourg.



- The UEPG Entrepreneurs' Forum 2015, welcomed by UNPG and UNICEM Alsace and supported by Liebherr France, focused on the economic, waterway transport and environment.
- Paul Rübiger MEP (EPP, Austria), welcomed UEPG Delegates at the European Parliament in Strasbourg and outlined how industry could get involved in policy making.



The UEPG Vision 2020 is available online at [www.uepg.eu/publications/special-editions](http://www.uepg.eu/publications/special-editions).



The UEPG Team in the General Secretariat office is located at Rue d'Arlon 21 in Brussels, close to the European Parliament, within easy distance of the European Commission and many other European Institutions. This a perfect location which enables the UEPG General Secretariat to regularly attend and participate in stakeholder consultation meetings, committee meetings in the European Parliament and other external fora.

### The Brussels based Team and their services offered to UEPG Members

The UEPG General Secretariat is headed by Dirk Fincke, Secretary-General, and furtherance by Public Affairs Managers, Sandrine Devos and Miette Dechelle. Through its small but highly-professional and dedicated Brussels based staff, it has achieved tangible results for the industry, continuously reinforcing its high visibility and trust amongst its stakeholders.

On the one hand, 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. On the other, the General Secretariat is at the service of its Members to represent their activities in Brussels, to support them in their respective countries, and invites staff of Member Associations and Companies to share their expertise.

### Coordinating EU lobbying campaigns

UEPG develops targeted advocacy strategies and acts as a coordinator in their implementation. Examples include ensuring the sustainable supply of aggregates in Europe, by supporting the EU Raw Material Strategy and improving the legal framework conditions for sustainable access to resources within Europe. UEPG demonstrates that the Aggregate Industry is an essential part of the Circular Economy supporting the Initiatives on Resource Efficiency. UEPG also advocates the compatibility of Natura 2000 and the aggregates extraction underlining the industry's contribution to biodiversity. UEPG strongly promotes the prevention of accidents to achieve zero harm, especially via national committees, indicators and the project 'Safer by Design' through CEN and DG Employment with the support of the EU Sectoral

Social Dialogue Committee for the Extractive Industry and the Standing Working Party for the Mining and Other Extractive Industries.

### Cooperation with stakeholders

UEPG cooperates closely with other European Associations and NGOs such as EPRA (European Platform for Recycled Aggregates), the Explosives for civil uses Task Force or Birdlife. UEPG works closely with European Industry Associations of the Non-Energy Extractive Industry Panel (NEEIP), and organises the annual NEEIP Fora – high-level events, which allow to debate areas of common interest with EU decision makers. UEPG is a member of Construction Products Europe (CPE) and of ISSA-Mining (International Social Security Association). UEPG is an EU Social Partner in the NePSi Social Dialogue on respirable crystalline silica and at the Sectoral Social Dialogue Committee of the Extractive Industry. With Health & Safety as a key priority, UEPG became an EU official partner of the last three EU-OSHA Healthy Workplaces Campaigns; the last one being on 'Healthy Workplaces Manage Stress'. Where there are common issues, UEPG also contributes to joint advocacy with the World Business Council for Sustainable Development - Cement Sustainability Initiative, the European Concrete Platform and EuroGeoSurveys.

### Providing EU intelligence and regular news updates

The UEPG General Secretariat's first mission is to provide UEPG Members with advance notification of policy initiatives that may impact on the European Aggregates Industry. Its small and highly dedicated team keeps UEPG Members informed of any relevant EU policy developments at all stages of the legislative process through timely and concise email reports and policy briefings 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 and explains, in a precise and concise way, Communications, Directives, Regulations and EU initiatives.

The **Issue Matrix** offers the user an overview of all UEPG Live Issues leading via hyperlink directly to the Issue Tracker. 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 **UEPG website** [www.uepg.eu](http://www.uepg.eu) offers a public section available for everyone on UEPG's structure, activities, News, Position Papers, brochures, statistics and databases for biodiversity case studies and water management good practices. The Members-only section is accessible for UEPG Full Members offering a wide range of services.



The **e-newsletter** has proved a popular tool which offers a succinct summary of recent policy developments and UEPG work. 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. It also promotes achievements and good practices of UEPG Members. The newsletter is available on the UEPG website in English (as EU Insight), in French (as Bulletin Europe) and in German (as Bericht aus Brüssel).

## Raising excellence in sharing good practices



UEPG supports and promotes the spread of best practice and by encouraging projects that go well beyond what is required by planners or regulators, set new standards of excellence and provide an inspirational example that others can follow. The UEPG tri-annual **Sustainable Development Awards** illustrate that policy.

UEPG also provides to his members **guidance documents** to operate with care and concern for the environment, for its employees and neighbours, and for society as a whole. The UEPG General Secretariat drafted recommendations on the implementation of the Track and Trace Directive for explosives for the whole supply chain and also for users only. UEPG is promoting and disseminating good practice examples to control respirable crystalline silica on site through NePSi. **Concrete examples** and **cases studies** on biodiversity and water management are published on the UEPG website and promoted during key EU events.

## Involving the Aggregates Industry in EU Policy Making

The physical proximity to the EU Institutions and day-to-day contact with policy-makers allow the UEPG General Secretariat to identify "early-bird" opportunities to become involved in the policy making process. UEPG President Arnaud Colson met the highest ranking EU decision-makers, such as Karmenu Vella, Commissioner for Environment, Maritime Affairs and Fisheries, Stefan Leiner, Head of Unit for Natura 2000 from DG Environment, Carlo Pettinelli, Director for Sustainable Growth and EU 2020 from DG GROW, Anne Sander MEP (EPP, France), Nadine Morano (EPP, France) and Paul Rübzig (EPP, Austria).

Initiated by UEPG President Arnaud Colson, Board Members of the French Aggregates Association visited Brussels on 28 January 2015 with the objective to get a closer link to and better understanding on relevant EU topics and discover ways to support UEPG lobbying campaigns. Members of the UNPG Board discussed with colleagues from the French Permanent Representation to the EU, with Members of the European Parliament and with representatives from the European Commission. The event inspired other UEPG Members to visit the General Secretariat and to use the Brussels UEPG office for their events.

UEPG has continuously strengthened its network of key contacts within the European Commission, European Parliament, EU Council working groups, EU Agencies, Academia and NGOs. Useful platforms are the UEPG Board Policy Dinners, Debates and Conferences, Awards and Exhibition opened and informal discussions with key EU policy-makers. In cooperation with different sectors of the non-energy extractive industries, UEPG organised the





first NEEIP Forum on 20 November 2014 in Brussels to discuss ways of reindustrialising Europe. This event brought together EU and national high-level decision makers to address economic recovery and job creation in Europe; a policy which became the core priority for the new European Commission led by President Jean-Claude Juncker. Speakers, included Director Carlo Pettinelli (European Commission), Ben Knapen (European Investment Bank), Flor Diaz Pulido, (European Commission),



Sylvain Lefebvre (IndustriAll), Alexandre Affre (BUSINESSEUROPE), Olivier Belle (Permanent Representation of Belgium), Michael Schulz (MIRO, Germany) ably moderated by Simon van der Byl (Mineral Products Association, UK). The distinctive Members of this Panel debated with Industry and decision-makers participating.

## Raising the industry's profile

The General Secretariat continues to promote the achievements of the European Aggregates Industry by making keynote speeches at international conferences. It also developed and coordinated targeted events. A successful example was the UEPG Sustainable Development Awards Exhibition, hosted by Sirpa Hertell (EPP, Finland), Member of the Committee of the Regions (CoR) and Member of the CoR Natural Resources and Environment Committee, showcasing the 19 SDA winners out of 51 cases studies of excellence in Europe.

## Governance

Over recent years, UEPG has grown into a highly-representative and respected association, representing the largest non-energy extractive sector. UEPG sets great value on maintaining its reputation and its transparency via the EU Transparency Register and high standard audited accounts. Each of UEPG General Secretariat staff is a member of SEAP, the Society of European Affairs Professionals and bound by its code of conduct.



Arnaud Colson handed over the Presidency to Jesús Ortiz at the UEPG Delegates Assembly in May 2015 (Strasbourg, France)

## The Global Aggregates Information Network (GAIN)



GAIN was founded by UEPG in 2010, driven by the conviction that international sharing of experience and best practice promotes a more efficient and sustainable aggregates industry globally. GAIN meetings were held in Brussels in October 2010, in Charlotte, NC, USA in March 2012, and the most successful meeting yet was held in Brussels in October 2014, attended by representatives from aggregates associations across Europe, from OSSGA of North America, FIPA of South America, CCAA of Australia, ASPASA of South Africa and CAA of China. It is impressive that GAIN members currently represent 60% of the global aggregates production estimated at 37.5 billion tonnes, so therefore can

potentially have a major lobbying strength on behalf of the industry globally (see table).

Many valuable insights and experiences were shared on common health & safety, environmental, economic, technical and public relations challenges. The discussions revealed that the industry faces similar challenges across the globe, but the various regions have devised different approaches and solutions. There are ongoing contacts between these associations, providing valuable support on specific industry challenges as they arise. It was agreed that GAIN meetings should continue at two-year intervals, and the next meeting will be kindly hosted by ASPASA of South Africa in April 2016.

Global Population and Aggregates Production	GAIN Members				Population (billions)	Estimated Tonnages (billions)
Asia	China	China	CAA	<a href="http://www.zgss.org.cn/index.html">http://www.zgss.org.cn/index.html</a>	1.0	
	India				1.2	5.0
	Others				1.5	4.8
Africa		South Africa	ASPASA	<a href="http://www.aspasa.co.za/">http://www.aspasa.co.za/</a>	1.0	3.3
Europe	EU+EFTA				0.5	2.6
Russia + ME					0.5	2.4
North America	USA	USA	NSSGA	<a href="http://www.nssga.org/">http://www.nssga.org/</a>	0.3	2.6
		Canada	APABC, ASGA, OSSGA	<a href="http://www.gravelbc.ca/">http://www.gravelbc.ca/</a> <a href="http://www.asga.ab.ca/">http://www.asga.ab.ca/</a>		
	Others				0.2	0.4
South America		Iberoamericana	FIPA	<a href="http://www.fiparidos.info/">http://www.fiparidos.info/</a>	0.5	2.2
		Columbia	ASOGRAVAS	<a href="http://www.asogras.org/">http://www.asogras.org/</a>		
		Brazil	ANEPAC	<a href="http://anepac.org.br">http://anepac.org.br</a>		
Oceania		Australia	CCAA	<a href="http://www.ccaa.com.au/">http://www.ccaa.com.au/</a>	0.4	1.7
		New Zealand	AQA	<a href="http://www.aqa.org.nz/">http://www.aqa.org.nz/</a>		
Totals					7.5	40.0



National Stone, Sand & Gravel Association



## European Projects

Participation in all these European projects has been and continues to be of strategic importance to UEPG.

UEPG has also supported several EC-funded projects focused on further developing the Aggregates Industry in Europe.

The **SNAP-SEE** (SustaiNable Aggregates Planning in South-Eastern Europe) two-year project was funded by the ERDF and concluded with its final meeting in Bled, Slovenia in September 2014. The project involved 27 partners from 14 countries in the region, and it successfully developed a template for the planning and development of a responsible and sustainable aggregates industry in the region. Then Past-President Jim O'Brien represented UEPG in the University of Leoben leader team, and also attended several national stakeholder meetings in the South-Eastern region. Jim O'Brien also represented UEPG in the two-year pan-European **Minerals4EU** project, funded by the 7<sup>th</sup> Framework Programme, which was focused on the development of a minerals intelligence network and a yearbook for all minerals extracted, traded and used in Europe, including aggregates. UEPG provided inputs and insights on the Aggregates Industry in Europe.

The many contacts made will help further improve the accuracy of production data across Europe. The final meeting of the Minerals4EU project will be held in later August 2015, and its work will continue through the formation of a permanent body.

Jim O'Brien has now been appointed to represent UEPG on the Advisory Board of the three-year EU-funded **MINATURA 2020** project, led by MinPol of Austria and involving partners from right across Europe. Its first meeting was held in Vienna in March 2015. The particular focus of the project is the development of Mineral Deposits of Public Importance, taking into account geological availabilities of all minerals including aggregates, market demands, stakeholder viewpoints, and in particular the appropriate protection and fostering biodiversity. This project is of importance for the successful implementation of the Raw Materials Strategy. UEPG has already provided valuable inputs to the European Commission on behalf of the Aggregates Industry.

 **Austria**

Fachverband der Stein-  
und keramischen Industrie  
Österreich (FVSK)

Phone: +43 590 900 35 31  
Email: steine@wko.at  
<http://www.baustoffindustrie.at>

 **Belgium**

Fédération des Industries  
Extractives et Transformatrices  
de Roches non Combustibles  
(FEDIEX SCRL)

Phone: +32 02 511 61 73  
Email: info@fediex.org  
<http://www.fediex.be>

 **Bosnia and Herzegovina**

Livnoputovi d.o.o. Livno

Phone: +387 34 200 344  
Email: info@livnoputovi.com  
<http://www.livnoputovi.com>

 **Bulgaria**

БАПИМ (BAPIM)

Phone: +359 888 506 407  
Email: i.koleva@bapim.org  
<http://www.bapim.org>

 **Croatia**

PROMINS

Phone: +385 1 49 21 886  
Email: gordan.sredl@promins.hr  
<http://www.promins.hr>

 **Cyprus**

Παγκύπριος Σύνδεμος  
Σκυροποιών (CAPA)

Phone: +357 22266920  
Email: latouros@latouros.com  
<http://www.cyprusquarries.pro.cy>

 **Denmark**

Danske Råstoffer

Phone: +45 40263330  
Email: lmv@danskbyggeri.dk  
<http://www.danskeraastoffer.dk>

 **Estonia**

AS Kunda Nordic

Phone: +372 32 29 900  
Email: knc@knc.ee  
<http://www.heidelbergcement.com/ee/et/kunda/home.htm>

 **Finland**

INFRA ry

Phone: +358 9 1299 564  
Email: eija.ehrukainen@infra.fi  
<http://www.rakennusteollisuus.fi/en/>

 **France**

Union Nationale des  
Producteurs de Granulats  
(UNPG)

Phone: +33 1 44 01 47 01  
Email: unpg@unicem.fr  
<http://www.unicem.fr>

 **Germany**

Bundesverband Mineralische  
Rohstoffe e.V. (MIRO)

Phone: +49 221 93 46 74 60  
Email: info@bv-miro.org  
<http://www.bv-miro.org/>

 **Greece**

Λατομείο Χάλυψ (Halyps)

Phone: +30 210 5556221  
Email: s.costa@italcimenti.it  
<http://www.halyps.gr/ENG>

**Lafarge Ελλάδα (Lafarge)**

Phone: +30 210 28 85 501  
Email: info@aget.gr  
<http://www.aget.gr/>

 **Hungary**

Magyar Bányászati Szövetség

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

 **Iceland**

Björgun ehf

Phone: +354 563 5600  
Email: gunnlaugur.kristjansson@bjorgun.is  
<http://www.bjorgun.is>

 **Ireland**

Irish Concrete Federation (ICF)

Phone: +353 1 4 64 00 82  
Email: info@irishconcrete.ie  
<http://www.irishconcrete.ie/>

 **Israel**

הכירצו היינב ירצומ תוישעת דוגי  
(IAA)

Phone: +972 3 5198801  
E-mail: enav@industry.org.il  
<http://www.industry.org.il>

 **Latvia**

Par Būvmateriālu Ražotāju  
asociāciju (BRA Latvia)

Phone: +371 29 298 138  
Email: Leonids.Jakobsons@bra.lv  
<http://www.bra.lv/>

 **Luxembourg**

CLOOS

Phone: +352 57 03 73 - 1  
Email: info@cloos.lu  
<http://www.cloos.lu/index.php?lang=eng&tc=>

 **Netherlands**

Vereniging Zand en  
Grindproducenten (Cascade)

Phone: +31 488 47 71 81  
Email: l.vandervoort@cascade-zandgrind.nl  
<http://www.cascade-zandgrind.nl/>

 **Norway**

Norsk Bergindustri

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

 **Poland**

Polski Związek Producentów  
Kruszyw (PZPK)

Phone: +48 41 344 66 88  
Email: biuro@kruszpol.pl  
<http://www.kruszpol.pl/>

 **Portugal**

Associação Nacional da  
Indústria Extractiva e  
Transformadora (ANIET)

Phone: +351 22 609 66 99  
Email: geral@aniet.pt  
<http://www.aniet.pt/>

 **Romania**

Asociația Profesională a  
Producătorilor de Agregate  
(APPA)

Phone: +4031 437 9962  
Email: eric.thieulot@lafarge.com;  
bogatulaurentiu@yahoo.com  
<http://www.appa.org.ro>

 **Slovakia**

Slovenské združenie výrobcov  
kameniva (SZVK)

Phone: +421 (0)55 726 12 16  
Email: kancelariaszvk@intas.sk  
<http://www.szvk.sk>

 **Slovenia**

Salonit Anhovo

Phone: +386 5 330 82 00  
Email: kamnolomi@kamnolomi.si  
<http://www.salonit.si/>

 **Spain**

Federación de Áridos (FdA)

Phone: +34 915 522 526  
Email: secretariafda@aridos.info  
<http://www.aridos.info/>

 **Sweden**

Sveriges Bergmaterialindustri  
(SBMI)

Phone: +46 8 76 26 225  
Email: kansliet@sbmi.se  
<http://www.sbmi.se/>

 **Switzerland**

Fachverband der  
Schweizerischen Kies- und  
Betonindustrie (FSKB)

Phone: +41 31 326 26 26  
Email: info@fskb.ch  
<http://www.fskb.ch/>

 **United Kingdom**

Mineral Products Association (MPA)

Phone: +44 207 963 8000  
Email: info@mineralproducts.org  
<http://www.mineralproducts.org/>



### President

#### Arnaud COLSON

*Sustainable Development and Environment  
Director, Lafarge France*  
Union Nationale des Producteurs de Granulats  
(UNPG)  
[www.unicem.fr](http://www.unicem.fr)



### Past President

#### Jim O'BRIEN

*CSR Consultant (retired from CRH)*  
Irish Concrete Federation (ICF)  
[www.irishconcrete.ie](http://www.irishconcrete.ie)



### Honorary President

#### Michael SCHULZ

*General Manager, Hülskens Holding GmbH  
& Co.KG*  
Bundesverband Mineralische Rohstoffe e.V.MIRO  
[www.bv-miro.org](http://www.bv-miro.org)



### Treasurer

#### Jean-Marc VANBELLE

*ACM Quality Manager, Holcim Belgium*  
*Fédération des Industries Extractives et*  
*Transformatrices de Roches non Combustibles*  
(FEDIEX)  
[www.fediex.be](http://www.fediex.be)



### Vice-Presidents

#### Elisabeth GAMMELSÆTER

*Secretary General*  
Norsk Bergindustri  
[www.norskbergindustri.no](http://www.norskbergindustri.no)



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*Chief Executive*  
Mineral Products Association (MPA)  
[www.mineralproducts.org](http://www.mineralproducts.org)



### Board Members

#### Michiel DANKERS

*Director, NV Niba Beheer*  
Vereniging Zand en Grindproducenten (Cascade)  
[www.cascade-zandgrind.nl](http://www.cascade-zandgrind.nl)



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Παγκύπριου Συνδέσμου Σκυροποιών  
(CAPA)  
[www.cyprusquarries.pro.cy](http://www.cyprusquarries.pro.cy)



#### Jorge Manuel de MIRA AMARAL

*President of Board*  
Associação Nacional da Indústria Extractiva  
e Transformadora (ANIET)  
[www.aniet.pt](http://www.aniet.pt)



#### Jesús ORTIZ

*General Manager and Director Competence  
Center for Aggregates and Concrete Materials,  
Northern/Western Europe – Benelux – Africa  
– Mediterranean Basin and Country Manager*  
*HeidelbergCement, Spain*  
Federación de Áridos (FdA)  
[www.aridos.info](http://www.aridos.info)



#### Pertti PELTOMAA

*Business Sector Director NCC*  
*Roads Oy*  
*Infra ry*  
[www.rakennusteollisuus.fi/en](http://www.rakennusteollisuus.fi/en)



#### Hermann REIFENSCHIED

*Managing Director LZR Lenz-Ziegler-*  
*Reifenscheid GmbH*  
Bundesverband Mineralische Rohstoffe  
e.V.MIRO  
[www.bv-miro.org](http://www.bv-miro.org)



#### Niklas SKOOG

*Raw Material Supply Manager*  
*at Sand & Grus AB Jehander*  
*Sveriges Bergmaterialindustri (SBMI)*  
[www.sbmi.se](http://www.sbmi.se)



#### Robert WASSERBACHER

*Legal Advisor*  
Fachverband der Stein- und keramischen  
Industrie Österreich (FVSK)  
[www.baustoffindustrie.at](http://www.baustoffindustrie.at)

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## PR & Communications Task Force

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## General Secretariat

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(MPA, UK), Jan Bida (SBMI, Sweden), Thomas Blomgren (SBMI, Sweden), Raphaël Bodet (UNPG, France), Michel Buzot (UNPG, France), Brian Bone (MPA, UK), Michel Calozet (FEDIEX, Belgium), Richard Claydon (BRALatvia, Latvia), Aurélie Delannoy (MPA, UK), Eija Ehrukainen (INFRA ry, Finland), Olaf Enger (MIRO, Germany), Gerry Farrell (ICF, Ireland), Sébastien Fonteny (UNPG, France), Asbjørn Fossum (Norsk Bergindustri, Norway), Adeline Guerlais Rédarès (UNPG, France), Christian Haeser (MIRO, Germany), Olav Hallset (Norsk Bergindustri, Norway), Ingo Hammwöhner (MIRO, Germany), Andreas Heming (MIRO, Germany), Ernst Honegger (FSKB, Switzerland), Carmen Ionescu (PPAM, Romania), Riho Iskül (AS Kunda Nordic, Estonia), Kenneth Johansson (SBMI, Sweden), Thilo Juchem (MIRO, Germany), Barbara Kopczyńska (PZPK, Poland), Irina Koleva (BAPIM, Bulgaria), Costas Kythreotis (CAPA, Cyprus), Georgiou Lambros (CAPA, Cyprus), Lionel Lathion (FSKB, Switzerland), Benoit Lussis (FEDIEX, Belgium), Cécile Moreau (FEDIEX, Belgium), Walter Nelles (MIRO, Germany), Bjarne Overgaard

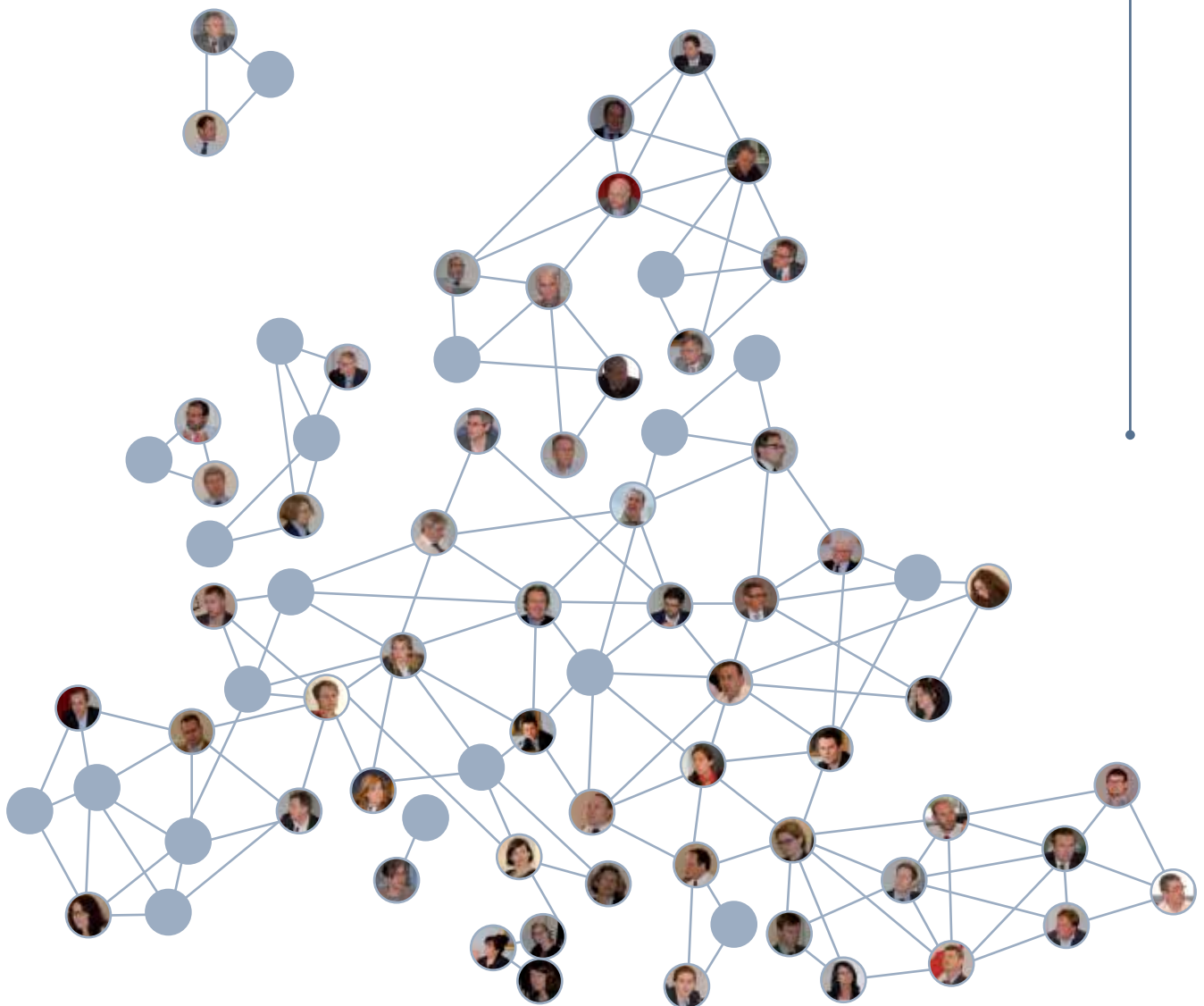
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*UEPG Delegates Assembly Meeting in May 2015 at the European Parliament, Strasbourg, France*



Annual Review  
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Rue d'Arlon 21 | 1050 Brussels | Belgium | Tel: +32 22 33 53 00

secretariat@uepg.eu | [www.uepg.eu](http://www.uepg.eu)

EU Transparency Register: 15340821653-49