

European Aggregates Association

Building foundations for Europe's future



A N N U A L R E P O R T 2006

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Core Values

Economic Prosperity

Supplying essential materials

The European aggregates industry supplies, and will continue to supply, materials essential for the improvement of standards of living and the quality of life in Europe.

Providing jobs

The European aggregates industry's operations are an important source of jobs and economic development, particularly in rural areas.

Contributing to Europe's competitiveness

The European aggregates industry is and will continue to be a fundamental pillar of the European Economy.

Social Progress

Ensuring Health & Safety

The Health & Safety of its employees, contractors and visitors is the highest priority for the European aggregates industry.

Training employees

The European aggregates industry will maintain and develop a well trained and professional workforce.

Partnering with stakeholders

The European aggregates industry aims to engage with all relevant stakeholders and will continue to promote best practices throughout the sector. The European aggregates industry's operations are an integral part of regional and local communities.

Contributing to Europe's Heritage

The European aggregates industry acknowledges the importance of our common natural and built European heritage.

Environmental Stewardship

Contributing to biodiversity

The European aggregates industry is committed to integrating biodiversity in its operations.

Managing Land

The European aggregates industry accepts its responsibility as land managers to prepare sites for environmental, agricultural, recreational, landscape or other community use during and after the operations.

Conserving Resources

The European aggregates industry recognises recycled aggregates as an additional source of raw materials that needs to be promoted.



President's Introduction



2006 has seen UEPG consolidating its position as the sole trusted partner of the EU Institutions on any issue impacting on the European aggregates industry.

We launched our business plan "Building foundations for Europe's future" which provides our Members, Committees and Secretariat General with clear objectives and milestones against which our progress can be measured.

UEPG has also continued to ensure a positive public policy environment for the European aggregates industry. A major success has been the advocacy campaign on the directive on management of waste from the extractive industries. On this issue our national associations played a key role by briefing effectively their national Members of the European Parliament and their Council representatives. This demonstrates the way in which UEPG works as an effective and well-coordinated team across Europe.

One of our new challenges is to promote the economic benefits of the European aggregates industry to European society. Few industries make a greater contribution to the quality of life of European citizens than the aggregates industry. Our materials provide the essential materials for every hospital, school and home. A first step has been our contribution to the European Commission's working paper on the Competitiveness of the EU Non-Energy Extractive Industry as well as the establishment of the UEPG Economic Committee which will improve our economic database.

Health & safety continues to be a top priority for UEPG. To demonstrate this, our Health & Safety Committee started working on a Guide on UEPG Good Health & Safety Practice in the Aggregates Industry. Our involvement in the Social Dialogue Agreement on Respirable Crystalline Silica, to protect workers from silica dust exposure, was an important voluntary initiative by 12 industrial sectors.

UEPG is continuing its expansion by welcoming new Members to ensure that our Association is fully representative of the new Europe. I am pleased to say that Croatia, Greece and Romania have joined UEPG.

No Presidential Introduction would be complete without my recording the deep sadness of all UEPG members at the premature death of our long serving colleague and Secretary General of our French Association, Renaud Rollin. Our sympathy goes out to his family.

Finally, I would like to thank our Committee Members for their excellent work and, in particular, their respective Chairmen and Vice-Chairmen for their outstanding leadership this year, as well as the UEPG General Secretariat for its professional services.

Didier Audibert
President UEPG



Aggregates in Europe

UEPG represents:

- 21 European countries
- 3 billion t of aggregates per year
- 28,000 sites
- 350,000 employees (incl. sub-contractors)

What are Aggregates?

Aggregates are a granular material used in construction. The most common natural aggregates of mineral origin are sand, gravel and crushed rock. An end-product in themselves as railway ballast or armourstones, aggregates are also a raw material used in the manufacture of other vital construction products such as ready-mixed concrete (made of 80% aggregates), pre-cast products, asphalt (made of 95% aggregates), lime and cement.

Aggregates are produced from natural sources extracted from quarries and gravel pits and in some countries from sea-dredged materials (marine aggregates). Secondary aggregates are usually by-products from other industrial processes, like blast or electric furnace slags or china clay residues. Recycled aggregates derive from reprocessing materials previously used in construction, including construction and demolition residues and railway ballast.

What are Aggregates used for?

The main end-uses of aggregates are:

Homes

The construction of a typical new home uses up to 400 tonnes of aggregates (both end-product and concrete) - from the foundations through to the roof tiles.

Other buildings and structures

From local hospitals and schools to bridges and flood protection - all are made possible by aggregates. In many cases they provide not just strength but, through special finishes, architectural beauty. The construction of a school uses up to 3,000 tonnes of aggregates. For a sports stadium, up to 300,000 tonnes are needed.

Roads

Aggregates feature at all levels of the road construction up to the surface, which includes aggregates resistant to polishing, ensuring skid-resistance. The construction of 1 km of motorway uses up to 30,000 tonnes of aggregates.

Railways

Aggregates are essential as track ballast for Europe's rail network. The construction of 1 meter of railway for a High Speed train (TGV) uses up to 9 tonnes of aggregates.

What does the European aggregates industry represent?

The European aggregates industry is the largest non-energy extractive sector in the EU with 3 billion tons produced every year. It consists of more than 28,000 extraction sites across Europe and a majority of operators in the sector are small and medium sized enterprises. The average annual aggregates production represents 7 tons per EU citizen. The European aggregates industry plays a key role by providing essential materials for the European construction sector. Take away aggregates and our built environment would literally fall apart.

Take away aggregates and our built environment would literally fall apart.



What is UEPG?

UEPG stands for “Union Européenne des Producteurs de Granulats” (European Aggregates Association). Since 1987, UEPG has 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 positively promotes the profile of the European aggregates industry.



Economic Outlook

Continuous growth, but still no signs of a short-term acceleration in rate

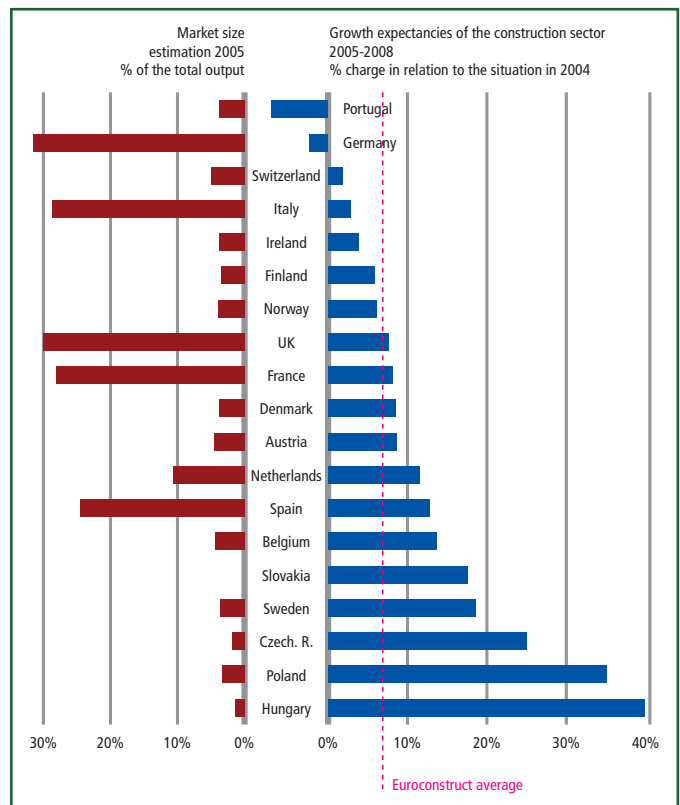
The latest estimates for 2005, reported by Euroconstruct, indicated that the whole construction sector in the Euroconstruct area is likely to exceed EUR 1,200 billion of value generated. This means an increase of +1.3%, which is a fall in comparison with the growth of the sector in 2004, which was capable of generating +2.2% more value than in 2003. The forecast for the construction sector is not the only one which has deteriorated. The macro-economic forecast for all the countries in the Euroconstruct group has been revised to show a fall. Despite this, the forecast for growth in the European economy continues to be higher than that for construction. Therefore, the short-term prospects (2006-2008) still show signs of growth in the European construction sector, but a very small margin, of between 1.5% and 2%.

Powerful growth in Eastern European countries contrasts with the irregular behaviour of the 'big five' countries

The European construction market continues to be an amalgam of very heterogeneous national situations. A country-by-country analysis of the growth expectations throughout the 2005-2008 period shows the following:

Figure 1: Average Construction growth and market size by country, 2005-2008 (in %)

S: EUROCONSTRUCT, Barcelona Nov'05.



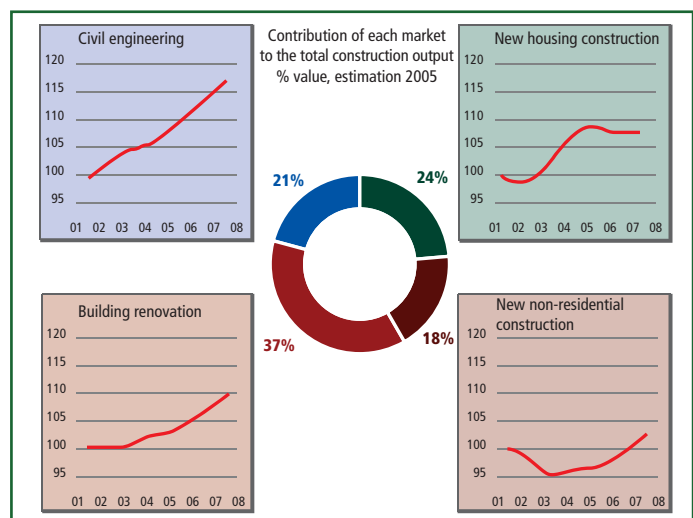


The graph shows how the number of countries above the group average clearly exceeds the number of countries left below the average. The explanation lies in the fact that the countries, which are growing most, have very small market volumes and therefore their capacity to alter the average is also very limited. In fact, of the 'five big ones', only Spain is clearly placed above the group average, while Germany and Italy are among the countries with the least growth expectations.

In view of the trends in earlier Euroconstruct reports, it is nothing new to report that the Central and Eastern European countries lead in the ranking of potential growth. In fact, the 2005 results have been somewhat below what was expected in these countries: +5.4% compared to an expected +6.0%. But this has not affected expectations for coming years in the context of these countries, where the growth forecast exceeds the barrier of an annual 7%.

Figure 2: Evolution of the different markets: Index 2001=100, constant prices

S: EUROCONSTRUCT, Barcelona Nov'05.



Civil engineering grows strongly while growth in residential construction stops

If each one of the construction sector markets is analyzed separately, clearly different development scenarios appear:

New residential building – is in practice responsible for a quarter of all the value generated in the sector. It seems to be leaving its years of good performance behind and to be moving towards a situation of stagnancy as from 2006. Again the contrast between Western and Eastern markets is clear. Whilst in Western Europe the situation is going to be somewhat regressive, in the Eastern countries there will be growth, which is going to be even stronger in 2007. The growth in the residential sector in Sweden, Belgium, the Netherlands and Denmark is also going to be strong, although they will be short-lasting phenomena: the Swedish boom may cease in 2006 and stagnancy will reach Belgium by 2007 and Denmark by 2008. Other large-sized markets like France, the United Kingdom and Spain are also leaving behind their periods of best performance. On the other hand, there is going to be a negative net balance at the end of the 2004-08 period in countries like Switzerland, Italy, Portugal, Germany and Ireland.



The European aggregates industry Annual Statistics 2005

Source: UEPG

■ Data 2004
■ Data 2003
■ Data not available

Country	Companies	Sites	Employees ¹	Production (Million t)				
				Sand & Gravel ²	Crushed Rocks ³	Recycled Aggregates ⁴	Artificial Aggregates ⁵	Total
Austria	950	1.255	5.730	66,0	32,0	3,5	3,0	104,5
Belgium	183	267	1.830	13,9	38,0	12,0	1,2	65,1
Czech Republic	220	607	3.391	25,5	38,0	3,4	0,3	67,2
Denmark	350	400	3.000	58,0	0,3			58,3
Finland	400	3.600	3.000	63,0	44,0	0,5		107,5
France	1.770	2.680	14.700	170,0	223,0	10,0	7,0	410,0
Germany	1.890	3.180	54.500	263,0	174,0	46,0	30,0	513,0
Ireland	250	450	5.100	54,0	79,0	1,0	0,0	134,0
Italy	1.750	2.460	14.000	225,0	145,0	4,5	3,0	377,5
Netherlands	135	185	4.200	24,0	4,0	20,2		48,2
Norway	740	4.600	2.600	15,0	38,0	0,2		53,2
Poland	2.044	2.620	60.900	104,3	37,7	7,2	1,6	150,8
Portugal	331	357	4.081	6,3	82,0			88,3
Slovakia	170	208	1.883	8,9	16,9	0,2	0,3	26,3
Spain	1.500	1.920	84.000	159,0	300,0	1,3	0,0	460,3
Sweden	150	1.840	3.500	23,0	49,0	7,9	0,2	80,1
Switzerland	329	500	3.200	46,5	5,3	5,3		57,1
United Kingdom	350	1.300	88.000	124,0	85,0	56,0	12,0	277,0
Total	13.512	28.429	357.615	1.449,4	1.391,2	179,2	58,6	3.078,4

1) Number of people directly employed (i.e. under the payroll of the companies), comprising full-time employees and part-time employees as well as people indirectly employed including all on-site contractors (e.g. truck operators, cleaners etc) unless indicated otherwise.

2) Sand and Gravel: sold production including marine aggregates and crushed gravel.

3) Crushed rock: sold production (excluding crushed gravel).

4) Recycled Aggregates: materials coming from construction and demolition waste used in aggregates market.

5) Artificial aggregates include blast-furnace-slag, electric-arc-furnace-slag, incinerator bottom ash (IBA), pulverised fuel ash (PFA) and other industrial and extraction by-products for construction and civil engineering.

In the chapter of new **non-residential** building, 2005 has turned out to be a disappointing year as the expectations of finishing the financial year with growth have not managed to materialise. Also, in the revision of Euroconstruct forecasts a scenario of growth is envisaged for 2006-2007, but somewhat lower than what had been thought six months ago. Therefore the long-awaited recovery in the European non-residential market continues to be postponed.

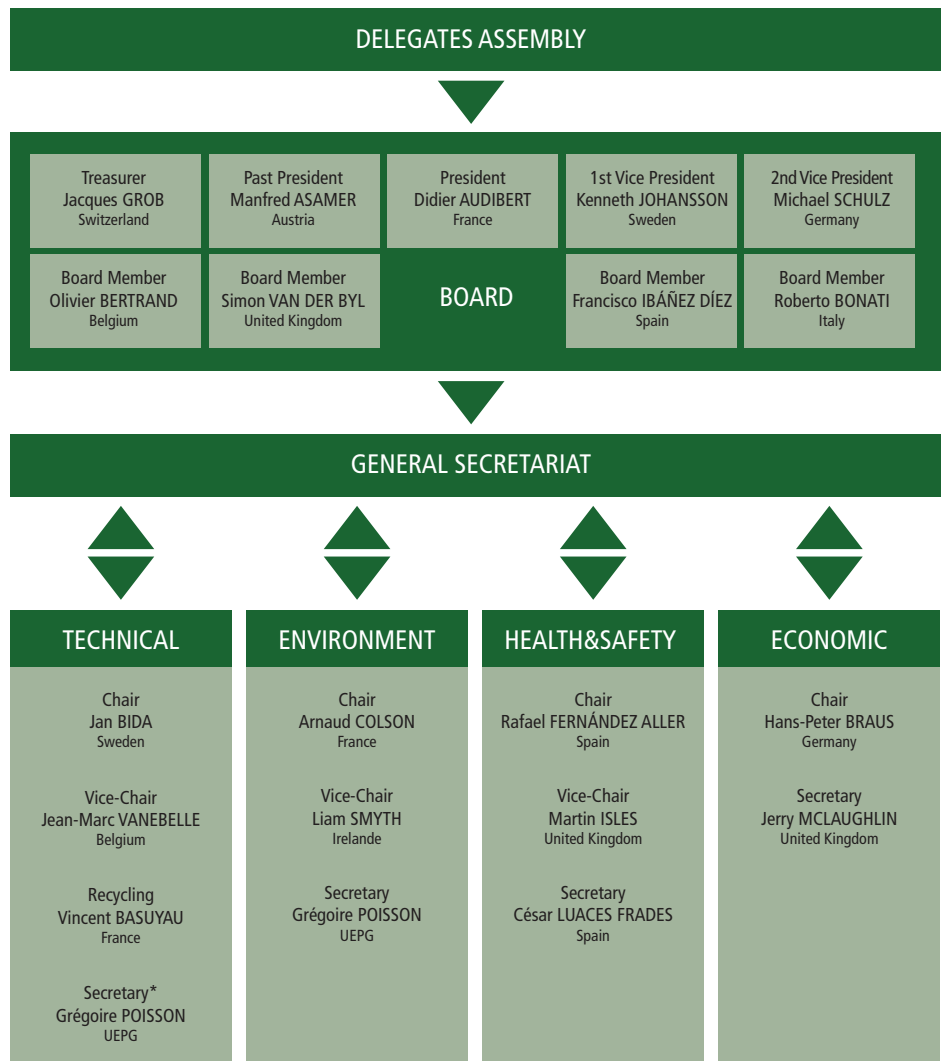


Ireland is the country with the best prospects for its **non-residential market** in the 2004-08 period, as a flow of both private as well as public investment is expected in virtually all the sub-markets. Also in Sweden the non-residential market is destined to grow at around 10.5% in 2006 and 2007. There will be a clear recovery in the office market and positive prospects in construction related to education, health and trade. Slovakia will be the only country in the Eastern European group that will not manage to get into the list of leaders in future growth, mainly as a consequence of the falling trend in commercial construction, which has a substantial weight in this country. Portugal and Germany look like being recessive markets throughout the 2004-08 period.

The **civil engineering market** has shown itself to have the most rapid and sustained growth in the last few years, and the forecasts indicate that it will continue in this vein, growing above the construction sector averages. Transport infrastructure (rail, but above all roads) will be the main markets responsible for this good performance. Apart from the Central and Eastern European countries, the forecasts for the civil engineering market are also very promising in countries like Spain, Sweden, Ireland or Austria, whose optimism is based on ambitious government investment programmes in transport infrastructures. Spain will take maximum advantage of its last years as a net receiver of European Union funds. On the opposite side, it is necessary to highlight the recessive scene in Portugal and Germany, where civil engineering is one of the main victims of budget cuts.



UEPG Structure



* Meeting Secretary: Markus SCHUMACHER, Germany



Activities

Health & Safety Environment Technical Economic

Under the Chairmanship of Dr Rafael Fernández Aller (ANEFA, Spain), vice-chaired by Martin Isles (Quarry Products Association, United Kingdom), the UEPG Health & Safety Committee's mission is to contribute to shaping policy at European level and to participating in voluntary initiatives. The Committee consists of 30 members.

Social Dialogue Agreement on Respirable Crystalline Silica

The Social Dialogue Agreement on Respirable Crystalline Silica is a voluntary initiative from the industry to protect workers from silica dust exposure. Twelve industrial sectors including aggregates, glass, foundries, concrete, cement, industrial minerals, metal mining and ceramics participated in the negotiations. This initiative consists of two elements: an agreement with annexes (including a reporting format and a health surveillance protocol) which establishes the principles applicable to the parties, and a good practices guide which gives general elements about crystalline silica. It also establish a risk assessment method and includes task sheets to be implemented by the industry. Because aggregates comprise a variety of materials with a wide range of free silica content (from 0% to 100%), not all European aggregates producers are concerned with respirable crystalline silica. The Agreement will enter into effect three months after signature by the first two Parties, one representing Employers and one representing Employees in the same industry sector, provided the Agreement has been officially translated in all EU official languages.

UEPG Health & Safety Good Practice in the Aggregates Industry

Health & Safety is a top priority for UEPG. To demonstrate this, the UEPG Health & Safety Committee plans to encourage voluntary initiatives that will highlight the European aggregates industry's achievements in this area. The Committee agreed to start working on a Guide on UEPG Good Health & Safety practice in the Aggregates Industry. This Guide will be a reference document presenting Good practices applied in our sector all over Europe and provide examples other aggregate companies can follow.

Standing Working Party for the Mining and Other Extractive Industries - SWPEI

UEPG is represented by the Chairman of the H&S Committee in the SWPEI, a consultative party within the Advisory Committee for Health and Safety. Its main objectives are:

- Reviewing bibliographies and screening of the most important documents adopted by the Safety and Health Commission for the Mining and Other Extractive Industries (SHCMOEI)
- Preparing a code on good practice on issues where needed
- Identifying Commission legislative tools for which the SWPEI could comment
- Promoting the exchange of information with the new countries on aspects related to the health and safety of workers in the mining and other extractive industries in the EU Member States

Health & Safety is a top priority for UEPG.



*UEPG regards
"risk prevention at work"
as an essential aspect of
aggregate production in
Europe.*

Other work areas

The UEPG Health & Safety Committee is monitoring on a number of other issues including: the new EU Chemical Policy – Registration, Evaluation and Authorization of Chemicals (REACH), as well as the implementation of the Vibrations Directive at national level.

UEPG Health & Safety Policy Statement

The overall aim of UEPG's Health and Safety strategy is to develop policies aimed at achieving a zero accidents objective as well as safe and healthy working conditions in the European aggregates industry.

UEPG regards "risk prevention at work" as an essential aspect of aggregate production in Europe, already integrated in the EU Sustainable Development policy.

In particular, UEPG has identified the following high-priority issues:

- To convey to Member associations and European aggregate producers the need to integrate the Prevention culture in companies and sites.
- To disseminate effectively UEPG's Health and Safety expertise to EU policy-makers and legislators and become an authoritative source of information on behalf of the European aggregates industry.
- To participate in and promote common projects for the improvement of Risk Prevention at Work issues.
- To exchange knowledge and expertise, in addition to legislation and documents from the different Member associations.
- To promote Health and Safety through UEPG participation in the fora organized by the European Commission and other European Institutions.
- To develop a coherent overall prevention policy for the European aggregates industry which covers technology, organization of work and working conditions.
- To encourage further engineering and management improvements in safety conditions on extraction sites and treatment plants.
- To upgrade information, dialogue and balanced participation on Health and Safety at Work between employers and workers.
- To promote safety training for workers, adapted to the particular conditions of each extraction site and to promote the need to give them appropriate instructions.
- To promote awareness, exchange of information, and improvements in occupational health.
- To promote a common basis for the collection and processing of statistical information to characterize the Industry's safety performance, and
- To develop methods of statistical comparison in occupational health.



Activities

Health & Safety Environment Technical Economic

The UEPG Environment Committee aims at being a dynamic platform, where UEPG members can address common environmental issues, report on any relevant developments at national level and exchange best practices.

Under the chairmanship of Arnaud Colson (UNPG, France) and the Vice-Chairmanship of Liam Smyth (ICF, Ireland), the UEPG Environment Committee aims at being a dynamic platform, where UEPG members can address common environmental issues, report on any relevant developments at national level and exchange best practices. This provides the basis on which the Committee strengthens continuously its expertise.

Management of Waste Directive

The Second Reading of the European Parliament (EP) in September 2005 had a positive outcome for the European aggregates industry, as the adopted text enabled environmental improvements without imposing a disproportionate burden on companies. The implementation of the Directive will require the completion of a number of technical tasks under the comitology procedure. The timeframe for completion of these tasks is 2 years.

Pollutant Release and Transfer Register (PRTR)

The EC Regulation establishing the European PRTR (No 166/2006) was adopted on 18 January 2006 and published in the Official Journal of the European Union on 4 February. The PRTR Regulation, which entered into force on 25 February 2006, is binding in its entirety and directly applicable in all Member States. The European Commission has developed a draft Guidance Document on PRTR. The UEPG Environment Committee has coordinated the Non Energy Extractive Industry's inputs to improve the draft Guidance Document for the implementation of the European PRTR.

Marine Aggregates

In March 2005, the European Commission started working on a Green Paper for an all embracing Maritime Policy, under the leadership of José Manuel Barroso, President of the European Commission. The Green Paper on Maritime Policy was launched in June 2006. Arnaud Colson recommended the setting-up of the UEPG Marine Aggregates Task Force in order to contribute to the development of the future EU Maritime Policy by making constructive inputs.

The Task Force consists of the main countries where marine aggregates are produced including Belgium, Denmark, France, Germany, the Netherlands and the United Kingdom. It has exchanged views with John Richardson, Head of the EU Maritime Policy Task Force, and Yves Auffret from DG Fisheries and Maritime Affairs, European Commission. The European Commission welcomed UEPG's pro-active initiative to convene a meeting with representatives of the marine aggregates industry. The consultation will lead to a series of concrete policy proposals taking into account the different sea users.

Biodiversity

One of the UEPG Environment Committee's priorities is to promote the European aggregates industry's contribution to biodiversity. DG Environment invited UEPG to discuss informally



Sustainable Development Indicators represent a key opportunity for the industry to demonstrate its commitment to sustainable development.

a possible participation of the European aggregates industry in the Green Week 2006. This builds on the successful relationship with Nicholas Hanley established by immediate past UEPG President Manfred Asamer.

The Communication on "Halting the loss of Biodiversity by 2010 - and beyond" - addresses a number of key challenges and supporting 'Key Delivery Measures' to 2010 and beyond. The consultation paper asked to what extent stakeholders agree with these and whether there were any important key challenges or key delivery measures missing. The consultation sought stakeholders' opinions on how important they consider biodiversity and ecosystem services for Europe's prosperity, security and quality of life. Finally, the consultation called for case studies which demonstrate the values of biodiversity and ecosystem services.

Sustainable Development Indicators (SDIs)

The European Commission issued the report "EU Non-Energy Extractive Industry - Sustainable Development Indicators 2001-2003". This publication represents a significant achievement for UEPG as it demonstrates its willingness and efforts to integrate sustainability in its operations. This first step of a long-term exercise is very encouraging. Such indicators represent a key opportunity for the industry to demonstrate its commitment to sustainable development, through the reporting of the key economic benefits the sector provides, its commitment to social development and environmental protection. SDIs also provide a basis for more informed dialogue with interested parties, including permitting authorities, the general public and NGOs, on how the industry can continue to provide the raw materials which are vital to modern society in a way that best contributes to a sustainable Europe.

Other work areas

The Committee also worked on the dissemination of the results of the UEPG Sustainable Development Awards 2005 at national level in order to spread best practices and provide examples others can follow. Other policy issues addressed by the Committee included Groundwater Protection draft directive, Sustainable Use of Natural Resources, Protection and Sustainable Use of Soil as well as Waste Prevention and Recycling.



Activities

Health & Safety Environment **Technical** Economic

UEPG TC Members are recognized experts who are continuously working to develop and implement aggregates standards at national and European level.

Chaired by Jan Bida (SBMI, Sweden) and vice-chaired by Jean-Marc Vanbelle (Gralex, Belgium), the UEPG Technical Committee consists of 30 Members. UEPG TC Members are recognized experts who are continuously working to develop and implement aggregates standards at national and European level. This provides the UEPG Technical Committee a leading position to influence the work of CEN/TC 154 Aggregates.

Revision of the Construction Product Directive (CPD)

The European Commission believes that the Construction Products Directive (Directive 89/106/EEC) only partially eliminates barriers to trade and does not establish optimal conditions allowing the free circulation and use of construction products inside the Community, in particular for small and medium enterprises. Against this background, prior to preparing a legislative proposal to simplify the Directive, the Commission has launched a wide consultation of interested stakeholders on important features of the Directive.

The modification or removal of these should make this legislative tool more simple and transparent, improve its effectiveness as well as reduce the costs of its implementation. This consultation concerns the most important specific aspects to be considered in the revision of the Construction Product Directive (CPD). Coordinated by the Council of European Producers of Materials for Construction (CEPMC), a questionnaire was prepared with a working group of representatives from industries, to collect data expected by the European Commission.

The UEPG Technical Committee has contributed to the Commission's consultation through a survey on the cost of CE marking on construction products. The cost of CE marking would be between 3 to 8 cents per tonne.

Dangerous substances

Members of the UEPG Technical Committee have continued to monitor actively all developments related to dangerous substances developing a briefing on dangerous substances in relation to aggregates, which include the following key points:

- Many aggregate products do not contain dangerous substances as a consequence of their known mineral composition or will not release it in their intended use in a structure.
- It was the intention of CEN/TC 154 to ensure a classification of aggregates in these situations, without Testing or in some cases Without Further Testing.
- In circumstances where such a classification is not appropriate, CEN/TC154 will define the initial type testing and any further testing under the system of Factory Production Control that will be required before CE marking can be applied.
- UEPG TC Members will contribute to a catalogue of aggregates based upon their source and petrographic/mineral composition proposing classifications as



'Without Testing' (WT) or 'Requiring initial type testing' leading to 'Without Further Testing' (WFT) or 'Requiring Further Testing'. This catalogue will be submitted to the European Commission, DG Enterprise, G3 Construction unit to be approved as a WT/WFT list.

European Technology Platform on Sustainable Mineral Resources

The UEPG Technical Committee aims to identify research & development opportunities that could be relevant to the European aggregates industry. Achievements in this field included the active participation in establishing the European Technology Platform on Sustainable Mineral Resources (ETP SMR).

Its key objectives are:

- Securing the future supply of/access to European raw materials
- Supporting the revival of exploration of Europe's mineral potential
- Developing innovative and sustainable production technologies
- Implementing best practices
- Re-use, recovery and recycling as well as new product applications
- Creating European added value through Research and Technological Development (RTD)-based technology leadership, education and training

The UEPG Technical Committee has ensured that priorities of the European aggregates industries were included in the Strategic Research Agenda. Other R&D related activities included participation in the programme ECO-Serve Cluster 3 and Alkali Silica Reaction (ASR) research with closer contacts with the "Partner project".

The UEPG Technical Committee has continued working to build a partnership with aggregate-related European associations.

Other work areas

The UEPG Technical Committee has continued working to build a partnership with aggregate-related European associations. The Committee had established or strengthened links with the Council of European Producers of Materials for Construction (CEPMC), the European Ready Mixed Concrete Organisation (ERMCO), the European Mortar Organisation (EMO) and the European Asphalt Producers Association (EAPA). Another activity had been the promotion of UEPG's technical expertise and achievements. The Technical Committee has communicated effectively on European Standardization with the Aggregate Associations from the new EU Member States and had maintained a close cooperation with other UEPG Committees.



Activities

Health & Safety Environment Technical **Economic**

Chaired by Hans-Peter Braus (BKS, Germany), the UEPG Economic Committee is the main instrument to collect and analyse economic data. This is to demonstrate the valuable contribution of the European aggregates industry to the EU economy and quality of life. The Economic Committee was established by the Delegates Assembly in Paris. It takes over and continues the work of the Statistical Committee. The objectives of the new Economic Committee are:

- Analysing and interpreting UEPG statistics;
- Providing aggregates related economic data to EU stakeholders;
- Positioning the aggregates sector vis-à-vis other sectors and;
- Evaluating the benefits of the aggregates industry for regional taxes, employment, consumer capacities.

Demonstrate the valuable contribution of the European aggregates industry to the EU economy and quality of life.

The Committee will address issues such as:

Access to Resources

The European aggregates industry supplies, and will continue to supply, materials essential for the improvement of standards of living and the quality of life in Europe. The precondition to do so is access to resources. To maintain the minerals supply and to minimise the environmental impact, the industry needs to have access to resources close to areas of demand. Sound data and case studies will demonstrate the challenge and help to ensure a balance between environmental, social and economic interests.

European Commission's Working Paper on Competitiveness

The European Commission is preparing a Working Paper on Competitiveness in the EU non-energy extractive industries. The objective is to facilitate discussion within the Raw Materials Supply Group (RMSG). UEPG provided DG Enterprise with case studies and data to be included in this paper.



General Secretariat

The UEPG General Secretariat acts as a facilitator between EU policy-makers and UEPG Members and provides valuable networking opportunities.

Located in Brussels, at the centre of the European Union quarter, 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.

Providing EU intelligence

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 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.

The UEPG General Secretariat has tracked emerging proposals or initiatives such as the Pollutant Release and Transfer Register (PRTR), the Ambient Air Quality Directive and the Communication on Biodiversity. The UEPG General Secretariat maintains daily and close contacts with UEPG Members so that it can respond quickly to any arising national priority, question or concern. It also took the opportunity to brief Members directly by participating in national events in Finland, France, Germany, Norway and Slovakia.

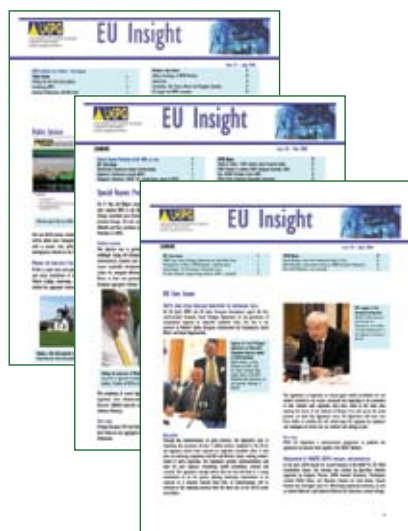
Since its inception in 2003, the monthly e-newsletter EU Insight has proved a popular tool which offers a succinct summary of recent policy developments. It outlines the next steps, so that UEPG Members can anticipate future developments of any EU initiative and provide constructive inputs to influence the outcome. The UEPG General Secretariat is equally well placed to attend and participate in Commission Stakeholder consultation meetings, committee meetings in the European Parliament and external fora.

Involving the Aggregates Industry in EU Policy Making

The proximity to the EU Institutions and day-to-day contact with policy-makers allow the UEPG General Secretariat to identify opportunities for the European aggregates industry to become involved in the policy making process. For example, UEPG was invited to chair the European Commission Sustainability Working Group of the Raw Material Supply Group (WG SEIE). This provides an exceptional opportunity to influence the direction of EU policy at a very early stage.

The UEPG General Secretariat has continuously strengthened its network of key contacts within the European Commission, European Parliament and EU Council working groups. A useful platform are the UEPG Board Policy Dinners where open and informal discussion with key EU policy-makers takes place. Speakers have included Abraão Carvalho, Head of Unit responsible for the aggregates sector at DG Enterprise and Industry, and Philippe Quevauviller, in charge of Groundwater Protection at DG Environment.

The UEPG General Secretariat acts as a facilitator between EU policy-makers and UEPG Members and provides valuable networking opportunities. Over the last twelve months, it has organized timely meetings with Nicholas Hanley (Nature and Biodiversity), François Wakenhut (Marine Environment), Paul Speight (Waste Framework Directive), Claudia Olazabal (Soil Protection), Herbert Aichinger (SMEs and Environmental Policy), Werner Bosmans





(Sustainable Use of Natural Resources) of DG Environment, Jean Trestour (Intermodality) of DG Transport, Tom Simpson and Paul Anciaux (Minerals) of DG Enterprise and Industry, John Richardson and Yves Auffret (Maritime Policy) from DG Fisheries and Maritime Affairs.

Coordinating EU lobbying campaigns

The UEPG General Secretariat designs targeted lobbying strategies and acts as a coordinator in their implementation.

The UEPG General Secretariat designs targeted lobbying strategies and acts as a coordinator in their implementation. Examples include the positive outcome on the Mining Waste Directive, where a well-coordinated pan-european action led to environmental improvements without imposing a disproportionate burden on the companies. The excellent cooperation between members of the Non-Energy Extractive Industries Panel (NEEIP) as well as the effective support of UEPG Members ensured a comprehensive briefing of key Members of the European Parliament through telephone calls and face-to-face meetings. The UEPG General Secretariat works closely with other European Industry Associations of the Non-Energy Extractive Industry. Where there is a consensus on a particular issue, the UEPG General Secretariat contributes to joint advocacy work. Examples of this coordinated approach included joint position papers on Pollutant Release and Transfer Register (PRTR), on Soil Protection or on Groundwater.

Raising the industry's profile

The General Secretariat has continued to promote the achievements of the European aggregates industry by making keynote speeches in international conferences such as the Technical Assistance Information Exchange Unit Workshop (TAIEX Workshop) in Hungary in November. It also develops and coordinates targeted events. A successful example is the close cooperation with the European Minerals Foundation (EMF) organising the European Minerals Forum 2005. The theme was "Securing EU Mineral Supply". The event had been especially designed to enable the industry to be more pro-active and to develop constructive recommendations on key policy issues and share them with EU policy-makers. High-level representatives from the European Commission included Pedro Ortún, Director, Liliana Brykman, Head of Unit, Tom Simpson and Paul Anciaux from DG Enterprise and Industry, as well as Timo Makela, Director in charge of Sustainable Development at DG Environment. The European Minerals Forum 2005 represented a key opportunity for the industry to formulate and present in a pro-active manner its recommendations for future policies. UEPG demonstrated that it was in a position to contribute in an authoritative way to public policy issues impacting on the European aggregates industry.



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Marine Aggregates Task Force: Arnaud Colson, UNPG, France

Silica Task Force: Rafael Fernández Aller, ANEFA, Spain

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RMSG Working Group: Sustainability of Extractive Industry Enterprises: Ulrich Hahn

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CEN/TC 292 "Characterisation of waste": Ulrich Hahn, Jean-Marc Vanbelle

CEN/TC 351 "Construction Products": Jean-Marc Vanbelle

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We would like to thank UEPG members for their contributions

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 Centre, right Biodiversity, restored quarry nearby Paris, France. Photograph by UEPG
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Left Modern House (web)
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Left Products from a gravel pit near Munich, Germany. Photograph by UEPG
 Centre Transport of gravel in Switzerland. Photograph by UEPG
 Right German Chancellery building, Berlin, Germany (web)
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 Centre Products from a gravel pit nearby Munich, Germany. Photograph by UEPG
 Right Newly build motorway. Photograph by UEPG

Economic Outlook

Left Site visit with Belgium MEPs. Photograph by UEPG
 Centre Conveyor on a quarry site. Photograph by Fachverband Steine-Keramik, Austria
 Right Vladimír Špidla – EU Commissioner for Employment, Social Affairs and Equal Opportunities at the Social Dialogue Agreement 2006, Brussels. Photograph by UEPG
 Left Jean-Paul Jeanrenaud (WWF International) at UEPG's Entrepreneurs Forum 2006. Photograph by UEPG
 Centre Machinery on a gravel pit nearby Munich, Germany. Photograph by UEPG
 Right Abraão Carvalho – Head of Unit in DG Enterprise, European Commission with UEPG President Didier Audibert at a UEPG Board Policy Dinner. Photograph by UEPG
 Left Delegates Assembly, June 2006, Paris, France. Photograph by UEPG
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 Right UEPG Entrepreneurs Forum, June 2006, Paris, France. Photograph by UEPG
 Left PR & Communication Task Force meeting, Paris, France. Photograph by UEPG
 Centre Floating grab excavator nearby Munich, Germany. Photograph by UEPG
 Right Meeting of the Working Group on the Sustainability of Extractive Industry Enterprises, Brussels. Photograph by UEPG

Structure

Left Delegates Assembly in 2005, Stockholm, Sweden. Photograph by UEPG
 Centre (from left to right) First Vice President Kenneth Johansson, President Didier Audibert and Second Vice President Michael Schulz at the Delegates Assembly 2005, Stockholm, Sweden. Photograph by UEPG
 Right PR & Communication Task Force meeting, Paris, France. Photograph by UEPG

Health & Safety

Left Manuel Fidalgo, Instituto Nacional de Silicosis, Spain, with Rafael Fernandez Aller, Chair of the Health & Safety Committee. Photograph by UEPG
 Centre Safety measurements in Finland. Photograph by SML, Finland
 Right Martin Isles, Vice Chair of the Health & Safety Committee. Photograph by QPA, United Kingdom
 Left Vladimír Špidla, EU Commissioner for Employment, Social Affairs and Equal Opportunities. Photograph by European Commission
 Centre Health & Safety contribution. Photograph by ANEFA, Spain
 Right Chair of the Health & Safety Committee Rafael Fernández Aller (right) and Secretary César Luaces Frades. Photograph by UEPG

Environment

Left Restored quarry nearby Munich, Germany. Photograph by UEPG
 Centre Arnaud Colson, Chairman of the Environment Committee with Nelly Olin, French Minister for Environment and Sustainable Development on a site visit nearby Paris, France. Photograph by Lafarge, France
 Right Marine Aggregates dredging in France. Photograph by Lafarge, France

Left Marine Aggregates Task Force meeting in the UEPG office, Brussels, Belgium. Photograph by UEPG
 Centre French quarry in restoration process. Photograph by Lafarge, France
 Right Simon van der Byl, Director General of QPA, and François Wakenhut, DG Environment, European Commission. Photograph by UEPG

Technical

Left Jan Bida, Chair of the Technical Committee with colleagues during a meeting of the Committee in Bratislava, Slovak Republic. Photograph by UEPG
 Centre Testing of aggregates. Photograph by Galex, Belgium
 Right TC 292 WG 8 Coordination Group meeting in the UEPG office with Jean-Marc Vanbelle, Vice Chair of the Technical Committee. Photograph by UEPG
 Left Philip Nixon, BRE, United Kingdom, (right) during a Technical Committee meeting. Photograph by UEPG
 Centre Digital measurement. Photograph by UEPG
 Right Prof. Dr. Ulrich Hahn, member of the Technical Committee. Photograph by MIRO, Germany

Economic

Left (From left to right) President Audibert, Tom Simpson from the European Commission and Hans-Peter Braus, Chair of the Economic Committee in the UEPG office. Photograph by UEPG
 Centre Modern bridge. Photograph by QPA, United Kingdom
 Right Jerry McLaughlin, Secretary of the Economic Committee in the UEPG office. Photograph by UEPG

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Left Antony Fell, UEPG General Secretariat (right), with President Didier Audibert (centre) and Pedro Ortún Silván, Director DG Enterprise & Industry, European Commission at Minerals 2005, Brussels, Belgium. Photograph by UEPG
 Centre Meeting of the Raw Material Supply Group in the Commission. Photograph by UEPG
 Right Grégoire Poisson, UEPG Director of Public Affairs (centre), with Tom Simpson (right) from the European Commission and Jan-Bida, Chair of the Technical Committee at the UEPG Board Policy Dinner, Brussels, Belgium. Photograph by UEPG
 Left Dirk Fincke, UEPG Public Affairs Officer (left), with Jerry McLaughlin, QPA. Photograph by UEPG
 Centre UEPG representation in the European Parliament, Brussels. Photograph by UEPG
 Right UEPG Delegation in the Commission. Photograph by UEPG

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Left Mircea Simionescu, APPA, Romania, (left) and John Maguire, Irish Concrete Federation in Paris, France. Photograph by UEPG
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 Right Member of Board Francisco Ibáñez Díez. Photograph by UEPG

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Left Alain Pasquier, Secretary General of UNPG (left) with Dr. Carl Hennrich, Chair of PR & Communication Task Force during a meeting in Paris, France. Photograph by UEPG
 Centre Treasurer Jacques Grob. Photograph by UEPG
 Right Past President Manfred Asamer with Nicholas Hanley from the European Commission. Photograph by UEPG
 Left Elisabeth Gammelsæter, Secretary General, Norwegian Mining and Quarrying Industries
 Centre Nico Vonk, Manager R&D from Niba Bouwgrondstoffen B.V., and Arnaud Colson, Chair of the UEPG Marine Aggregates Task Force, at a Hearing in the European Parliament
 Right Michael Schulz, President of the Bundesverband der Deutschen Kies- und Sandindustrie e.V., at the UEPG Board Policy Dinner in Brussels. Photograph by UEPG



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