

EUROPEAN AGGREGATES ASSOCIATION

A Sustainable Industry for a Sustainable Europe



Annual Review

2008 – 2009

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Past President's Introduction



Providing Essential Materials for a Sustainable Europe

During 2008, UEPG pursued its goal and progressed on major public affairs issues, campaigning for a European Commission Communication on Raw Materials and the Sustainable Development Initiatives with a special emphasis on Biodiversity.

In cooperation with IUCN/Countdown 2010, UEPG achieved international recognition for the European Aggregates Industry as one of the leading sectors to take practical steps to reduce the current rate of biodiversity loss, by providing appropriate ecosystems for both fauna and flora during and after extraction activity.

To illustrate UEPG actions toward Environmental and especially Biodiversity issues, a new online biodiversity database has been created.

The European Commission responded to calls for the drafting of a guideline paper for the non-energy extractive industries on extraction within or close to Natura 2000 areas, including in marine areas. This follows a call for greater recognition of the compatibility between extraction sites and protected areas through more flexible guidelines.

Committed to Sustainable Development, UEPG has taken a pro-active step forward by developing a single annual questionnaire covering all three sustainable development pillars. This would reduce the administrative burden on UEPG members and provide the European Commission with the more reliable sustainable development data they requested. This questionnaire should be updated every year.

UEPG welcomed the Commission's Raw Materials Initiative and has called for increasing access to European resources on a sustainable base and developing increased knowledge of potential resources. In cooperation with its European

partners from the non-energy extractive industries, UEPG briefed key representatives from the European Commission and the European Parliament on this main challenge.

We are calling on the Commission to classify aggregate raw materials as a strategic resource for the European Union's construction industry, and to press Member States to give higher priority to aggregate resources in their planning. Potential reserves must be better inventorised and proven resources should not needlessly be sterilised. We would like Member States to be urged to set up the necessary regulatory and administrative framework to finalise planning and authorising decisions within a reasonable timescale.

UEPG has continued to raise the profile of our sector: by improving the interactive communication on live issues, by shaping positively our public image, and through organising meetings at the highest level with the European Commission on policy initiatives and strategic plans. With the support of the permanent General Secretariat, UEPG has substantially widened its network in both the European Parliament and with EU Member States representatives.

On behalf of all UEPG members, I would like to thank the Committees, their members and particularly their Chairmen and Vice-Chairmen for their excellent work towards a sustainable future for the European Aggregates Industry.

It was a privilege to serve as your President from 2007 to 2009, and I am very happy to hand over to my successor, Jim O'Brien.

Denis Mertens
President UEPG 2007–2009



New President's Introduction



A Sustainable Industry for a Sustainable Europe

It is a great honour to be elected President of UEPG, and I pledge all my energies in continuing the excellent work of the Past-President in the next two years.

I am very conscious that we now are in much more difficult economic times: some of our national industries have suffered up to 50% declines in production volumes since 2008. Therefore UEPG must, more than ever, be highly cost-effective and provide excellent value for money to all its Members. In parallel, its aim must be to turn recession into opportunity, through lobbying for more investment in much-needed improvements in European buildings and infrastructure.

UEPG members supply 3 billion tonnes of aggregates a year, some 15% of global production. Continued long-term access to raw materials is vital to our industry, therefore we will continue to work very actively within the Raw Materials Initiative. We will continue to develop our environmental stewardship, cooperating in a very practical way with Natura 2000 goals. Our mission is a sustainable industry for a sustainable Europe.

The work of the Health and Safety Committee will continue to be high on our agenda. I am passionate about the need to raise safety standards for employees and contractors within our industry: injuries and fatalities are totally unacceptable. UEPG will continue as an active European Social Partner on health, safety and training, improving the quality of life of our present and future workforce.

In the Environment Committee, we will continue to focus on the many Directives potentially impacting our industry: though well-intentioned, some could have negative impacts, where we will instead seek new positive solutions for all our stakeholders. We will continue with our well-established biennial Sustainable Awards

program, and continue our unique and positive cooperation with IUCN, always seeking to provide a haven for biodiversity at our locations.

Through the Technical Committee, we will continue to assist in the development of more practicable standards for virgin as well as recycled aggregates, in order to stimulate more trade in both. We will actively promote the use of recycled aggregates, and seek to ensure that these continue to be supported by legislation and practice. We will develop stronger links with downstream users, such as through the European Concrete Platform.

Through the Economic Committee, we will continue to gather key national and European data for our industry through refining the Sustainable Development Indicators, enhancing our lobbying power, while in parallel ensuring that UEPG always acts in the best strategic interests of our industry to the highest standards of governance.

We can be proud that UEPG already represents 22 countries, and it will be my aim to seek to grow to 25-30 members. We are updating the Statutes so that UEPG has more effective structures and procedures to function effectively as a larger entity. UEPG now speaks with a loud voice in representing the aggregates industry at a European level, and we are furthering links with NSSGA and other associations.

You have an excellent Board, as well as highly-experienced Chairs and Co-Chairs of the Committees and Task Forces. I am very fortunate to inherit an outstanding UEPG support team in Antony Fell, Dirk Fincke, Sandrine Devos and Miette Dechelle. They all and I will continue to very actively serve the UEPG mission in the years ahead.

Jim O'Brien
President UEPG 2009-2011



An introduction to UEPG and Aggregates

UEPG represents:

- Members in 22 European countries
- 3 billion tonnes of aggregates per year
- 28,000 sites
- 350,000 employees (incl. contractors)

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.

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.

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 endproduct 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. They provide not just strength but in many cases also 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.



European Economic Developments

Construction Activity in Europe

After a peak in construction in 2006 which slightly weakened in 2007, 2008 and 2009 are considered to be significantly slower.

The decline in the global economic environment and the global credit crunch have led to a sharp decline in the construction market activity in a number of European countries.

Although the economy's short term difficulties are expected to result in a decline in real GNP in 2008 and 2009, the prospects for 2010 tend towards stability, with a modest return to growth in 2011.

One can observe different trends in construction in Western and Eastern European countries.

Western European countries

In Western European countries the construction sector cooled down in 2007, and even more in 2008. The causes of the weakening economy for construction in Western European countries lie above all in the international financial crisis, the increasing strength of the euro, higher interest rates and the fall in overall demand in the economy. Bad weather conditions also delayed planned works. The range of situations goes from a minor growth (for instance in Switzerland or in Austria) to a negative growth (for instance in Belgium).

It is difficult to produce a forecast for 2010 and beyond, as situations vary widely. In the countries which benefit from a strong governmental support with recovery plans (e.g. Germany or France), the 2010 forecast is a little positive. In others, recession or downturn is to be expected in 2009 but a recovery is predicted for 2010.

UK, Spain and Ireland are particularly under strain, with the bursting bubble in real estate markets. The downturn in the high price of real estate is putting the brake on demand for construction investment. The strong expansion in housing output increasingly led to over-capacity and the downturn has been significant.

Central Eastern countries

In Central Eastern European countries, unlike Western Europe in 2008 and at the beginning of 2009, some countries suffered a serious decline in aggregates demand (e.g. Croatia or Hungary) but some still experienced a growth of the sector (e.g. Romania or Slovakia). It is therefore extremely difficult to make any assumptions regarding 2010.



Prospects for the different markets

The prospects for the individual sectors of construction in 2010 are as follows:

- The volume of new residential construction is expected to record a substantial decline, which remains significant after taking account of the modest growth expected in residential Repair, Maintenance & Improvement (RM&I) expenditure.
- The uncertain economic situation is also adversely impacting on private non-residential construction, where the volume of construction output is also expected to weaken, following four years of double digit growth. The two areas of activity responsible for the decline are commercial building and tourism.
- The overall investment in productive infrastructure projects is expected to increase in volume terms led by an increase in airports and public transport.
- The volume of construction related investment in social infrastructure projects is up, reflecting investment in hospitals and other social infrastructure, including sporting facilities and local authority services.

Analysis of the European construction market broken down across the individual sectors reveals an interesting shift within those segments. Whereas in 2006 housing construction still exerted a key influence over growth in the overall construction sector, this segment has become less important due to a deteriorated confidence. The role as driver is now taken on by non-residential construction and by civil engineering.

UEPG is actively supporting its members through the economic crisis by lobbying to reduce legislative cost burdens on the industry and through lobbying for more investment in infrastructure and upgrading of buildings across Europe.

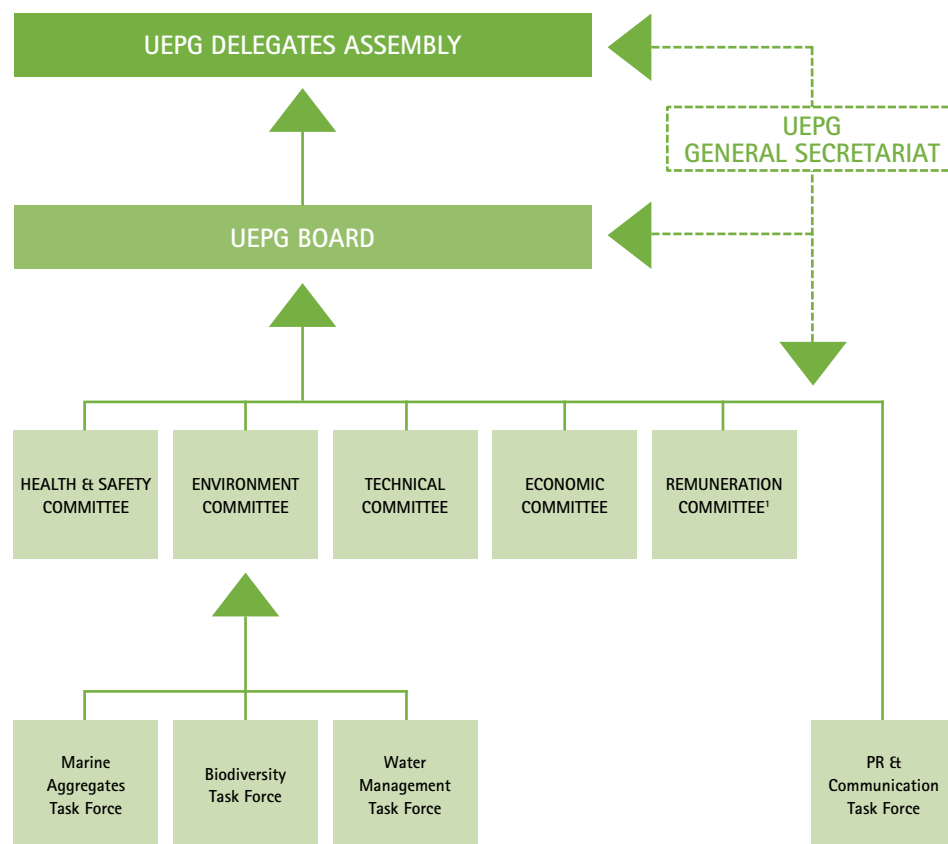


Core Values

Economic prosperity	Social Progress	Environmental Stewardship
<p>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.</p> <p>Continued long-term access to raw materials is vital for the industry.</p> <p>Providing jobs The European Aggregates Industry's operations are an important source of jobs and economic development, particularly in rural areas.</p> <p>Contributing to Europe's competitiveness The European Aggregates Industry is and will continue to be a fundamental pillar of the European Economy.</p>	<p>Promoting Health & Safety The health & safety of its employees, contractors and visitors is the highest priority for the European Aggregates Industry.</p> <p>Partnering with stakeholders The European Aggregates Industry aims to engage with all relevant stakeholders. The European Aggregates Industry's operations are an integral part of regional and local communities.</p> <p>Contributing to Europe's Heritage The European Aggregates Industry acknowledges the importance of our common natural and built European heritage and will continue to promote best practices throughout the sector.</p>	<p>Contributing to biodiversity The European Aggregates Industry is committed to integrating biodiversity in its operations.</p> <p>Managing Land The European Aggregates Industry accepts its responsibility as land managers to prepare sites for environmental, agricultural, recreational, landscape or other community use after the operations.</p> <p>Conserving Resources The European Aggregates Industry recognises recycled aggregates as a factor of sustainability and as a valuable source of raw materials.</p>



UEPG Organisational Structure



¹ As of 19 May 2009



Activities

Health & Safety Committee

The UEPG Health & Safety Committee's mission is to contribute to better health & safety in the industry through shaping policy at European level and to participate in voluntary initiatives.

Chaired by Martin Isles (Mineral Products Association, United Kingdom) and vice-chaired by César Luaces Frades (FdA, Spain), the UEPG Health & Safety Committee's mission is to contribute to better health & safety in the industry through shaping policy at European level and to participate in voluntary initiatives.

Ensuring successful implementation of the Social Dialogue Agreement on Respirable Crystalline Silica

The last response of enrolled sites has been impressive. UEPG will call Members for increasing the NEPSI 2010 Reporting aggregates sites, following the improvement of the NEPSI guidelines, website and promotion campaign on the Social Dialogue Agreement, reporting and achievement.

Atlantic Alliance

The Atlantic Alliance is an international network of extractive industry, regulators and accident insurers. Founder members were the USA, UK, Germany and Ireland. UEPG helps coordinate European involvement.

The preparation of the 6th Meeting of the Atlantic Alliance started in February 2009. This first step produced preliminary ideas about the themes, the budget, the target audience and the idea of opening the event to a more international level with the participation of International Social Security Association Section for Mining Industry.

MPA "Safer by Design" project

The UK's Mineral Products Association (MPA) has been successful at national level in attracting funding from the UK Government for a project entitled: "Safer by Design". The aim of this project is to achieve a significant improvement in safe & efficient sites operations by the development of a Code of Best Practice for purchasers and users of mobile plant. With a wide range of organisations supporting this Project, it is intended that the resulting voluntary Code will also be of benefit to the manufacturers and suppliers of mobile plant.

The development of this Industry advisory Code will allow aggregate and other mineral producing sites the ability to plan for improved operational health and safety performance by contributing to the social pillar of sustainable development. The outcome of this project will be a series of recommendations, categorised according to type & size of mobile plant. The UEPG Health & Safety Committee has already been involved in the first Project meeting, chaired by Martin Isles. MPA's firm intention is to maintain and enhance the valued linkage with UEPG and, with our Atlantic Alliance partners.



UEPG Sustainable Development Indicators

More and more sustainable developments indicators are seen as important to show the positive impact of the Industry in our society. UEPG Members are aware of this impact.

Therefore, UEPG's 22 Members sent their first contribution in respect of sustainable development indicators. This first attempt has been followed by the collection of data by the General Secretariat in a database system. At this stage no conclusions could be drawn. However for more consistency the data would be presented with questions and answers to the public, to guide readers to a better understanding of the figures.

EC Community strategy 2007– 2012 on Health & Safety at work

UEPG considers health & safety at work as its first priority and is therefore dedicated to constantly improve safety and health standards in quarries. To achieve this goal UEPG co-operates with the European Agency for Health & Safety in Bilbao.

UEPG has been accepted to become an EU Social Partner by joining the European Commission's Sectoral Social Dialogue Committee for the Extractive Industry.

On 2 March 2009, the UEPG General Secretariat presented the activities and projects of UEPG as well as the objectives in the area of health & safety to the members of the Sectoral Social Dialogue Committee for the Extractive Industries.

The application of UEPG and its potential contribution to the Sectoral Social Dialogue has been welcomed by the European Commission. UEPG has asked its members to update the Social Dialogue questionnaire dated 2005 and to provide further information on their working relationship with national Unions. All information has been sent to the European Commission by the end of April. As a result, the Committee has fully accepted the UEPG application to be a Social Partner during its plenary session on 4 June 2009. The next step is to be involved more in the Sectoral Social Dialogue issues.

Other work areas

The UEPG Health & Safety Committee is monitoring a number of other issues including the Standing Working Party for the Mining and Other Extractive Industries. UEPG is willing to get more involved, and create new ties with the DG Employment in Luxembourg to be pro-active in employment policies at European level.



Activities

Health & Safety Committee

Environment Committee

Technical Committee

Economic Committee

The UEPG Environment Committee continued to address and lobby on key EU environmental issues for the sector, drawing on the professional expertise of its Members while ensuring well-coordinated advocacy actions across Europe.

Chaired by Arnaud Colson (UNPG, France) and vice-chaired by Liam Smyth (ICF, Ireland), the UEPG Environment Committee continued to address and lobby on key EU environmental issues for the sector, drawing on the professional expertise of its Members while ensuring well-coordinated advocacy actions across Europe.

Natura 2000

The European Commission invited UEPG to contribute to a Guideline for the non-energy extractive industries on how to extract in and close by Natura 2000 areas. The initiative addresses the issue of sustainable access to mineral deposits in the context of the Commission's Raw Materials Initiative.

The European Aggregates Industry is one of the leading sectors to make a contribution to creating new habitats for endangered species and has already gained experience on extraction methods in environmental protection areas. UEPG provided the Commission with good examples of extraction sites within Natura 2000 areas.

Represented by Arnaud Colson, UEPG attends expert group meetings and makes a significant input in the drafting work of the guidance paper.

Soil Protection

In January 2009, the European Czech Presidency presented a new proposal for a Soil Protection Framework Directive with the aim of bringing it to a vote at the European Environment Council session in June. Since January, the European Czech Presidency has been presented each month a new proposal to reply to the numerous points of opposition from Member States against the impact and outcome of such a directive.

Aware of the lack of subsidiarity and the impact of Annex II on the European Aggregates Industry, UEPG has pro-actively monitored the evolution of the European Czech Presidency proposals, and has sent a joint position with CPEMC and IMA-Europe to inform Members State Representatives in Brussels about their concerns and position. A blocking minority supported by other Member States has impeded the Czech Presidency to make a political agreement on the last Soil Protection Directive draft at the 2009 June Council Meeting.

Biodiversity

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



As part of the partnership with the World Conservation Union – IUCN/Countdown 2010 UEPG committed itself to communicating the EU 2010 biodiversity target and disseminating Countdown 2010 materials, making every effort towards a net positive impact of the aggregates sector on biodiversity, and promoting compatibility between extractive sites and Natura 2000 areas.

Addressing a global platform, UEPG presented its contribution to the Ninth United Nations Conference of the Parties to the Convention on Biological Diversity in May 2008 in Bonn, Germany.

Thanks to its involvement in the European Biodiversity Action Plan, UEPG is fully recognised as a trusted partner in the protection of biodiversity. UEPG, the only industry-branch represented among major actors on the EU biodiversity policy described how projects supported by the European Aggregates Industry contributed to the 2010 biodiversity target at the local level during the High Level Round-Table. UEPG has therefore been invited to participate in the definition of post 2010 targets for the "Biodiversity Protection – Beyond 2010" Conference in April 2009.

The Industry's contribution to halting the loss of biodiversity is acknowledged, and promoted by the UEPG Biodiversity Case Studies database and by the development of a global Biodiversity Guide for the extractive industry.

Marine Aggregates

UEPG continues to increase its knowledge of management and best practices in the area of marine aggregates extraction.

The UEPG Marine Aggregates Task Force has established contacts with the European Commission and key Members of the European Parliament. After an intense lobbying campaign on the Marine Strategy Directive the article on marine protected areas, stating that it should include areas of a sufficient size to be protected from all extractive uses, had been removed.

The Task Force is now involved in the work structure which allows all stakeholders to participate to the implementation work of the Directive, through two different working groups. This work is essential, as it will help define whether a marine area is in good environmental status, which might impact on the requirements for marine aggregates extraction.

The Task Force is also involved in the Marine Aggregate Network (Magynet) which brings together research, governments and industries from countries across Europe. UEPG continues to increase its knowledge of management and best practices in the area of marine aggregates extraction.

The Members of the Task Force actively contributed to the preparation of the guideline for the non-energy extractive industries on how to extract in and close by Natura 2000 areas. They advocated that the terrestrial model of Natura 2000 should not be applied to the Marine Environment due to significant differences.



The European Aggregates Association has recognised the importance of the initiative in order to measure the progress of the industry, to raise awareness of sustainable development, to identify areas where the sector needs improvement and to improve communication with stakeholders.

UEPG Sustainable Development Initiative

Following the Communication "Promoting Sustainable Development in the EU Non-Energy Extractive Industry" the European Commission launched an initiative on Sustainable Development Indicators (SDIs) in 2000. The European Aggregates Association has recognised the importance of the initiative in order to measure the progress of the industry, to raise awareness of sustainable development, to identify areas where the sector needs improvement and to improve communication with stakeholders.

UEPG has taken a further step major forward by setting up and developing a single annual UEPG questionnaire adapted to the sector including data from all three sustainable development pillars based on sample statistical survey covering 10 large companies, 10 medium companies and 10 small companies. This UEPG Initiative responds pro-actively to the SDI Initiative of the European Commission.

Other Work Areas

The Environment Committee also worked on other issues including the Revised Waste Framework Directive, with particular emphasis on the use of excavated uncontaminated materials and by-products and on the Mining Waste Implementation.

The members of the Environment Committee also created a Water Management Task Force in order to exchange good practice, and to demonstrate that extractive industry is not a polluting activity.

UEPG in action

In February, UEPG met the European Commission representatives in charge of the Mining Waste Directive, the Revised Waste Framework Directive and the draft Soil Protection Framework Directive. UEPG briefed the European Commission representatives on the industry's concerns and informed them about issues which are addressed by more than one piece of European legislation.



Activities

Health & Safety Committee

Environment Committee

Technical Committee

Economic Committee

The UEPG Technical Committee has continued to work over the last twelve months as a well-coordinated European team on key technical issues likely to impact on the sector.

Chaired by Jean-Marc Vanbelle (Holcim, Belgium) and vice-chaired by John Lay (CEMEX UK), the members of the UEPG Technical Committee has continued to work over the last twelve months as a well-coordinated European team on key technical issues likely to impact on the sector.

Dangerous Substances

The UEPG Technical Committee continuously monitors the work of CEN/TC 351 (Dangerous substances), which aims at designing criteria and test methods to evaluate the potential release of dangerous substances from construction products. This could lead to a greater testing burden for UEPG members as a great majority of EU Member States do not have regulations for this currently.

Following the general consensus within the UEPG Technical Committee that protection of hygiene, health and the environment are vital, but measures should be proportionate to the risks involved, the "Without Testing" and in some cases the "Without Further Testing" concepts are supported by UEPG. This includes the emphasis on the approach that "half products" such as aggregates for all bound applications (i.e. in concrete or asphalt) should be excluded, as only the "final products" (i.e. concrete or asphalt) would need an evaluation of any potential release of dangerous substances relevant in their practical application.

The UEPG Technical Committee has also continued to monitor the work of TC154 TG13, which is in charge of the preparation of the adaptation of TC 154 standards to the standards which will be issued by TC 351 and to clarify which substances might be relevant for aggregates and which are not. Technical Committee members supported the actions of the CEN TC 154 chairman to convince the Standing Committee for Construction's Expert Group on Dangerous Substances of the necessity for a proportionate approach for aggregates.

As the discussion of the entire item is still open and new facets might arise, a major task for UEPG TC will be the intensive contacts with all parties involved.



The UEPG Technical Committee will participate in the forthcoming work on the revision of TC 154 standards with a view to practical and straightforward use of the standards for aggregate producers and their customers.

Standards Revision moves on: CEN/TC 154

Members of UEPG Technical Committee made a key contribution to amending TC154 products and test standards to better address the technical characteristics of recycled and secondary aggregates. The amendments have passed the Formal Vote procedure within CEN and will be available for implementation on national level in the near future.

The UEPG Technical Committee strongly supports the revision of TC 154 standards, which actively had started in Winter 2007/2008. The Committee members are very active in work to increase consistency between the different harmonized product standards of CEN TC154. The main items of revision and amendment have been identified, such as consistency of terms, definitions, gradings and requirement categories, and integration of clear rules for conformity for all standards with "familiar applications".

The UEPG Technical Committee will participate in the forthcoming work on these matters with a view to practical and straightforward use of the standards for aggregate producers and their customers.

The new Construction Products Regulation

The European Commission proposed a Regulation to replace the current Construction Products Directive (CPD). A Regulation is directly applicable. This means that it creates law which takes immediate effect in all the Member States in the same way as a national instrument, without any further action on the part of the national authorities, unlike a Directive. Key issues for UEPG have included electronic CE marking, clear and harmonized notification rules for testing laboratories certification bodies with respect to common level of attestation of conformity and impact of the essential requirement on recycling and durability of construction. UEPG continues to work closely with the Council of European Producers of Materials for Construction (CEPMC) in this area.

REACH and recycled aggregates

Through EPRA, members of the Technical Committee in collaboration with the General Secretariat and members of the FIR (Fédération Internationale de Recyclage) developed strong arguments to prove aggregates should be considered as articles regarding REACH. The issue was especially important for recycled aggregates in order to prevent a huge burden of non useful testing. UEPG and FIR succeeded in convincing the services of the European Commission to classify the recycled aggregates as articles.



Activities

Health & Safety Committee

Environment Committee

Technical Committee

Economic Committee

The economic data collected and analysed demonstrates the valuable contribution of the European Aggregates Industry to the EU economy and quality of life.

Under the Chairmanship of Hans-Peter Braus (BKS, Germany) and vice-chaired by Jerry McLaughlin (Minerals Products Association, United Kingdom) the UEPG Economic Committee focuses on key economic and strategic issues affecting the industry, and then actively lobbies key stakeholders on the vital interests of the industry. The economic data collected and analysed demonstrates the valuable contribution of the European Aggregates Industry to the EU economy and quality of life.

EC Raw Materials Initiative

Following a sustained public affairs campaign, the European Commission launched an initiative on raw materials based on five pillars: increase raw materials supply from European sources on a sustainable basis; ensure sustainable and more transparent supply from third countries; encourage greater efficiency in the use of resources; encourage capacity building in developing countries and establish an adequate EU knowledge base on raw materials.

In close cooperation with the Non-Energy Extractive Industries Panel (NEEIP) and the European Minerals Foundation, UEPG provided the industry's input and briefed key Commission representatives and Members of the European Parliament including through a first All Party Minerals Forum Dinner Debate which took place on 16 April 2008 in the European Parliament.

The Communication was published in the second half of 2008. It has been a key subject for the European Minerals Forum which took place on 26 November addressing the initiative. The key note guest speaker was Commission Vice-President Günter Verheugen. UEPG members made an active input to the debate with EU legislators.

The actual concern of UEPG as well as the NEEIP Members is the classification of raw material as "critical" materials. The term "critical" should be first defined and should be used for aggregates according to the socio-economic context and the need for access to resources.

Aggregates Taxation

The European Commission published a Green Paper on market based instruments in 2007. The paper reflected some of the elements of the European Environment Agency's report on Market based instruments for managing natural resources. The members of the Economic Committee responded by producing a Position Paper on aggregates taxation considering the issue from an industry point of view and concluded that a combination of appropriate and proportionate regulation, land use planning policies, industry actions and customer awareness are likely to be the most effective means of generating improved levels of sustainability in the aggregates sector.



Economic added value

The aggregates industry promotes economic growth, employment and social welfare. National studies from Germany and Austria underline this thesis providing productivity factors and figures of re-investment was a more effective solution.

In January 2009, the European Commission produced a document, analysing the replies to the Green Paper on market-based instruments for environment and related policy purposes.

The Council in March 2009 considered that market-based instruments providing a high degree of flexibility are central to efficient and cost-effective responses to climate change, including the trade with Assigned Amount Units (AAU).

Improving accuracy of UEPG statistics

UEPG extended its data questionnaire on environmental and social pillars. UEPG members aware of the importance of such database have submitted responses.

Since 2006, UEPG provides its Annual Statistics on the website www.uepg.eu giving member associations another opportunity to update figures, as necessary. For the first time the production of marine aggregates have been included demonstrating the economic potential in this sub-sector. The collection of statistical data has now become a part of the UEPG sustainable development initiative using a simplified questionnaire and contributing to the European Commission's Initiative on Sustainable Development Indicators (SDIs).

UEPG extended its data questionnaire on environmental and social pillars. UEPG members aware of the importance of such database have submitted responses.

A new initiative should appear in 2009 – 2010 to accompany data with explanations due to national legislation differences. As a consequence a section will be created with a list of questions and answers collected from our Members to illustrate their data.



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Located in Brussels, close to the European Parliament, 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 effective team keeps UEPG Members informed of any relevant EU policy developments at all stages of the legislative process through timely and concise email reports and issue trackers available online.

In January 2008, the UEPG General Secretariat launched the Issue Tracker System, which is an innovative tool to monitor latest developments on live issues having an impact on the European Aggregates Industry. An Issue Tracker is a one-page document which presents, in a precise and concise way, Directives, Communications and EU initiatives. Each paper – classified by high, normal and low priority – provides the background, key points, UEPG actions and next steps. The Issue Matrix offers the user an overview of all UEPG Live Issues leading via hyperlink directly to the Issue Tracker. Available on the UEPG website, these monitoring tools give UEPG members the opportunity to be briefed on all important EU legislation related to our industry in a precise and effective way, whenever needed.

UEPG has monitored emerging proposals or initiatives such as the Commission's Raw Materials Initiative, or the new proposal on the Soil Protection Framework Directive. It maintains daily and close contacts with UEPG Members so that it can respond quickly to any issue of national concern. It also briefed Members directly by participating in national events across the membership.

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 on any EU initiative and provide constructive inputs to influence the outcome. To ensure a further distribution of this communication tool, the newsletter is now available on the UEPG website (www.uepg.eu) in English (EU Insight), French (Bulletin Europe), German (Bericht aus Brüssel) and Spanish (UEPG Actualidad).

The UEPG General Secretariat is equally well placed to attend and participate in Commission Stakeholder consultation meetings, committee meetings in the European Parliament and other 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. This provides an exceptional opportunity to contribute to the direction of EU policy at the earliest stage.

COUNTDOWN
2010
SAVE BIODIVERSITY





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.

UEPG has continuously strengthened its network of key contacts within the European Commission, European Parliament and EU Council working groups. Useful platforms are the UEPG Board Policy Dinners where open and informal discussions with key EU policy-makers take place. In 2008, UEPG cooperated with the European Minerals Foundation organising the first All Party Dinner Debate in the European Parliament, gathering Members of Parliament, representatives from the European Commission and senior executives from the Minerals Industry to discuss the Raw Materials Initiative. In 2009, UEPG repeated the successful experience, to assess the Extractive Industry's Contribution to the EC Biodiversity Action Plan with Members of the European Parliament, including Paul Rübig (EPP, Austria), representatives of the European Commission, including Ladislav Miko (DG Environment), and NGOs, such as Countdown 2010, represented by Sebastian Winkler. UEPG acts as a facilitator between EU policy-makers and UEPG Members and provides valuable networking opportunities.

Coordinating EU lobbying campaigns

UEPG designs targeted advocacy 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 including face-to-face meetings.

In 2009, the UEPG General Secretariat coordinated the exchange of information on the proposal for a Soil Protection Framework Directive. UEPG worked closely with other European Industry Associations of the Non-Energy Extractive Industry. Where there is a consensus on a particular issue, UEPG contributes to joint advocacy work. Examples of this coordinated approach included joint position papers on the Soil Protection Directive and on REACH.

Raising the industry's profile

In 2008, more than 140 senior industry executives attended the European Minerals Forum with EC Vice President Günter Verheugen who presented the recently adopted European Commission's Raw Materials Initiative and the way forward.

The General Secretariat continued to promote the achievements of the European Aggregates Industry by making keynote speeches in international conferences such as the Ninth United Nations Conference of the Parties to the Convention on Biological Diversity in May 2008 in Bonn, Germany. It also delivered a key note speech at the High Level Round-Table reporting on the European Biodiversity Action Plan in the European Parliament. It also developed and coordinated targeted events. A successful example is the close cooperation with the European Minerals Foundation (EMF) organising the European Minerals Forum 2008. The theme was "The EU Raw Materials Strategy". UEPG had already played a key role in developing the Raw Materials Initiative by presenting the EC with proposals for constructive solutions.

In 2008, more than 140 senior industry executives attended the European Minerals Forum with EC Vice President Günter Verheugen who presented the recently adopted European Commission's Raw Materials Initiative and the way forward. It gave UEPG the opportunity to discuss each of the challenges raised by the supply of Raw Materials with leading EU Policy Makers.



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UEPG Board, Committees, Task Forces, Portfolios and General Secretariat

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¹ Didier Audibert proposed that Alain Pasquier should represent France's seat since he will be retired



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Vice-Chair: César Luaces Frades, FdA, Spain	Vice-Chair: César Luaces Frades, FdA, Spain
Secretary: Dirk Fincke, UEPG General Secretariat	Secretary: Dirk Fincke, UEPG General Secretariat
Environment	
Chair: Arnaud Colson, Lafarge/UNPG, France	Chair: Arnaud Colson, Lafarge/UNPG, France
Vice-Chair: Liam Smyth, ICF, Ireland	Vice-Chair: Liam Smyth, ICF, Ireland
Secretary: Julian Gonthier, UEPG General Secretariat	Secretary: Sandrine Devos, UEPG General Secretariat
Technical	
Chair: Jean-Marc Vanbelle, Holcim/FEDIEX, Belgium	Chair: Jean-Marc Vanbelle, Holcim/FEDIEX, Belgium
Vice-Chair: John Lay, MPA, United Kingdom	Vice-Chair: John Lay, MPA, United Kingdom
Recycling: Vincent Basuyau, SLAG/UNPG, France	Recycling: Brian James, MPA, United Kingdom
Secretary: Markus Schumacher, BKS, Germany	Secretary: Markus Schumacher, BKS, Germany
Economic	
Chair: Hans-Peter Braus, BKS, Germany	Chair: Hans-Peter Braus, BKS, Germany
Vice-Chair: Jerry McLaughlin, MPA, United Kingdom	Vice-Chair: Jerry McLaughlin, MPA, United Kingdom
Secretary: Dirk Fincke, UEPG General Secretariat	Secretary: Dirk Fincke, UEPG General Secretariat

UEPG TASK FORCES

2007 – 2009	2009 – 2011
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Chair: Manfred Asamer, Asamer & Hufnagl, Austria	Chair: Carl Hennrich, Austrian Association for Building Materials & Ceramic Industries (Austria)
Marine Aggregates	
Chair: Arnaud Colson, Lafarge/UNPG, France	Chair: Arnaud Colson, Lafarge/UNPG, France
Biodiversity	
Chair: Liam Smyth, ICF, Ireland	Chair: Liam Smyth, ICF, Ireland
Water Management	
	Chair: César Luaces Frades, FdA, Spain



PORTFOLIOS

2007 – 2009	2009 – 2011
Raw Material Supply Group (RMSG)	
Denis Mertens, César Luaces Frades	César Luaces Frades
RMSG Working Group: Sustainable Development Indicators	
Arnaud Colson, Jerry McLaughlin	Arnaud Colson, Jerry McLaughlin
RMSG Working Group: Sustainability of Extractive Industry Enterprises	
Ulrich Hahn	-
Non Energy Extractive Industries Panel (NEEIP)	
César Luaces Frades	César Luaces Frades
European Network on Silica (NePSi)	
Martin Isles	Martin Isles
Health & Safety – Standing Working Party of the Extractive Industry (Luxembourg)	
Martin Isles	Walter Nelles
European Agency for Safety and Health at Work (Bilbao)	
César Luaces Frades	César Luaces Frades
Liaison Network with Other Mineral Trade Associations	
Hans-Peter Braus, Simon van der Byl	Hans-Peter Braus, Simon van der Byl
Eastern European and Balkan countries	
Manfred Asamer	Manfred Asamer
EU Environmental Agency	
General Secretariat	Jens Madvig Nørgaard
CEN/TC 154 "Aggregates"	
Jean-Marc Vanbelle	Jean-Marc Vanbelle
CEN/TC 227 "Road Materials"	
Ulrich Hahn	Ulrich Hahn
CEN/TC 292 "Characterisation of waste"	
Ulrich Hahn, Jean-Marc Vanbelle	Jean-Marc Vanbelle
CEN/TC 351 "Construction Products"	
John Lay	-

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Antony Fell
Public Affairs Manager
Dirk Fincke
Public Affairs Officer
Sandrine Devos
Public Affairs Assistant
Miette Dechelle

Photo Credits

We would like to thank UEPG members for their contributions.

Cover

Top, left.....Marine Aggregates, *Photograph by DR médiathèque Lafarge*
 Top, centre left.....European Commission, Charlemagne Building, *Photograph by UEPG*
 Top, centre right.....Utricularia australis, *Photograph by Lafarge, France*
 Top, right.....El Día de los Árboles, *Photograph by ANEFA, Spain*

Centre, bottom right.....Viaduc de Millau Bridge, *Photograph by UNPG, France*
 Centre.....Quarry, *Photograph by DR médiathèque Lafarge*

Bottom, left: Truck in quarry, *Photograph by UNPG, France*

Centre, top left.....Botanical Conservatory, *Photograph by UNPG, France*
 Centre, top right.....Valencia Opera house, *Photograph by iStockphoto*
 Centre, bottom left.....European Parliament in Brussels, *Photograph by UEPG*

Bottom, centre left.....Common Frog in Pond, *Photograph by iStockphoto*
 Bottom, centre right.....European Commission, Berlaymont Building, *Photograph by UEPG*
 Bottom, right.....Recycled aggregates, *Photograph by CRH, Ireland*

President's Introduction

Jerzy Buzek, Denis Mertens, Abraão Carvalho, *Photograph by UEPG*
 Jim O'Brien, Krzysztof Mączka, Michel Buzot, Arnaud Colson, *Photograph by UEPG*

An introduction to UEPG and Aggregates

Left.....Sandrancourt quarry, France, *Photograph by UEPG*
 Centre.....Ballincollig By-pass, *Photograph by CRH, Ireland*
 Right.....Gravel, *Photograph by iStockphoto*

Left.....Porvoo Bridge, *Photograph by INFRA, Finland*
 Centre.....Quarry, *Photograph by DR médiathèque Lafarge*
 Right.....Building, *Photograph by iStockphoto*

European Economic Developments

Left.....Highway Bridge under construction, *Photograph by iStockphoto*
 Centre.....Denis Mertens, Jim O'Brien, *Photograph by UEPG*
 Right.....Sand quarry, *Photograph by UNPG, France*

Left.....Karl-Heinz Florenz, *Photograph by UEPG*
 Centre.....Gravel quarry, *Photograph by DR médiathèque Lafarge*
 Right.....Günter Verheugen, *Photograph by UEPG*

Core Values

Left.....Viaduc de Millau Bridge, *Photograph by UNPG, France*
 Centre.....Sandrancourt quarry, *Photograph by Lafarge, France*
 Right.....Nature at Niederbipp, *Photograph by CRH*

UEPG Organisational Structure

Left.....UEPG Committee Meeting in Istanbul, *Photograph by UEPG*
 Centre.....UEPG Board Meeting, *Photograph by UEPG*
 Right.....UEPG Committee Meeting in Istanbul, *Photograph by UEPG*

Health & Safety Committee

Left.....Martin Isles, *Photograph by UEPG*
 Centre.....Rory Graham, *Photograph by CN Charte, France*
 Right.....César Luaces Frades, *Photograph by UEPG*

Left.....Safety Check, *Photograph by CN Charte, France*
 Centre.....Martin Isles, César Luaces Frades, *Photograph by UEPG*
 Right.....Safety Check, *Photograph by MPA, United Kingdom*

Environment Committee

Left.....Arnaud Colson, Sebastian Winkler, *Photograph by UEPG*
 Centre.....Quarry, *Photograph by CN Charte, France*
 Right.....Liam Smyth, *Photograph by UEPG*

Left.....Entrepreneurs Forum, *Photograph by UEPG*
 Centre.....Sand and gravel quarry, *Photograph by Magnus Larsson, Sweden*
 Right.....Jo Leinen, *Photograph by UEPG*

Left.....Brian James, *Photograph by UEPG*
 Centre.....Ocura quarry, *Photograph by Holcim, Croatia*
 Right.....Arnaud Colson, *Photograph by UEPG*

Economic Committee

Left.....Hans Peter Braus, Jerry McLaughlin, *Photograph by UEPG*
 Centre.....Gravel pit, *Photograph by iStockphoto*
 Right.....Gordan Sredl, Thomas Guillot, *Photograph by UEPG*

Left.....Pierre de Prémare, Ingo Hammwöhner, *Photograph by UEPG*
 Centre.....Asphalt Road, *Photograph by iStockphoto*
 Right.....Jim O'Brien, Jacques Grob, *Photograph by UEPG*

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Left.....Aggregates, *Photograph by UNPG, France*
 Centre.....John Lay, Jean-Marc Vanbelle, Markus Schumacher, *Photograph by UEPG*
 Right.....Aggregates, *Photograph by Lafarge, France*

Left.....Measuring vibrations, *Photograph by CN Charte, France*
 Centre.....Jean-Marc Vanbelle, *Photograph by UEPG*
 Right.....Sand pit, *Photograph by iStockphoto*

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Left.....Antony Fell, Paul Anciaux, *Photograph by UEPG*
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 Right.....Dirk Fincke, *Photograph by UEPG*

Left.....Sandrine Devos, *Photograph by UEPG*
 Centre.....Rehabilitated quarry, *Photograph by Lafarge, France*
 Right.....Miette Dechelle, *Photograph by UEPG*

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Left.....Alain Pasquier, Martti Kärkkäinen, *Photograph by UEPG*
 Centre.....El Día de los Árboles, *Photograph by ANEFA, Spain*
 Right.....Graham Willmott, Denis Mertens, Elisabeth Gammelsæter, *Photograph by UEPG*

Left.....Alain Pasquier, Olivier Bertrand, *Photograph by UEPG*
 Centre.....Frog, *Photograph by CN Charte, France*
 Right.....Martin Nitsch, Gordan Sredl, *Photograph by UEPG*

Left.....Krzysztof Mączka, Michel Buzot, *Photograph by UEPG*
 Centre.....Water reservoir, *Photograph by SZVK, Slovakia*
 Right.....Özgür Öztürk, *Photograph by UEPG*

Left.....European Minerals Forum 2008, *Photograph by UEPG*
 Centre.....Products from a gravel pit nearby Munich, *Photograph by UEPG*
 Right.....Francesco Castagna, Cirino Mendola, *Photograph by UEPG*

Left.....Biodiversity Task Force Meeting, *Photograph by UEPG*
 Centre.....PR & Communications Task Force Meeting, *Photograph by UEPG*
 Right.....Marine Aggregates Task Force Meeting, *Photograph by UEPG*



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