

EUROPEAN AGGREGATES ASSOCIATION

A Sustainable Industry for a Sustainable Europe



Annual Review

2009 – 2010

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President's Introduction

"A Sustainable Industry for a Sustainable Europe"

The first year of my Presidency has been very busy. We have achieved much progress, yet much more remains to be done. It has been a very tough year for many of our Members, yet I believe our industry faces the new economic realities with optimism.

The Highlights of 2009–2010

The principal achievements in the past year were:

- UEPG worked very actively with the Commission's Raw Materials Initiative (RMI), our goal being to ensure better future access to local aggregate resources. We engaged Leoben University to define the position of the Aggregates Industry more authoritatively. Their timely and excellent Review was highly appreciated by the two RMI Working Groups. The Leoben conclusions were the basis of the Madrid Declaration at the recent European Minerals Conference there. Commission Vice-President Antonio Tajani warmly acknowledged these inputs.
- We also worked actively with the Commission on its drafting of Guidelines for Extractive Activities within Natura 2000 areas. The UEPG viewpoints were clearly understood, in particular that Natura 2000 and similar conservation designations should not a priori prohibit new or existing aggregates extraction. On the contrary, UEPG's proven significant contribution to Biodiversity is now being appreciated by a much wider audience.
- On Health and Safety, in early 2010, UEPG Members achieved a new record high degree of reporting under the Social Dialogue Agreement on Respirable Crystalline Silica, confirming the Industry's solid commitment to

that voluntary initiative. We are now focusing on the similar requirements under the Classification, Packaging and Labelling Regulation: we remain convinced that the aggregates industry, managed responsibly, poses minimal health risk.

- On Technical matters, our key achievement was the recognition by ECHA (the European Chemicals Agency) that Recycled Aggregates would be deemed as "Articles" under REACH, thus eliminating a completely unnecessary registration process: further work is ongoing to also ensure fulfilment the Commission's End-of-Waste criteria. Through EPRA, we continue to promote more recycling, though the challenges vary by country.
- Considerable efforts were made to collate Sustainable Development Indicators to provide key metrics on our industry's Economic, Environmental and Social performance. Best available data for 2008 is included in this Review, and we are determined to achieve even better quality data in future years.
- This year's Sustainable Development Awards were a giant success, with 30 high-quality entries from 10 countries. We were very honoured to have a high-calibre independent Jury. The Awards and Certificates of Excellence were presented at our Delegates Assembly in Munich. The Awards brochure, strongly endorsed by Commissioner Janez

Potočnik, has become an excellent "calling card" for the Industry. These Awards are now indeed the pinnacle of the UEPG calendar.

The Objectives for 2010–2011

We look forward to the challenges and opportunities of the year ahead:

- UEPG and its Members have already made a significant contribution to promoting Biodiversity in our quarries and pits, based on the successful "Countdown 2010" campaign with IUCN. We are organising a Workshop in September to brainstorm the UEPG Biodiversity policy, targets and indicators for the next 5–10 years. UEPG is honoured to be elected to the Steering Committee of the Commission's "B@B" Biodiversity Platform.
- On Health and Safety, we are organising the sixth Atlantic Alliance meeting in October, to promote the "Safer by Design" initiative on a global basis. In parallel, we will seek to advance the good work of the Cement Sustainability Initiative on fatality prevention by promoting its Driving and Contractor Safety Guidelines.
- We will be following the Raw Materials Initiative to its completion. We are delighted that Commission Vice-President Antonio Tajani has provisionally accepted to be the keynote speaker at the European Minerals Forum in December.



- The Environment Committee will be completing several important work areas including the UNEP Biodiversity Toolkit, as well as industry guidelines on water management, consistent transposition of the Mining Waste Directive and good practice guidelines in marine extraction.
- The Technical Committee will continue to address the never-ending challenges of the standardisation process, and will through EPRA (European Platform for Recycled Aggregates) redouble efforts to incrementally increase levels of recycling across Europe.
- Through our PR and Communications Task Force, we will more closely address how we can further enhance the reputation of the Aggregates Industry through sharing the many well-proven best practices between all our Members.

Strengthening the UEPG Organisation

UEPG as an industry association became significantly stronger in the last year:

- We were delighted to welcome four new members, namely the Hungarian Mining Association, the Cyprus Aggregate Producers Association, Halyps, another Greek company member, and DTD Kamenko Gagrčin, the first company member for Serbia. We continue to seek further members. The more representative we are, the better we can champion the European industry. We are also forming more communications links with international aggregates associations.
- Due to the recession, some of our existing Members had real challenges in maintaining their UEPG membership. We have tried to be supportive, demonstrating the even greater need for, and benefits deriving from, UEPG membership in these times of economic crisis.
- For that reason, UEPG has continued to "tighten its belt", successfully operating within a very tight budget of €370,000, which I believe gives exceptional value for money to its Members. We have diligently avoided any increase in Member contribution levels for 2010, and hope to do the same again for 2011.
- During the year, we adopted new Statutes and Internal Regulations that will ensure even better UEPG governance and operational efficiency in the years ahead. We also inaugurated the Remuneration Committee.
- On financial controls, we have strengthened our internal accounting systems and procedures, as well as engaging a new external auditor, to ensure rigorous financial governance.
- On IT, after the office server crashed in February, we switched to an exter-

nally-hosted server that will ensure greater reliability and inherently provide disaster recovery.

A Word of Thanks

The progress of the last year would have been impossible without the strong support of the UEPG Board, particularly my two Vice-Presidents, Denis Mertens and Alain Pasquier. I also hugely appreciated the sterling work done by the Committee Chairs and Vice-Chairs, as well as the Task Force Chairs, every one of whom gave everything in time and dedication in advancing the "engine-room" activities of UEPG: they truly are all individually our industry champions. Finally, my very special thanks to the UEPG General Secretariat, namely Antony Fell, Dirk Fincke, Sandrine Devos, Miette Dechelle, and recently Dana Wasserbacher as our intern. Their continued dedication beyond the call of duty makes UEPG the success it really is.

Jim O'Brien
President UEPG 2009-2011



An introduction to UEPG and Aggregates

In Summary:

- UEPG has Members in 26 European countries (see map)
- The European aggregates demand is 3 billion tonnes per year, representing a turnover of around €20 billion
- The aggregates sector is by far the largest amongst the non-energy extractive industries
- That aggregate demand represents just over 6 tonnes per capita
- Some 90% of all aggregates produced are from natural resources
- The remaining 10% comes from recycled aggregates (6%), and marine & manufactured aggregates (2% each)
- The aggregates industry comprises some 17,000 companies (mostly SMEs), producing at some 23,000 sites with 400,000 employees (including contractors)

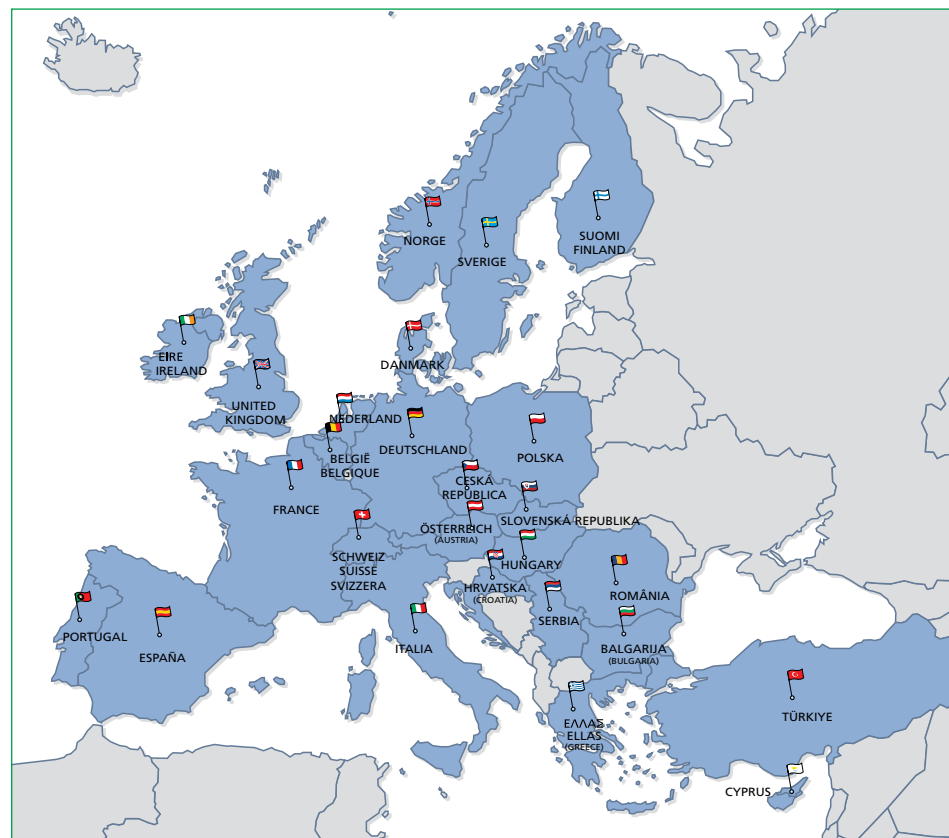
What is UEPG?

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

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.

UEPG Membership 2010

In May 2010, UEPG was delighted to welcome four new Members, namely the Hungarian Mining Association, the Cyprus Aggregate Producers Association, DTD Kamenko Gagrčin (Holcim Serbia) and Halyps (Italcementi Greece), bringing the total number of UEPG member countries to 26. UEPG will be actively seeking to welcome further new members in the year ahead.

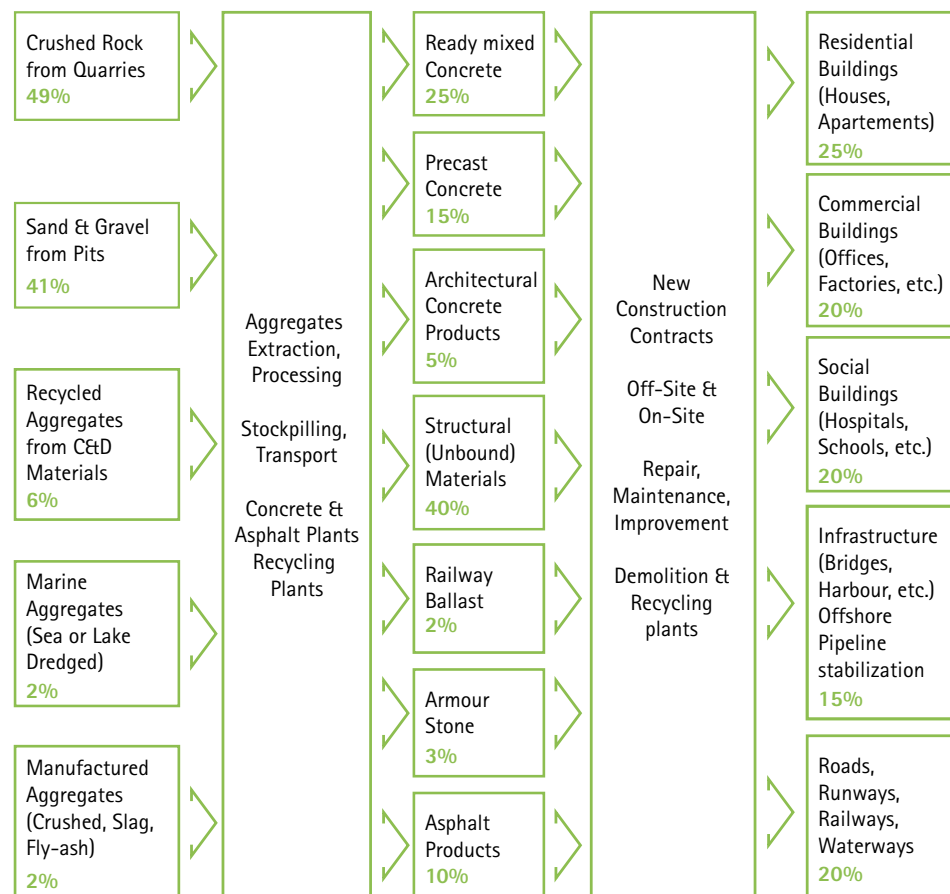




Aggregates – the Fundamental Building Material

Aggregates are a granular material used in construction. The most common natural aggregates of mineral origin are sand, gravel and crushed rock.

The diagram below illustrates the sources, intermediate and end uses of aggregates:



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

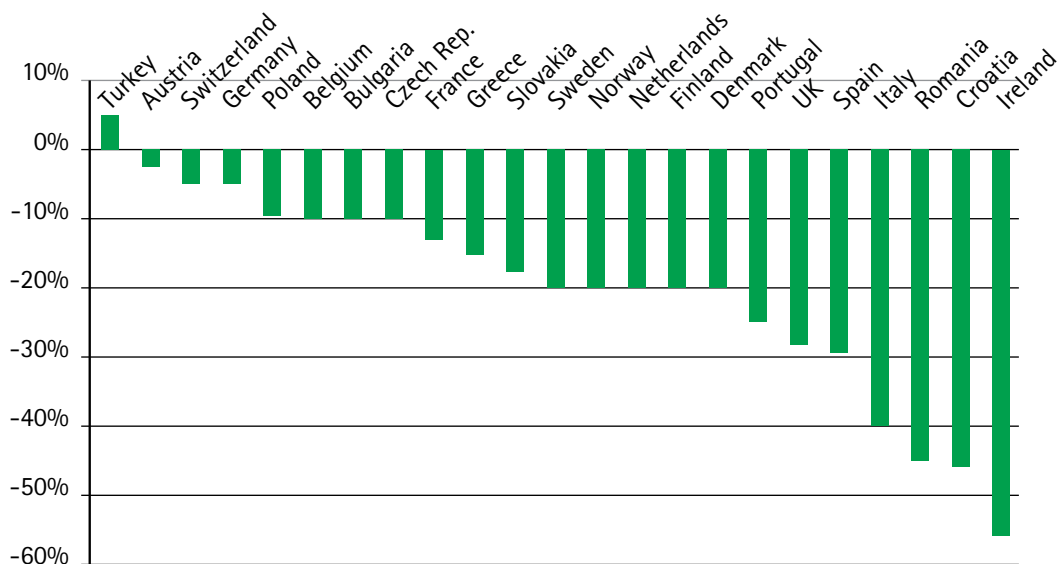


European Economic Developments

Current trends for the Aggregates Industry (based on the Leoben 2010 Review)

In 2008, about 3.5 billion tonnes of aggregates were produced in about 23,000 production sites. The direct value of this production amounted to €20-25 billion. Recent years have shown a dramatic decline in numbers of producing companies, down from nearly 30,000 in 2006 to about 17,000 in 2008. Similar trends can be observed for other sectors of the minerals industry and are an indication of the growing importance of large multinational companies. Annual aggregates production has peaked in 2006 at about 3.7 billion tonnes. As a consequence of the onset of economic problems, aggregate production declined to about 3.5 billion tonnes in 2008, and is predicted to have declined further to around 2.9 billion tonnes in 2009 (see Figure 1). Some countries are reporting even further declines in 2010, though this will hopefully reverse as economic recovery takes hold.

Figure 1: Estimated changes in tonnages 2009 v 2008, Data & reports at October Economic Committee, show overall 19% decline 2008-2009 to 2.86 billion tonnes. Range was +5% for Turkey to -55% for Ireland (source: UEPG, 2010)



Aggregates consumption per capita is closely related to the economic performance of a country measured as GDP/capita (see Figures 2 and 3). Aggregate consumption per capita is most likely underestimated as national aggregate production and consumption statistics are deficient in many countries. If it is assumed that in some time to come new Member States will reach a GDP/cap of €25,000 and the corresponding mean per capita aggregates consumption reaches 8 tonnes, then an additional 530 million tonnes per year will be required. It can therefore be expected that annual European aggregates consumption will exceed 4 billion tonnes in the not so distant future.



Figure 2: Aggregates production in 2008 in Europe in decreasing tonnes/capita (left vertical scale) & GDP(€000)/capita (right vertical scale), (source: UEPG, 2010)

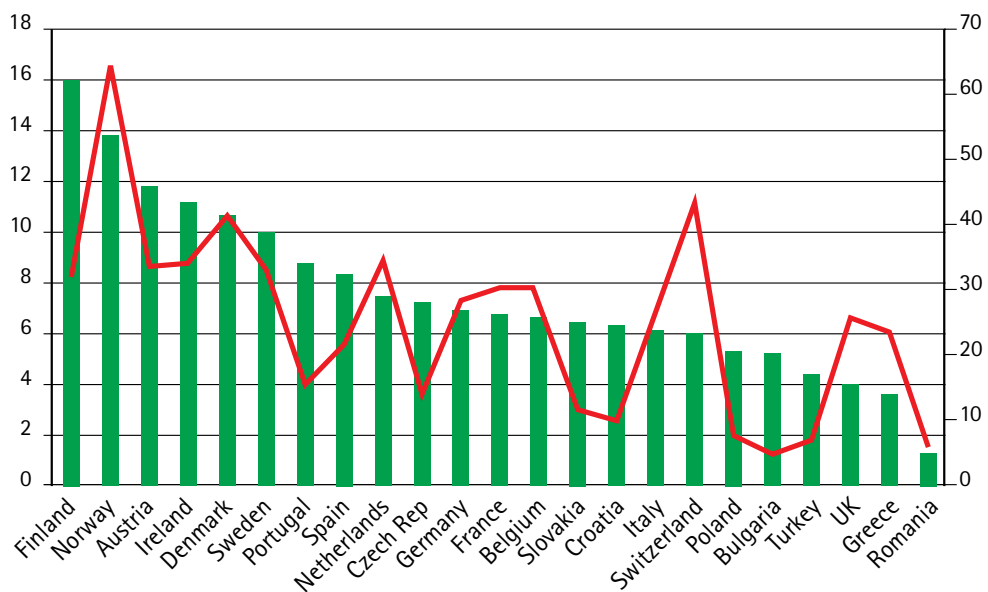
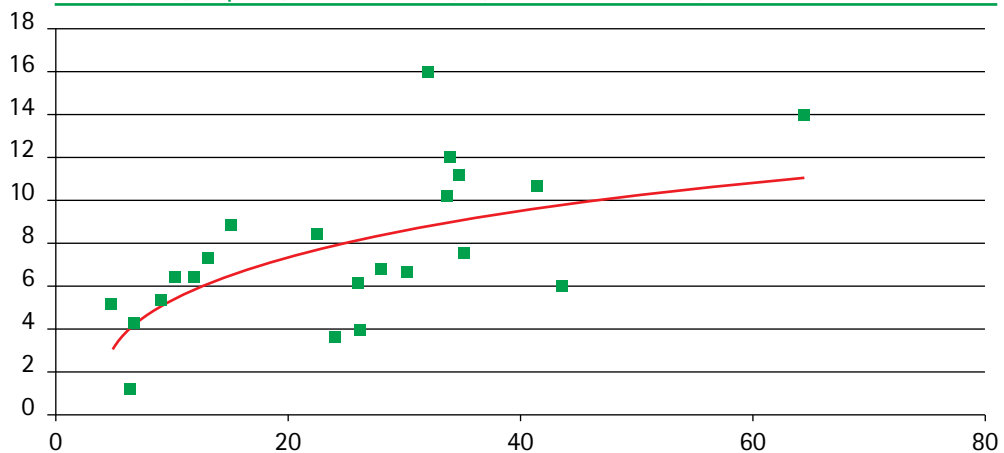


Figure 3: Aggregates production in 2008 in Europe – tonnes per capita (vertical scale) & GDP(€000)/capita (horizontal scale), (source: UEPG, 2010)



These aggregates constitute an essential component of the materials input into the European construction industry which directly and indirectly employs some 400,000 persons. As indicated above, infrastructure development in Europe will continue to grow at rate faster than the overall economy because of the activities in the new Member States. From this it follows that, once the current recession is over, the demand for aggregates will increase substantially in the medium term, that is at least for the next 20-30 years.



Construction Activity in Europe

According to Euroconstruct, the current recession will go down as the most challenging in the industry for decades. Construction output fell by -8.8% in 2009, and a further contraction of -4.0% is expected in 2010. By the end of this year the European construction industry will have been in recession for three years.

Several countries had acted to lessen the impact of the recession with fiscal stimulation packages in 2008 and 2009, which supported construction. However the priority now has firmly shifted towards fiscal consolidation, which will have negative consequences for the industry, particularly for civil engineering. In a number of countries, notably Spain, Ireland and Portugal, the crises came on top of the collapses in local housing markets, leading particularly severe contractions.

As a rule, in Western Europe the construction recession has been more severe than the overall economic downturn. The opposite is the case in Central & Eastern Europe, where the construction sector has acted as a stabiliser for the overall economy.

Looking forward, the prospects for Western Europe are for a sluggish but gradual pick up in construction activity in 2011 (+0.6%), gathering pace in 2012 (+1.8%). Ireland, Spain and Portugal will do no more than stabilise at a deeply depressed level however. Central & Eastern Europe, dominated by Poland and the Czech Republic, is expected to see much stronger growth, of 3.7% in 2010 and almost 10% per annum in 2011 and 2012. The key drivers for this are new non-residential construction and civil engineering, both benefitting from EU Structural Funds.

Prospects for aggregates consumption

At a European level, the linkage between economic development and aggregate consumption is critically dependent on the large differences in the stage of economic development of the different countries.

Since the rate of economic development of the new Member States of EU is considerably higher than that of the old Member States, aggregate consumption in Europe will grow substantially in the former in the medium term.

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

Best estimates of 2008 production data are shown in Table 1.



Table 1: Best estimates of Aggregate Production Data for 2008

Country	Total Number of producers (companies)	Total number of extraction sites (active quarries and pits)	Sand & gavel	Crushed Rock	Marine Aggregates	Recycled Aggregates	Manufactured Aggregates	Totals
Austria	960	1290	62	32	0	4	2	100
Belgium	180	253	11	42	4	14	2	72
Bulgaria	200	100	18	22	0	0	0	40
Croatia	367	308	7	22	0	0	0	29
Czech Rep	219	489	27	44	0	4	0	76
Denmark	350	300	43	0	5	0	10	58
Finland	400	2255	25	60	0	1	0	86
France	1640	3050	165	237	7	15	8	432
Germany	2300	3000	260	218	11 ¹	56	18	563
Greece	300	200	20	20	0	0	0	40
Ireland	150	355	25	25	0	0	0	50
Italy	1796	2360	225	135	0	5	3	368
Netherlands	65	225	46	0	54	24	0	124
Norway	690	713	15	52	0	0	0	68
Poland	2044	1786	131	49	0	22	1	203
Portugal	350	200	61	15	0	0	17	93
Romania	500	730	18	7	0	1	0	26
Slovakia	170	92	13	21	0	1	0	35
Spain	1600	2060	134	244	0	5	1	383
Sweden	985	1802	19	67	0	7	0	93
Switzerland	350	505	37	5	0	5	0	47
Turkey	770	770	25	290	0	0	0	315
UK	450	781	55	114	12	53	9	243
Total	16.836	23.624	1.441	1.720	92	216	72	3.541

¹As there are less than 3 producers, for commercial confidentiality this figure is estimated as 2% of total national production.



Our Vision, Mission and Objectives

Our Vision is a Sustainable Industry for a Sustainable Europe

Our Mission is to be the Industry Champion and a trusted Partner

UEPG Core Values are to be Open, Transparent and Honest

Our Objectives are as follows

Economic Objectives

Economic Survival

Many UEPG member companies recently suffered highly adverse market conditions. Drastic actions were necessary to survive economically. These companies are now determined to face new economic realities

Supplying essential Building Materials

UEPG member companies supply materials fundamentally essential for the residential, social and commercial infrastructure of modern European society. Continued long-term access to local raw materials is a critical and vital issue for the industry.

Retaining Jobs

Despite the current recession, UEPG member companies' operations continue to be an important long-term source of jobs, both direct and indirect, particularly in rural areas.

Contributing to Europe's Competitiveness

The Aggregates Industry is highly competitive. Its activities are indeed a fundamental pillar of the European Economy.

Social Objectives

Promoting Health & Safety

UEPG member companies are dedicated to ensuring the health and safety of its employees, contractors and visitors. UEPG is committed to partnerships with relevant health and safety initiatives.

On safety, the industry recognises that improvement is needed, and it is strongly committed to addressing that challenge.

Partnering with Local Stakeholders

UEPG member companies aim to engage with all relevant stakeholders. Their operations are an integral part of regional and local communities.

The industry is committed to Open-Door communications with its neighbours and other key stakeholders.

Contributing to Europe's Heritage

UEPG member companies acknowledge the importance of the common natural and built European heritage and will continue to promote best practices in its extractive and restoration activities.

Environmental Objectives

Promoting Biodiversity

UEPG member companies are committed to promoting Biodiversity both during its extractive activities and subsequent restoration.

UEPG has established a database of impressive Biodiversity case studies across Europe and has developed leading partnerships with NGOs.

Sustainable Production

UEPG actively promotes the recycling of construction and demolition materials, in order to conserve resources and to minimise waste to landfills.

It also promotes the further development of marine and manufactured aggregates in order to conserve land-based resources.

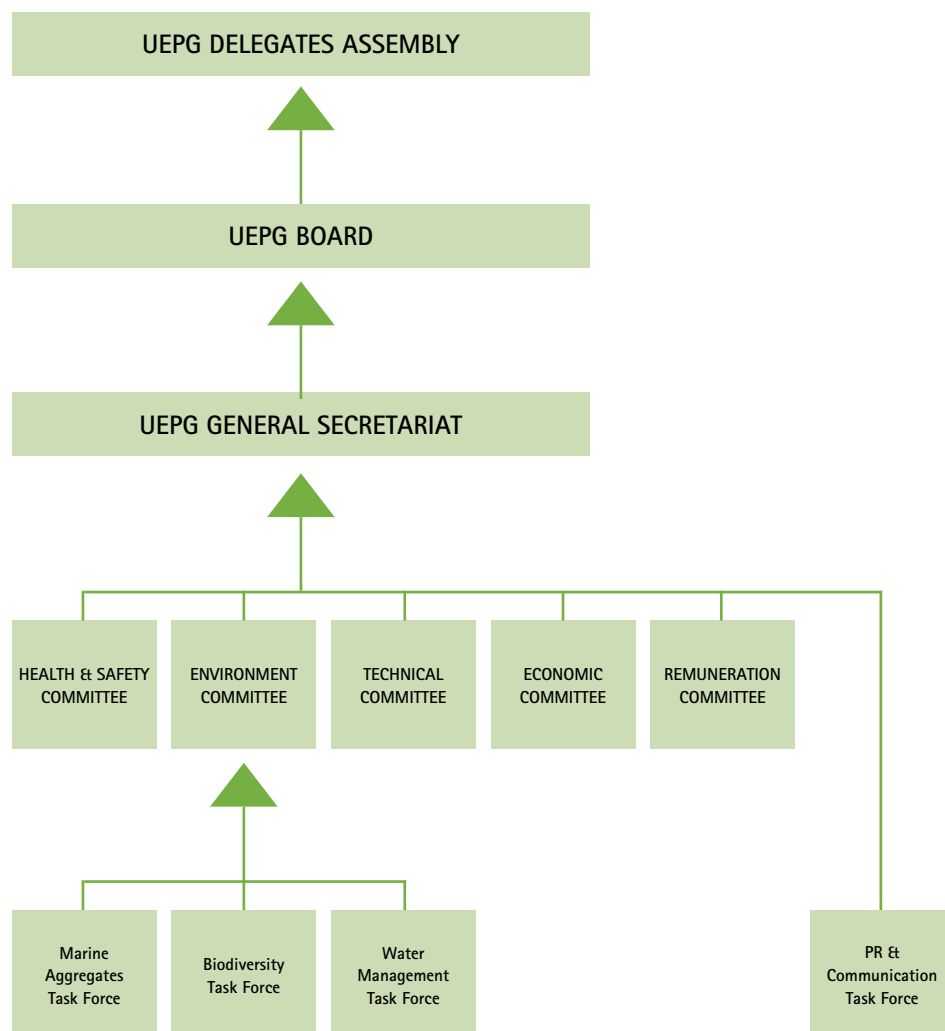
In all activities, the highest standards of environmental stewardship are an imperative of the Aggregates Industry

Awards

UEPG promotes Sustainable Development Awards in order to recognise and further promote excellence in the Industry.



Organisational Structure



The Health & Safety, Environment, Technical and Economic Committees and their associated Task Forces are the “engine-room” of UEPG activities (their reports follow). These Committees meet twice yearly and report with the General Secretariat (see pages 23 & 24) to Board. The Board reviews progress and strategy twice yearly. The highest level meeting is the Delegates Assembly, held in May each year, where all Members debate and decide ongoing UEPG administration, activities and strategy.



Activities

Health & Safety
Committee

Environment
Committee

Technical
Committee

Economic
Committee



Under the Chairmanship of Martin Isles (Mineral Products Association, United Kingdom) and vice-chaired by César Luaces Frades (FdA, Spain), the UEPG Health & Safety Committee's mission is to actively promote better Health & Safety in the industry through improving awareness and knowledge sharing, acting as an industry leader in voluntary initiatives and lobbying on key policy Health & Safety issues at European level. During 2009-2010, the Health & Safety Committee has actively addressed a number of key Health and Safety areas with considerable success.

Health

Further implementing the Social Dialogue Agreement on Respirable Crystalline Silica

Despite the financial crisis, the 2010 NePSi reporting demonstrated a significant increase in the number of enrolled sites, as well as continued progress on the exposure reduction measures. The enormous efforts with numerous awareness campaigns being made by UEPG Member Associations, are showing positive results. The results continue to support UEPG's view that the aggregates industry generally has minimal exposure risks, but that ongoing exposure reduction is prudent to further improve workplace hygiene. UEPG, together with other NePSi partners, will analyse how further to improve the NePSi reporting guidelines, website and promotion campaign on the Social Dialogue Agreement, to optimise its take-up and thereby maximise the opportunities to demonstrate increasing success of the Agreement in protecting the occupational health of workers.

Classification, Labeling and Packaging (CLP) Regulation

From the end of 2010, the CLP Regulation will oblige producers of material containing crystalline silica to label the product and to report to the European Chemicals Agency (ECHA). While UEPG believes that there is minimal exposure risk in the case of aggregates, it is analyzing proposals to develop labeling criteria if a product contains more than 1% of respirable crystalline silica (RCS) in cooperation with other NEEIP members. Methods to assess exposure risk as related to the content of RCS in bulk granular aggregates are under active consideration.

Safety

UEPG "Safer by Design" project

The UK 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 persuade mobile plant suppliers to include all essential safety features in new equipment as standard and preferably without additional costs. These features are clearly set out on the "Safe Quarry" website http://www.safequarry.com/safer_by_design.aspx (see inset). This project has received top recognition within MPA Safety Awards and in UEPG's 2010 Sustainable Development Awards.

In April 2010, the UEPG Board approved "Safer by Design" as a UEPG project, asking all national Member Associations and their member companies to promote more widely and actively the procurement of safer mobile plant. This will be 'win-win' for both



suppliers and the industry through ensuring consistently higher safety standards in plant specification and consequently significantly reducing industry workplace risks.

Atlantic Alliance

The Atlantic Alliance provides a growing international network comprising the extractive industry, its regulators, its suppliers and accident insurers. Founder members were the US, UK, Germany and Ireland. It now meets every two years, alternately in the US and Europe. UEPG coordinates the European involvement.

The 6th Meeting of the Atlantic Alliance will take place in Brussels on 20-21 October 2010, strongly supported by our Belgian Member FEDIEX and the Mining Section of the International Social Security Association (ISSA-Mining). The event will address "Global Perspectives on Safety and Health" with a focus on the "Safer by Design" project. Its aim is to promote safer specification and purchasing of mobile plant globally. Speakers and participants are expected from many parts of the world, both developed and emerging markets.

Liaison with European Commission on Safety-related Activities

In 2009, UEPG was accepted as an EU Social Partner in the European Commission's Sectoral Social Dialogue Committee for the Extractive Industry (SSDCEI). The UEPG General Secretariat presented the activities and projects of UEPG such as improving the reporting of accident statistics; analysis of root causes; and thereby to focus on achieving real improvement.

The "Safer by Design" project has been presented to the SSDCEI and also to the Standing Working Party for the Mining and Other Extractive Industries (SWPEI). The Health & Safety Committee is also addressing

good practice in the safe storage, handling and use of explosives for civil use.

Liaison with the Cement Sustainability Initiative (CSI) on Safety

The Health & Safety Committee also maintains liaison with the CSI Task Force, as its scope includes aggregates activities. UEPG has benefitted from its work on Fatality Prevention, and has adopted the recent global CSI initiatives on Driving and Contractor Safety, downloadable from http://www.wbcsdcement.org/index.php?option=com_content&task=view&id=170&Itemid=229.

UEPG Sustainable Development Indicators

UEPG is committed to reporting Sustainable Developments Indicators in order to measure industry progress under Economic, Environmental and Social Pillars. Safety is the primary indicator under the Social Pillar, and UEPG is promoting industry-wide consistent reporting of fatalities and injuries for its employees and contractors, both on-site and off-site, in the conviction that such data will induce further improvement in industry health and safety performance.

Partial data for 2008 indicated, despite extensive dedication to safety in the industry, at least 23 employee fatalities and 6 contractor fatalities, a situation which is totally unacceptable. The partial data also indicated an unacceptably high level of lost-time injuries. It is hoped that more accurate data will be gathered for 2009. The industry trends in health and safety will be reported in future UEPG Annual Reviews.



Activities

Health & Safety
Committee

Environment
Committee

Technical
Committee

Economic
Committee



Chaired by Arnaud Colson (Lafarge, France) and vice-chaired by François Pétry (Holcim, France), the UEPG Environment Committee continued to actively address and represent the environmental interests of the aggregates industry on key EU and wider stakeholder issues. It draws on the considerable professional shared expertise of its members while ensuring well-coordinated advocacy actions across Europe, and while also growing liaisons with NGOs. Its workload is shared by three Task Forces focused on Biodiversity, Water Management and Marine Aggregates which report to the Environment Committee, the activities of each being summarized below in sequence.

Biodiversity Task Force

Biodiversity is a top priority for UEPG. Since the beginning of its partnership with the IUCN project Countdown 2010 in May 2007, UEPG has become one of the 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.

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. As Countdown 2010 is coming to an end in October 2010, UEPG is now pursuing its cooperation with IUCN through the European Commission Business and Biodiversity Platform (B@B), which UEPG joined as the first industry

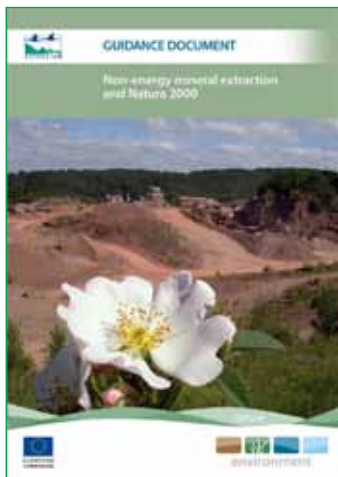
association in April 2010. Our President Jim O'Brien has been nominated as a Steering Committee Member of the Platform.

The Biodiversity Task Force, chaired by Robert Wasserbacher (FSKI, Austria), is establishing new, ambitious but realistic targets for the European Aggregates Industry. The new targets will include both qualitative and quantitative items, such as encouraging UEPG Members to develop and implement biodiversity promotional initiatives in their own countries. As one of the few industry sectors represented among major actors on the EU biodiversity policy, the European Aggregates Industry is now widely recognised as a trusted partner in biodiversity by EU Institutions and a growing number of NGOs.

In 2009, UEPG launched its online database of more than 120 biodiversity case studies, promoting best practice of the sector. UEPG is also developing a Toolkit on Quarries, Pits and Biodiversity in partnership with the United Nations Environment Programme (UNEP). Following the success of 2009, UEPG members will again participate in the European Minerals Day in 2011. The UEPG Sustainable Development Awards 2010, with special awards for Biodiversity, were the highlight of the International Year of Biodiversity for UEPG. The brochure (see inset) features many astounding biodiversity case studies.

UEPG is closely following the development of the study on the Economics of Ecosystems and Biodiversity (TEEB). This study is striving to put an economic value on ecosystem services such as pollination by bees, filtering of drinking water, storm protection and anti





erosion effects by forest and vegetation. UEPG will analyze the TEEB D3 Report, particularly focused on business. Aggregates producing companies already globally invest millions of Euros in environmental restoration, biodiversity and ecosystems.

UEPG is partnering its biodiversity activities with other NEEIP members and other NGOs. In September 2010, UEPG is organizing a workshop with all its stakeholders to brainstorm its biodiversity policy, targets and indicators for the next 5-10 years.

Marine Aggregates Task Force

Chaired by Arnaud Colson (UNPG, France), the UEPG Marine Aggregates Task Force has established many key contacts with both the European Commission and Parliament.

The Task Force has been particularly active in the development of a chapter on marine extraction in the Guidance for the non-energy extractive industries on how to extract in and close by Natura 2000 areas. The Members of the Task Force actively contributed to the preparation of the guidance. They advocated that the terrestrial model of Natura 2000 should not be applied to the Marine Environment due to significant differences.

After an intense advocacy campaign on the Marine Strategy Framework Directive, the article on marine protected areas, stating that it should include areas of a sufficient size to be fully protected from all extractive uses, had been removed. The Task Force is now involved in the implementation of the Framework Directive, with a particular focus on the definition of good environmental status and the three key indicators biodiversity (1), sea floor integrity (6) and underwater noise (11). This work is essential, as it will help define whether a marine area is in good environmental status and which might impact on the requirements for marine aggregates extraction.

The Members of the Task Force recognize the need to further improve the knowledge on the environmental impact of marine aggregates extraction and to campaign a better image of the industry, notably through

involvement in research programs, better representation within UEPG, improving the data on production, license areas and employment, as well as arranging site visits for EU decision makers

Water Management Task Force

Chaired by César Luaces Frades (FdA, Spain), the Water Management Task Force aims at exchanging good practice in ground and groundwater management in quarries and pits, ensuring that the aggregates industry does not impact water quality. The Task Force is building up a database of best practice, as well as a UEPG Guidance Paper both on the implications of the Water Framework and the Groundwater Directives, together with detailed guidance on best practice, to ensure that the industry maintains its record of good environmental stewardship in this area.

Other Environment Committee Activities

Natura 2000 Guidelines

The European Commission invited UEPG to contribute to the Guidelines for the Non-Energy Extractive Industries for extracting in and close by Natura 2000 areas (see insert). The initiative addresses the key issue of sustainable access to mineral deposits, a priority for UEPG 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. In fact, the European Aggregates Industry has produced not only essential materials for the EU economy but at the same time new Natura 2000 areas. Aggregates extraction sites have been declared Natura 2000 during or after extraction. UEPG provided the European Commission with good practice examples of extraction sites within Natura 2000 areas.

UEPG attended expert group meetings and made a significant input in the drafting work of the guidance paper. UEPG deliberately made the link between Natura 2000 and the Raw Materials Initiative, in order to promote truly sustainable access to resources. A



Position Paper addressing both subjects was circulated to EC Officials, followed up by the Leoben 2010 Report, and UEPG will maintain the momentum on this vital issue.

As a result, the latest Guideline draft, issued in February 2010, was a significant improvement for the Industry, particularly in its crucial acceptance that Natura 2000 designations do not a priori prohibit existing or new extraction activities. On the contrary, it recognizes that extraction activities can actually contribute to biodiversity. UEPG will closely monitor the finalisation and translation of the Guidelines into EU official languages in the second half of 2010.

Soil Protection Framework Directive

UEPG was informed that the European Parliament's Environment Committee has not scheduled the Soil Protection Framework Directive on its agenda expecting that the Council would not come to an agreement. At the Environment Council Working Group meeting on 21 January 2010, the blocking minority (Austria, France, Germany, the Netherlands and the UK) reaffirmed firm opposition. UEPG will monitor closely developments during the Belgian EU Presidency.

Transposition of the Mining Waste Directive

UEPG is collating data on the process of transposition in the various Member States, in order to ensure consistency of application across the EU, and to ensure that inert wastes are listed correctly from the industry perspective. This work will be completed in the second half of 2010.

Other Work Areas

Chaired by Pierre de Prémare, a small Ecological Offset Working Group is developing a UEPG Position Paper, to ensure consistency in interpretation and application by regulators, authorities and the industry.

UEPG Sustainable Development Indicators

UEPG is committed to reporting Sustainable Developments Indicators in order to

measure industry progress under Economic, Environmental and Social Pillars. Various indicators are being developed under the Environmental Pillar, including those for land use, restoration, transport, environmental performance and communications. Partial data was collected for 2008, and it is hoped to have much improved reporting for 2009 which can be summarized in the next Annual Review.

Green Week 2010 and European Minerals Day 2011

UEPG actively participated in Green Week 2010, sharing a stand with other NEEIP partners. UEPG has supported European Minerals Days in the past and will do so again in 2011. UEPG and its Member Associations and Companies continue to support many "open-Day" and other communication events across Europe, in the conviction that the positive story of the industry deserves much wider recognition.

Sustainable Development Awards 2010

The UEPG Sustainable Development Awards are the proud showcase of the European Aggregates Industry. These awards have been made every 2-3 years since 1997, and have gained excellence with each event. In 2010, we had a record 30 entries from 10 countries, all entries being of truly outstanding quality. This time we were very honoured to have a truly independent Jury, each of the four members being internationally distinguished experts in the fields of biodiversity, conservation, health & safety and mining engineering. As 2010 is the UN International Year of Biodiversity, this time there was a new UEPG Biodiversity Award category, in addition to the traditional categories of Environmental, Health & Safety, Operational and Restoration Best Practice, Community Relations and Contribution to Society. The Awards were presented on May 28 at the Delegates Assembly in Munich. All entries are featured in the brochure (see inset), downloadable from <http://www.uepg.eu/index.php?pid=7&id=28>. These Awards are indeed the pinnacle of the UEPG calendar.





Activities

Health & Safety
Committee

Environment
Committee

Technical
Committee

Economic
Committee

Chaired by Jean-Marc Vanbelle (Holcim, Belgium) and vice-chaired by John Lay (CEMEX, UK), the members of the UEPG Technical Committee have continued to work as a well-coordinated European team on key technical issues relevant to the sector. The Committee addresses all aspects of technical standards for naturally-occurring aggregates as well as recycled and marine aggregates, the common goal being to establish a truly open and competitive European market for all aggregates. The Committee maintains a close liaison with CEPMC (the Council of European Producers of Materials for Construction), as well as ECP (the European Concrete Platform) and EPRA (the European Platform for Recycled Aggregates).

The Construction Products Regulation (CPR)

For many years, the Technical Committee has closely followed the development of aggregate standards under the Construction Products Directive (CPD). The success has been evidenced in the successful implementation of harmonised aggregate standards across the EU, and thereby more open and competitive markets.

In 2009, the European Commission proposed a Regulation to replace the CPD. Key issues for UEPG in the proposed CPR include clear and harmonized notification rules for testing laboratories, certification bodies with respect to common level of attestation of conformity. Other issues include the impact of the essential requirements on recycling and durability of construction, as also how to manage the intended merger of aggregate standards for concrete, asphalt and other applications with regard to the requirement for clear descriptions of the "intended uses".

Under Basic Work Requirements 7, the CPR demands EU Member States to measure the sustainable use of natural resources. In the first version, it was suggested to measure the sustainability of resource use with the Total Mass Requirement (TMR). CEN TC 350 has rejected this method, in that criteria based on mass would unfairly disfavour heavy bulky materials. In cooperation with other NEEIP sectors and the ECP, UEPG is currently analysing alternatives to measure more accurately the sustainable use of natural raw materials and continues to work closely with CEPMC in this area.

The Technical Committee will continue to follow developments very closely to ensure a reasonable outcome for implementation of the CPR.

Revision of Harmonised Standards in CEN/TC 154

The UEPG Technical Committee continues to closely follow the relevant issues. Within this key CEN Committee, these are the revision of product and FPC (Factory Production Control) standards, the further development of Conformity criteria, joint work with TC 51 and TC 104 on ASR (Alkali Silica Reaction) and so-called Dangerous Substances. All developments underlie the importance of the continued detailed monitoring and inputs by UEPG, to ensure progress in a satisfactory way for the industry.

The new issue on possible background aggregate radioactivity was discussed in the light of European and regional geological spread of rock types with radioactive potential. From the UEPG Committee's point of view, challenges in defining appropriate testing and assessment methods will be addressed.



With regard to so-called Dangerous Substances, the amended mandate M125 should soon come into force and the TC 154 answer given appropriately quickly, which would require stand still of the various national regulation projects on this issue. UEPG will keep monitoring the developments on Dangerous Substances and will strive to ensure that any extra testing requirements for aggregates will be little or none.

Standardization Legislation

There are a number of new initiatives to restructure the European Standardization processes, organizations and even the availability rules of standards. The EU Commission is in favour of an ESO (European Standards Organization) development program including CEN, EOTA and CENELEC. The public discussion and impact assessment is underway. Most of the Member States and their standardization bodies appear to be still unaware of the entire development or even the consequences, only a few have detected some major concerns so far.

From the Technical Committee's point of view, the options presented by the ESO have pros and cons for the Aggregates Industry. One negative concern is that in future, the standardisation process could include NGOs which have little or no technical competence. UEPG will closely monitor the item, in collaboration with CEPMC, and is in favour of a mixture of the good aspects from each option.

European Platform for Recycled Aggregates (EPRA)

In 2009, UEPG and the Fédération Internationale du Recyclage (FIR) jointly created EPRA, in order to promote recycling and the use of recycled aggregates.

A particular success of EPRA was that, in line with the latest update of the Guidance from

the European Chemicals Agency (ECHA), RCA (ReCycled Aggregates) conforming to hENS are considered as "Articles" under REACH and makes their registration unnecessary. This has been supported by the Chairman as UEPG representative within the Partner Expert Group, giving necessary examples for the "Article" approach.

Recycling is likely to receive even higher focus in the output of the Raw Materials Initiative: therefore UEPG will be even more supportive of recycling in the future. EPRA actively participated in the recent European Minerals Forum, on 25 November 2009, which focused on the Raw Materials Initiative.

The UEPG 2008 data indicates that an impressive 216 million tonnes of materials were recycled aggregates in that year, however that represented only 6% of the total European production of aggregates. Some countries, particularly the UK, Belgium and Netherlands, now recycle nearly all available construction and demolition materials available, representing 20-25% of their national outputs. Recycling rates in other countries appear to be significantly lower, though that may be due to inconsistent definitions or underreporting. EPRA is, in cooperation with other authorities, developing more specific definitions, and will seek to ensure greater accuracy of reporting in future.

EPRA will also strive to encourage greater levels of high-quality recycling across Europe. However recycling rates are determined by many economic (price differential between natural and recycled aggregates), technical (type of demolition, transport distances, degree of urbanisation), social (perception of recycled materials) and regulatory (availability of permits) factors. Therefore actions to further promote recycling will vary by country.



Activities

Health & Safety
Committee

Environment
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Technical
Committee

Economic
Committee



Chaired by 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 demonstrates the valuable contribution of the European Aggregates Industry to the sustainability of the EU economy. During 2009-2010, the main focus of the Economic Committee has been the Raw Materials Initiative and the compilation of Sustainable Development Indicators (SDI).

During 2009 and 2010, UEPG has proactively contributed to the two ad-hoc Working Groups on defining Critical Raw Materials and on exchanging Best Practices on land use planning, permitting, geological knowledge sharing and on integrating subsurface information into GMES. UEPG was recognised by the Commission for its many constructive inputs and technical contributions. UEPG summarised the aggregates industry position in a paper in December 2009.

EU Raw Materials Initiative

In early 2010, UEPG wished to develop the aggregates industry position even more authoritatively. In February 2010, it commissioned Leoben University to carry out a study on planning Policies and Permitting Procedures to Ensure the Sustainable Supply of Aggregates in Europe. The Leoben team did truly excellent work in a very short timescale, and their Review (see inset) was finalised at the UEPG Delegates Assembly in May 2010, and has become the centrepiece of UEPG's contribution to the EU Raw Materials Initiative.

In October 2007, the then UEPG President, Denis Mertens, and CEPMC President, Jim O'Brien, met Commission Vice-President Verheugen to emphasise the importance of access to raw materials for the European Minerals Industry. This meeting was very successful in that it created a high-level political awareness of the criticality of raw materials for the European economy.

The Report identified that the demand for aggregates continues to grow in line with economic development. Advanced economies may demand up to 9 -12 tonnes/capita, though this growth may suffer shorter-term positive or negative influences from economic boom or recession. European demand for aggregates is predicted to reach 4 billion tonnes in the longer term, driven mainly by economic growth in central and south-eastern Europe.

In close cooperation with the Non-Energy Extractive Industries Panel (NEEIP) and the European Minerals Foundation, UEPG provided further industry input and briefed key Commission representatives and Members of the European Parliament through an All Party Minerals Forum Dinner Debate which took place in April 2008 in the European Parliament. The EC Communication was published in November 2008, setting a timescale for implementation by the end of 2010.

The report analysed Minerals Policies across Europe, and more specifically Aggregates



Planning Policies. It concluded that few Member States have a well-structured approach to address the future sustainable supply of aggregates. Aggregate supplies may therefore become critical in several regions, with associated inefficiencies in aggregates transport and energy usage. Hence it is vital to establish Aggregates Planning Policies in all Member States.

The report also concluded that most Permitting Systems for extraction of aggregates are unduly complex and slow, unnecessarily constraining access to resources, and that many permissions eventually granted are too short to justify adequate investments. Hence Member States need to develop simplified, more rapid, permitting systems, ideally as a "one-stop-shops", by rationalising links and procedures between the national, regional and local agencies often involved.

The Report concluded with recommendations to the Raw Materials Initiative urging the development of a comprehensive European Raw Materials Strategy for aggregates. This should focus on the development of Aggregates Planning Policies and timely Permitting Systems in all Member States, to ensure sustainable long-term access to local aggregate deposits throughout Europe. While these areas are ultimately subject to subsidiarity, each Member State should adopt appropriate good practices already proven in other Member States. UEPG has submitted the Report as its detailed position paper on the Raw Materials Initiative.

The Report conclusions were also included in the Industry Declaration announced at the conclusion of the Madrid Conference on June 16-18. Commission Vice-President Antonio Tajani has acknowledged the very significant inputs made by UEPG within the Raw Materials Initiative, which inputs are anticipated to be incorporated into the final Initiative conclusions due by end 2010.

The Leoben Review has also been warmly welcomed by the SARMa Project, which is focused on Sustainable Aggregates Resource Management in south-eastern Europe. This project is addressing key sustainability issues for the growing aggregates industry in that region, and will reach conclusions by September 2011. The UEPG President, Jim O'Brien, has been appointed as an external advisor to the SARMa project, and it is hoped that all countries in that region will become UEPG Members within a similar timescale.

UEPG Sustainable Development Indicators (SDI)

UEPG is committed to reporting Sustainable Developments Indicators in order to measure industry progress under Economic, Environmental and Social Pillars. Significant efforts were made during later 2009 and early 2010 in collating best available economic data for 2008, as summarised in the European Economic Developments section. An ad-hoc working group met in June 2010 to review the questionnaire in order to ensure even better quality data SDI collection for 2009.

The indications are that the European demand for aggregates suffered a 20% decline from 3.5 billion tonnes in 2008 to around 2.9 billion tonnes in 2009. Industry turnover is estimated at €20 billion (UEPG does not capture price data for anti-trust reason). Approximately 17,000 companies produce at 23,000 locations, employing some 200,000 directly and a similar number indirectly.

All these statistics point to the key importance of the aggregates industry in both economic and employment terms in Europe. Continued good access to local aggregates resources is therefore vital for economic and social sustainability of the aggregates industry in Europe.



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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. The General Secretariat is also available to support Member Association activities in Brussels or in their respective countries. It always welcomes suggestions from Member Associations on how to optimally focus its limited resources, and indeed welcomes support from staff in Member Associations where they have particular expertise.

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.



The UEPG General Secretariat offers members 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, the European Commission Business and Biodiversity Platform or the proposal on the Soil Protection Framework Directive. It maintains 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 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 physical proximity to the EU Institutions and day-to-day contact with policy-makers allow the UEPG General Secretariat to identify "early-bird" opportunities to become involved in the policy making process. UEPG was recently invited to become a member of the Steering Committee of the European Commission Business and Biodiversity Platform. This provides an exceptional opportunity to contribute to the EU policy on biodiversity at the earliest stage.



UEPG has continuously strengthened its network of key contacts within the European Commission, European Parliament, EU Council working groups and NGOs. Useful platforms are the UEPG Board Policy Dinners and All Party Dinner Debates in the European Parliament in cooperation with the European Minerals Foundation where open and informal discussions with key EU policy-makers take place. In April 2010, key note speaker of the Dinner Debate was the Commissioner for Environment Janez Potočnik who appreciated that UEPG has been active in working to enhance biodiversity. The event was hosted by Jo Leinen MEP (Socialist Group, Germany) Chair of the Parliamentary Environment Committee. Other Members of the European Parliament present were Esther de Lange (EPP, Netherlands), Rapporteur of the implementation of EU legislation aiming at the conservation of biodiversity, Gerben Jan-Gerbrandy (ALDE, Netherlands) and Paul Rübiger (EPP, Austria) and partners from the World Conservation Union IUCN and NGOs, such as Bird Life International. UEPG acts as a facilitator between EU policy-makers and UEPG Members and provides valuable networking opportunities.

Coordinating EU lobbying campaigns

UEPG targets advocacy strategies and acts as a coordinator in their implementation. Examples include the positive outcome on REACH and Recycled Aggregates, where a well-coordinated pan-European action of UEPG experts led to an update of the guidance stating recycled aggregates as an "Article". After a period of legal uncertainty this decision facilitates recycling and contributes to the sustainable use of natural resources. 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 Representatives of the European Commission including face-to-face meetings.

UEPG works closely with other European Industry Associations of the Non-Energy Extractive Industry, Recycling Organisations and Sea Bed User on the Marine Strategy Framework Directive. 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 Raw Materials Initiative and on REACH.

Raising the industry's profile

The General Secretariat continued to promote the achievements of the European Aggregates Industry by making keynote speeches in international conferences such as the EU Presidency Conference on the Raw Materials Initiative in June 2010 in Madrid, Spain. 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 2009. The theme was "Turning Recession into Opportunities" which was focusing on preparing the industry for the upturn. In 2009, more than 120 senior industry executives attended the European Minerals Forum including Michel Catinat, Chair of the Ad-Hoc Working Group on defining critical raw materials and Maria Spiliopoulou-Kaparia, Chair of the Ad-Hoc Working Group on land use planning and exchange of good practice.



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UEPG Board

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Committees, Task Forces, Portfolios and General Secretariat

UEPG Committees

Health & Safety

Chair	Martin Isles, MPA, UK
Vice-Chair	César Luaces Frades, FdA, Spain
Secretary	Dirk Fincke, UEPG General Secretariat

Environment

Chair	Arnaud Colson, Lafarge/UNPG, France
Vice-Chair	François Petry, Holcim, France
Secretary	Sandrine Devos, UEPG General Secretariat

Technical

Chair	Jean-Marc Vanbelle, Holcim/FEDIEX, Belgium
Vice-Chair	John Lay, MPA, United Kingdom
Recycling	Brian James, MPA, United Kingdom
Secretary	Markus Schumacher, BKS, Germany

Economic

Chair	Hans-Peter Braus, BKS, Germany
Vice-Chair	Jerry McLaughlin, MPA, United Kingdom
Secretary	Dirk Fincke, UEPG General Secretariat

UEPG Task Forces

Communication & PR

Chair	Carl Hennrich, Austrian Association for Building Materials & Ceramic Industries, Austria
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Marine Aggregates

Chair	Arnaud Colson, Lafarge/UNPG, France
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Biodiversity

Chair	Robert Wasserbacher, Austrian Association for Building Materials & Ceramic Industries, Austria
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Water Management

Chair	César Luaces Frades, FdA, Spain
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Portfolios

Raw Material Supply Group (RMSG)

César Luaces Frades

RMSG Working Group: Sustainable Development Indicators

Arnaud Colson, Jerry McLaughlin

Non Energy Extractive Industries Panel (NEEIP)

César Luaces Frades

European Network on Silica (NePSi)

Martin Isles

Health & Safety – Standing Working Party of the Extractive Industry (Luxembourg)

Walter Nelles

European Agency for Safety and Health at Work (Bilbao)

César Luaces Frades

Liaison Network with Other Mineral Trade Associations

Hans-Peter Braus, Simon van der Byl

Eastern European and Balkan countries

Manfred Asamer

EU Environmental Agency

Jens Madvig Nørgaard

CEN/TC 154 "Aggregates"

Jean-Marc Vanbelle

CEN/TC 227 "Road Materials"

Ulrich Hahn

CEN/TC 292 "Characterisation of waste"

Jean-Marc Vanbelle

General Secretariat

Secretary General

Antony Fell

Public Affairs Manager

Dirk Fincke

Public Affairs Officer

Sandrine Devos

Public Affairs Officer

Miette Dechelle

Photo Credits

We would like to thank UEPG members for their contributions.

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 Top, right: Frechen local community project, Photograph by Quarzwerke, Germany
 Centre, top left: Rivecourt quarry, Photograph by Lafarge, France
 Centre, top right: Hütewangen gravel plant, Photograph by Holcim, Switzerland
 Centre: Wheel-mounted front-end loader, Photograph by Fachverband Stein- und Keramische Industrie, Austria
 Centre, bottom left: European Parliament, Photograph by European Parliament, Brussels
 Centre, bottom right: Peacock butterfly, Otley quarry, Photograph by Hanson, UK
 Bottom, left: Stress management at CEMEX Austria, Photograph by CEMEX, Austria
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 Bottom, centre right: El Puente gravel pit, Photograph by Holcim, Spain
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President's Introduction

Jim O'Brien, UEPG SDA ceremony Munich, Photograph by UEPG
 European Minerals Conference Madrid, Photograph by Federación de Áridos – FdA, Spain

An introduction to UEPG and Aggregates

Left: Janez Potočnik, European Minerals Forum Dinner Debate, Photograph by UEPG
 Centre: Rives du Beaujolais, Anse, Photograph by Plattard Granulats, France
 Right: Christian Niemann-Delius, Shulamit Alony, Jukka Takala, Jean-Claude Lefeuve, UEPG Jury Members SDA ceremony Munich 2010, Photograph by UEPG

Left: Mobile crusher at Ofenauerberg quarry, Photograph by Leube, Austria
 Centre: "La Falconera" quarry, Photograph by Pramsa, Spain
 Right: Water transport, Site visit Lafarge Paris, Photograph by UEPG

European Economic Developments

Left: Entrepreneurs' Forum Munich, Photograph by UEPG
 Centre: Hospital, Photograph by Lafarge, France
 Right: Peter Moser, Leoben University, UEPG Delegates Assembly Munich, Photograph by UEPG

Left: Michel Buzot and Nicolas Vuillier, UEPG Delegates Assembly Munich, Photograph by UEPG
 Centre: Site visit Lafarge Paris, Photograph by UEPG
 Right: Predrag Mikulčić, Gordana Šredić, UEPG Committee Meeting Dublin, Photograph by UEPG

Left: Benoit Lussis, Andreas Pfeiler and Carl Hennrich, UEPG Committee Meetings Dublin, Photograph by UEPG
 Centre: Water transport, Site visit Lafarge Paris, Photograph by UEPG
 Right: Stefan Francu, Carmen Ionescu, UEPG Committee Meeting Dublin, Photograph by UEPG

Left: Maria Spiliapoulou-Kaparia, European Minerals Forum, Photograph by UEPG
 Centre: Nievenheim Gänse, Rheinische Baustoffwerke, Germany
 Right: Yves Adam, Biodiversity Task Force, Vienna, Photograph by UEPG

Core Values

Left: Holcim-Aushubwaggons, Photograph by Holcim, Switzerland
 Centre: Protected ruins, Photograph by Aricemex, Spain
 Right: Window cleaning from ground level, Photograph by Hanson, UK

Organisational Structure

Left: Alain Pasquier, Antje Winttenberg, Jim O'Brien, Michael O'Briain, UEPG Board Dinner, Photograph by UEPG
 Centre: El Puente gravel pit, Photograph by Holcim, Spain
 Right: Antony Fell, UEPG Entrepreneurs' Forum Munich, Photograph by UEPG

Health & Safety Committee

Left: Martin Isles, René Kampmeier, Rory Graham, Matthew Heppleston, Stefano Boy, Ian Fraser, Paul Pounsford, Safer by Design project Meeting, Photograph by UEPG
 Centre: CPD side workshop, Photograph by MPA, UK
 Right: César Luaces Frades, UEPG Committee Meetings Brussels, Photograph by UEPG

Left: Torbjørn Lilleås, UEPG Committee Meetings Brussels, Photograph by UEPG
 Centre: Bunnratty quarry, Bunnratty, Co. Clare, Photograph by CRH – Roadstone Wood Ltd., Ireland
 Right: Walter Nelles, UEPG Committee Meetings Dublin, Photograph by UEPG

Environment Committee

Left: Arnaud Colson, Photograph by UEPG
 Centre: Dragonfly, Otley Quarry, Photograph by Hanson – HeidelbergCement, UK
 Right: Stefan Leiner, European Minerals Forum, Photograph by UEPG

Left: Esther de Lange, European Minerals Forum, Photograph by UEPG
 Centre: Bee orchid, Otley Quarry, Photograph by Hanson – HeidelbergCement, UK
 Right: Robert Wasserbacher, PR and Communication Task Force Meeting in Vienna, Photograph by UEPG

Left: Michael Rademacher, European Minerals Forum, Photograph by UEPG
 Centre: Otley quarry, Photograph by Hanson – HeidelbergCement, UK
 Right: Pierre de Prémare, European Minerals Forum, Photograph by UEPG

Technical Committee

Left: Markus Schumacher, Jean-Marc Vanbelle, UEPG Committee Meetings Dublin, Photograph by UEPG
 Centre: Crusher, Sološnica, Photograph by Alas Slovakia, s.r.o., Slovak Republic
 Right: John Lay, UEPG Committee Meetings Dublin, Photograph by UEPG

Left: Brian James, UEPG Committee Meetings Dublin, Photograph by UEPG
 Centre: Crookedwood, Co. Westmeath, Photograph by BD Flood Ltd., Ireland
 Right: Raphaël Bodet, Jaume Puig i Canal, UEPG Committee Meetings Brussels, Photograph by UEPG

Economic Committee

Left: Jerry McLaughlin, Hans Peter Braus, Antony Fell, UEPG Committee Meetings Croatia, Photograph by UEPG
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 Right: Jim O'Brien, Jerry McLaughlin, UEPG Committee Meetings Dublin, Photograph by UEPG

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 Centre: El Puente, Seseña, Taldeda, Photograph by Holcim, Spain
 Right: Ulrich Hahn, UEPG Committee Meetings Dublin, Photograph by UEPG

General Secretariat

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 Centre, left: Antony Fell, UEPG Committee Meetings Brussels, Photograph by UEPG
 Centre, right: Dirk Fincke, UEPG Committee Meetings Dublin, Photograph by UEPG
 Right: Miette Dechelle, UEPG Committee Meetings Brussels, Photograph by UEPG

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 Centre, left: Miette Dechelle UEPG Committee Meetings Brussels, Photograph by UEPG
 Centre, right: Dana Wasserbacher, UEPG office, Photograph by UEPG
 Right: Sandrine Devos, UEPG Biodiversity Task Force Meeting, Vienna, Photograph by UEPG

Members

Left: Kjell Appeland, UEPG Delegates Assembly Munich, Photograph by UEPG
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Board, Committees, Task Forces, Portfolios and General Secretariat

Left: Michael Schulz, Peter Nüdling, UEPG Delegates Assembly Munich, Photograph by UEPG
 Centre, left: Simon van der Byl, European Minerals Forum Dinner Debate, Brussels, Photograph by UEPG
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 Centre, right: Denis Mertens, UEPG Committee Meeting Croatia, Photograph by UEPG
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 Right: Christian Haeser, Reinhard Fischer, UEPG Committee Meetings Dublin, Photograph by UEPG

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 Right: Dirk Fincke, Ingo Hammwöhner, Ingo Jeffrey Thompson, Peter Wessel, Frank Devriese, UEPG Marine Aggregates Task Force Meeting, Photograph by UEPG



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