

ROADMAP TO 2030

The European Aggregates Industry

- » Sustainable
- » Essential
- » Strategic



www.uepg.eu

MESSAGE FROM THE PRESIDENTS

What do we need to play our part in the digital and green transition of the European economy to climate neutrality by 2050?

This is the central question answered in the roadmap of UEPG, the European Aggregates Association which represents by-far the largest non-energy extractive industry in Europe. Our members meet annual demand in Europe of 3 billion tons of sand, gravel, crushed rock, recycled, manufactured and marine aggregates, extracted from 26,000 sites and operated by 15,000 companies across Europe.

This industry is here to stay. We produce in Europe and for Europe – now and in the future. Our companies are mostly SMEs, often operating in rural areas supplying essential and strategic, primary, and secondary raw materials and ensuring the supply chain of an industrial ecosystem: the construction industry.

The areas of making such significant contributions are wide and diverse: Our members contribute to shared environmental goals on biodiversity, water management, air quality, circular economy, renewable energy, transport, climate change mitigation and adaptation, as well as socio-economic goals such as health & safety, social progress, technical standards, sustainable finance, and natural capital.

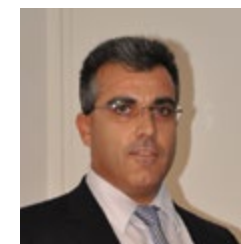
In this roadmap, we outline the EU policies, strategies and initiatives needed and identify the underlying opportunities for our industry as well as the remaining challenges. Our members have worked hard to review tools and policy measures, and to name actions to be taken to align our industry to better contribute to the EU policies and targets.

We want to join EU and national policy makers, environmental NGOs, academics, and wider society as we all build the Europe we want for future generations.



A handwritten signature in black ink, appearing to be 'T. Juchem'.

Thilo Juchem
UEPG President
2018-2021



A handwritten signature in black ink, appearing to be 'Antonis Antoniou Latouros'.

Antonis Antoniou Latouros
UEPG President
2021-2024

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WHAT WE NEED:

- 1 Sustainable access** to local resources, optimising transport to market
- 2 Streamlined/efficient** national land-use planning and permitting **policy**
- 3 Regulations** facilitating a Circular Economy, **increasing resource efficiency**
- 4 A level playing-field** for all through **consistent implementation of EU law**

WHAT WE PROMISE:

- 1 Professional representation** of our Industry, the largest in scale in Europe, ever mindful of our predominantly-SME membership
- 2 Responsible Sourcing** and excellence in **delivering high quality Products**
- 3 Improved Public Awareness** of Aggregates as essential to Society
- 4 Showcasing our Industry as a high-tech sector**, offering **attractive Careers** for forward-thinking People





WHAT WE WILL DELIVER:

- 1 We will play **an active role** in **Climate Change Mitigation and Adaptation**
- 2 We will **deliver on responsible Environmental Stewardship**
- 3 We will **deliver Biodiversity net gain** in both extraction and restoration
- 4 We will **prioritise** employee/contractor **Safety, Health and Well-Being**
- 5 We will **foster better links** and **communications** with Local Communities
- 6 We will further **extend good practice exchanges** through the Global Aggregates Information Network (GAIN™), helping **make our Industry more sustainable globally.**



POLICY COMPASS TO AGGREGATES





Photo courtesy of FEDIEX, Belgium ©ECrooy

CONTRIBUTING TO CLIMATE NEUTRALITY

Europe wants to become the first climate neutral continent by 2050 and has introduced a climate law making it a world leader in fighting climate change.



OPPORTUNITIES

The CO₂ footprint of aggregates extraction and production from cradle to gate is negligible (3-5 kg/t). The impact could be further reduced with electrification of equipment and use or production of renewable energy on site.

Yet, the potential to contribute to climate neutrality is closely linked with continued local access to resources to avoid long transport distances of bulky material. An increase of the maximum permissible total weights of trucks could also contribute to climate neutrality, as numerous journeys could be saved, further reducing emissions.



CHALLENGES

The decarbonisation of the electricity generation and its distribution will take time and require significant investment. Today, electrified or hydrogen-powered equipment for our sector is not mature enough to be widely available and affordable to SMEs. Supporting development and getting the incentives right to roll out such technology when ready will be decisive.

Permitting and land-use planning should be adapted to allow different activities (mineral extraction, recycling, production of renewable energy) on site. Access to domestic resources, land-use planning and permitting is a national competence, while sustainable and responsible access to protected areas (Natura 2000) is decided in Brussels. In addition, the NIMBY effect could block local access to resources and result in longer transport distances with a significant negative impact.



ACTIONS

UEPG and its Members **will promote energy efficiency, the electrification of machinery and the use and production of renewable energy.**

Between now and 2030, UEPG will strive to better align local and sustainable access to resources with the protection of biodiversity, while improving long term land-use planning policies and streamlining permitting procedures.

UEPG **will call for policies which ensure that aggregates resources are secured and exploited in an economically viable way, based on sustainable development principles, incorporating economic, environmental, and social requirements.**



UEPG SDA 2019, Dekker, The Netherlands ©swietkowiak

ESSENTIAL FOR THE EU CLIMATE CHANGE ADAPTATION STRATEGY

The European Commission has adopted its Climate Change Adaptation Strategy to better prepare Europe's built environment and citizens to extreme weather conditions and rising sea levels.



OPPORTUNITIES

While the CO₂ footprint of aggregates per tonne is very low, extraction sites and the materials produced are essential for the adaptation to climate change effects.

Sand and gravel sites close to rivers often function as retention areas reducing high water levels and help avoiding the flooding of villages and cities.

Dikes, dams, and coastal infrastructure, as well as adapted cities, clean and waste-water management infrastructures, renewable energy production facilities and distribution networks, renovation of buildings to improve energy efficiency, sustainable transport, or new infrastructures will require huge amounts of locally sourced aggregates which makes this industry essential in the quest to adapt to the effects of climate change.



CHALLENGES

While quarries and sand/gravel extraction sites are going to be an essential partner in climate change adaptation, the industry is often still wrongly perceived as harmful to environment and climate.



ACTIONS

UEPG will showcase different examples of how the European Aggregates Industry is needed to support climate change adaptation.

The expertise of our industry restoring sites will also play a role in contributing towards the delivery of nature-based solutions alongside nature recovery. In doing so, this contributes to EU Green Infrastructure and ecological connectivity.



UEPG SDA 2019, Bernegger GmbH, Austria

AGGREGATES - KEY FOR THE RENOVATION WAVE (EU GREEN DEAL)

Renovating Europe's built environment using sustainable materials and modern design (New European Bauhaus) will further contribute to climate neutrality by 2050.



OPPORTUNITIES

With the EU Green Deal the Commission has acknowledged the massive need for sand and gravel to support renovation of our built environment. Responsibly sourced aggregates will be key for the construction or renovation of sustainable and green transport infrastructure and for green high energy efficient buildings and private houses.



CHALLENGES

There is a widespread misconception that biomass products (timber) and recycled materials could cover the total demand for construction materials and that such products would always be the most sustainable choice. There needs to be a more transparent and consistent way to demonstrate the sustainability credentials of different sources of construction materials, rather than relying upon perception.

The lack of progress on technical standards linked with the Construction Products Regulation prevents a better adaptation of the quality criteria for aggregates to requirements of constructions works and a more sustainable use of aggregates.



ACTIONS

UEPG will support Green Public Procurement to ensure sustainably sourced primary and secondary aggregates are used for the Renovation Wave.

UEPG will make use of its Recycling Task Force and its Working Group on Market Based Instruments to identify, together with the European Commission, how to further increase recycling rates where technically, environmentally, and economically viable.

The Environmental Product Declaration for aggregates will support and demonstrate the sustainability of our products.

UEPG and its technical experts also commit to contribute to the future development of standards.



UEPG SDA 2019, Swerock, Sweden

THE EU'S DEPENDENCY ON AGGREGATES (NEW EU INDUSTRIAL STRATEGY)

The updated EU Industrial Strategy identified 14 strategic industrial ecosystems and the dependency on (domestic) raw materials.



OPPORTUNITIES

Several EU policy areas, such as the EU Green Deal, the renovation wave, and the Climate Change Adaptation Strategy require massive additional amounts of sand, gravel and crushed rock. The recognition of the need to ensure a long-term supply of essential and strategic primary and secondary raw materials to support for Europe's construction industry and wider economy is an important step forward. The key question on access to resources is not whether we need primary and secondary aggregates, but where and how to get it from in the most sustainable way.



CHALLENGES

The fact that land-use planning and permitting for domestic raw materials is a national or regional competence while access to resources in protected areas (at least 30% by 2030) and environmental management (Environmental Impact Assessment) are covered by European legislation. What makes this policy area even more challenging, is the fact that public attention and the focus of decision makers lies mainly with critical raw materials and battery raw materials. Shortages on the supply of aggregates can lead to broken supply chains, delays or even closure of construction sites and impacts negatively on transport distances and the related CO₂ footprint.



ACTIONS

UEPG will make use of its active role in industrial alliances such as Industry4Europe, the European Raw Materials Alliance (ERMA) and the

Construction 2050 Alliance to assist in the coordination of long-term access to essential and strategic primary and secondary domestic raw materials. EU policies and the above-mentioned industrial alliances should have a pillar on access to primary and secondary resources. UEPG recommends an update of the EU Raw Materials Initiative of 2010 and is ready to contribute to the European Commission's Raw Materials Supply Group (RMSG) and in the industrial ecosystem "construction".



CIRCULAR BY DEFINITION (EU ACTION PLAN)

From eco-design to circular economy process, the new action plan addresses the entire life cycle of products and encourages sustainable consumption. It targets waste prevention, ensuring resources are used and kept in the EU economy for as long as possible.



OPPORTUNITIES

The European Aggregates Industry is a responsible supplier of high-quality, durable and sustainable products, which are recyclable. The industry contributes to the development of the circular economy through waste avoidance, resource and energy efficiency, and quality recycling for Europe.

UEPG, representing both primary and secondary raw materials, promotes excellence in daily operations, with the complete use of the reserves, delivery of products with a long life span, and through recovery operations, in site restoration, and backfilling.

In response to green procurement policies, the aggregates industry is demonstrating sustainable and responsible sourcing of primary and secondary raw materials using tools such as Life Cycle Assessment, Carbon footprint and CE marking, brought in by the Construction Products Regulation (CPR).



CHALLENGES

UEPG supports the use of recycled and manufactured materials, providing that the required technical standards are met and that it is environmentally and economically viable.

The potential contribution of recycling and related figures should be realistic and not raise false expectations to which extent primary aggregates could be substituted. Even with the highest recycling rates, around 80% of natural aggregates will be needed to meet the total demand for construction across Europe.

The availability of recycled materials is uneven between metropolitan and rural areas, and legally binding minimal recycled content, irrespective of the location, could lead to major CO₂ impacts.

EU and national policies are promoting a European Recycling Society and call for fixed EU-wide targets, while indicators are not yet fully developed nor accurate / representative.

The range of policy tools reaches from innovative products, new technologies, recycling targets, resource taxation and further restrictions to landfill. A better understanding of what is happening in the field is required to track the cause and effect of policy and regulatory interventions.



ACTIONS

With its Recycling Task Force, UEPG **will provide guidance on End-of-Waste for aggregates** to improve further recycling rates and continue sharing ever-more efficient new business models incorporating the production of both primary and secondary aggregates.

UEPG **will continue to demonstrate the wide contribution of the Aggregates Industry to the Circular Economy** by collecting data on the extraction of primary raw materials and the recovery of construction and demolition waste.

UEPG **will continue to help shaping the necessary policy tools and expectations of EU decision makers** with the objective to raise C&D waste recovery rates where environmentally, technically and economically feasible.



UEPG, SDA 2019, Lafarge Holcim and Sodira, Spain

A KEY PARTNER FOR EU BIODIVERSITY (EU STRATEGY)

The EU Biodiversity Strategy recognises the need to further involve businesses, to ensure increased investments in nature, and to develop a new governance framework enabling transformative change.



OPPORTUNITIES

Biodiversity conservation can benefit from a more dynamic management. Aggregate extraction sites can be natural biodiversity heavens, creating new habitats and attracting pioneer species. By allowing a temporary activity such as responsible aggregates extraction, companies will progressively restore the area and implement plans creating high biodiversity value.

In that respect, active and restored aggregate extraction sites form an integral part of nature conservation areas, with several of them having been designated Natura 2000 or national nature parks, contributing to the expansion of protected areas, as well as to connecting habitats.



CHALLENGES

It is essential to reconcile socio-economic and nature conservation objectives, to engage with stakeholders (particularly landowners and users) and create partnerships between local authorities, businesses, and NGOs to deliver practical results on the ground.

Despite the EU Guidance on non-energy extractive activities in Natura 2000, proving in many cases the compatibility with biodiversity, aggregates extraction is often inappropriately excluded from protected areas or its surroundings. This is based on an outdated misperception that aggregates extraction harms the environment, leading to unsuitable local decisions against the letter and spirit of EU Directives.



ACTIONS

By 2030, UEPG will aim to contribute to biodiversity net gain and measure progress with targeted indicators, as well as with the many projects across Europe implementing biodiversity management plans and promoting the concept of dynamic management of biodiversity.

UEPG will make use of its Biodiversity Task Force and its active presence in European expert groups such as the Coordination Group for Biodiversity and Nature, the Nature Directors Expert Group (NADEG) and EU Business@ Biodiversity Platform to show this industry is a strategic ally to meet the targets set-out in the EU Biodiversity Strategy to 2030. Active and restored aggregates extraction sites can contribute to the recovery and conservation of EU species and habitats, as well as to the expansion of protected areas. The Industry can help connecting habitats for a Trans-European Nature Network (green infrastructure) and should be considered as a key partner to restore 25.000 km of free-flowing rivers, to plant 3 billion trees and halt the decline of wild pollinators.

UEPG will continue collecting and disseminating good practices at European and global level and actively encourage its Members to contribute to the conservation of biodiversity. More than 300 case studies are available on www.uepg.eu.



ENSURING SAFE AND HEALTHY WORKPLACES (EU EMPLOYMENT)

The European Pillar of Social Rights includes policies to create safe and healthy jobs.



OPPORTUNITIES

The European Aggregates Industry offers opportunities to people with different levels of education and qualifications in local jobs, often in rural locations, while also training the current workforce for the green and digital transition and keeping it safe and healthy.

Companies have introduced a health & safety culture towards reducing the number of fatalities and lost-time incidents while fostering healthy workplaces.



CHALLENGES

As many other industries in Europe, aggregate producers face the issue of an ageing workforce and the challenge of attracting young people towards the industry. The digital transition of SMEs and the need for new green jobs may also be challenging at times.



ACTIONS

By 2030, the European Aggregates Industry aims at further improving training rates and to have a digitally skilled workforce. UEPG will **continue to promote campaigns** such as the **Social Dialogue Agreement on Respirable Crystalline Silica (NePSi)**.

UEPG will **promote the adoption of strategies to attract young workers and offer more employment opportunities to women.**



UEPG SDA 2019, Destia Finland

IMPLEMENTATION & ENFORCEMENT OF EU LEGISLATION

The European Commission ensures the proper implementation and enforcement of adopted EU legislation to create a level playing field.



OPPORTUNITIES

The consistent implementation and enforcement of existing EU or national legislation would bring significant benefits to the economy, environment and to employees.



CHALLENGES

In a highly competitive industry, restrictive access to resources, unnecessarily costly impact assessments and lengthy permitting procedures make it difficult for companies to invest and continue to operate.

Limited access to finance further weakens the competitiveness of a sector which consists mainly of SMEs.

In some countries, illegal activities and occasional dumping of waste create an unbearable distortion of what should be a fair level playing-field. Existing artificial barriers due to different interpretations of EU legislation by the Member States fragments the single market and distorts competition.



ACTIONS

UEPG is calling for an EU policy supporting companies by cutting red tape and promoting smart regulation, i.e. better implementation of existing legislation rather than adding new legal obligations. Red tape and unnecessary regulatory requirements for the extractive industry further damage competitiveness by duplicating time, effort and cost. EU requirements should be streamlined, and implementation simplified.

UEPG organises tailor-made policy events and conferences with EU high-level decision makers to raise the concerns and constructive solutions of the European Aggregates Industry as operating costs for aggregates companies are highly impacted by EU and Member State policies for energy supply and by the regulatory framework. The cost of regulatory compliance is growing constantly, eroding the competitiveness of businesses.

UEPG offers the European Commission and Members States support on EU and national law enforcement.



UEPG SDA 2019, AHE Auenlandschaft Hohenrode-Landschaften, Germany

SUPPORTING UN SUSTAINABLE DEVELOPMENT GOALS (SDGs)

In 2015, the United Nations adopted 17 interlinked global goals designed to be a “blueprint to achieve a better and more sustainable future for all” by 2030.



OPPORTUNITIES

By supplying aggregates for housing, education, health, sanitation, energy, cultural heritage conservation, our industry contributes on a daily basis to UN Sustainable Development Goals.

At a local level, raw materials are used for local construction projects and aggregates companies provide for quality local employment and pay business taxes.

Responsibly managed aggregates extraction sites have minimal impact on the general environment, including landscape, water & groundwater, air and soil and can deliver a range of other environmental services through the management of flood water to improvements in biodiversity.

For many countries where depopulation of rural areas is a strategic challenge, our industry is an essential player as a generator of wealth and quality employment.

We can foster the added value of the Aggregates Industry for local communities and better communicate the contribution to SDGs at this local level.



CHALLENGES

The lack of knowledge and recognition by society and governments on the essential nature and use of aggregates for the daily needs of citizens – supply is assumed. In other regions of the world a very high demand for aggregates might trigger unsustainable and irresponsible extraction.



ACTIONS

UEPG's contribution to the Global Aggregates Information Network (GAIN) is key to share and disseminate Good Practices across the aggregates activity in the world and has a direct positive impact to improve the standards and the sustainability of this major extractive industry.

UEPG shares with global partners good practices increasing the efficiency of water use, improving water quality, minimising the effect on landscapes, preserving soil characteristics and improving air quality on site and their surroundings.

UEPG encourages every UEPG Member to have a national public relations campaign in place by 2030 to ensure proper recognition of the benefits of the sector to society and of its contribution to UN Global Sustainable Goals.

Engagement with local people and the increased implementation of governance, transparency, ethics and corporate social responsibility will contribute to social acceptance and to operate as a trustable and reliable member of the community.

NOTES

PHOTO CAPTIONS AND CREDITS

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- ▲ Photo courtesy of HeidelbergCement, France
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- ▲ UEPG SDA 2019, AHE Auenlandschaft Hohenrode-Landschaften, Germany

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- ▲ INDUSTRIAL AND RAW MATERIAL STRATEGY: UEPG Meeting 2017, Lafarge Holcim, France
- ▲ ENVIRONMENT: UEPG, SDA 2019, Lafarge Holcim and Sodira, Spain
- ▲ WATER MANAGEMENT: UEPG Mission 2017, Colas Mineral, Croatia
- ▲ CLIMATE CHANGE ADAPTATION: UEPG Mission 2018, Sten og Grus Prøvestenen, Denmark
- ▲ SAFETY: UEPG SDA 2013, John Wainwright and Co, UK
- ▲ HEALTH: UEPG SDA 2019, CEMEX, France
- ▲ EMPLOYMENT: UEPG SDA 2019, CEMEX, France
- ▲ TECHNICAL STANDARDS: UEPG Meeting 2017, Velde, Norway
- ▲ CIRCULAR ECONOMY: UEPG Meeting 2016, Ebbsfleet, UK

based on the **UEPG Policy Compass for aggregates**
(<https://uepg.eu/mediatheque/media/policy-compass-leaflet.pdf>)

The European [EU27+UK+EFTA, 2019] aggregates production is



3 billion
tonnes/year,

representing an annual turnover of an estimated €15-€20 billion.

The European [EU27+UK+EFTA, 2019] average demand for aggregates is almost



6 tonnes
per capita per year.



The aggregates sector is by far

the largest

amongst the non-energy
extractive industries

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

The aggregates industry comprises



15,000
companies (mostly SMEs).

producing aggregates at



26,000
sites across Europe.

with just on



187,000
people employed
(including contractors).

KEY FACTS ABOUT THE AGGREGATES INDUSTRY

- ▲ Aggregates are granular material used in construction comprising sand, gravel, crushed rock, marine aggregates, manufactured and recycled aggregates.
- ▲ Aggregates are used to build and maintain your houses, roads, railways, bridges, hospitals, schools and other essential infrastructures you use in your everyday life.
- ▲ Every different application requires a different technical specification of aggregates, some with extremely demanding requirements in respect of shape, durability, abrasion, frost resistance and other factors.

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Get in touch with us



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Aggregates Association)



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