

EUROPEAN AGGREGATES ASSOCIATION

---

A Sustainable Industry for a Sustainable Europe

# 2020 Vision for a Sustainable Aggregates Industry



The aggregates industry comprises some

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

operating in

**25,000**  
QUARRIES & PITS  
across Europe,

employing

**230,000**  
PEOPLE directly and indirectly.

representing a turnover of more than

**15** BILLION EURO.

The European Aggregates demand is

**2.7** BILLION TONNES/YEAR,

The European average aggregates demand is

**5.2** TONNES /CAPITA/YEAR

## The European Aggregates Industry

UEPG represents the Aggregates Industry in Europe, with members in 30 countries, with 15,000 companies (most of which are SMEs) extracting from 25,000 quarries and pits, with almost 230,000 people employed.

With an annual demand and production figures of 2.7 billion tonnes, a turnover of €15 billion, 25,000 extraction sites and 15,000 companies, the European Aggregates Industry is the biggest non-energy extractive Industry sector.

Aggregates are sand, gravel, crushed rock, marine and manufactured aggregates and recycled materials.

## Facts & Figures

Aggregates are the third most used resource after water and air. The question is not whether we need it, but where to get it from, in the most sustainable way.

UEPG develops a health and safety culture in Europe through the creation of dedicated Committees in each of its Member Association and the share of good practice.

More than 150 biodiversity cases studies available online [www.uepg.eu](http://www.uepg.eu) demonstrate the compatibility of aggregates extraction and environmental protection.

UEPG promotes triennial Sustainable Development Awards in order to recognise and further promote excellence in the Industry in all three pillars of sustainable development as described in this Industry Vision.

## A Local Player

The economic transport radius by road is a limiting factor and typically is in the range of about 50 km. The right transport mix (rail and water ways) and access to local resources close to the point of demand reduces lengthy and costly transport, CO2 emission and overloading transport infrastructure.

# Our 2020 Vision for a Sustainable Aggregates Industry

**T**he future of any profession depends on its ability to anticipate the needs of society and to innovate in a sustainable manner. For thousands of years, aggregates from quarries and sand pits are the foundation of buildings and infrastructure. 2.7 billion tonnes are needed each year to construct and maintain hospitals, schools, private homes, roads, railways, water channels, dams and dykes for flood protection, beach refurbishment and coastal protection. Aggregates are the most used bulk material on the planet. The question is not whether we need aggregates, but where and how to get the raw materials in the most sustainable way.

Aggregates can only be sourced from quarries and pits where suitable deposits geologically occur. While Europe is self-sufficient for aggregates, long-term access to local resources becomes an ever greater challenge. This is partly caused by a negative and outdated image of the Industry and the related Not-In-My-Backyard (NIMBY) effect.

Over the last five years, the European Aggregates Industry –in common with the wider construction industry– in Europe has suffered a severe recession. The Industry has now adapted to the new economic, environmental and social challenges and faces the future with prudent optimism while some countries still face a decline in production.

The Industry will continue to increase efforts towards an environmentally friendly and resource efficient extraction and production, towards an excellent health & safety record, towards good neighborhood policy and affording attractive careers for young people. This goes hand in hand with streamlined and smart regulation that will foster renewed economic and construction growth in Europe.

This UEPG Vision 2020 is designed to set targets and ambitions for the European Aggregates Industry to foster our overarching objective of a Sustainable Aggregates Industry for a Sustainable Europe. The UEPG Vision 2020 is addressing the Industry and its stakeholders. This Vision will serve to identify the legislative and political needs to achieve our ambitions, and to that end, will serve as basis to define Industry positions.



Arnaud Colson  
President, UEPG



# Place excellence in health and safety at the centre of our activities



## Our objective

**Zero harm to all our employees, contractors and sub-contractors and visitors by 2020**

## The challenge

Our statistics show that the European Aggregates Industry has a poor safety record. Data gathering needs to be improved. Safety awareness and training need to move to a higher level. Companies have introduced a health & safety culture towards reducing the number of fatalities and lost-time incidents and fostering healthy workplaces. Any harm to employees and sub-contractors is deemed unacceptable.

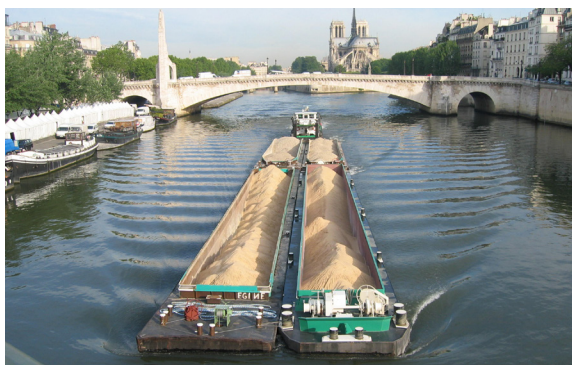
## Our solution

Health & Safety needs to be systematically addressed by all UEPG Members. This is why each national Association is requested to establish a dedicated Health & Safety Committee if not already existing. In future, each national association should capture safety data from its members.

UEPG reviews the definition on health & safety related data collection (UEPG Sustainable Development Indicators) to enable measuring progress or to identify setbacks. It has already adopted the CSI Safety Definitions.

UEPG and its national Member Associations will continue to promote campaigns such as the Social Dialogue Agreement on Respirable Crystalline Silica (NePSi), ensuring safe access to mobile machinery (Safer by Design), sharing cost-effective examples to improve health and safety in quarries and pits other companies should follow (UEPG Health & Safety Good Practice Guide).

# Ensure **sustainable access** to **primary local resources**, optimising transport



## Our objective

**Land-use for extraction should be recognised as an activity of public interest similar to agriculture, forestry, water and nature and should receive the same priority**

## The challenge

Competition in land-use, absence or complexity of aggregates policies, lengthy permitting procedures and NIMBYism, long-term access to primary local resources becomes an ever greater challenge. Access to local resources is essential to reducing lengthy and costly transport, CO<sub>2</sub> emission and avoiding congestion of transport infrastructure.

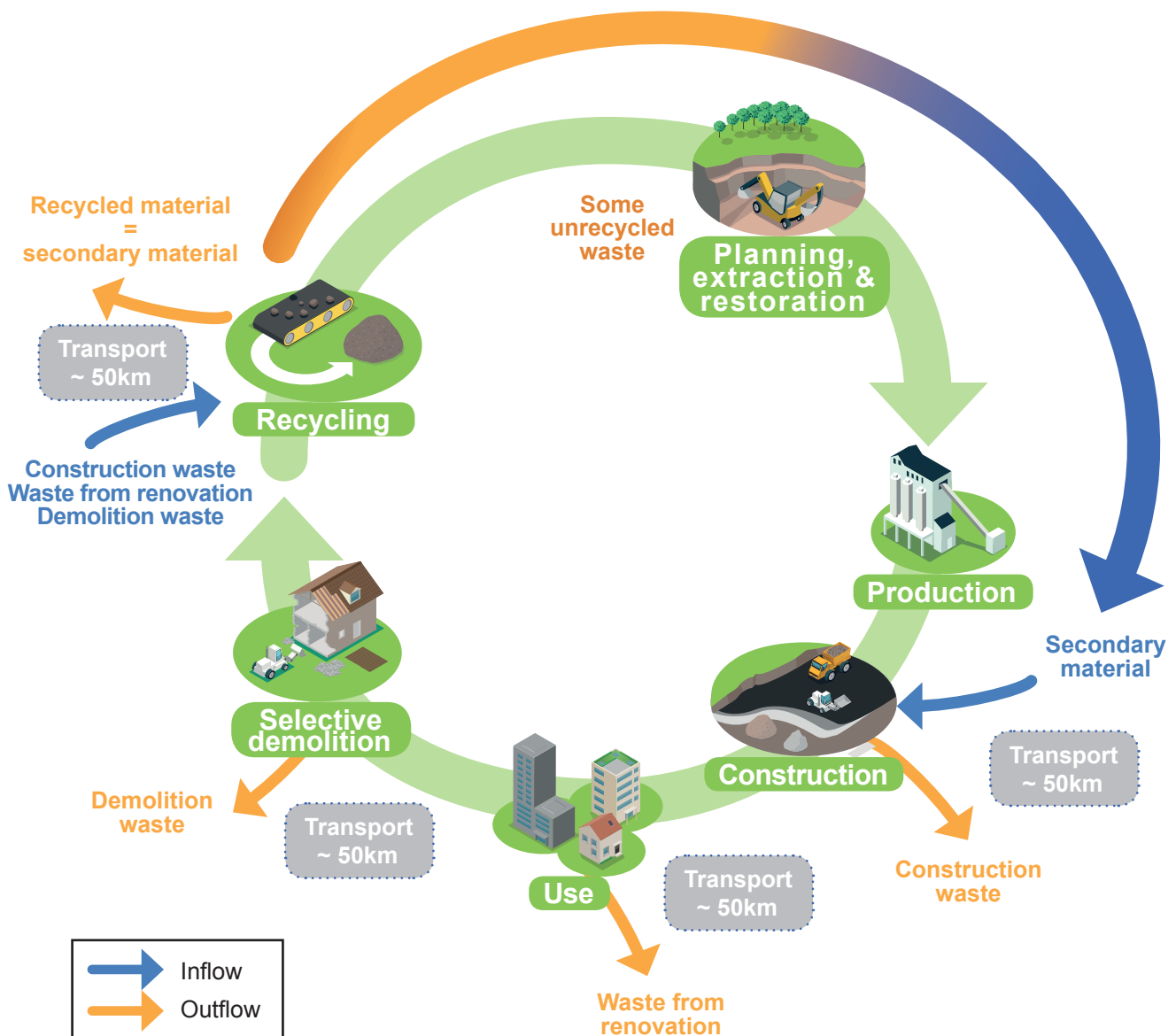
## Our solution

UEPG has closely followed the EU Raw Materials Strategy from its very start. With a seat in the European Commission Raw Materials Supply Group, UEPG is perfectly placed to influence the debate on availability of geological data, including the Aggregates Industry's interest in land-use planning and streamlining permitting procedures.

UEPG and its Members will continue to launch campaigns to explain why quarries and pits are needed and what their added value to society is (Make the link – Mineral Products Association, UK). UEPG is also represented in the European Commission WG on sustainable use of natural resources and the Business & Biodiversity Platform and commits to further contribute to long-term solutions ensuring a sustainable supply of aggregates.

# Develop the **circular economy** through efficiency, recycling and restoration

Towards a circular economy for aggregates







Our objective

**To demonstrate the contribution of the Aggregates Industry to the Circular Economy by 2020**

### **The challenge**

The Industry recognises the imperative of achieving maximum efficiency in all stages of the life-cycle. This includes most optimal extraction, production and transport, proximity, local economic development, usage, recycling and ultimately restoration.

Plenty of EU legislation and Initiatives are promoting a European Recycling Society and call for fixed EU-wide targets while indicators are not yet fully developed or not appropriate, such as the Raw Materials Consumption Indicator based on weight. The range of policy tools reaches from innovative products, new technologies, recycling targets, resource taxation and ban on land-fills.

### **Our solution**

The European Aggregates Industry is an integral part of the circular economy playing a vital role in the total sustainability of construction. All UEPG Members are already contributing to the Circular Economy through excellence in daily operations, complete use of the reserves, recycling and restoration.

UEPG supports the use of recycled materials, providing that the required technical standards are met and that it is environmentally and economically viable. The potential of recycling and related figures should be realistic and not raise false expectations to which extent virgin aggregates extraction could be replaced.

UEPG has established a Recycling Task Force to debate the policy tools and expectation from EU decision makers.

# Assist in improving a streamlined national land-use planning and permitting policy



## Our objective

**To encourage and assist all UEPG Members to have a national aggregates planning policy in place by 2020**

## The challenge

Europe as a whole has numerous non-energy raw materials at its disposal, including great quantities of aggregates. Access to aggregate deposits is insufficiently secured, sometimes even intentionally inadequate, when land-use planning does only take into account the regional domestic demand. While the Aggregates Industry is a local player, export and import should not be restricted as some regions may have a shortage, some will have a surplus.

## Our solution

UEPG will call for a national or regional aggregate policy to ensure that aggregate resources are secured and exploited in an economically viable way, based on sustainable development principles incorporating economic, environmental and social requirements as well as the regional geological specificities.

Set up of land use planning policies to ensure that access to aggregate deposits is secured either in general, independently from the domestic need of aggregates, or at least sufficiently enough to cover the needs of present and future generations within appropriate market areas.

Actual “extraction zones” are determined only after an informed and balanced assessment of the different options has been made not excluding otherwise protected areas.

With a seat in the European Commission Raw Materials Supply Group and the Ad-Hoc Working Group on land-use planning and permitting, UEPG is perfectly placed to influence the debate.



# Create and maintain a level-playing-field through **consistent implementation of EU law**



Our objective

**Consistent implementation and enforcement of existing EU/ national legislation by 2020**

## **The challenge**

In a highly competitive Industry, restrictive access to resources and unnecessarily costly impact assessments reduce the already low profit margin of aggregates producers. Difficult access to finances, further weakens the competitiveness of a sector which consists mainly of SMEs. In some countries, illegal operators and occasional dumping of waste create an unbearable distortion of what should be a fair level-playing-field.

## **Our solution**

UEPG is calling for an EU policy supporting also SMEs by cutting red tape and promoting smart regulation, i.e. better implementation of existing legislation rather than adding new legal obligations. Overlapping requirements for the extractive industry damage competitiveness. EU legislation applying to the industry need be reviewed, requirements streamlined and implementation simplified. UEPG offers the European Commission and its Members support on EU and national law enforcement.

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 permanently eroding the competitiveness of the companies. 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.

# Promote the compatibility of aggregates extraction and the environment



## Our objective

**UEPG to assist its Members in achieving that responsible aggregates extraction should not be automatically prohibited for environmental reasons**

## The challenge

Responsibly managed aggregates extraction sites have minimal impact on the general environment including landscape, water, air and biodiversity. Despite the EC Guidance on extractive activities in Natura 2000, aggregates extraction is often inappropriately excluded. This is due to an outdated misperception that aggregates extraction will harm environment.

## Our solution

Over 150 case studies, available on [www.uepg.eu](http://www.uepg.eu), demonstrate that both active and restored Quarries and Pits, many of which are in or near Natura 2000 or other conservation areas, are biodiversity havens. In fact, some aggregates producers may add 'Biodiversity and contributions to ecosystem services' to their product line.

UEPG will continue to actively encourage its Member Associations to foster Biodiversity among their member companies, and where appropriate for them to partner with local NGOs, universities, research centres and other interested stakeholders.

UEPG will also enhance efforts to measure progress on biodiversity through biodiversity indicators and workshops across Europe demonstrating their application in the field.



# Improve public awareness of aggregates extraction as beneficial to society

AMBITION #7



Our objective

**Every UEPG Member to have a national public relations campaign in place by 2020 to ensure positive appreciation of the benefits of the sector to society**

## **The challenge**

Due to the lack of knowledge in society about the essential nature and use of aggregates for our daily needs such as housing, schools, hospitals, roads, railways, flood protection, coastal protection and beach refurbishment, the positive role of the European Aggregates Industry is often not fully appreciated. With its turnover of more than 15 billion EUR, the Industry is a very significant sector and contributes to local employment and to European heritage.

## **Our solution**

UEPG will contribute and distribute national and European Initiatives of public relations and sustainable construction to UEPG Members and EU stakeholders. UEPG encourages its Members to organise national or regional Open-Days and visits of decision makers. Where appropriate, the constructive use of social media is encouraged.

# Promote the **added value** of the **Aggregates Industry** for **local communities**



## Our objective

**Encourage UEPG Members to undertake public events, develop communication tools and PR training by 2020**

## The challenge

The European Aggregates Association encourages operating responsibly among all its Members. Despite this progress, an outdated image of the Industry and the related Not-In-My-Backyard (NIMBY) effect hinders new projects or extensions. This is partly due to insufficient external communication, which can contribute to distrust amongst the local communities. Consequently, the public often is not aware about the positive aspects of the sector.

## Our solution

As the Aggregates Industry is a local player, the raw materials are used for local construction projects. Furthermore, aggregates companies provide for local employment and corporate tax. Extraction of aggregates is a temporary activity and producers are obliged to restore quarries or pits after extraction to nature parks or recreation areas.

Guidance on a good Neighbourhood Policy (Norsk Bergindustri, Norway), surveys and cooperation with the local press (Lower Rhine Initiative, Germany) show in a transparent manner the activities and positive contributions of the Aggregates Industry. Other good examples are “Days of the Trees” (FdA, Spain), Guidance documents for an effective External Communication (SBMI, Sweden) and Schools’ Classes dedicated to the sector (WKÖ, Austria). UEPG will work more intensively on PR & Communication through a dedicated Task Force.



# Showcase the Industry as an **attractive career,** in particular for **young people**



Our objective

**To encourage UEPG Members to raise awareness in public relations, job agencies and educational institutions about the career opportunities for both genders**

## **The challenge**

The positive aspects of the Aggregates Industry are often unappreciated and, hence, it has not been considered as offering good career opportunities and prospects. In particular, young people often did not consider the Aggregates Industry as an attractive employer. The Industry can offer career opportunities for all levels of qualification and both genders.

## **Our solution**

UEPG and its Members organise Open-Air school rooms, Open-Days for schools and Universities and launched or maintained projects with Universities. UEPG Members organise or sponsor exhibitions and trade fairs and present the job opportunities for future generations. The development of new technology and new skills is highly important for an innovative and modern Industry.

# Ensure **responsible sourcing** and **excellence** in customer service and satisfaction



Our objective

**Get Industry recognised as a trusted and responsible supplier of goods and services with all its customers in the downstream sectors, particularly the concrete and asphalt industries**

## **The challenge**

In the last 25 years, the European Aggregates Industry has traditionally a responsible supplier of high-quality products. Existing and new high-tech applications (High-Speed trains, modern motorways, high-rise buildings, tunnels, water filtration) require even higher levels of product development to achieve more demanding standards and certification. There are also increasing requirements such as the Environmental Products Declaration (EPD) and others brought in through the Construction Products Regulation (CPR). Both the Asphalt and Concrete Industries are introducing requirements for demonstrating responsible sourcing of aggregates.

## **Our solution**

Experts of the Aggregates Industry are ensuring technical standards are met in CEN TC 154 and related CEN TCs. The UEPG Technical Committee contributes to responsible sourcing schemes for construction products.



30 UEPG has Members in  
COUNTRIES.

UEPG MEMBERS





UEPG AISBL  
European Aggregates Association  
General Secretariat  
Rue d'Arlon 21 - 1050 Brussels - Belgium  
Tel: +32 2 233 53 00  
Email: [secretariat@uepg.eu](mailto:secretariat@uepg.eu)  
[www.uepg.eu](http://www.uepg.eu)

EU Transparency Register: 15340821653-49

**Photo Credits**

P3 – Photo courtesy of Lafarge – Arnaud Colson, UEPG President  
P4 – Photo courtesy of Cédric HESLY for CEMEX, Photo library, France  
P5 – Photo courtesy of Lafarge  
P6 – UEPG/ Lafarge graph, 'Towards a Circular Economy for Aggregates'  
P7 – Ljubisa Danilovic  
P8 – Photo courtesy of Lafarge  
P9 – UEPG  
P10 – Photo courtesy of Chartre Environnement, UNICEM, France  
P11 – Photo courtesy of CEMEX, Photo library, France  
P12 – UEPG Sustainable Development Award 2013, Rudus, Lake Mellilanjärvi, Finland  
P13 – Photo courtesy of Chartre Environnement, UNICEM, France;  
P14 – Photo courtesy of Jiri Skupien for VINCI, Photo library, France