



ANNUAL REVIEW 2025 - 2026





PRESIDENT'S INTRODUCTION

The past year has once again demonstrated that aggregates are not only the foundation of Europe's infrastructure but also a prerequisite for its economic resilience, energy transition and housing ambitions. As Europe seeks to strengthen its competitiveness while delivering on its environmental objectives, our industry has an increasingly important role to play.

This Annual Review reflects the breadth of work undertaken by Aggregates Europe and its members during 2025–2026. Through the dedication of our Committees, Task Forces, Secretariat and national associations, we have continued to engage constructively with European institutions, promote science-based and practical policies, share best practices, and strengthen the voice of our sector at European level.

Our priorities remain clear: securing access to essential raw materials, supporting a competitive European economy, advancing health and safety, driving sustainability and circularity, and demonstrating that responsible quarrying and nature restoration go hand in hand. Europe needs both protected nature and essential minerals if it is to build a resilient and prosperous future.

I would like to express my sincere appreciation to all our members, committee chairs, experts and the Brussels Secretariat for their commitment, professionalism and collaborative spirit throughout the year. Their collective efforts continue to strengthen Aggregates Europe and ensure that our industry remains a trusted partner in shaping Europe's future.

As we look ahead, we will continue to advocate with determination for policies that recognise the strategic importance of aggregates and enable Europe to build the homes, infrastructure, renewable energy systems and industries that future generations will depend upon.

Antonis Antoniou Latouros
President, Aggregates Europe



Economic Committee

Chaired by Aurélie Delannoy (MPA, UK) and supported by Dirk Fincke from the Brussels-based Aggregates Europe team as Committee Secretary, members of the Aggregates Europe Economic Committee addressed a range of policy, market and regulatory developments impacting the European aggregates industry.

Discussions covered the **2025 Sustainable Development Indicators (SDIs) data and the related questionnaire**, which remains an important evidence base supporting Aggregates Europe's advocacy. Members also reviewed ongoing EU initiatives aimed at **simplifying legislation and reducing regulatory burdens** to strengthen Europe's competitiveness.

Committee members contributed to the reactivation of the European Commission's **Raw Materials Supply Group (RMSG)** and shaped Aggregates Europe's advocacy efforts related to the **revision of the Critical Raw Materials Act (CRMA)**, with a particular focus on securing **access to essential raw materials** and improving permitting procedures.

Further discussions focused on the **European Strategy for Housing Construction**, highlighting the need to ensure adequate access to primary construction materials to meet future housing and infrastructure demands. Members also reviewed the newly developed **Aggregates Europe Preparedness Guidance**, which supports industry resilience in response to natural disasters, cyber threats and geopolitical challenges.

Finally, the Committee examined a discussion paper on **resource taxation**, contributing to the broader European debate on **market-based instruments and sustainable resource management**.

Technical Committee

Chaired by Stefan Janssen (MIRO, Germany) and supported by Mike Wharton (MPA, UK) as Committee Secretary, members of the Aggregates Europe Technical Committee discussed key technical, environmental and regulatory developments affecting the aggregates industry.

The Committee reviewed ongoing work on **recycling, end-of-waste criteria and REACH**, with a particular focus on maintaining a practical and science-based regulatory framework for recycled aggregates. Discussions also covered the need for improved data collection on recycled aggregates and broader circular economy initiatives.

Members examined environmental sustainability topics, including **Environmental Product Declarations (EPDs)**, and agreed on strategic options to support the sector's engagement with the European Commission. Progress was also reported on the development of **sector-specific product category rules** and environmental performance data



The Technical Committee addressed emerging challenges related to **PFAS and asbestos**, highlighting the importance of clear responsibilities throughout the value chain and the need for practical guidance for producers. A **dedicated working group on PFAS** has been established to support the sector's response to this issue.

The Committee reaffirmed its commitment to supporting technical excellence, regulatory consistency and sustainable resource management across the European aggregates industry.

Updates were also provided on **regulated dangerous substances** and ongoing standardisation work under the **Construction Products Regulation (CPR)**. Members emphasised the importance of ensuring that future **environmental assessment requirements** remain practical and do not create unnecessary bottlenecks for the construction products market.



Health & Safety Committee

Chaired by César Luaces Frades (FdA, Spain) and supported by Philip Lovegrove-Falomir from the Brussels-based Aggregates Europe team as Committee Secretary, members of the Aggregates Europe Health & Safety Committee discussed key developments in occupational health, workplace safety and workforce-related policies.

The Committee reviewed ongoing evaluations of **EU Occupational Safety and Health (OSH) legislation** and broader policy initiatives aimed at **improving workplace safety, preventing occupational illnesses** and supporting adaptation to the changing world of work. Members also followed developments related to the **Quality Jobs Act** and other relevant European consultations.

Discussions covered the new **NEPSI project for 2025–2028**, which focuses on **promoting good practices, supporting digitalisation, enhancing capacity building and improving awareness of respirable crystalline silica risks** across the sector. The Committee also monitored developments concerning the possible revision of occupational exposure limits.





Naturally occurring asbestos The Committee received updates remained a key topic, with members examining emerging regulatory initiatives and considering the need for further **data collection and industry coordination** to ensure that the sector's perspective is properly reflected in future policy discussions.

on the **Sectoral Social Dialogue Committee for the Extractive Industries**, including initiatives related to **diversity, inclusion and workforce renewal**. Members highlighted the importance of **attracting younger talent and addressing labour shortages** across the industry.

Further discussions focused on the revision of **EU rules on civil explosives** and on the evolving role of the Committee itself, reflecting a growing focus on **workforce development, skills and employment-related issues** alongside traditional health and safety matters.

The Committee reaffirmed its commitment to promoting safe, healthy and attractive workplaces while supporting the long-term sustainability and competitiveness of the European aggregates industry.



Environment Committee

Chaired by William de Lumley (UNPG, France), with Miquel París Coderch from the Brussels-based Aggregates Europe team as Committee Secretary, members of the Aggregates Europe Environment Committee discussed key environmental policy developments and their implications for the European aggregates industry.

The Committee reviewed ongoing discussions surrounding the European Commission's **Environmental Omnibus initiative**, which aims to **simplify environmental legislation and reduce regulatory burdens** while maintaining high environmental standards. Particular attention was given to permitting procedures, environmental impact assessments, waste management and extractive waste regulation.

Members received updates on the implementation of the **Nature Restoration Regulation (NRR)**, including Aggregates Europe's engagement with the European Commission Expert Group and ongoing work related to National Restoration Plans. Discussions focused on ensuring that the realities of the aggregates sector are adequately reflected in restoration policies and financing mechanisms.

The Committee also examined developments related to **nature restoration funding and emerging initiatives on Nature Credits**, which could create new opportunities to recognise and support **positive biodiversity outcomes** associated with quarry restoration and sustainable land management practices.

Throughout the discussions, members emphasised the importance of maintaining a balanced regulatory framework that supports environmental objectives while ensuring the continued supply of essential construction materials across Europe.

The Committee reaffirmed its commitment to constructive engagement with European institutions and stakeholders to promote practical, science-based and sustainable environmental policies for the aggregates industry.



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PR & Communication

Chaired by Jaume Puig i Canal (FdA, Spain) and supported by Patricia Aybar Cruz from the Brussels-based Aggregates Europe team acting as Task Force Secretary, members of the PR & Communications Task Force discussed a range of initiatives aimed at strengthening the visibility, engagement and communication activities of Aggregates Europe.

The Task Force reviewed the proposed new corporate identity for Raw Materials Europe (formerly NEEIP), designed to better reflect the shared objectives of partner associations and reinforce the sector's collective voice on sustainable resource management and responsible extraction.



Members discussed ways to increase participation in Task Force and Working Group meetings, drawing on feedback collected through a member survey. The results highlighted a preference for hybrid meetings, concise agendas and content focused on topics of greatest relevance to members.



Updates were provided on several communication initiatives, including the Women's Day campaign showcasing women working across the aggregates industry, the ongoing development of the "Aggregates: The foundation of everyday life" campaign, and support for a documentary on biodiversity in the aggregates sector being prepared for ARTE TV.

The Task Force also examined opportunities to improve the reach and effectiveness of Aggregates Europe's communications through a revised newsletter format, new guidance on the responsible use of artificial intelligence, and enhanced direct communication between members through a dedicated platform.

Task Force members reviewed the organisation's digital communication strategy, including the simplification of reporting the annual activities of Aggregates Europe and the closure of the X account, allowing resources to be focused on communication channels that provide greater engagement and visibility.

The Task Force reaffirmed its commitment to promoting the positive contribution of the aggregates industry and strengthening communication across the sector and with external stakeholders.





Events

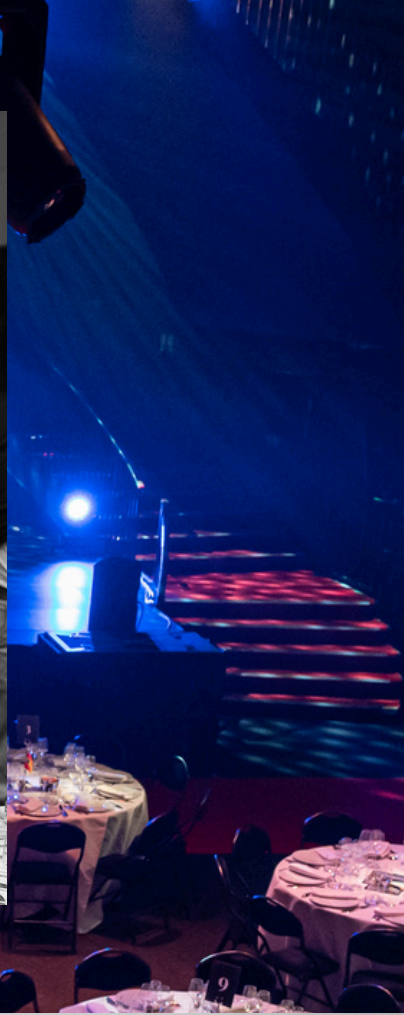
Throughout the year, Aggregates Europe continued to bring together industry representatives, policymakers, experts and stakeholders through a series of flagship events that strengthened dialogue, showcased best practices and reinforced the essential role of aggregates in Europe's sustainable future.

Sustainable Development Awards 2025

The Sustainable Development Awards once again demonstrated the sector's commitment to social progress, innovative environmental management and responsible resource management. Held in Brussels, the most prestigious event brought together representatives from across Europe to celebrate outstanding initiatives that deliver tangible environmental, social and economic benefits.

With 65 entries from 16 European countries, the Awards highlighted the diversity and quality of projects developed by the aggregates industry. Winning initiatives showcased achievements in biodiversity, restoration, health and safety, innovation, recycling, communication, local community engagement and operational excellence, illustrating how the sector continues to contribute to Europe's green and resilient future.

Beyond recognising excellence, the Awards provided a valuable platform for sharing best practices, inspiring collaboration and promoting continuous improvement across the industry.



Delegates Assembly and Entrepreneurs' Forum in Cyprus

Hosted by CAPA in Larnaca, Cyprus, the 2026 Delegates Assembly and Entrepreneurs' Forum brought together members from across Europe for two days of strategic discussions, knowledge exchange and networking.

The Entrepreneurs' Forum addressed the fundamental question “Why We Need Minerals” and focused on the interaction between nature protection, permitting and the sustainable supply of essential minerals, providing an opportunity for industry representatives, policymakers and stakeholders to discuss how Europe can achieve its environmental ambitions while ensuring access to raw materials needed for the green and digital transitions.

The Delegates Assembly was honoured by the attendance of H.E. Nikos Christodoulides, President of the Republic of Cyprus, underlining the strategic importance of the aggregates sector and its contribution to Europe's economic resilience and sustainable development. The Delegates Assembly gave members the opportunity to review the Association's activities, discuss future priorities and strengthen cooperation across the European aggregates sector.

