

European Aggregates Association

Providing essential materials for Europe



ANNUAL REPORT 2004



UEPG European Aggregates Association

Since 1987, UEPG has promoted the interests of the European Aggregates Industry by representing its 16 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.

Through an early-warning system, UEPG detects issues at the earliest stage. This is achieved by building and maintaining close relationships with key officials in the European Commission and by working in alliance with our sister associations in the Non-Energy Extractive Industries Panel (NEEIP). UEPG develops and implements Public Affairs/Public Relations strategies. Its actions include: advocacy vis-à-vis the European Commission, the European Parliament and the Council of Ministers' working parties, developing communication materials and UEPG position papers as well as participating in conferences with policy-makers and legislators.

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President's introduction

UEPG has completed its first successful year in its permanent Brussels base, with the Belgian Ministry of Justice having approved the UEPG Statutes as an Association Sans But Lucratif. Located just off the main square in front of the European Parliament, UEPG has significantly strengthened its network by establishing close links with legislators from all the main European political parties. We are also in the same street as the Commission's Directorate General Enterprise, with its policy makers covering the raw materials sector. Regular meetings now enable us to make constructive and proactive inputs to proposals likely to impact on our industry.

Delivering quality service to our Members has been the first objective for UEPG, especially the need for timely and concise early-warning reports. Launched in October 2003, the UEPG newsletter EU Insight responds well to this need by ensuring that our Members are kept ahead of the game in knowing what issues are coming over the horizon.

The second objective has been to expand UEPG Membership to the Accession countries, as the Enlargement of the European Union will have a major influence on our activities. With the increase from 15 to 25 Member States, the European Institutions have emphasised the importance of having a single authoritative voice for the European Aggregates Industry. UEPG has therefore initiated contacts with representatives from the Czech Republic, Estonia, Hungary, Lithuania, Poland and the Slovak Republic. Applications for new membership are currently being considered. This will enable UEPG to represent effectively the priorities and concerns of the European Aggregates Industry, especially in respect of access to mineral resources.

Our third objective had been to promote a better understanding of the role played by our industry in the context of European Society. This, I believe, represents our main challenge. Frequent participation at EU conferences as well as the next UEPG Sustainable Development Awards will undoubtedly help us to reach our goal.

I would like to thank all our National Association representatives who have devoted their professional expertise to promote the European Aggregates Industry interests, especially the Chairs, Vice-Chairs and Secretariat of our Committees. We are particularly grateful to Rafael Fernández Aller and his team for making the General Secretariat transfer from Madrid to Brussels such an efficient one. This close cooperation between the Madrid and Brussels offices demonstrated that UEPG now works as a well-coordinated and professional European team.

Finally, I would like to offer my best wishes to all our Members in the coming year, which will bring about major changes for us all with the enlargement of the European Union.

Manfred Asamer
President UEPG



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A strong growth in the construction sector in Eastern Europe is expected in 2004 because of the positive business trend in Hungary and the recovery in Poland

Economy

The European construction industry has performed poorly due to the slowdown of the overall European economy. This unfavourable business environment was a major influence on the construction sector output in Western Europe, which declined by 0.2% according to the latest forecasts of EuroConstruct in November 2003.

The construction industry in Western Europe is forecast to recover slowly. Growth rates of +0.9% and +1.6% for the year 2004 and 2005 are expected. Analyses of the Eastern European construction market show a similar trend as a strong growth is expected in 2004 because of the positive business trend in Hungary and the recovery in Poland (Eastern Europe 2004: +4.3% and 2005: +8.6%).

The recovery of the European economy was delayed due to budgetary constraints imposed by the governments in some European countries to meet the EU Stability Pact. The performance of the construction industry was again weaker than the general economic development. The reasons were: the low demand in residential construction, which had been - with a share of 45% - the most important construction sector in Europe; the increasing unemployment rates until 2003 (about 8% in Western Europe); and the weak increase in disposable income. These negative factors had a dampening influence on the housing sector. Emerging budgetary constraints, which were high in France, Germany and Italy and the restrictive policy on housing subsidies in some European countries caused negative economic effects.

EuroConstruct expects a moderate upswing of the European housing sector with growth rates of 0.2% in 2004, +0.4% and +1.6% in the years 2005 and 2006 respectively. This trend will be affected by a number of factors which positively influence the European housing market. The increasing availability of credit, higher attractiveness of property investments and a scarcity of rental options in major urban areas have encouraged further investment in residential property.



Non-residential construction across the EuroConstruct countries faced the second year of recession in 2003 (-1.7%). The forecast for the next three years is more optimistic with growth accelerating from a slight 0.4% in 2004 to a modest 2% in 2006.

In Western Europe the recovery of the construction sector is often based on anticyclical measures in infrastructure (2004: +3.3%). The positive development of the infrastructure sector is also expected to continue over the next few years (2005: 3.7% and 2006: 3.9%).

In Eastern European countries residential construction is forecast to develop strongly in the year 2005 (+7.5%) and 2006 (+8.9%).

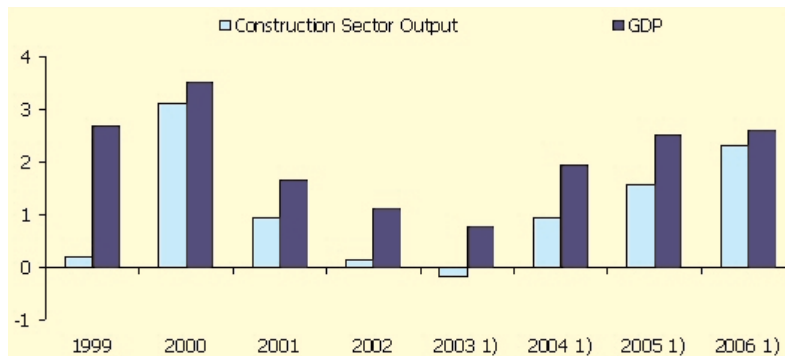


Figure 1: Real Gross Domestic Product vs. Construction Sector Output
Source : 56th EURO-CONSTRUCT- Conference Portugal, November 2003.

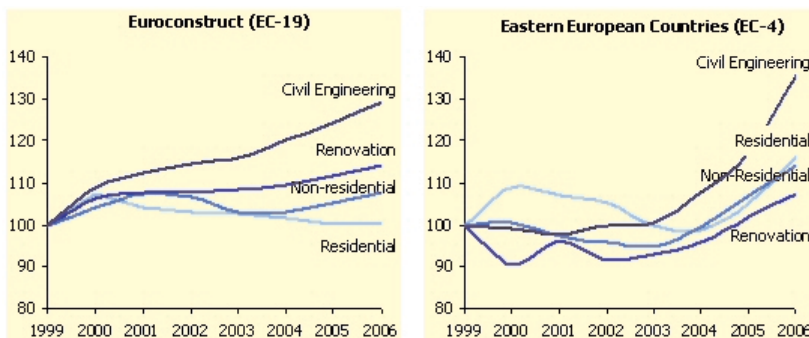


Figure 2: Construction sectors by type in Europe 1999-2006
Index 1999=100
Source: 56th EURO-CONSTRUCT- Conference Portugal, November 2003.



Development of the Aggregates Industry in Europe

The Aggregates Industry has nearly 20.000 extraction sites across Europe. The average annual aggregates production is 2.624,7 million tons which translates into a consumption of 7 tons per person per year. The data shows the relevance of this extractive activity, which stands at the base of the construction sector as it supplies the essential raw materials to meet the needs of society.

The Aggregates Industry in Europe

The Aggregates Industry has nearly 25,000 extraction sites across Europe. The average annual aggregates production is 2,757.3 Million tons which translates into a consumption of 7 tons per person per year. These data show the importance of this industry, which stands at the base of the construction sector by supplying essential materials to meet the needs of the European society.

Country	Companies	Sites	Production (Million t)		
			Sand & Gravel	Crushed Rocks	Recycled Aggregates
Austria	900	1250	66	27	3
Belgium	90	72	8,7	46,6	3,1
Czech Republic	300	520	30	32	5
Denmark	400		43,5	0,4	
Finland	300	3600	52	39	1
France	1800		168	215	18
Germany	1854	5920	297	165,7	90
Ireland	250		35	45	
Italy	1800	2480	210	140	4,5
Netherlands			5,2	16,8	0,5 (concrete only)
Norway	793	4500	14,7	35,7	0,9
Portugal	331	357	7,5	93,4	
Slovakia	128	181	6	14	
Spain	1550	1935	150	270	1
Sweden	170	1940	26	41	8,2
Switzerland	280	607	49,1		
United Kingdom	350	1600	82,7	126,6	62,5
Total	11296	24962	1251,4	1308,2	197,7



Technology

The UEPG Technical Committee agreed on a trend-setting and future-oriented business plan, aiming that UEPG would be the official and respected voice of the European Aggregates Industry in relation to all committees and institutions dealing with technical aspects of aggregates and their use at European level.

The Committee has striven to support the European Aggregates Industry in its continuous efforts to optimise the production process and to deliver high quality aggregates at a European-wide level.

Consisting of 20 experts drawn from the aggregates industry from all Member countries the Committee is chaired by Peter Verheul (NL). The Vice-Chairman is Jan Bida (S) and Hans Riechers (D) is the Technical Secretary.

UEPG has played a key role in the development of European standards for its sector. This has contributed to the removal of barriers to trade and the prevention of new ones from being developed. UEPG has therefore worked closely with the European Committee for Standardisation (CEN) to develop European standards for aggregates through CEN/TC 154 “Aggregates”. The UEPG work has recently focused on the integration of the European standards into the different national building regulations.

The UEPG Technical Committee has also been active in the European “Group of Notified Bodies” in order to make sure that certification is based on the same level in all European countries and accepted without any additional national rules.

The UEPG Technical Committee has been involved in several European research projects such as Alkali-Silica-Reaction (ASR) and life-cycle assessment. UEPG is partner of the ECO-SERVE network which is supported by the European Commission. In addition, UEPG has maintained close contacts with other European associations, including CEPMC (Council of European Producers of Materials for Construction), ERMCO (European Ready-Mixed Concrete Organisation), EMO (European Mortar Organisation) and EAPA (European Asphalt Pavement Association).

At a very early stage, UEPG realised that recycled aggregates also fall into the scope of the aggregate producers. For this reason UEPG strongly supported the European

The UEPG Technical Committee agreed on a trend-setting and future oriented business plan



UEPG regards recycled aggregates as an additional source of raw materials that needs to be promoted

standardisation of recycled aggregates. Activities within the Technical Committee concerning recycled aggregates are coordinated by Vincent Basuyau (F).

UEPG regards recycled aggregates as an additional source of raw materials that needs to be promoted. It welcomed and encouraged the use of recycled aggregates as a significant contribution to sustainable development. The experience acquired by the aggregates industry in the production of construction materials gives it an advantageous position.

All technical standards will in the future have to include “regulated substances” (formerly “dangerous substances”). The European Commission considers the aggregates sector as an example where those regulations are needed. This means that aggregates standards would include requirements related to radioactivity, content of heavy metals, toxic substances etc. There is a need for a strong UEPG engagement in the field of “regulated substances”, which is seen to have a growing importance.

The UEPG Technical Committee is campaigning to convince the key European bodies that natural aggregates would be one of the typical construction products where no complex investigations are required. They should be assigned to the category “Classified Without Further Testing” (CWFT) because of their natural origin.

The strong liaison between UEPG, CEN and the European Commission has been maintained during the year and expanded with the active support of the UEPG Technical Committee.



Environment

The UEPG Environment Committee has striven to become an authoritative source for the EU Institutions on all environmental issues affecting the European Aggregates Industry.

The Committee consists of 30 professionals with solid experience, complementary skills and professional expertise. It is chaired by Arnaud Colson (F) and vice-chaired by Elisabeth Gammelsaeter (N). Grégoire Poisson (General Secretariat) acts as the Secretary.

Through an early-warning system, the Committee has identified and tracked a wide range of issues with significant implications for the industry, including:

Environment

- Management of Waste from the Extractive Industries
- Environmental Liability
- Shipments of Waste
- Safety at Sea and in harbours
- Groundwater Protection
- Prevention of Waste and Recycling
- Public Access to Environmental Information

Access to Resources

- Study on Mineral Planning Policies in Europe
- Sustainable Use of Natural Resources
- Soil Protection
- Natura 2000

Concise and updated information is regularly circulated to Members through the UEPG Newsletter “*EU Insight*” and other reports.

The Committee developed and implemented representational strategies on these issues and arranged a series of meetings with key Commission officials and Members of the European Parliament. It also worked closely with colleagues in the Non-Energy Extractive Industry Panel (NEEIP) and particularly benefited from the excellent collective work and support of its Members.

The UEPG Environment Committee has striven to become an authoritative source for the EU Institutions on all environmental issues affecting the European Aggregates Industry



The UEPG Sustainable Development Awards will play a key role in promoting the contribution of the European Aggregates Industry

Places were sought and obtained on the European Commission’s “Sustainable Use of Natural Resources” Forum. In the framework of the stakeholder consultation, the Commission’s Directorate General Environment appointed Michael Schulz, UEPG Second Vice President and Rafael Fernández Aller, Chairman of the UEPG Health & Safety Committee as Members of the Advisory Forum. Professor Ulrich Hahn was selected as a Member of the Working Group “Supply of Resources”.

The Environment Committee has also developed a UEPG Statement on Sustainable Development and participated in a conference in Slovenia organised by the European Commission. The Committee Secretary gave a presentation on “Restoration Best Practice in the European Aggregates Industry”.

Building on the success of the UEPG European Restoration Awards in 2002, Arnaud Colson, Committee Chairman, recommended that the scope of the 2005 event should be enlarged to all sustainable development aspects: social; economic and environmental. This would enable companies from each UEPG Member country to compete for an award. This programme will play a key role in promoting the contribution of the European Aggregates Industry to sustainable development. During the UEPG Environment Committee in Brussels, an Award Task Force was set-up with clear terms of reference.

A site visit was organised, in June 2004, for officials from the European Commission, including DG Environment, DG Enterprise and DG Employment. The objective was to provide them with a useful opportunity to see how an aggregates production site provides essential materials in a responsible way. Participants were able to assess operational practices and exchange views with quarry managers on various topics such as site restoration.



The General Secretariat's team has developed an extensive network of contacts throughout the Commission Directorates General, the Parliamentary Committees as well as with Members of Council Working Groups

General Secretariat

Early-warning, effective communication with Members, Advocacy and Promoting the Image of the European Aggregates Industry have been the four pillars of the UEPG General Secretariat's work during the last twelve months.

Early-warning

The General Secretariat detects at the earliest stage EU initiatives and draft legislation which are likely to impact the European Aggregates Industry. Fundamental to this objective has been Member companies' need to have secure access to mineral resources.

Based in Brussels, the General Secretariat's team has developed an extensive network of contacts throughout the Commission Directorate Generals, the Parliamentary Committees as well as with Members of Council Working Groups. This has enabled UEPG to have early discussions with EU policy-makers on key issues including the planned EC study on mineral planning and the initiative on Competitiveness of the Extractive Industries.

Effective communication with Members

The General Secretariat provides UEPG Members with immediate updates on key developments (including European Commission consultations, discussions and votes in European Parliament and Council of Ministers meetings) by disseminating concise summaries and analyses rather than just raw data. UEPG Members also play a key role by providing their views and feedback on the likely impact of those developments.

Since October 2003, ad-hoc reports have been complemented by the monthly newsletter EU Insight, which contains updates on key EU developments of relevance to the European Aggregates Industry. Its electronic format enables UEPG Members to disseminate articles with their national briefings.

The President and General Secretariat have also regularly presented UEPG's work and priorities to Member associations. This provided an opportunity to listen to Members' concerns at first hand. This included Presidential visits to National Associations in France, United Kingdom, Germany, Austria, Norway and Sweden. The General Secretariat intends to build on these contacts with UEPG Members, taking in to account the varying requirements of both large and smaller associations in both the Northern and Southern parts of Europe.



Advocacy

Once the General Secretariat has gained a thorough understanding of the potential impact of draft legislation on the European Aggregates Industry, it develops position papers and ensures that they are considered by EU decision-makers. This is achieved by meeting key European Commission officials and Members of the European Parliament. Site visits are also organised in coordination with national associations.

Position papers on such subjects as the management of waste from the extractive industries, sustainable development indicators and competitiveness of the extractive industries were drafted, and served as a basis for advocacy work in Brussels, Strasbourg and Luxembourg. The General Secretariat simultaneously liaised with UEPG Members to disseminate key messages at national level.

The General Secretariat also works together with sister associations to decide whether a common position needs to be developed.

Promoting the Image of the European Aggregates Industry

The General Secretariat contributes to promote the reputation of the European Aggregates Industry by representing UEPG in EU and international conferences, and by developing EU public relations programmes. Its work included a contribution to the European Minerals Foundation's Corporate Social & Environmental Responsibility CD-Rom project. This initiative received the assistance of Members in assembling a remarkable range of best practices in this area, and will be extremely useful in raising the awareness of the European Aggregates Industry's achievements.

Communication materials from UEPG Members have also been regularly presented to EU policy-makers during working sessions at the UEPG offices.

*Position Papers
serve as the basis for
advocacy work in
Brussels, Strasbourg
and Luxembourg*

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Vice-Chair	Jean-Marc Vanbelle	FEDIEX, Belgium
Recycling	Vincent Basuyau	Union Nationale des Producteurs de Granulats
Secretary	Hans Riechers	Bundesverband der Deutschen Kies- und Sandindustrie e.V., Germany

Environment

Chair	Arnaud Colson	Lafarge Granulats, France
Vice-Chair	Elisabeth Gammelseater	Norwegian Aggregate Producers Association, Norway
Secretary	Grégoire Poisson	UEPG General Secretariat, Brussels

Health & Safety

Chair	Rafael Fernández Aller	Asociación Nacional Española De Fabricantes De Áridos, Spain
Secretary	César Luaces Frades	Asociación Nacional Española De Fabricantes De Áridos, Spain

Statistics

Chair	Hans Peter Braus	Bundesverband der Deutschen Kies- und Sandindustrie e.V., Germany
Secretary	General Secretariat	UEPG General Secretariat, Brussels

UEPG PORTFOLIOS

EU Environmental Agency	General Secretariat
Raw Material Supply Group (RMSG)	Arnaud Colson, General Secretariat
RMSG Sustainable Development Indicators Group	Arnaud Colson, Michael Schulz, Martin Isles, Peter Tuschl, General Secretariat
RMSG Safe Operations and Mining Working Group	Ulrich Hahn
RMSG Enlargement Working Group	Manfred Asamer, Steffen Wiedenfeld, General Secretariat
Non Energy Extractive Industries Panel	Rafael Fernández Aller, Arnaud Colson, General Secretariat
CEN TC 154	Hans Riechers
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