WHAT IS UEPG?

UEPG stands for “Union Européenne des Producteurs de Granulats” (European Aggregates Association). Since 1987, UEPG has strongly promotes the interests of the European Aggregates Industry by representing its National Member Associations on economic, technical, environmental and health & safety policies.

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 also positively promotes the profile of the European Aggregates Industry.
Health & Safety Committee
Respirable Crystalline Silica and NEPSI, Evaluation of the EU Occupational Safety and Health Directives, Accident and Ill-health Prevention

Environment Committee

PR & Communications Task Force
Enhancing the Industry Image: Exchanges of Best Practice, Promotion of public events and other initiatives
UEPG Sustainable Development Awards and UEPG 30th Anniversary

General Secretariat
Your team in the Brussels office, providing EU Intelligence and networking opportunities

UEPG Members
Get in contact, keep in touch

Board, Committees, Task Forces and Working Groups Chairs, Portfolios and General Secretariat
Benefiting from the UEPG network

Photo captions and credits
The aggregates sector is by far the largest amongst the non-energy extractive industries in numbers of sites, companies, numbers employed and tonnages produced.

Aggregates demand is just on 5 tonnes per capita per year.

The European [EU28+EFTA, 2015] aggregates demand is 2.7 billion tonnes per year, representing an annual turnover of an estimated €15 billion.

The aggregates industry comprises 15,000 companies (mostly SMEs), producing at 26,000 sites across Europe with just over 200,000 people employed (including contractors).
Aggregates are produced from natural sources extracted from quarries in some countries from sea-dredged materials (marine aggregates). Recycled aggregates derive from reprocessed materials previously used in construction, including construction and demolition residues. Manufactured aggregates are sourced from industrial processes, for example from blast or electric furnace slags or china clay residues.

THE AGGREGATES SECTOR IS BY FAR THE LARGEST AMONGST THE NON-ENERGY EXTRACTIVE INDUSTRIES

Aggregates are a granular material used in construction. Aggregates are sand, gravel (including marine aggregates), crushed rock, recycled and manufactured aggregates. The diagram below illustrates the sources, intermediate and end uses of aggregates:

DID YOU KNOW THAT?

- Aggregates are indeed the core building material in all our homes, offices, social buildings and infrastructure: without aggregates these would literally fall apart
- Every new home typically requires up to 400 tonnes of aggregates
- Every new school typically requires some 3,000 tonnes of aggregates
- A new sports stadium may require up to 300,000 tonnes of aggregates
- Every new 1 km of roadway requires up to 30,000 tonnes of aggregates
- Every new 1 km of high-speed railway typically requires 9,000 tonnes of aggregates
- 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
Today, the European Aggregates Industry covers a demand of 2.7 billion tonnes of aggregates produced every year on 26,000 sites by 15,000 companies (mostly SMEs) employing 200,000 people across Europe. No other industry sector but the European Aggregates Industry can proudly present these most impressive figures. After water and air, aggregates are the most used materials. The question is not whether we need it, but how to supply aggregates in the most sustainable way. Furthermore, the European sector is a truly local industry of global importance.

Aggregates producers are contributing to the Natura 2000 network and other environmental protected areas before, during and after extraction with projects such as Temporary Nature, Life in Quarries and Nature after Minerals. The Aggregates Industry is indispensable for the well-being of our modern society, the backbone of infrastructure, private and commercial housing; literally essential for our built environment.

The steady availability of aggregates is taken for granted and appears only to become a political priority when facing a shortage of supply. This is why UEPG and its Members decided to strengthen its efforts on public affairs and PR & Communication to ensure the visibility and positive image of the European Aggregates Industry – seen as a part of the solution of numerous challenges. In that context, UEPG has built-up over the past 30 years an excellent network of experts in the areas of technical, environmental, economic and health & safety matters and launched projects and intensified cooperation with EU Institutions, Partners, NGOs, Trade Unions and Academia to become a recognised and trusted partner.

In 2016-2017, UEPG focused on contributing to the EU Raw Materials Strategy, the Circular Economy Package, the Natura 2000 Fitness-Check and the Action Plan on better implementation, the compatibility of Business and Biodiversity, Safer and Healthier Workplaces, a culture towards Zero Harm, reviewing 10 years of NEPSI Social Dialogue Agreement, calling for an ambitious EU Industrial Strategy and on officially endorsing the EU Protocol for the management of Construction and Demolition Waste. UEPG has been insisting on the need for better implementation and regulatory enforcement of EU legislation, rather pushing for new pieces of EU or national legislative proposals. UEPG has implemented numerous initiatives generating value or savings for aggregates producers. Those achievements are outlined in this Annual Review.

In 2016, UEPG promoted good practice examples, which are going beyond what is expected and providing examples others can follow over its Sustainable Development Awards Ceremony with more than 41 applicants from all over Europe.

UEPG will continue implementing its commitments of the UEPG 2020 Vision and in representing the best interests of our Members whilst enhancing a constructive dialogue based on trust and active cooperation with our stakeholders. You may count on my commitment and the one of the whole UEPG staff for delivering those goals.

JESÚS ORTIZ
UEPG President

In December 2016, the European Commission published the EU Fitness Check Evaluation of the Birds and Habitats Directives. Drawn conclusions confirmed that within the framework of broader biodiversity policy, the Directives remained relevant and fit for purpose. However, substantial improvements in their implementation were needed to fully achieve their objectives. In view of improving the implementation of the Natura 2000 Directives, the European Commission decided to develop an Action Plan and published an EU Roadmap identifying key challenges and actions to take. UEPG provided its first reactions and recommendations to the European Commission. UEPG recommendations focused on the need for increased flexibility and a more evolutionary approach towards biodiversity management, referring to solutions the European Aggregates Industry can provide such as the concept of "Temporary Nature". UEPG made clear that the European Aggregates Industry is a trusted partner and part of the solution to improve nature protection in Europe which was taken into account into the EU Action Plan published in April 2017.

NEPSI 2016 Reporting results demonstrated the continued commitment to EU Social Dialogue. Thanks to UEPG Members, reporting of the aggregates sector further improved. The European Commission report on NEPSI was also positive. UEPG actively contributed with its Members to the 2015-2016 NEPSI co-funded Communication Campaign from webinars to the 10th Anniversary Conference. In May 2016, the European Commission issued a proposal to include "work involving exposure to respirable crystalline silica dust generated by a work process" in Annex I of the Carcinogens and Mutagens Directive with a binding occupational exposure limit at 0.1 mg/m³ in Annex III of the Directive. The proposal also recognised the work of NEPSI as a valuable instrument to complement regulatory requirements and to support their effective implementation. UEPG contributed to strengthen the recognised work and benefits of the NEPSI agreement toward EU Institutions and Partners during the current ordinary legal procedure.

UEPG contributed to the development of an EU Protocol for the management of Construction and Demolition Waste and succeeded in providing key messages. The Protocol was published in November 2016 and officially endorsed by UEPG.

UEPG praised 41 entrants at a prestigious Ceremony on 16 November 2016 in the Brussels Centre of Fine Arts showing that aggregates producers are strongly committed to sustainable development. In 2017, UEPG marked its 30th Anniversary. Since 1987, UEPG has grown and is more visible, cooperating closely with EU Institutions, NGOs and Partners, for a continuous improvement, demonstrating that aggregates are essential to ensure Europe's growth, living standards, local employment and sustainability.
Our Vision is a Sustainable Industry for a Sustainable Europe. Our Mission is to be the Industry Champion and a Trusted Partner. Our Core Values are to be Open, Transparent and Honest.

Vision, Mission, Core Values and Ambitions

Our Ambitions are as follows:

1. To place excellence in health & safety at the centre of our activities with an objective of “Zero Harm” for all Industry’s employees, contractors, sub-contractors and visitors.

2. To ensure sustainable access to primary local resources, optimising transport, with the aim of land-use for extraction to be recognised as an activity of public interest similar to agriculture, forestry, water and nature protection which should receive the same priority.

3. To develop the “circular economy” through resource efficiency, recycling and restoration of extraction sites to demonstrate the contribution of the Aggregates Industry to the Circular Economy.

4. To assist in improving a streamlined national land-use planning and permitting policy to encourage and assist all UEPG Members to have a national aggregates planning policy in place.

5. To create and maintain a level-playing-field through consistent implementation of EU law, if necessary through law enforcement of existing EU/national legislation.

6. To promote the compatibility of aggregates extraction with environment, with the objective to assist its Members in achieving that responsible aggregates extraction should not be automatically prohibited for environmental reasons.

7. To improve public awareness of aggregates extraction as beneficial to society for every UEPG Member to have a national public relations campaign in place to ensure positive appreciation of the benefits of the sector to society.

8. To promote the added value of the Aggregates Industry for local communities, with the objective to encourage UEPG Members to undertake public events, develop communication tools and PR training.

9. To showcase the Industry offering attractive career opportunities, in particular for young people and to encourage UEPG Members to raise awareness in public relations, job agencies and educational institutions about jobs for both genders.

10. To ensure responsible sourcing and excellence in customer service and satisfaction to 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.
Our Organisational Structure

The Health & Safety, Environment, Technical and Economic Committees and their associated Task Forces and Working Groups are the “engine-room” of UEPG activities. These Committees meet twice yearly and report with the General Secretariat to the Board. The Board reviews progress and strategy twice yearly. The highest level meeting is the Delegates Assembly, held in May or June, each year, where all Members debate and decide on UEPG activities and strategies.
European Economic Developments

Each year, UEPG gathers and collates best available aggregates production data from right across Europe. The data for 2015 for 39 countries is presented on page 12, together with the sub-totals for the EU28 plus EFTA countries as well as for the EU28 countries only. UEPG data quality improves year by year, and in some cases is based on best estimates and the most authoritative available.

In 2015, the production of aggregates in the EU28 plus EFTA countries was 2.66 billion tonnes (bnt), up very marginally from 2.65 bnt in 2014 and 2.61 bnt in 2013. Since 2006, with its production level of 3.7 bnt, there had been a 30% decline due to the 8-year economic recession to the 2.61 bnt level in 2013. Seen in that context, the recovery in production between 2013 and 2015, though a mere 2%, is very welcome, at last demonstrating a weak economic recovery.

Figure 1 summarises the 2015 national production tonnages by country and by type of aggregates for all 39 countries. In 2015, Germany was the largest, producing 545 million tonnes (mt), in turn followed by Russia, Turkey, France, Poland and UK. At the other end of the scale are the smallest countries, namely Macedonia, Luxembourg, Cyprus, Iceland, Montenegro and Malta, with less than 5mt each.

Figure 2 shows the national 2015 production data expressed in tonnes/capita (t/c) across Europe, which include exports (mainly from Norway) but exclude imports. This data varies by national climate, terrain, state of economy and building tradition, being highest in Norway at over 17 t/c, and lowest in Spain, Macedonia and Greece at only 2 t/c. The EU28 plus EFTA average is 5.1 t/c versus the 7.2t/c enjoyed in 2007.

It is also interesting to correlate the production in tonnes per capita to the GDP per capita for each country. In Figure 3, this data for each country is represented by a blue dot, and the red trend line illustrates the best fit curve. The graph illustrates very clearly that the production in tonnes per capita increases almost linearly as the GDP per capita increases. This is good news for the aggregates industry as Europe slowly returns to economic growth.

Taking the EU28 plus EFTA countries, over the last 5 years, the percentage of sand and gravel has declined modestly. In 2015, 46.6% of all production was crushed stone, while the sand and gravel component was 40.9%. In parallel, aggregates production from recycled and re-used materials, at 212 mt, actually decreased slightly to 8% of all production, this also representing around 40% of total demolition materials available. The remaining 4.4% was almost evenly split between marine and manufactured aggregates. Surprisingly, production of marine aggregates declined to only 55mt in 2015 compared to 82mt in 2009. Production of manufactured aggregates increased to 65mt in 2015 and demonstrated an irregular trend.
In terms of recycling, Germany led with 68mt of recycled materials, followed by UK, France, the Netherlands, Belgium, Poland and Switzerland. Production of recycled materials in other countries is slowly increasing, though may not be as technically or commercially viable in countries of lower population density. It is likely that recycling data is in some cases not fully reported, so that actual progress maybe greater.

The European Aggregates Industry is demonstrating its commitment to the Circular Economy through producing no less than 277 mt of secondary materials in 2015, including recycled, re-used and manufactured aggregates within that overall total, which now corresponds to 10.4% of all aggregates production of 2.66 billion tonnes in EU plus EFTA.

It remains challenging to assemble exact data for an industry that is comprised predominantly of SMEs. In 2015, the EU28 plus EFTA statistics show that there were just under 15,000 companies operating on 26,000 quarries, employing over 200,000 people (of which 73% were employees and 27% were contractors). That data implies less than two quarries per company, each quarry on average employing 8 people and producing on average just on 100,000 tonnes a year. While there is an ongoing gradual consolidation of the industry by the bigger players, the majority are still local players who produce aggregates close to the key markets and who provide essential local employment.

After 8 years in which European aggregates production had declined by 30% to 2013, as previously mentioned, 2014 and 2015 at last saw a slight increase. Looking forward, Figure 4 illustrates the number of countries predicting some growth in 2016 (light blue bars) exceeded those predicting a decline (dark blue bars), but with generally very modest growth projections.

The overall prediction is another 0.9% growth in 2016 versus 2015, indicating an EU28 plus EFTA total tonnage of just on 2.7bnt in 2016, as illustrated in Figure 5. Both the European Commission and Euroconstruct predict continued modest growth across Europe in 2017, 2018 and 2019. This growth, plus the pent-up demand for housing and infrastructure since the economic crisis, should hopefully positively influence the demand for aggregates in the coming years, possibly again reaching the level of 3 billion tonnes by 2020.
### Provisional Estimates of Aggregates Production Data for 2015

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<th>Total Number of Extraction Sites (Quarries and Pits)</th>
<th>Sand &amp; Gravel (millions tonnes)</th>
<th>Crushed Rock (millions tonnes)</th>
<th>Marine Aggregates (millions tonnes)</th>
<th>Manufactured Aggregates (millions tonnes)</th>
<th>Recycled Aggregates (millions tonnes)</th>
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**EU28 + EFTA**: 14758 26518 1089 1241 53 65 202 10 2660

**EU28 only**: 13341 24953 1033 1168 53 65 196 10 2524

Note: FM = Full Member, AM = Associate Member, AFM = Affiliate Member, NM = Non-Member
In 2016–2017, Members of the UEPG Economic Committee unpacked and analysed the Circular Economy Package, in particular the proposed amendments for the Waste Framework Directive and the Landfill Directive with a focus on the potential use of economic incentives. Land-use planning and permitting, resource taxation and natural capital or the economic value of ecosystem services and biodiversity remained areas of continued interest. A new and important item was added to the agenda with a dedicated Task Force established on ‘Better Implementation and Regulatory Enforcement’.

The UEPG Economic Committee is led by its Chair, Jerry McLaughlin (MPA, UK), assisted by Vice-Chair, Christian Haeser (MIRO, Germany) and by its Secretary Dirk Fincke. The Economic Committee receives reports from the Task Force on ‘Better Implementation and Regulatory Enforcement’, chaired by César Luaces Frades (FdA, Spain) and from the Working Group on ‘Market Based Instruments’, chaired by Jerry McLaughlin (MPA, UK).

**Circular Economy Package**

The ‘more ambitious’ circular economy package published on 2 December 2015 includes amendments to the existing Waste Framework Directive. The European Parliament plenary adopted amendments on 14 March 2017 providing Rapporteur Simona Bonafé MEP (S&D, Italy) with a mandate to enter Trilogue negotiations. UEPG has published a Position Paper on the amendments to the Waste Framework Directive and the Landfill Directive, proposed by the European Commission, and reacted to the 1100 amendments and compromise amendments tabled by the European Parliament. The Economic Committee focused on definitions of the final recycling process, backfilling, sorting, end-of-waste criteria and recovery.

With particular attention, Committee Members monitored the indicative list of instruments to promote a shift to a circular economy, such as a progressive increase of landfill taxes and/or fees for all categories of waste and economic incentives for local authorities to promote prevention, develop and intensify separate collection schemes.
The Economic Committee stressed the area of extractive waste which should be covered by the Mining Waste Directive, not the Waste Framework Directive; and the risk to still use weight-based lead indicators. More work is needed to develop sound resource efficiency indicators before setting new and stricter targets.

**Land-use planning and permitting**

UEPG supports efforts of the European Commission to make progress on the implementation of the EU Raw Materials Strategy and its second pillar on sustainable access to resources within the European Union.

This is why the Economic Committee contributed to the commitment under the European Innovation Partnership (EIP), the ‘European Network on Sustainable Quarrying and Mining’ (ENSQM). The kick-off Workshop, focusing on the positive contribution of the extractive industry to Natura 2000, took place on 9 February 2017 in Madrid with the participation of Director General of DG Environment Daniel Calleja-Crespo and representatives from DG Growth, industry and NGOs.

Other ENSQM Workshops will take place in Germany and Portugal addressing the most relevant challenges and identifying solutions on access to resources with European, national and local stakeholders from government, Industry and NGOs.

The UEPG Economic Committee supported the Horizon 2020 funded MIN-GUIDE web-based tool offering currently 615 policies on land-use planning and permitting policies from all 28 EU Member States.

**Better Implementation and Regulatory Enforcement**

In line with the European Commission policy of better regulation, better implementation of existing legislation and, if needed, regulatory enforcement and to ensure the competitiveness of the European Aggregates Industry, the UEPG Economic Committee undertook a survey developed by the Task Force ‘Better Implementation and Regulatory Enforcement’.

This survey was open from 14 October 2016 and will allow an extended period to indicate the appearance of the following 12 defined points: Illegal extraction and production of aggregates; aggregates extraction as part of civil works; illegal landfilling, backfilling and dumping of waste; poor environmental performance and no or bad site rehabilitation; unsafe & unhealthy working conditions; grey/black/informal employment; black Markets/underground economy/shadow economy; no accounting and breaching financial rules; illegal late payment practices; transport (overloading and exceeding working time); sale of aggregates not complying with CE marking or with other compulsory national quality requirements; imported non-compliant products.

Replies from almost all UEPG countries had been received showing that the points identified are of significant interest for many UEPG Members; with an emphasis on 3-4 topics.
The UEPG Technical Committee continued working in 2016-2017 on the Construction Products Regulation, European Aggregates standards, Recycling of aggregates, the Environmental Product Declaration and Regulated Dangerous Substances.

The UEPG Technical Committee was run by its Chair Jean-Marc Vanbelle (FEDIEX, Belgium), the newly elected Vice-Chair Stefan Janssen (MIRO, Germany) and Secretary John B-Bullock (MPA, UK).

Standardisation

The UEPG Technical Committee has been very active on reviewing and updating the Aggregate Product Standards within CEN/TC 154 on 'Aggregates'.

The European Aggregates standards have passed the final vote stage. It is foreseen that the European Aggregates Standards will be published before the end of 2018.

Construction Products Regulation (CPR)

UEPG provides active input through representation on the CPR Implementation Task and Working Groups and is supportive of the work done by Construction Products Europe and, in addition, to reduce the bureaucratic burden and avoiding the duplication of information provided with DoP and CE-marking.

In 2017, the European Commission outlined in public events that after having received many concerns on the functioning of the CPR (Construction Products Regulation), the European Commission started to consult Members States and Stakeholders to define together the future of the CPR.

The European Aggregates Industry has two main concerns: the application of Article 9.2 of the CPR and the strict legal approach of the EC regarding hEN which results in no citation of the product standards. Consequently, UEPG calls for a flexible interpretation of Article 9.2 of the CPR to prevent duplication of the DoP on delivery documents.
UEPG underlined in a position paper the importance and necessity for flexible and uniform interpretation of the CPR to optimise its widest implementation in all sectors of the construction industry. A repeal of the CPR and the loss of CE marking, combined with a move to mutual recognition, will throw the construction industry backwards by about 30 years and will not be beneficial to cross-border trading within the EU. Additionally, specificity of national requirements must be considered, where appropriate, to work alongside those harmonised standards.

Environmental Product Declaration (EPD) and Regulated Dangerous Substances (RDS)

The main focus of the RDS and EPD Working Group, chaired by Brian Bone (MPA, UK), was drafting a guidance on how to introduce the Regulated Dangerous Substances covered by TS 16637-1, -2 and -3 standards requirements into the European standards for aggregates.

As regards to EPD, the Working Group is following-up closely the initiatives to create digital product declaration systems which are overlapping with existing mechanisms and which are susceptible to create administrative burden.

Recycled Aggregates

With the publication of the EU Circular Economy Package and the review of the EU Waste Framework Directive, UEPG was actively involved in the policy-making process and improvement of the sector at European level.

The UEPG Recycling Task Force, chaired by Brian James (MPA, UK), has been focusing on the European Aggregates Industry’s contribution to resource efficiency and helped shaping the new EU Protocol for the Management of Construction and Demolition Waste, considered secondary raw materials. The Task Force aims at bringing the debate on recycling to a realistic level, emphasising the technical implications and environmental and economic limitations of recycling, while examining the necessary conditions for its future potential. In view of this legislative developments, UEPG supported the development of an “end-of-waste criteria” and officially endorsed the EU Protocol for Construction and Demolition Waste Management.

UEPG cooperated with the European Demolition Association (EDA) in the organisation of the DDR Expo (Demolition, Decontamination and Recycling) which took place on 14-16 June 2017 in Brussels. For this occasion, the Task Force produced a leaflet on “Life Cycle of Aggregates” to convey the aggregates industry’s message on the circular economy.
Health & Safety Committee

In 2016–2017, the Members of UEPG Health & Safety Committee promoted a Health and Safety culture working towards Zero Harm in each member country. Within this assignment, the Committee contributed to the continuous improvement of control of Respirable Crystalline Silica on site as part of the Social Dialogue Agreement NEPSI, the evaluation of 24 Occupational Safety and Health Directives and the prevention of accidents and ill health at work.

The UEPG Health & Safety Committee was driven by the Chair, César Luaces Frades (FdA, Spain), the Vice-Chair, Walter Nelles (MIRO, Germany) and actively supported by its Committee Secretary Miette Dechelle.

Respirable Crystalline Silica and NEPSI

UEPG believes that prevention is crucial. UEPG is one of the founding signatory parties of NEPSI, established in 2006. The focus during the 10 years of NEPSI EU Social Dialogue Agreement on Respirable Crystalline Silica lies with its good handling and use. This provides adequate control measures and workers protection guidance. NEPSI Signatories have facilitated the implementation of good practice in dust reduction measures and monitored the application of the Agreement through five biennial reports of key performance indicators. UEPG Members have strongly participated with further improvements in 2016 Reporting. In addition, UEPG contributed to a NEPSI EU co-financed Communications Campaign that included setting up explanatory videos on NEPSI added value, activities and series of webinars in 8 languages targeting new sectors and NEPSI OSH Managers. The European Commission recognised the benefits of NEPSI outlined by EU Commissioner Marianne Thyssen over an introductory video at the 10th Anniversary Conference and an Evaluation Report on NEPSI.
In May 2016, the European Commission published a proposal to revise partially the Carcinogens and Mutagens at work Directive. On this occasion, the Commission proposed to include in Annex I "work involving exposure to respirable crystalline silica dust generated by a work process" and to establish in Annex III a Binding Limit Value for respirable crystalline silica dust (‘respirable fraction’) at 0.1 mg/m³. The NEPSI Signatories acknowledge the Commission’s proposal and Binding Limit Value which aims to protect workers while defining a clear ‘level playing field’ across the EU. Furthermore, the Recital 6 of the proposal acknowledges NEPSI Good Practice and its role as a valuable instrument to complement regulatory requirements and to support their effective implementation. The proposal will need now to be adopted by the EU Council and the European Parliament under the ordinary legislative procedure (COD). UEPG has closely monitored the development of the proposal over the trilogue negotiations, conveying NEPSI positions for a higher recognition of the Agreement, reporting actively to Members and offering NEPSI guidance documents to support them.

The Commission would launch and conclude within two years a program for reviewing provisions in the Directives with the contribution of the Social Partners, such as UEPG, and the Advisory Committee for Safety and Health (ACSH) to ensure a better protection.

**Accident and Ill-health Prevention**

While prevention of accidents is one of the overarching objectives of UEPG, data on Fatalities and Lost Time Injuries still need to be improved. If the Aggregates Industry is to review progress on accident prevention, all UEPG Members need to commit to provide data. UEPG is working on sharing good practices to improve the current state of play and data collection.

**Evaluation of the EU Occupational Safety and Health Directives**

In January 2017, the European Commission published its communication on new initiatives to improve health and safety at work called “Safer and Healthier Work for All - Modernisation of the EU Occupational Safety and Health Legislation Policy”. This communication was the final outcome of the REFIT evaluation of the OSH Framework Directive 89/391/EEC and 23 related Directives, which UEPG has monitored and contributed to different stages since 2014.

The overall structure of the EU-OSH acquis was considered in general as effective and fit-for-purpose. However, some individual Directives have become outdated or obsolete. In addition, the need to find effective ways to address new risks was highlighted. To respond to these points, the European Commission proposed a set of main actions, firstly on fighting against occupational cancer through legislative proposals accompanied by increased guidance and awareness-raising; secondly, on helping businesses, in particular micro-enterprises and SMEs, to comply with OSH rules; and finally, on cooperating with Member States and social partners to remove or update outdated rules and to refocus efforts on ensuring better and broader protection, compliance and enforcement on the ground.

UEPG is also monitoring OSH initiatives, is contributing to the Sectoral Social Dialogue Committee and the Standing Working Party for the Extractive Industry (SSDCEI & SWPEI), and is cooperating with the EU Agencies EU-OSHA and EUROFOUND.

A UEPG Health & Safety Thematic Tool Box was produced to support and recognise Members’ activities on OSH – Occupational Safety and Health. The first Tool Box was on Vibration and was presented to the SWPEI in May 2017 by Walter Nelles (MIRO, Germany), recognised as a useful tool for all. The second UEPG Tool box would focus on Noise.

UEPG is closely monitoring the work of the EC Machinery Working Group, and has a liaison observer status in the Technical Standardisation Committee CEN/TC 151 on Construction Equipment and Building Materials Machinery Safety, and is represented in WG 9 with Raphaël Bodet (UNPG, France).

UEPG is maintaining a strong link with the European Commission, EU Members States and the whole supply chain on explosives for civil uses applying the implementation of the “Track and Trace” Explosives for civil uses Directive.
Environment Committee

In 2016–2017, the workload of the UEPG Environment Committee and its Members addressed key EU environmental policies. Its workload is shared by five Task Forces and Working Groups, dedicated to Biodiversity, Water Management, Air Quality, Mining Waste and Marine Aggregates, which report back to the Environment Committee.

The UEPG Environment Committee was chaired by Alain Boisselon (UNPG, France), supported by Vice-Chair Benoit Lussis (FEDIEX, Belgium) and its new Committee Secretary Alev Somer.

Biodiversity

The UEPG Biodiversity Task Force, chaired by Benoit Lussis (FEDIEX, Belgium) was involved in the first phase of EU Business@Biodiversity Platform which is an initiative of the European Commission’s DG Environment aiming at integrating natural capital and biodiversity into business practices. UEPG participated to the work stream on Temporary Nature and will take an active role in the second phase of the Platform which will cover the period of 2017-2019. UEPG promoted the Dutch Green deal and the FEDIEX Life Project as good practice examples of Temporary Nature.

Nature Action Plan

On December 2016, the European Commission published the EU Fitness Check Evaluation of the Birds and Habitats Directives. Drawn conclusions confirm that, within the framework of a broader biodiversity policy, the Directives remain relevant and fit for purpose. However, substantial improvements in their implementation are needed to fully achieve their objectives.

In view of improving the implementation of the Natura 2000 Directives, the European Commission decided to develop an Action Plan and published, in February 2017, an EU Roadmap identifying key challenges and actions to take, to which UEPG provided recommendations, both welcomed positively by the European Commission and used as a reference into the EU Action Plan published in April 2017.

Natural Capital is a priority for the European Commission and it is essential for UEPG and its Members assessing the impact and contribution of aggregates extraction and restoration of biodiversity and ecosystems. In that context, UEPG added to its Biodiversity Task Force scope Natural Capital as a cross-cutting issue, providing the UEPG Economic Committee with an opinion.
UEPG recommendations focused on the need for increased flexibility and a more evolutionary approach towards biodiversity management, referring to solutions the European Aggregates Industry can provide such as the concept of Temporary Nature. UEPG made clear that the European Aggregates Industry is a partner and part of the solution to improve nature protection in Europe. UEPG will continue its efforts to cooperate with the European Commission on the implementation of the EU Nature Action Plan, to promote flexibility in the application of the Directives and to open the door for innovative solutions.

Environmental Implementation Review

In February 2017, the European Commission adopted an Environmental Implementation Review (EIR) package. This new initiative aims at establishing a dialogue with Member States to improve their implementation of existing EU environmental policy and legislation. The package includes 28 reports for each Member State, which will be reviewed in two year cycles to assess the progress and achievements. Policy areas tackled in the reports correlate with key issues addressed at UEPG level, such as circular economy, waste management, air quality, water management, biodiversity and natural capital. UEPG advised its Members to monitor closely the exchanges between the European Commission and EU Members States.

Water Management

The UEPG Water Management Task Force, chaired by César Luaces Frades (FdA, Spain), supports the exchange of good practices on Water Management in quarries and gravel sites. Water management is an important matter for the Aggregates Industry to be able to obtain a permit when extracting below the water table, to access water and use it, while maintaining the good water quality. In that order, good practices are promoted as the UNPG Water Management document translated into English and communicated to all UEPG Members.

EU Mining Waste BREF Review

The EU Mining Waste BREF Review continues to be a high priority addressed by the UEPG Mining Waste BREF Working Group, chaired by Benoit Lussis (FEDIEX, Belgium).

In November 2016, UEPG contributed to the ongoing revision process as part of the stakeholders' consultation, with a position paper and a list of comments, prepared by the UEPG dedicated Working Group. The UEPG position was joined and co-signed by other European Associations. A UEPG delegation with Stakeholders briefed Joint Research Center (JRC) experts working on the issue and invited them for site visits showcasing the management of extractive waste, with the support of FdA, the Spanish Aggregates Federation. The JRC welcomed the constructive input and is expected to complete the review by the end of 2017.

Air Quality

The new UEPG Air Quality Working Group was chaired by Yves Adam (UNPG, France) and aimed at raising awareness on the air quality issue, addressing the environmental impact of dust emissions and prevention measures in the sector. The Working Group has developed a communication strategy and will first produce an information document for internal use. The document would assess common issues and raise awareness on the main sources of dust emissions (fine particles of matter, known as PM), as well as communicate existing good practices that can be further harnessed in operations.

Marine Aggregates

Meetings of the UEPG Marine Aggregates Task Force, chaired by Ingo Hammwöhner (MIRO, Germany), are now hosted by companies and includes site visits. The priorities of this Task Force are on Natura 2000 at sea, a better implementation of the European Commission Nature Action Plan, the Marine Strategy Framework and the Maritime Spatial Planning Framework Directives, to which UEPG communicated its opinion through Position Papers.
The UEPG PR & Communications Task Force aims at improving the image of the European Aggregates Industry. Its work is based on the conviction that the Industry has genuinely good stories to tell on resource efficient operations, local access to resources, dedication to biodiversity and environmental stewardship, excellence in health & safety, all hallmarks of a sustainable industry.

The aim of this Task Force is to share examples of National PR & Communications Good Practice, to work on current and new PR and Communications tools, initiatives and targets in liaison with UEPG Committees and other Task Forces, and to prepare for future events. The Task Force is also a platform for exchange of information on EU News, institutional work, structure and policies, thereby, to better communicate to targeted audiences, UEPG priorities, initiatives and events.

The work is led by Robert Wasserbacher (FVSK, Austria), Chair of the Task Force.

Some examples of PR & Communications good practices at National level:

- **FdA** (Spain): organised in 2016 a National congress and the day of the trees addressing Biodiversity. The Federation will host in 2018 the Global Aggregates International Network (GAIN) and UEPG Delegates Assembly.

- **FEDIEX** (Belgium): marked in 2017 its foundation of 75 years ago. Over the year, the Federation organised thematic events with the participation of relevant Ministries, Authorities and Experts to show-case good practice and exchanges with professionals of the sector on the future of the industry.

- **FVSK** (Austria): prepared with Birdlife Austria a guidance document on how to extract in protected nature areas covered by a co-funded LIFE project. To strengthen trust towards its Members, the Association re-underlined its services to its Members over regional meetings. The Association hosted the UEPG Delegates Assembly Meeting in 2017 and the ceremony of UEPG’s 30th Anniversary in Vienna.

- **MIRO** (Germany): joined political party meetings to convey the Position of Industry in the election campaigns. The Association worked on an internal and external PR & Communications strategy including Forum, Guidance and Tools (such as banners, posters, postcards, stone clipboard, books, brochures and videos). A booklet was made for schools. MIRO also organised at regional level workshops on ‘how to support Members in crisis time’.

- **MPA** (UK): worked on the campaign ‘Stay Safe’ to raise awareness amongst youngster, parents and teachers about the dangers of entering quarries and related sites uninvited and unsupervised. An intensive communication targeting MPs was made. The Association also reinforced Communication with Local Schools and Radio Interview with Children. MPA has also increased its Social Media Campaigns and published a sustainable development report and Brexit expectation for Government.

- **UNPG** (France): prepared a document on the 2022 sector’s ambition for the French elections. The Association updated its White Paper to take stock of five years of activities and to anticipate the new challenges facing at local level. Series of brochures were also published.
The UEPG Sustainable Development Awards showcase the best practices in the European Aggregates Industry

UEPG presented and celebrating 41 entries at the prestigious Sustainable Development Awards Ceremony on 16 November 2016, in the Brussels Centre of Fine Arts, showing that aggregates producers are strongly committed to sustainable development.

Opened by UEPG President Jesús Ortiz, followed by a keynote speech from Rastislav Rybanič, the Director-General of the Ministry of Environment of the Slovak Republic holding the EU Council Presidency in the second half of 2016, the achievements of all 41 entries were recognised by presenting each case and handing over a UEPG certificate and showcased in the SDA 2016 brochure available on the UEPG website.

The 2016 independent Jury was composed of Angelo Caserta, Regional Director, Birdlife Europe, Dr. Jonas Satkūnas, EuroGeoSurveys, Director of Lithuanian Geological Survey, Jean-Pierre Damm, Vice-Chair of Sectoral Social Dialogue Committee for the Extractive Industry (industriAll – Trade Union), Sirpa Hertel, Member of the Committee of Regions, (EPP, Espoo, Finland), Dr. Robert Galler Institute for Subsurface Engineering, Leoben University, Austria.

Moderated by Peter Woodward, the examples of excellence were presented for their environmental, social progress and economic contribution and achievements for biodiversity.

Nigel Jackson, UEPG Vice-President and CEO of the Mineral Products Association (MPA, UK), in his conclusion described the European Aggregates Industry as the “great dynamo of the economy”, the largest sector among the non-energy extractive industries in Europe.

UEPG marked 30 years of cooperation and continuous improvement

At the occasion of the 2017 UEPG Delegates Assembly, kindly hosted by our Austrian colleagues from the “Fachverband Steine-Keramik” (FVSK), UEPG marked its 30th Anniversary, not only looking back at past achievements but also looking ahead of what might be the big milestones coming up for the European Aggregates Industry.

It was not only timely to review the past achievements of passionate and strongly committed national associations and aggregates producing companies, but a good opportunity to undertake an outlook on what kind of major challenges might lie ahead.

Jim O’Brien, Honorary President and UEPG President 2009-2012, brilliantly managed to outline 30 years and 10 Presidencies in less than 30 minutes. UEPG President Jesús Ortiz described a number of tasks UEPG might have to address in the next few years.

UEPG took this opportunity to produce a brochure on the activities and added value of the European Aggregates Association delivering to its Members.
General Secretariat

The multilingual UEPG Team is located in Brussels, close to the European Parliament, the European Commission and the many other European institutions. This a perfect location which enables the UEPG General Secretariat to regularly attend and participate in stakeholder consultation meetings, committee meetings in the European Parliament and other external fora. The Brussels based Team is composed of Dirk Fincke, Secretary-General, Miette Dechelle, Public Affairs Manager and Alev Somer, Public Affairs Officer. Through its small but highly-professional and dedicated Brussels based staff, it has achieved tangible results for the industry, continuously reinforcing its high visibility and trust amongst its stakeholders.

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 and at the service of its Members to represent their activities in Brussels, to support them in their respective countries, and invites staff of Member Associations and Companies to share their expertise. The UEPG Team is also organising specific meetings for its Members welcoming National Associations Board Members and Members to interact with key EU-decision-makers from Commission, Parliament, Council, Committee of the Regions, European Economic and Social Committee, Academia and NGOs. In 2017, the UEPG Team had the pleasure to welcome the Board Members of FdA, the Spanish Aggregates Federation in its Brussels office.

Coordinating UEPG lobbying campaigns

UEPG develops targeted advocacy strategies and acts as a coordinator in their implementation. Examples include ensuring sustainable supply of aggregates in Europe, by supporting the implementation of the EU Raw Materials Strategy, contributing to the work of the European Commission Raw Materials Supply Group and engaging in projects improving the legal framework conditions for sustainable access to resources within Europe. UEPG produces Position Papers alone or with other stakeholders and joins Alliance where a common interest exists.
UEPG shares with its Members good practices, guidance documents, tool boxes, indicators and campaigns. UEPG is campaigning to reduce the bureaucratic burden and especially the duplication of information provided by companies.

Cooperation with stakeholders,

UEPG cooperates closely with other stakeholders such as the European Demolition Association (EDA) and Bird Life Europe. UEPG works closely with European Industry Associations of the Non-Energy Extractive Industry Panel (NEEIP) and with the European Network for Sustainable Quarrying and Mining (ENSQM), a raw material commitment under the European Innovation Partnership to improve Europe’s raw materials framework conditions and public awareness. The first ENSQM workshop was dedicated to the “Contribution of the extractive industry to the Natura 2000 network – an opportunity for biodiversity” and took place in Spain. UEPG is a member of Construction Products Europe (CPE) and of ISSA-Mining (International Social Security Association). UEPG is recognised as a EU Social Partner in the NEPSI Social Dialogue on respirable crystalline silica and at the Sectoral Social Dialogue Committee of the Extractive Industry. UEPG is also a partner of the EC Standing Working Party for Extractive Industry, of the EC Raw Materials Supply Group, the EC Business@Biodiversity Platform and the #Industry 4 Europe Alliance.

Providing EU intelligence and regular updates

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 highly dedicated 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 policy briefings available online. The UEPG General Secretariat offers the Issue Tracker System, the UEPG Website and a Newsletter published in English, French and German.

Raising excellence in sharing good practices

UEPG supports and promotes the spread of good practice by encouraging projects that go well beyond what is required by planners or regulators, sets new standards of excellence and provides an inspirational example that others can follow. The UEPG tri-annual Sustainable Development Award is one illustration (more information can be found in this Annual Review at the PR and Communications section).

UEPG also provides guidance documents to operate with care and concern for the environment, for employees and neighbours, and for society as a whole. UEPG is promoting and disseminating good practice examples to control respirable crystalline silica on site through NEPSI and vibration.

Concrete examples and cases studies on biodiversity and water management are published on the UEPG website and promoted during key EU events as well as through UEPG publications.
Involving the Aggregates Industry in EU Policy Making

The physical proximity to the EU Institutions and the 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 has continuously strengthened its network of key contacts within the European Commission, European Parliament, EU Council working groups, Permanent Representations of EU Member States, EU Agencies, Academia and NGOs. Useful tools are the UEPG Board Policy Dinners, Debates, and Conferences, Awards and Exhibitions. UEPG Board Policy Dinner in April 2017 was dedicated to the revision of the carcinogens and mutagens directive at work with the inclusion of the respirable crystalline silica generated by process. For this occasion, the Maltese Presidency Representative was invited to inform UEPG Board Members on the state of play and to better understand the impact on the European Aggregates Industry.

UEPG Missions to Members

The UEPG Team is at the service of its Members. To get out of the “Brussels EU bubble” the UEPG Team visits Members and gets into the field work of companies and national associations. It is a great opportunity to experience at first hand the daily business of aggregates producers including the challenges they face and to learn about the impact of EU legislation on site. It allows also to refresh the technical knowledge of the Team and provide a better understanding of companies' needs when developing an EU lobby strategy for the Aggregates Industry. Members visited in 2016-2017 were PROMINS (Croatia), Magyar Bányászati Szövetség (Hungary) and FSKB (Switzerland).

Raising the industry's profile

The General Secretariat continues to promote the achievements of the European Aggregates Industry by giving keynote speeches at international conferences. It also developed and coordinated targeted events. Some examples of successfully raising the profile of our Industry are the NEPSI Campaign and Reporting, the Third EU B@B Annual Conference, in the Hague, Netherlands, the First MIN-GUIDE Annual Conference, in Brussels and the Soil Stakeholders’ Conference in Brussels. In 2017, UEPG was one of the 130 Industry Associations’ signatories standing together to call for a strong EU Industrial Strategy. It is essential to build a strategy to support European manufacturers in delivering growth & jobs. The Joint Declaration called for a European industrial vision for which the EU must strengthen our ability to reach the target of 20% of GDP from industry.

Governance

Over recent years, UEPG has grown into a highly representative and respected association, representing the largest non-energy extractive industry. UEPG sets great value on maintaining its reputation and its transparency via the EU Transparency Register and high standard managed accounts. Each of the UEPG General Secretariat staff is a member of SEAP, the Society of European Affairs Professionals and bound by its code of conduct.

The Global Aggregates Information Network (GAIN)

GAIN was founded by UEPG in 2010, driven by the conviction that international sharing of experience and best practice promotes a more efficient and sustainable aggregates industry globally. GAIN members currently represent 60% of the global aggregates production estimated at 40 billion tonnes. Many valuable insights and experiences were shared over the years on health & safety, environment, economy and technical aspects and PR, with different approaches and solutions to reply to them. A GAIN Newsletter summarising activities of each Region of the world was published. The next GAIN meeting is foreseen in 2018, in Spain. In between, Regional Aggregates Associations are exchanging by email, over the phone and face to face meetings on specific topics.
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- FdA Board Meeting in UEPG office
- Alev Somer (UEPG Public Affairs Manager) at ANIET International Natural Stone Conference Portugal
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- Left to right: Cseh Zoltán (Hungarian Mining Association (HMA) President of Aggregate Branch), Dr. Gábor Katona (Hungarian Office for Mining and Geology (HOMG) ), Miette Dechelle (UEPG Public Affairs Manager), Mr. Gábor Zelei (Hungarian Office for Mining and Geology (HOMG) Head of Division), Dr. Zoltay Ákos (Hungarian Mining Association (HMA) Executive Secretary General)
- Left to right: Kadri Simson (Minister of Economy and Infrastructure in Estonia), Jean-Philippe Peuziat (UNIFE Head of Unit Public Affairs), Dirk Fincke (UEPG Secretary General) in the European Parliament
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