



QUARRY NZ 2023 CONFERENCE

5 - 7 JULY 2023

CHRISTCHURCH - NEW ZEALAND

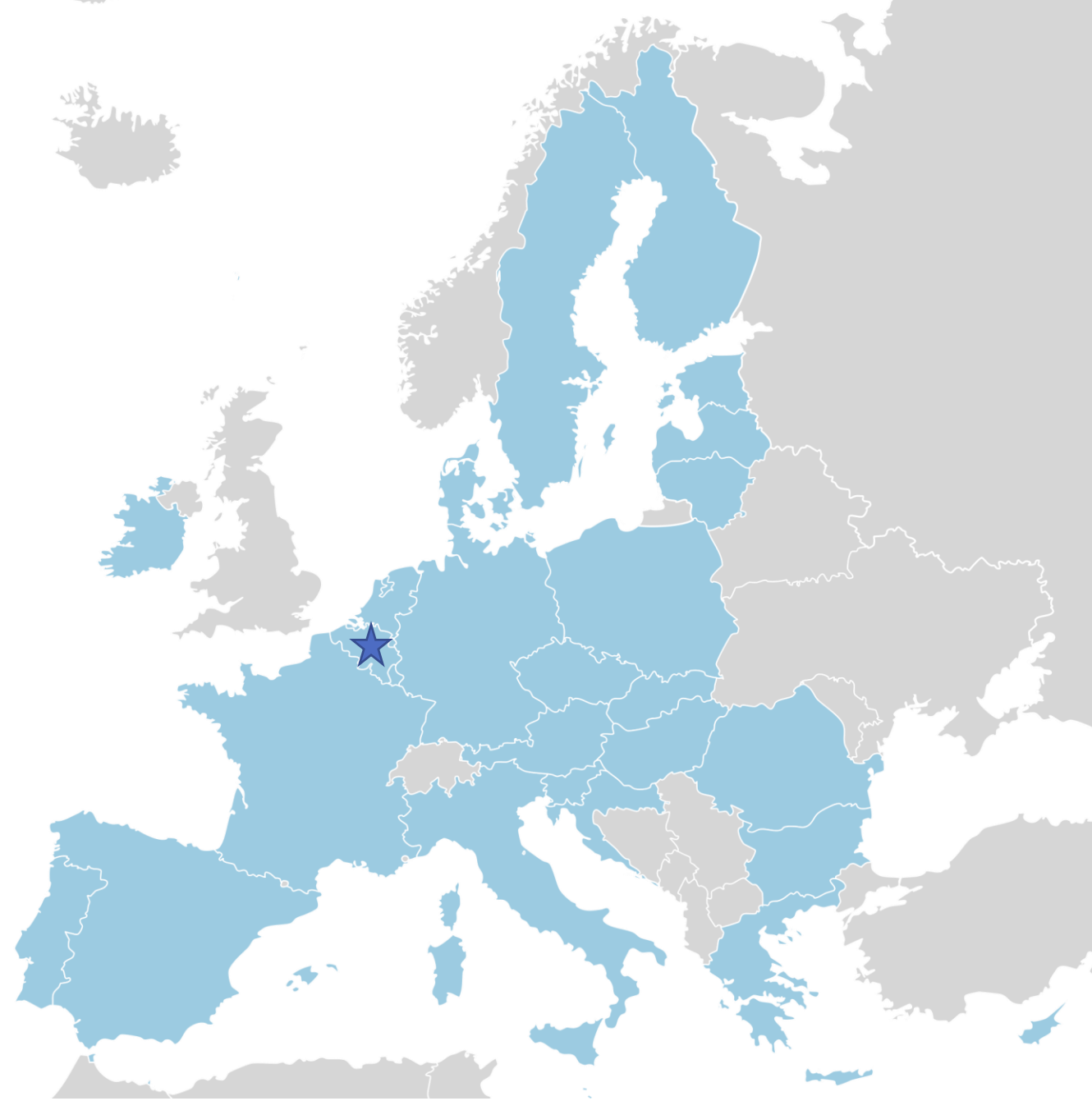


UEPG
AGGREGATES EUROPE



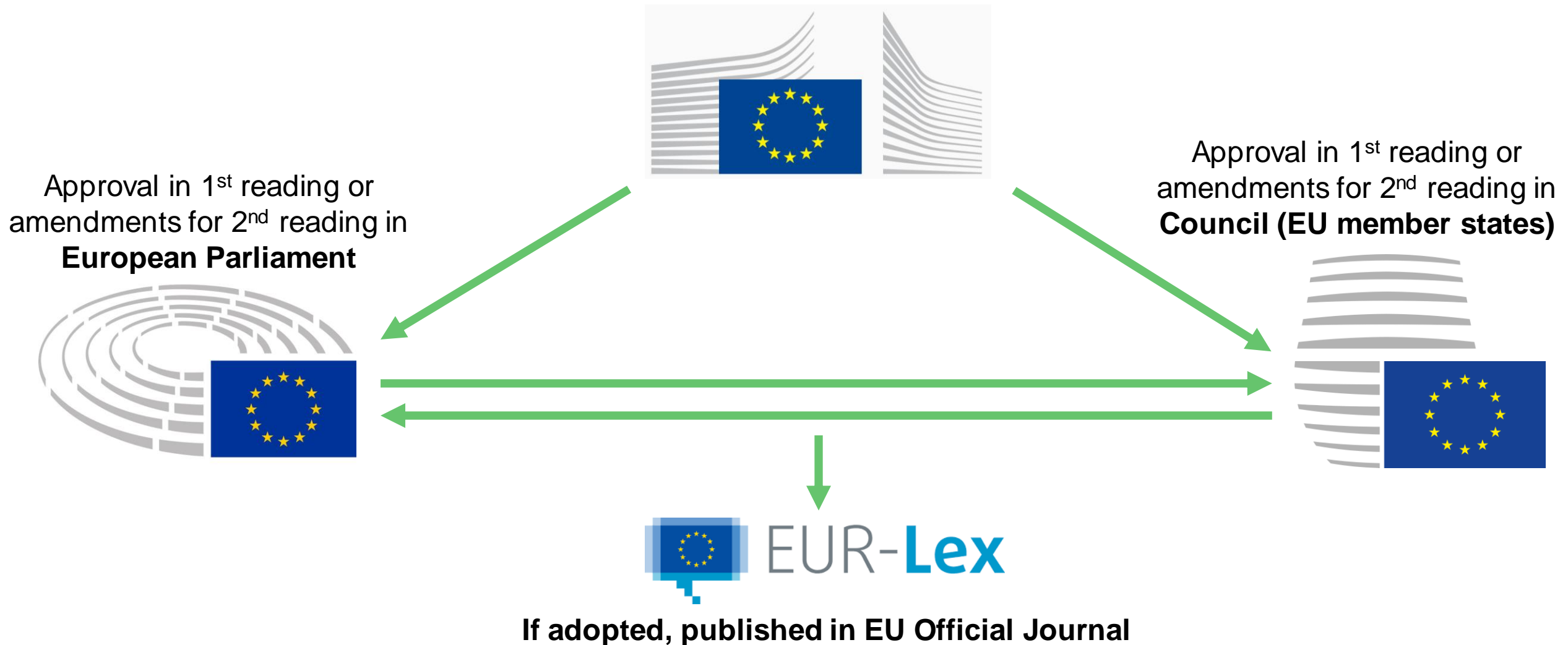
THE EUROPEAN UNION

- 447,7 million inhabitants
- More than 4 million km² surface
- 27 EU member states
- 24 official EU languages (three main working languages: English, French, German)
- 18.6% of the world's GDP (2018)
- “Capital of EU”: Brussels



EU LEGISLATIVE PROCEDURE

The **European Commission** tables a legislative proposal (Regulation, Directive, Decision) ~ 100 proposals/year





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AGGREGATES EUROPE



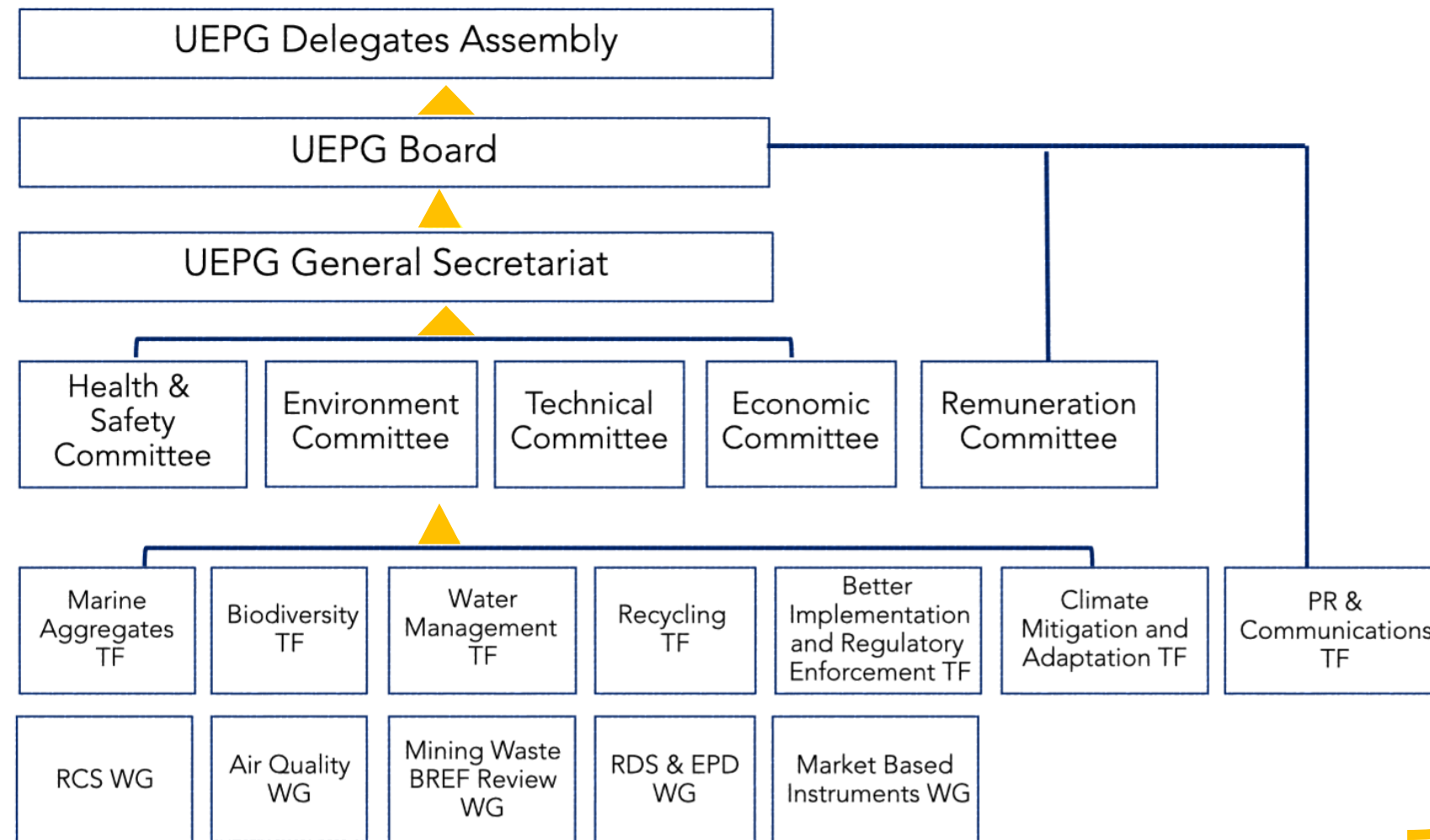
WHY?

HOW?

WHAT?

- Since 1987
- Members in 25 countries
- Offices in Brussels





Aggregates Europe – UEPG has seats in several European Commission expert groups:

- Raw Materials Supply Group
- EU Biodiversity Platform
- Marine Expert Group
- Sectoral Social Dialogue
- Extractive Industry (SSDCEI)
- Explosives Working Group
- Machinery Working Group

SELECTION OF CURRENT TOP PRIORITIES

- **EU (Critical) Raw Materials Act** – Improved permitting procedures and land-use planning; local access to resources for critical, strategic and essential raw materials needed for adapting to climate change, the EU Green Deal's renovation wave, energy transition (RePowerEU) and military infrastructure
- **Nature Restoration Law (NRL)** – Ensuring sustainable access to resources and promoting the industry's contribution to restoration of nature, biodiversity and ecosystems
- **Respirable Crystalline Silica** – Provide an adequate control, measures and worker's protection under the NEPSI Social Dialogue Agreement
- **Review of the Construction Products Regulation (CPR)** – Aggregates in construction products, technical standards, declaration of performance (DoP) and CE marking
- **European Technical Standards** – Reviewing comprehensive European Aggregates Standards (CEN TC 154 and related bodies)

SELECTION OF CURRENT TOP PRIORITIES

- **Biodiversity Strategy to 2030** – 30% protected areas, 10% strictly protected areas; EU Guidance and compatibility with aggregates extraction; improved sustainable access to local resources
- **Biodiversity Indicators** – The European Aggregates Industry can be a net contributor to biodiversity; UEPG supports 'Temporary Nature' and 'Dynamic management of biodiversity' and develops biodiversity indicators by 2025.
- **Resource Taxation (part of Circular Economy)** – Pro & Cons; providing alternatives to achieve resource efficiency and high recycling rates without resource taxation
- **Recycling (part of Circular Economy)** – Potential & limitations, trends and changing business models, exchange of good practice; complementary use of primary and secondary raw materials
- **EU Health & Safety legislation** – Better regulation of EU Occupational Health and Safety Directives
- **Better/Smarter Regulation** – Better Implementation of existing legislation and Regulatory Enforcement ensuring a competitive industry

EUROPEAN AGGREGATES INDUSTRY: CHANGING BUSINESS MODEL



- 1.** Primary aggregates (sand, gravel, crushed rock)
- 2.** Secondary aggregates (recycling, manufactured)
- 3.** Habitats hosting endangered/protected plant and animal species
- 4.** Renewable energy

THE EUROPEAN AGGREGATES INDUSTRY.



The European
Aggregates demand is

3 billion
tons per year

The European
Aggregates Industry
comprises 15,000
companies (mostly
SMEs) and producing
aggregates at

26.500
sites across Europe

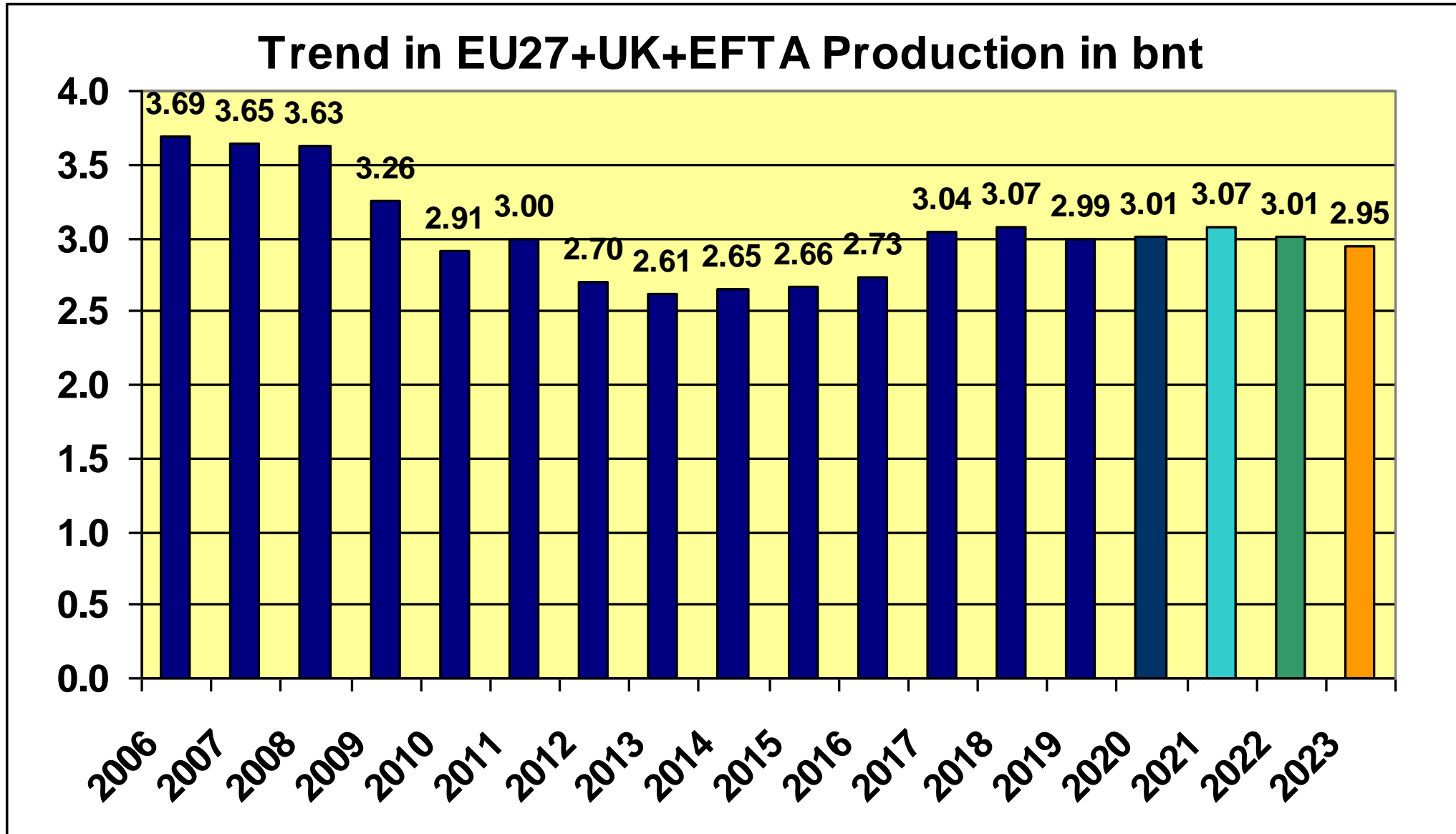
The European
average demand for
aggregates is around

6 tons
per capita per year

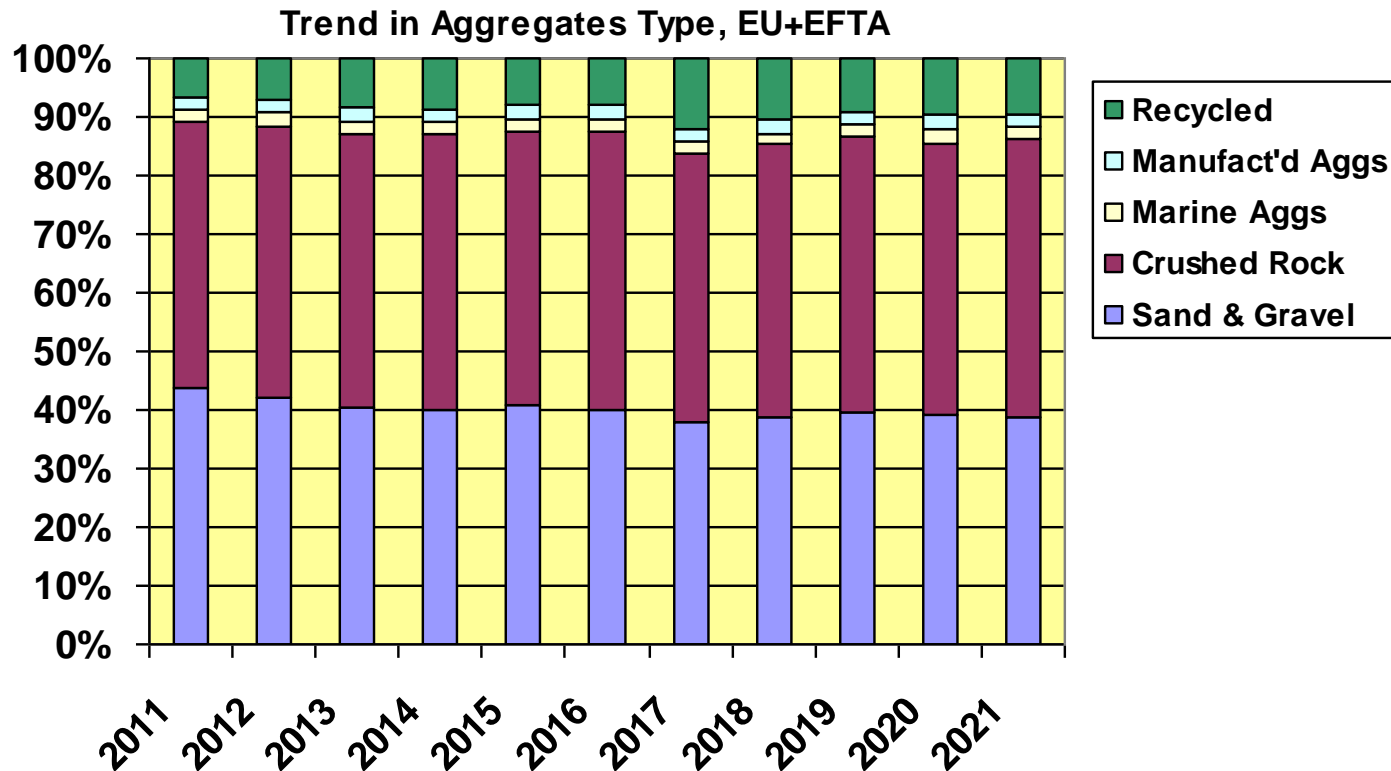
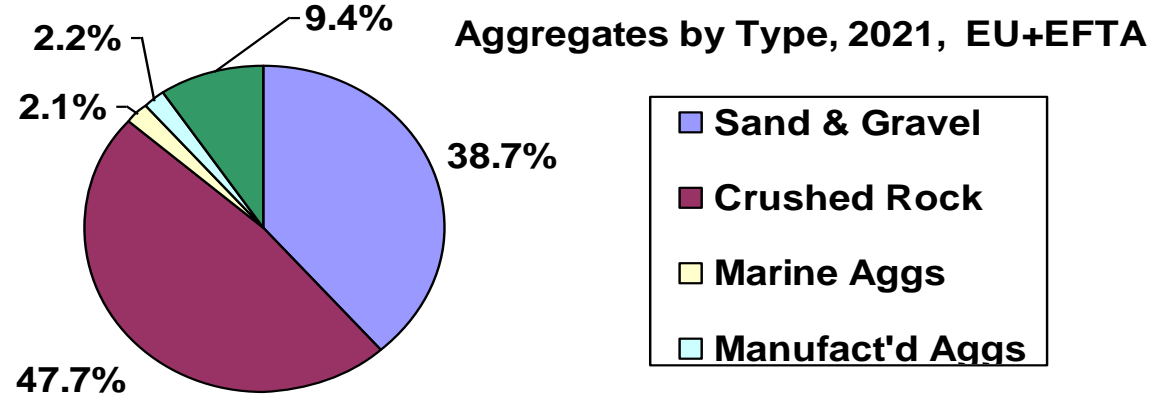
The industry
employs around

185.000
people (including
contractors)

TREND IN EU27+UK+EFTA



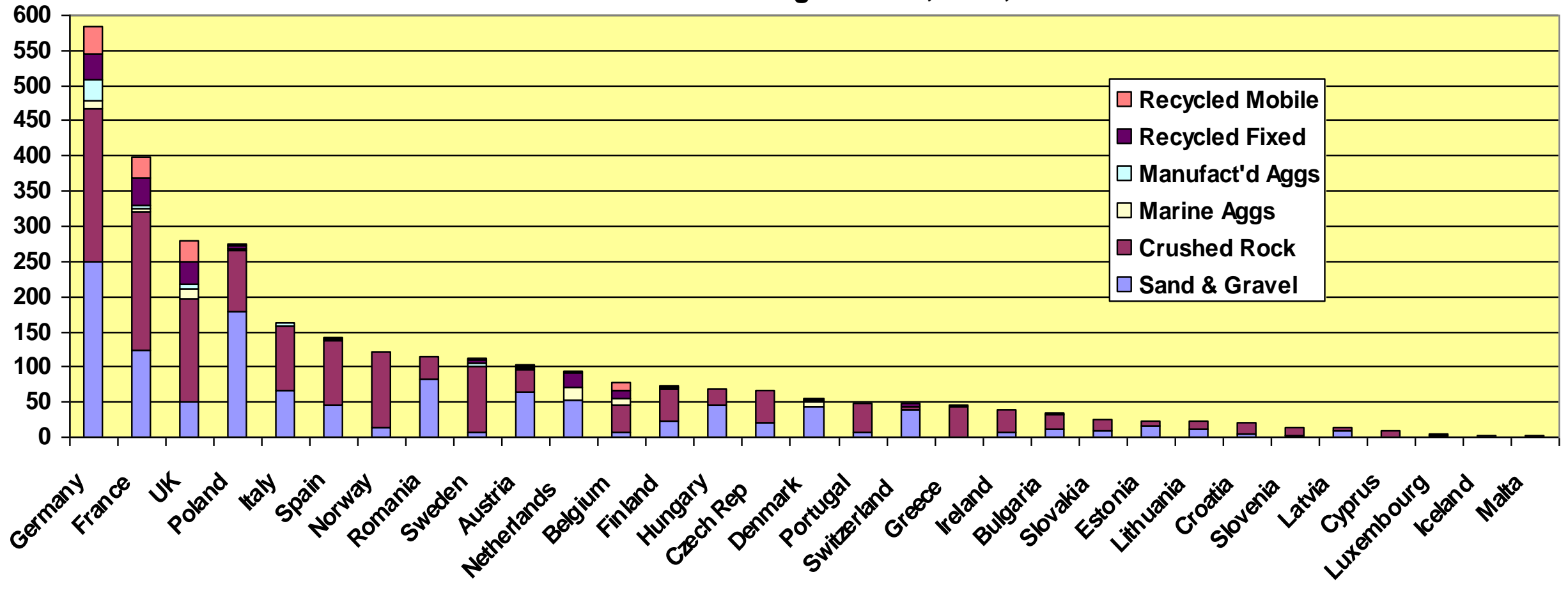
ANALYSIS BY TYPE FOR 2021 & TREND



- Sand & gravel 38.7%, crushed rock 47.7%, recycled 9.4%, manufactured 2.2%, marine 2.1%
- Slight decline in % Sand & Gravel over time
- Earlier growth in Recycled Materials, now stagnant – or has reporting disimproved?

THE LEAGUE TABLE IN 2021

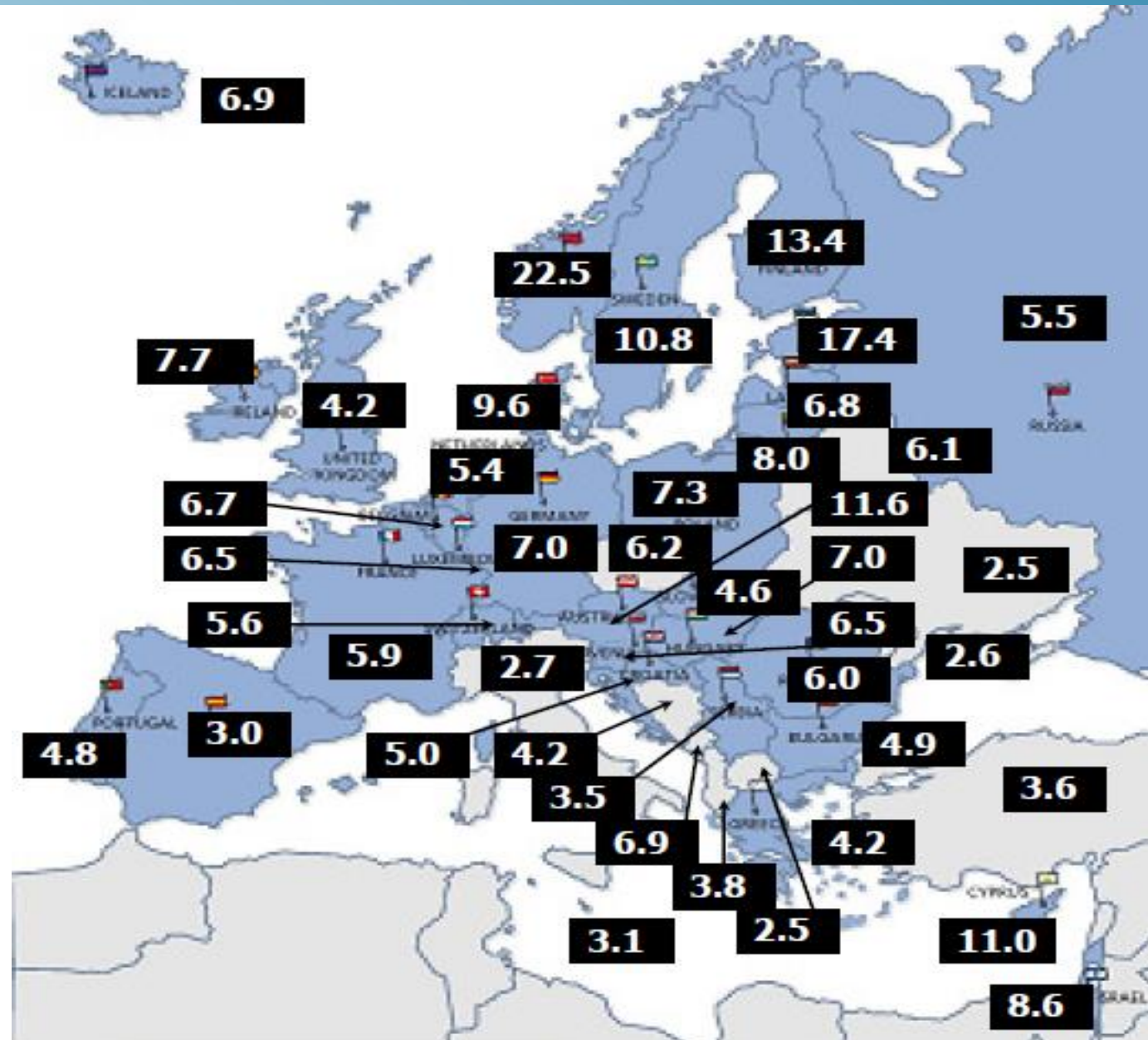
EU27+UK+EFTA League Table, 2021, mt

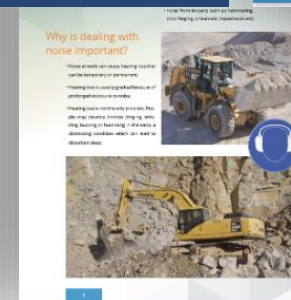
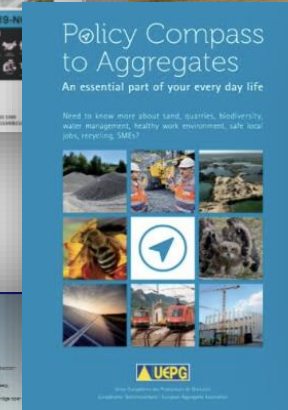
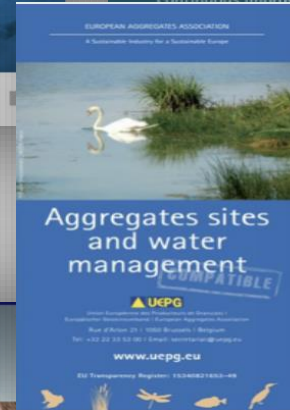
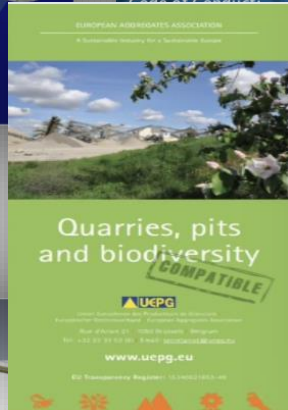
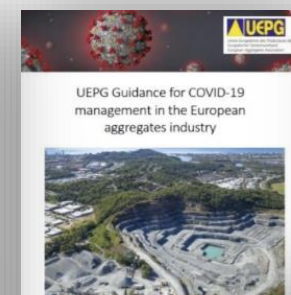
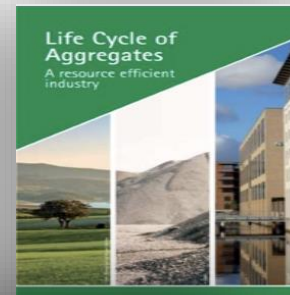
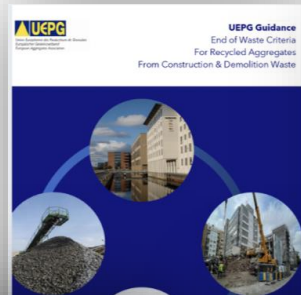


- Ranges from 584mt for Germany down to 1.6mt for Malta
- Also shows wide range of aggregates types for each country

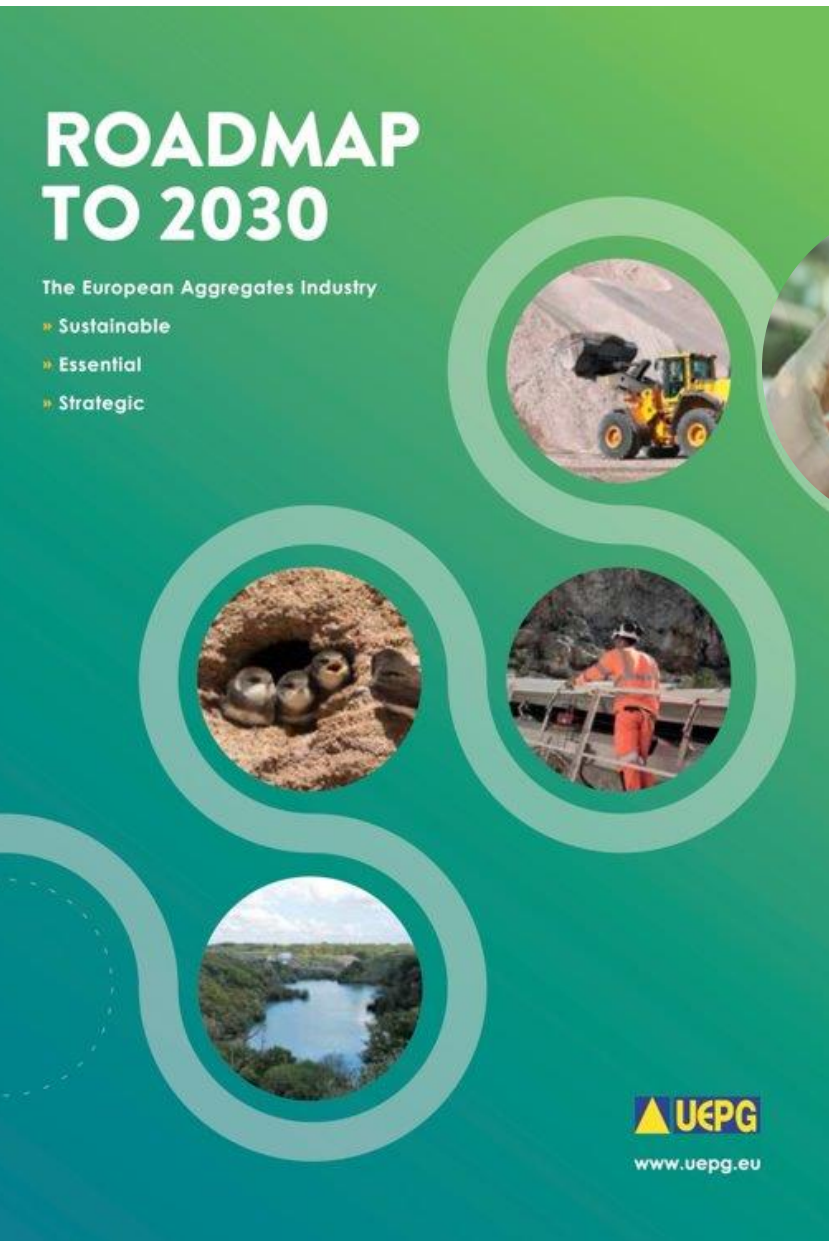
TONNES PER CAPITA FOR 2021

- Map shows variety in national aggregates consumption per capita
- Depends on state of economies, local climate and building tradition, etc
- Average for EU27+UK+EFTA (3.079bnt/529m people) was 5.8t/c





RECENT IMPORTANT PUBLICATIONS



___ WHAT WE NEED

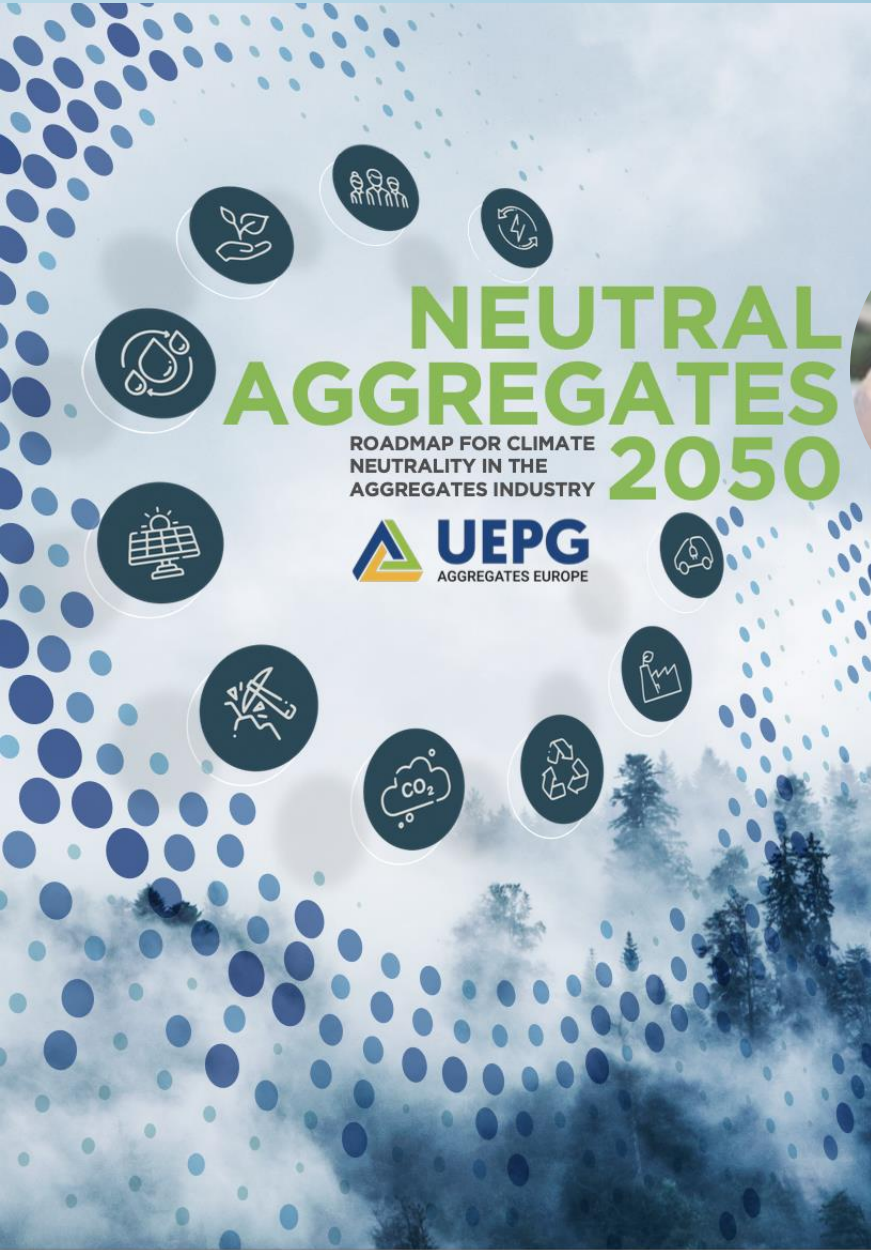


___ WHAT WE PROMISE



___ WHAT WE WILL DELIVER

RECENT IMPORTANT PUBLICATIONS



___ WHAT WE NEED



___ OUR ESSENTIAL ROLE



___ OUR CONTRIBUTION

ACTIONS ...



OCTOBER 2021

Extractive Sector Species Protection Code of Conduct:

A manageable approach for planning
and permitting procedures respecting
EU legislation and fostering biodiversity



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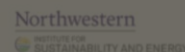
A key partner for EU Biodiversity
(EU Strategy)



The European Aggregates Industry is
NOT a threat to the environment!
The European Aggregates Industry is
PART OF THE SOLUTION and
a very good example to be followed
worldwide!



At the IUCN Conservation Congress!



ACTIONS ...



THANK YOU!

Antonis Antoniou Latouros
President



UEPG
AGGREGATES EUROPE

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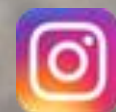
UEPG (European Aggregates Association)



UEPG European Aggregates Association



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