



European Policies impacting on the supply of raw materials

Dirk Fincke, Secretary General, Aggregates Europe - UEPG
Infran Ammattipäivät, 13-14 March 2024, Tampere, Finland

THE EUROPEAN AGGREGATES INDUSTRY

Aggregates Europe - UEPG represents the European Aggregates Industry

by far the largest non-energy extractive industry



The European [EU28+EFTA, 2018] aggregates demand is

3 billion
tonnes per year,

representing an annual turnover estimated at €15-€20 billion.



The European [EU+EFTA, 2018] average demand for aggregates is almost

6 tonnes
per capita per year.

The European Aggregates Industry comprises



15 000
companies (mostly SMEs),

producing aggregates at



26 000
sites across Europe,

with just on



200 000
people employed
(including contractors).



Antonis Antoniou Latouros
President
Aggregates Europe - UEPG

Why essential raw materials? An example:

“Manufacturing wind turbines and components requires stable, secure supply and cost-competitive supply of raw materials such as concrete, iron, and steel that make up more than 90% of the mass of a turbine, including the foundation.” [Wind Europe, Nov 2022](#)

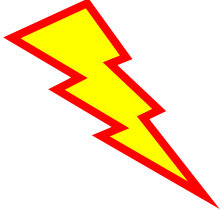
Our colleagues from the German Aggregates Federation (MIRO) stated in the German Parliament during a hearing in 2023:

1. One 3-megawatt wind turbine requires 1,300 t aggregates for the base plus 700 t for the tower;
2. The German Government plans to build 30 wind turbines per week to achieve the “Energiewende”, i.e. 1,560 wind turbines per year;
3. That means more than 3,000,000 t of aggregates per year for the wind turbines only (not counting for infrastructure), or the total annual average production of an additional 20-30 aggregates sites, not yet permitted.
4. And we need access now!



Meanwhile in the offices in charge of land use planning and permitting procedures:

Good news from Brussels: From now on focus on critical and strategic raw material projects.

 *What about all the other essential raw materials?*





"Supply issues of sand?
We have it everywhere!"

"If not critical nor strategic,
why bothering?"

"Essential raw materials could
be covered at national level."

"If not accessible in one country, it
could be imported from another!?"



WWF

“... the Commission’s proposals presented today are a blunt instrument that could do a lot of unnecessary damage along the way, especially to nature and biodiversity.”

Source: <https://www.wwf.eu/?9452966/PR-NZIA-CRMA-Proposal>

Friends of the Earth

“The EU’s new Critical Raw Materials Regulation fails to tackle rampant overconsumption and deliver justice for communities facing mining”

Source: <https://friendsoftheearth.eu/press-release/new-eu-raw-materials-plans-fail-to-deliver-justice/>

The European Environmental Bureau

“EU’s Critical Raw Materials Act: A Mixed Bag of Aspirations and Shortcomings”

Source: <https://eeb.org/eus-critical-raw-materials-act-2/>

THE ESSENTIAL RAW MATERIALS COALITION



EUROPEAN CRITICAL RAW MATERIALS ACT

At the EU Sectorial Social Dialogue Committee for the Extractive Industries we reviewed the provisions of the Critical Raw Materials Act (CRMA) and cleared up some wide-spread claims.

1. The CRMA is a step in the right direction!

👉 Sure, but most raw materials needed for the green & digital transition are left out and behind.

2. The CRMA will have positive side effects for all the other raw materials!

👉 Absolutely unclear and the possibility of negative side effects is given with competent authorities for permitting and land-use planning already heavily charged and are now requested to prioritise.

3. The CRMA has raised the importance of raw materials for our economy!

👉 Yes, but the debate and most of the EU events are exclusively around critical raw materials, thus, addressing a fraction of the needed supply.

Europe needs all raw materials, not a selection.



EUROPEAN CRITICAL RAW MATERIALS ACT

Aggregates Europe - UEPG



2,103 followers

3mo •

The Essential Raw Materials Coalition Policy Dinner in the European Quarter in Brussels

...see more



Next steps for The Essential Raw Materials Coalition

- Observe the implementation of the Critical Raw Materials Act and the impacts on essential raw materials
- How to ensure sustainable supply of non-critical/non-strategic raw materials if not through the Critical Raw Materials Act?
- Gather fact and figures on the risk of supply for essential raw materials before they qualify as critical
- Exchange on strategy between partners of the Coalition

Message: The EU Green Deal and its objectives need all raw materials!

DESIGNATION OF PROTECTED AREAS

- **BDS 2030: main targets**

- Expansion of **protected areas** to at least 30% of EU's land and seas;
- **Strict protection** of at least 10% of EU's land and seas;
- Development of **legally binding nature restoration** targets (cf. Nature Restoration Law);
- Development of a Trans-European nature network



30%
of land in
Europe



30%
of sea in
Europe



DESIGNATION OF PROTECTED AREAS

- Issue raised by Aggregates Europe - UEPG members: **Lack of transparency & stakeholders' involvement** regarding the designation process by Member States of protected and strictly protected areas.
- Letter to Commissioner Sinkevičius to raise the issue (and reminders): meeting with Commissioner's cabinet on 02/05/2023.
- The same concern had been raised again during a meeting on 18 September with Andrea Vettori, Head of the Nature Conservation Unit, DG Environment, European Commission



NATURE RESTORATION LAW

LEGALLY BINDING EU-WIDE RESTORATION TARGETS

- 1. Overarching targets:** By 2030, action has been taken to restore 20% of the EU's lands and seas. By 2050, ecosystems in the EU are restored to and maintained in good condition
- 2. Specific targets for ecosystems:** use of targets based on existing legislation + creation of new targets including pollinators, (farmland/ forest) birds, etc.
 - If methodology to assess the biodiversity trend of specific species/habitats is not established yet, a methodology needs to be found and agreed upon by 2030.

IMPLEMENTATION OF THE NRL

- 1. National Restoration Plans** submitted by Member States to the Commission within two years of the Regulation coming into force.
- Member States should **monitor the progress made and report on it**, while the **European Environment Agency is to issue regular technical reports** on progress towards the targets.
- Commission to carry out **periodic review of National Restoration Plans** and review progress

NATURE RESTORATION LAW

Actions undertaken and steps monitored by Aggregates Europe - UEPG

11/2022: Meeting with European Parliament Rapporteur César Luena MEP (S&D, Spain)

01/2023: Joint Position Paper with other NEEIP associations

02-03/2023: Meetings with BirdLife Europe & Central Asia

03/2023: Meeting with Florika Fink-Hooijer, Director General of DG Environment, European Commission

03-04/2023: Meeting with Swedish and Spanish PermRep officials

04/2023: Publication of Parliamentary voting recommendations with NEEIP associations

09/2023: Meeting with Andrea Vettori, Head of the Nature Conservation Unit, DG Environment, European Commission

27/02/2024: Adoption by European Parliament plenary vote

12/04/2024: Scheduled vote in Council

2024-2026: Developing National Restoration Plans

AGGREGATES EUROPE - UEPG AD-HOC WORKING GROUP ON BIODIVERSITY INDICATORS

- **Goal:**

- To define a harmonised methodology & better communicate the need for this data
- To collect data with a sampling approach (commitment from pilot sites for a specific period)
- To set baseline scenario for our industry by 2025

- **Developments:**

- Four meetings during the first trimester of 2023
- A draft questionnaire for level 1 of Biodiversity Indicators, established by the Spanish Industry association ANEFA and suggesting indicators was presented, discussed, and provided to participants

EU SOIL MONITORING DIRECTIVE

- Key objective is **to address key soil threats**, it requires Member States **to monitor soils and obliges them to take measures to improve soil health.**
- Agenda:
 - Publication by the Commission proposal 05/07/2023
 - Parliament & Council debate
 - AGRI opinion voted on 13 February 2024
 - ENVI on 11 March 2024
 - European Parliament plenary vote on 10 April 2024

EU SOIL MONITORING DIRECTIVE

SOIL MONITORING LAW - What is in it ?

- **Definition, article 3:** "soil' means the top layer of the Earth's crust situated between the bedrock and the land surface, which is composed of mineral particles, organic matter, water, air and living organisms;"
- **The European Commission published the Soil Monitoring Law proposal** to enable the objectives of the EU soil strategy and achieve good soil health by 2050
- **Solid and coherent soil monitoring framework:** Member States should establish soil districts throughout their territory to manage the soils and the requirements of the directive, with appropriate authorities to manage these districts.
- **Inciting sustainable soil management throughout the EU:** Member States will have to define which practices should be implemented by soil managers and which should be banned because they cause soil degradation
- **Requesting to address soil contamination issues:** Member States should identify potentially contaminated sites, investigate these sites, and address unacceptable risks for human health and the environment, thereby contributing to a toxic-free environment by 2050.

INDUSTRIAL EMISSIONS DIRECTIVE'S REVISION

- Publication of the **IED's Revision proposal** by the Commission in April 2022
- **NEEIP Joint position papers & Voting recommendations**



Revision of the Industrial Emissions Directive:

**Joint position from the
European non-energy extractive industry**
(CEMBUREAU – Cerame-Unie – EUROGYPSUM –
EUROROC – EXCA – IMA-Europe – UEPG)

4 October 2022

- **Aggregates are out of the scope:** Neither the Commission proposal, the Parliamentary Reports and the Council's General approach did include aggregates extraction in the scope of the IED.
- 12 March 2024, European Parliament plenary vote
- Annex I, 3.6: "Extraction including on-site treatment (operations such as comminution, size control, beneficiation and upgrading) of the following ores on an industrial scale: bauxite, chromium, cobalt, copper, gold, iron, lead, lithium, manganese, nickel, palladium, platinum, tin, tungsten and zinc."

**Your voice
in Europe!**



UEPG
AGGREGATES EUROPE

Aggregates Europe - UEPG

Square de Meeûs 40, 1000 Brussels

secretariat@aggregates-europe.eu

EU Transparency Register:

15340821653-49

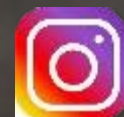
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