



Building the future™

Securing Access to Non-Energy Mineral Resources

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Non-Energy minerals

THREE BROAD SUB-SECTORS:

- **Construction minerals**
 - Largest sector, locally (EU) produced
 - Sand, gravel, crushed rock, etc
- **Industrial (non-construction) minerals**
 - Salt, Calcium Carbonates, Bentonite etc.
 - Raw materials for example for chemical, steel, fertiliser industries
- **Metaliferous minerals**
 - Production capacity in EU but heavy reliance on imports
 - EU responsible for circa 30% of global consumption
 - Exposed to changing global demand patterns – key strategic issue

Construction minerals – demand and usage

- **Annual EU demand - 3 billion tonnes**
 - 7 tonnes per capita
- **Global demand forecast to 2020 - construction to rise by 70% from 2008 baseline – developed economies by 35%**
- **EU will see increasing demand for construction minerals creating a strategic imperative for access to be secured, balanced by evolving societal demands**

Sustainable Construction

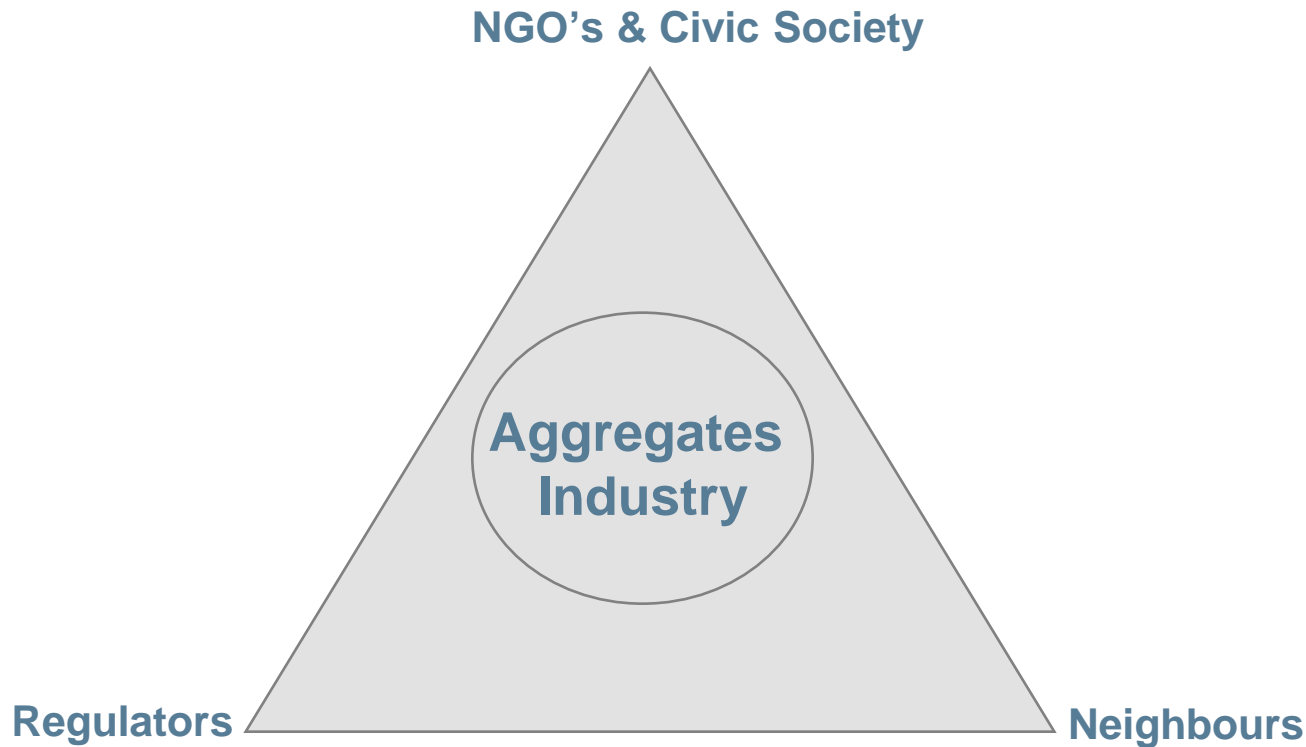
- **Re-cast energy performance of buildings directive**
- **Targets being set across EU for low carbon construction**
- **Strategic importance of supply side**
- **Key role for concrete in meeting low carbon objectives – aggregates fundamental to delivering sustainable construction**

Responsible Sourcing

- **Key to sustainable construction for industry clients**
- **All aspects of supply to be managed, with traceable commitments**
- **Responsible employment, training, labour rights and health and safety**
- **Responsible and sustainable production with attention to environment, quarry rehabilitation, eco-systems and biodiversity**
- **Key to this in Europe – Natura 2000**
- **Understandable societal constraints**

Industry Addressing Stakeholder Demands

Supporting access to aggregates – the licence to operate



CEMEX Supporting the Licence to Operate

- Quarry liaison committees
- Targeted support to local community/environment projects
- Support and engagement through education
- Quarry and plant open days
- Constant pro-active engagement with regulators and governments – national and local. Media engagement.
- Support of industry activities
- CEMEX construction book series in partnership with international NGO's, Conservation International, BirdLife, IUCN



CEMEX / BirdLife Relationship

- 2007 signing of 10 year partnership agreement
- Sharing best practise – raising standards of CEMEX biodiversity strategy
- Raising awareness of employees, sites and local communities to the value of birds as a key indicator of healthy eco systems
- Seeking opportunities to reduce quarry impacts and enhance conditions to encourage bird populations
- Partnerships at local level e.g. RSPB – UK, LPO – France, OTOP – Poland, NABU - Germany
- Conservation book 2008 – Birds and People
- Biodiversity scoping study

BirdLife / CEMEX Biodiversity Scoping Study

- Objective:** Categorise CEMEX sites based on a proximity analysis with areas of importance for biodiversity to facilitate focused action
- Scope:** 22 countries, 546 sites
- Deliverables:**
- Executive Report
 - 22 mapping catalogues
 - 22 biodiversity proximity databases
 - Foundations for action
- Natura 2000:**
- EU – 850,000 km² coverage
- 106 sites in or within 2km of Natura 2000 areas

European Commission – Balancing Needs

Sustainable Construction & Responsible Sourcing



“The challenge is to achieve a balance between securing minerals and protecting the environment, taking into account human, social and economic welfare”

Leoben Report 2004

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- Industry constantly improving performance to support licence to operate – recognises it must do more
- Industry supports the Raw Materials Initiative
- Industry wants to see EU institutions provide a coordinated, comprehensive European raw materials strategy to ensure sustainable, long-term access to mineral deposits
- Industry recognises the importance of environment, biodiversity and eco-systems and the essential contribution made in mitigating dangerous climate change
- Industry wants to play its role in contributing to meeting national and local carbon reduction targets

Aggregate Industry Priorities

Priority 1:

Giving higher priority to locally sourced non-energy minerals in land use planning.

- To include sand, gravel and crushed rock within the ad hoc working group “criticality” profile
- Encourage locally sourced reserves and avoid sterilisation of reserves – thus reducing CO² from transport services
- Internalising CO², low value, high mass materials
- More strategic long-term planning – investment cycles

Aggregate Industry Priorities

Priority 2:

Encouraging competent authorities to manage permit applications more effectively.

- Give aggregates a national level priority in all countries
- Encourage 'One-Stop Shop' approach to reduce planning timeframes with parallel processing and coordination between competent authorities to speed up planning process.
- Over 10 years is not unusual for a planning application and can be longer than the expected life of the reserve

Aggregate Industry Priorities

Priority 3:

Conserving natural resources by promoting the use of recycled aggregates.

- Maximising potential use of recycled aggregates ensuring coordination and compatibility across EU legislative, regulatory and product standards mechanisms - some aspects of REACH constrains potential use - some product standards make the use of recycled materials more difficult.

Aggregate Industry Priorities

Priority 4:

Enhancing benefits of new extraction sites for local communities.

- Extraction activities in or near NATURA 2000 areas can be reconciled with environmental protection and biodiversity enhancement
- Although many large players, still predominantly SME's – local jobs, predominantly rural areas
- Amenity provision – wide ranging possibilities including eco tourism
- Developing and enhancing biodiversity and eco system protection
- Industry and governments need to understand strategic need, ensure access and demonstrate societal benefits through improved performance and communications

Aggregates Industry Recommendations

- **To recognise the aggregates industry as a Key Sector with its own criticality and priority within the Raw Materials initiative**
- **Simplify the regulatory framework to make it consistent and balanced on the basis of a comprehensive impact assessment taking full account of the need for sustainable development. ‘One Stop Shop’ could be set as an objective**
- **Recognise that sand, gravel and crushed rock are strategically critical at a local level – access to vital local resources needs to be maintained**

Aggregates Industry Recommendations

- **Develop an EU Minerals Policy to identify, protect and enhance mineral deposits in land use planning, particularly at the local level including a review of the interpretations of the Natura 2000 Directive**
- **Promote the continued use of Recycled Materials by minimising “red tape” and legislative and regulatory barriers while not compromising a technical quality**
- **Continued effort to highlight the contribution of the European Aggregates Industry to meeting the sustainable development goals of the European Union**



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Discussion

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