Mineral Products Association

The Trade Association for the Aggregates, Asphalt, Cement, Concrete, Dimension Stone, Lime, Mortar and Silica Sand Industries

Summary Sustainable Development Data 2016

The Mineral Products Association (MPA) is the trade association for the aggregates, asphalt, cement, concrete, dimension stone, lime, mortar and silica sand industries. It has a growing membership of 480 companies and is the sectoral voice for mineral products. MPA membership is made up of the vast majority of independent SME quarrying companies throughout the UK, as well as the 9 major international and global companies. It covers 100% of GB cement production, 90% of aggregates production, 95% of asphalt and over 70% of ready-mixed concrete and precast concrete production. Sustainabilty impacts on every aspect of our activities - from quarry development to restoration, dredging and recycling to manufacturing and transport operations, to the use of our products and materials in construction and other activities. This summary data, is supported by more detailed information on the MPA's Sustainable Development website and additional product information in the sustainable development reports for Cement, Concrete, Lime and Marine Aggregates.

Sales of mineral products were generally positive in 2015, although all materials except ready-mixed concrete (RMC) saw more modest growth than in 2014. Sales of aggregates increased by 4.9% compared to 2014, whilst RMC sales accelerated in 2015 (4.3%) compared to 2014 (+3.7%), increasingly influenced by infrastructure projects, with more modest contributions from housing. Reflecting slower housing activity throughout the year, mortar sales grew by 4.2% in 2015, after a 17.9% increase in sales volumes in 2014. Asphalt sales grew by 6.5% in 2015, boosted by faster than anticipated roads spending, but declined in the last quarter of the year. Aggregates and cementitious market remained nonetheless 24-27% below their pre-recession peak in 2007.

Highlights

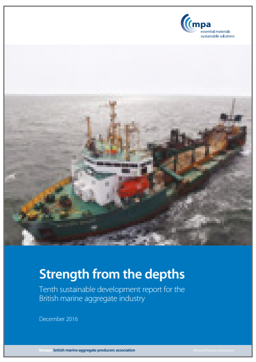
- **Lost Time Injury Frequency Rate** - MPA members' Lost Time Injury Frequency Rate deteriorated slightly from 3.25 to 3.79. This was coupled with five fatalities of four employees and one contractor recorded in 2015 indicating a clear need to continue focusing on the industry's hard target of Zero Harm.
- **Public safety** - The focus on public safety around active operations, on disused sites and in the transportation and use of our products has increased.
- **Recycled and secondary aggregates** - The recycled and secondary aggregates share of the GB market remained high and is estimated to represent 28% of the market, nearly three times higher than the average market share in Europe.
- **Airborne emissions** - There has been a sustained and significant reduction in airborne emissions from cement plants since 1998 and 2015 saw the continuation of this trend.
- **Operational carbon dioxide emissions** - There was a general improvement in operational carbon dioxide emissions from the majority of products, except cement.
- **Local supply chains** - The importance of local supply chains was demonstrated by delivery distances. Average road delivery distance for aggregates increased again to 35miles/52 kilometres, asphalt also increased to 27 miles/56 kilometres and ready-mixed concrete remained at 7 miles/12 kilometres.
- **Rail freight** - Rail freight remains highly significant for the sector, accounting for 10% of aggregates and 28.4% of cement (aggregated with water) representing over 20 million tonnes.
- **Marine dredged aggregates** - Marine dredged aggregates landings increased again to 13.2 million tonnes in 2015, dredged from 82.7 square kilometres of the UK seabed, less than 0.01% of the total UK seabed.
- **Quarry restoration and biodiversity** - There was further progress on quarry restoration and biodiversity as MPA records an additional 469ha of land restored to priority habitat and a further 2748ha planned for future priority habitat creation.
- **Certified environmental management systems** - 100% of cement sites and 92% of aggregates quarries surveyed reported that they operated with certified environmental management systems.

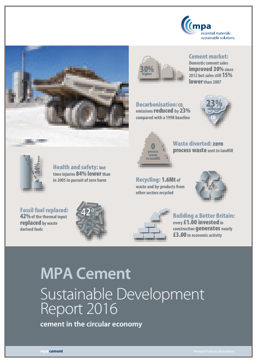



SUMMARY RESULTS 2016 (2015 DATA)	UNITS	2013	2014	2015	% CHANGE*
CREATING SUSTAINABLE COMMUNITIES					
Lost Time Incident Frequency Rate (LTIs per million employees- all MPA activities)		5.13	3.25	3.79	16.6%
Employment- direct by MPA members (excl cement, precast)		19,940	22,021	21,653	-1.7%
Employment- direct by MPA Members (cement)		2,584	2,517	2,339	-7.1%
Number of recorded complaints (aggregates)		269	419	444	6.0%
Number of community liason groups (aggregates)		148	246	270	9.8%
Liaison group meetings (cement)		39	26	31	19.2%
Recorded visitors to aggregates sites, cement kiln sites		29,365	30,292	33,568	10.8%
CLIMATE CHANGE AND ENERGY					
CO_2 emissions directly from cement production	kg/tonne	694	679	709	4.4%
CO_2 emissions from crushed rock production	kg/tonne	3.7	3.8	3.4	-11.3%
CO_2 emissions from sand and gravel- land won production	kg/tonne	3.9	3.5	2.4	-32.3%
CO_2 emissions from asphalt production	kg/tonne	27.4	33.9	25.2	-25.7%
CO_2 emissions from ready-mixed concrete production	kg/tonne	1	0.8	0.7	-12.5%
Share of sales moved by rail (aggregates)	%	9.5	12	10.2	-15.0%
Share of sales transported by modes other than by road (cement))	%	16.9 (rail only)	20.4 (rail only)	28.4 (rail and water)	See note**
Average road delivery distance (aggregates)	miles	31	32	34.9	9.3%
Average road load (aggregates)	tonnes	22	22.7	22.3	-1.8%
Marine dredged aggregates landings for construction use	mt	10.5	11.7	13.2	13.2%
NATURAL RESOURCES & ENHANCING THE ENVIRONMENT					
Trees planted		92,156	46,846	151,443	223.3%
Hedgerows planted	km	3.03	5.5	4.6	-16.3%
Dry Stone Walling- Kilometres built	km	0.19	0.7	0.2	-71.4%
Waste and by products recovered as raw materials and fuels by cement industry	mt	1.45	1.61	1.6	-0.6%
Archaeology- land investigated pre-planning permission	Ha	402	331	307	-7.3%
Archaeology- land investigated post-planning permission	Ha	321	183	226	23.5%
Proportion of UK land area being quarried (aggregates)	%	0.1	0.1	0.1	
Ratio of land restored to land prepared for quarrying		1:0.9	1:1.4	1:1.2	
Area of seabed dredged	km^2	98.7	85.7	82.7	-3.5%
SUSTAINABLE CONSUMPTION & PRODUCTION					
Aggregates production (primary) GB	GB mt	134.4	154.6***	162.0	4.8%
Recycled/secondary materials sales GB (production)	GB mt	56.7***	61.3	64.3	4.9%
Asphalt sales GB	GB mt	18.9	20.6	21.9	6.5%
Ready-mixed concrete sales GB	GB m^3	15.7	16.3	17.0	4.3%
Cement - domestic sales GB/UK	GB mt	8.3 (GB)	9.0 (GB)	10.2 (UK)	13.3%
Cementitious materials GB/UK	GB mt	11.5 (GB)	12.4 (GB)	14.0 (UK)	12.9%
Quicklime and Dolomite sales GB	GB mt	1.2	1.3	1.2	-4.7%
Per capita production aggregates (GB/Europe)	(GB/ Europe) tonnes	3.2/4.9	3.5/na	3.9/5.1	
Aggregate sites with certified EMS	% of survey	86	96	92	-4.2%
Cement sites with certified EMS	%	100	100	100	0.0%

* discrepancies in percentages due to rounding of data. ** the 2013 and 2014 figures account for share of sales moved by rail. The 2015 figure accounts for both rail and water due to Competition and Markets Authority data aggregation rules. *** reflects revised figure

Sustainability across the MPA





The Mineral Products Association is the trade association for the aggregates, asphalt, cement, concrete, dimension stone, lime, mortar and silica sand industries.

For further MPA information visit www.mineralproducts.org

Mineral Products Association
38-44 Gillingham Street
London SW1V 1HU

Tel 020 7963 8000
Fax 020 7963 8001
info@mineralproducts.org
www.mineralproducts.org

mpa
essential materials
sustainable solutions

Printed on paper from well-managed forests, controlled sources and recycled wood or fibre. FSC accredited: TT-COC-002651