

Annual Report 2002-2003

Industrial Minerals Association – Europe

BENTONITE

BORATES

CALCIUM
CARBONATE

DIATOMITE

FELDSPAR

KAOLIN

PLASTIC
CLAYS

SILICA

TALC

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Industrial minerals
Your world is made of them



Table of Contents

	Page
Message from the President	2
Message from the Secretary General	3
Report from the Statutory Bodies	4
Board of Directors	
Technical Committee	
Food and Feed Committee	
Communication Steering Committee	
Sustainable Development Working Groups	
Horizontal Issues: Health & Safety	7
IMA Industrial Hygiene Project	
Horizontal Issues: Product Regulation	8
Crystalline Silica	
New Chemicals Policy	
Food and Feed, and Related Issues	
Horizontal Issues: Environment	10
Directive for the Management of Mining Waste	
BAT Reference Document	
Thematic Strategy for Soil Protection	
Horizontal Issues: Sustainable Development	11
Sustainable Development Indicators	
ETAP: Environmental Technology Action Plan	
Horizontal Issues: Communication	12
IMA's Communication Strategy	
Horizontal Issues: Research & Development	13
IMA's involvement in RTD	
Overall Activities : External Relations	14
Interaction with the EU Stakeholders	
Partnerships	
Vertical Issues: Report from the Sections	15
Financial Report	17
Committee membership	19

Message from the President



*André J. Talmon
President*

After one year in office, I have a number of observations, which I would like to share with you. They relate to the past of IMA-Europe, as well as the future.

My first discovery was, how the three Administrations in Brussels, the Commission, the Council of Ministers, and the Parliament actually interrelate and function. This does not seem to be common knowledge.

The second discovery was, how well respected, how well introduced and how efficient a communicator, our IMA has become in its dealings, essentially, with the Commission. It certainly gives our Association the credibility and thus the potential “access” to the people we need to work with today, as well as in the future. To build on such a strong foundation makes life a lot easier.

With your support, last year, we decided to start broadening IMA-Europe’s scope of activities, and to address Sustainable Development issues, for Industrial Minerals. Three Working Groups were created to deal with (1) a new SD Charter for our Association, (2) the definition and collection of the data required to measure the current situation as well as progress towards defined objectives – the SD Indicators, and (3) the conception and construction of the Tool(s) – hardware and software of a new Databank – necessary to collect and to analyse this data in the future.

Good progress is being made on all three fronts though further effort is required in the area of transparency. As SD is a new political orientation, new laws for the European Union will be needed. New laws, are the job of the European Parliament.

We have brought IMA's Awareness Campaign to different leading MEPs to make them aware, for the first time in most cases, of the existence of Industrial Minerals and their role in Industry.

To help us in these new activities, I would like to welcome Christophe Sykes who has joined the IMA team as of this month.

I also would like to mention that last month, IMA-North America celebrated its first year of existence. I do strongly feel that a lot of constructive initiatives will eventually come from the cooperation between our two Associations.

Our activities on the two days surrounding our 2003 General Assembly have been tailored to address some of the demands we think we have heard from you, on different occasions:

- The joint IMCEC/IMA BOARD will cover an informative description of how things work in Brussels, and there will be a report on IMA's SD initiatives progress.
- Then a mini-conference will gather all IMA's Members offering a forum for discussion with representatives from the Commission about the future, after the next Enlargement.
- The General Assembly itself will enable you to appreciate all the activities and achievements of this year.

I do hope you will find the time well spent, and thank you very much for your help and support.

Message from the Secretary General



*Michelle Wyart-Remy
Secretary General*

At the beginning of IMA-Europe's 10th anniversary year, IMA's newly elected President, André Talmon, not only launched the Association into the era of Sustainable Development, but also gave it a new dimension with the creation of the Industrial Minerals Chief Executives Council (IMCEC). These new orientations were immediately followed by an action plan, the first fruits of which should already be available in 2003.

Besides these major developments, IMA - Europe has also successfully grown in the last few months with the accession of another two key industrial minerals associations. We were very pleased to welcome EuroARGILLA, the European Association for Producers of Fine Ceramic and Refractory Clays, and IDPA, the International Diatomite Producers Association. Taking account of all the subsidiaries and business units directly affiliated to IMA-Europe, our Association is now made up of some 180 members.

Facing new topics and introducing new members and new sectors was all achieved in addition to our active work on a series of ongoing files. In this past year, there has been some very positive progress in some of these subjects. Just to mention a few: the crystalline silica and the new chemicals policy dossiers called for serious efforts and time, through which outstanding progress was achieved. The proposal for a Mining Waste Directive and the drafting of a Reference Document on Best Available Techniques (BAT) for the Management of Tailings and Waste-Rocks has spurred our Members' to seek a more satisfactory outcome.

Other ongoing initiatives and projects were also well developed. An increasing number of member companies are implementing the IMA Dust Monitoring Protocol. IMA's Hygiene Project, presented at the Minerals 2003 Conference on Corporate Social Responsibility (CSR), was hailed by DG Enterprise as a showcase of CSR. In addition, a significant (although still not sufficient) number of IMA's Members participated in the EC Sustainable Development Indicators (SDIs) first reporting exercise. IMA's unflagging contribution to the SDI reporting initiative should in the near future help the sector to demonstrate its commitment to the forthcoming IMA Charter.

Taking stock of this year's developments, I would also like to highlight the wider implementation of the Industrial Minerals *Awareness* campaign at local level and the reinforcement of IMA's presence at the European Parliament (EP) through a systematic approach of a selection of MEPs.

Our American colleagues are to be congratulated for the outstanding development of IMA - North America and welcome the friendly co-operation started this year on a series of common issues.

In this year intensive activity, I would like to express my gratitude to the IMA Board Members for their support and to all IMA's section delegates who personally contributed to this success. I would also like to warmly acknowledge the professionalism and the dedication of the IMA team - Roger Doome, Amina Langedijk, Florence Lumen, and Sabine Van den Brempt, who are delighted to have recently welcomed a new staff member, Christophe Sykes.

Report from the Statutory Bodies



*Gisbert Majewski
CCA-Europe President*



*Sean T. Murray
EBA President*



*Olivier Vandermarq
EKA President*



*Ron Shuttleworth
EuroArgilla President*

Board of Directors

With EuroARGILLA and IDPA becoming members, the IMA-Europe Board welcomed their representatives: Ron Shuttleworth (WBB), President of EuroARGILLA, and Mel Mirliss, IDPA Executive Director; a second non-nominative seat being granted to IDPA.

With EuroARGILLA forming a joint section with EKA, EUROFEL has become an independent section and Dr. Otto Hieber (AKW) became the feldspar section second Director on the IMA Board. Horst Grosspeter (Quarzwirke) succeeded Peter Overdick as EUROSIL's President and IMA's Director.

During 2002, we saw the retirement of Dr. Graham Lawson. In its December meeting, the Board paid a warm tribute to one of IMA's founding members, its second President, and IMA Director since its foundation, who contributed so much to the Association. Dr. G.B. Lawson had the pleasure to see one of his dearest desires fulfilled before he left, i.e. the creation of an IMA plastic clays section with the joining of EuroARGILLA.

Having consulted the IMA member Associations and the Industrial Minerals Chief Executive Council (IMCEC) created in June 2002, the Board agreed on a Sustainable Development Action Programme which was launched at the beginning of 2003.

In addition, in view of the Enlargement and of establishing better relationships with Member States' (MS) authorities, the Board also decided to launch two other reflection groups: one on Enlargement and another one on Political Networks and Contacts.

Acknowledging the importance of a fruitful dialogue with stakeholders, the Board recommended that IMA becomes a member of the Social Dialogue Mining Committee, and that the *Awareness* campaign be promoted with the Members of Parliament and at local level.

With four intensive meetings a year, the Board was pleased to hold its Autumn meeting in Istanbul, magnificently hosted by Eti Holding.

Technical Committee

In order to improve the way IMA's horizontal issues are managed, proposals for changing the scope of the Technical Committee were looked at. The Technical Committee (TC) decided to maintain the existing organisation, as it provided a unique forum for the technical delegates from the IMA sections - with their various interests and skills - to continue to monitor all kinds of issues (H&S, environment, standards, products, etc.). The TC recommended that technical work should be assigned to an ad hoc working group when specific competency is required.

The sub-committees of the IMA TC were indeed very active over the period. This was particularly the case of the Chemicals Task Force which elaborated IMA's position on the New Chemicals Policy (NCP) and submitted it successfully to the European Commission services. And the IMA SDI Working Group finalised the SDI questionnaire. This group will remain active within the framework of IMA's new Sustainable Development (SD) programme, while two new sub-groups have been set up to prepare an IMA Charter and to adapt IMA's IT tools (see above).



Chris Watkins
EUBA President

This year again, the TC devoted time and energy to submissions to the Commission's proposal for a Mining Waste Directive. It also monitored new EC initiatives, such as the Thematic Strategy on the Sustainable Management of Natural Resources

Food and Feed Committee



Marc Lebrun
EUROFEL President

This year, particular emphasis was given to the animal feed legislation as new authorisation procedure for the feed additives, and new limits for undesirable substances (e.g. dioxins, heavy metals) were discussed. In doing so, the co-operation with FEFANA and EMFEMA has been strengthened in order to submit common industry's proposals to the decision-makers.

With regard to the dioxins and dioxin-like PCBs issue, the FFC has launched its first monitoring project with 127 samples representing all of the IMA minerals used in the food chain, i.e. calcium carbonate, talc, bentonite, kaolin, and diatomite. A first glossary consisting of the main definitions, an inventory of the Community legislation in force, and a list of the frequent acronyms was also prepared and made available to all IMA's members.

Following FFC's recommendation, IMA-Europe also applied for a formal liaison status with the CEN/TC 327 *on Animal feedingstuffs – Methods of sampling and analysis*. This new co-operation will allow FFC's experts to be deeply involved in the activities of Working Group 1, which deals with minerals and contaminants.



Horst Grosspeter
EUROSIL President

Acknowledging the importance of these issues, five new companies' representatives joined the FFC, which now brings together more than 25 experts.

Communication Steering Committee

In June 2002, IMA-Europe successfully launched its Awareness campaign during IMA's 2002 Conference in Brussels.

A meeting of IMA's member companies' communication experts was convened in November to exchange ideas and experiences in view of implementing the campaign both at local and at European level. Early in 2003, guidelines were issued to promote the implementation at local level. French and German versions of the brochure became available in the second quarter of 2003.

At European level, the Communication Steering Committee (COM SC) - with the assistance of a consultant - helped IMA-Europe to establish relationships with some 20 MEPs in order to inform them of the specificity of the IM sector, the potential impacts of new legislation, and the voluntary initiatives taken by industry in the field of sustainable development (SDI reporting, dust monitoring project).

In view of its 2004 objective to broaden the Awareness campaign, the Steering Committee has started working on the development of an educational, interactive CD ROM.



Claude Stenneler
EUROTALC President



Mel Mirliss
IDPA Secretary General

Sustainable Development Working Groups

Within the framework of the 2003 Sustainable Development Action Programme, three Working Groups (WGs) were set up. The mission of WG 1 is to draft an IMA Charter. WG 2 will refine the Sustainable Development Indicators (SDIs) and WG 3 will adapt IMA's IT tools and set up an extranet.

SD WG1 - IMA Charter

Under the Chairmanship of Sean Murray (EBA President), the WG prepared the skeleton of the future Charter. It was agreed to devise an ambitious framework based on global initiatives and principles, such as those of the International Council of Mining and Metals and the "OECD Guidelines". This skeleton has already been submitted to IMA's Sections for consultation and through this larger reflection, strong core principles should be selected by the Autumn. The intention is to measure IMA's members commitment to the charter - which should in no way be seen as just a declaration - through the reporting of the SDIs.

SD WG2 - Refining SDIs for the IM sector

Acknowledging the specificity of the industrial minerals sector, IMA's Board decided to refine the set of indicators adopted for the extractive industries by the official SDI Working Group chaired by the Commission. To achieve this objective, the IMA SDI Shadow Group was reinstated and its membership was extended so as to cover all of IMA's sections. Under the Chairmanship of Eric Turner (Luzenac), the IMA SDI Working Group will promote the participation of all IMA's members in this SDI reporting exercise. In the meantime, it was suggested to add some extra indicators to demonstrate the contribution of industrial minerals to the well-being of the Community and of Society at large. The completion of the work is expected by end of 2003.

SD WG3 - Adapting IMA's IT tools

This WG, co-ordinated by Florence Lumen (IMA's Information Co-ordinator), was created to assess and answer the technological needs induced by the IMA SD programme.

The WG identified as a primary need an **upgrade** of IMA's computer infrastructure, which was carried out in May '03. Secondly, the WG agreed that IMA needed an **extranet** to improve the exchange of information with its members and to, eventually, communicate the results of the SD projects. An extranet skeleton will be developed before the end of 2003. It will take into account the needs and expectations of the IMA members, which will have been identified from a survey the WG will carry out shortly.

Horizontal Issues - Health and Safety

IMA Industrial Hygiene Project

For three years now, IMA has been developing a “hygiene project”, which aims to harmonise the dust monitoring strategies of the European Minerals Industry.

Early in 2002, the common protocol was finalised and a training programme was organised in view of its implementation. It gathered 35 hygiene and occupational safety experts from IMA's member companies.

The implementation phase started in the summer of 2002, and the participating companies have been collecting dust samples according to the protocol. A total of 22 IMA member companies, representing together all minerals, are today participating in the project. This represents roughly 3500 workers monitored in more than 70 production sites across Europe.

A discussion forum dedicated to the project was created at the end of August 2002 in order to promote dialogue between the project leaders and the participants and to provide access to a series of useful documents, including the protocol in Dutch, English, French, German and Spanish.

Personal reports on the summer 2002 measurement campaign were sent to the participating companies in April 2003.

The final report on the first year of measurements, with tables of the dust exposure results by mineral, country and job function - i.e. a job-exposure matrix for the whole industry sector - should be ready in autumn 2003. It will be presented at a debriefing meeting at the end of 2003, which, at the request of the many interested Members, will be coupled to a seminar on “Elements of Epidemiology”.

The IMA industrial hygiene project is one of the first voluntary initiatives of this type in our sector and it is very positively viewed by the EU Commission and other industries. The harmonisation objective and the commitment required from the industry make this a very ambitious project. Ultimately, this project could become a European Standard as IMA has applied for membership to CEN TC 137 “Assessment of workplace exposure”, with the intention to propose the protocol as a work item of this Committee.

The project should help create a real health policy culture in our industry, it will also be an integrated part of IMA's SD programme. It is intended to continuously compile dust monitoring data according to the standardised protocol from an increasing number of companies. This would certainly promote the development of a real dust exposure prevention policy within the sector and the continuous improvement of working conditions. Furthermore, it could lead, considering the success of this first initiative, to a second project aimed at defining a standard medical surveillance strategy in the IM industry.

Horizontal Issues – Product Regulation

Crystalline Silica

In June 2002, the EC Scientific Committee on Occupational Exposure Limits (SCOEL) issued its draft recommendations for a Respirable Crystalline Silica (RCS) limit. The Scientific Committee favoured the approach "Silicosis prevention prevents cancer". However, the data currently available did not allow them to recommend a health-based value. According to the procedure, SCOEL's draft recommendations received ample comments from the scientific community, national regulatory and industry bodies, including IMA and EUROSIL. It is expected that the Committee will react to all comments before the end of this year. The EC should only then announce the way it would go.

IMA's silica section, EUROSIL, has commissioned, with partner-industries, two important research projects: a mortality survey of the UK industrial sand workers and an in vitro-in vivo study on commercial silica samples. The very positive results of these studies have been recently delivered and should be published soon. In the absence of known carcinogens, the human data showed no consistent relationship between RCS and the development of lung cancer. The experimental data seems to favour a secondary genotoxic effect mechanism.

EUROSIL also launched several new initiatives. Carl Kirby, EUROSIL's TC chairman, co-ordinated a study conducted amongst quartz producing and consuming sectors on the socio-economic consequences of a possible lowering of current limits. This study should be completed by the end of 2003. A Regulatory Affairs Committee (RAC) and a Research Committee were created this year, firstly to monitor regulatory developments and recommend strategic orientations, and secondly, to make proposals on further research.

While the RAC worked hard to develop a draft Good Practices Document for RCS to be discussed with the stakeholders; the Research Committee reviewed a series of research proposals. It recommended to hold the second EUROSIL Scoping Meeting in Autumn 2003 to discuss new research orientation with a panel of scientific experts. EUROSIL organised a first Scoping Meeting in October 2002 on the occasion of the Third International Symposium on Silica, Silicosis, Cancer and Other Diseases (ISSCOD3) in San Margherita de Ligure.

EUROSIL's Secretary-General was invited to make presentations on the RCS EU regulatory developments: in the above-mentioned ISSCOD3, in the Mining Social Dialogue Committee January 2003 meeting, and in the International Social Security Association (ISSA) Mining Committee Conference in Johannesburg in May 2003.

New Chemicals Policy

In 2001, the White Paper on a Strategy for a Future Chemicals Policy (COM(2001)88final) announced that a new system governing registration, evaluation, authorisation (and restriction) of chemicals (i.e. REACH) will be implemented according to a tiered approach based on production figures. IMA-Europe submitted to the Commission strong arguments in favour of differentiating minerals from chemicals in the new legislation. As a consequence, the draft proposal released in May for public consultation should grant a registration exemption for naturally occurring substances, minerals and ores which have not been chemically modified during the

process provided they do not meet the criteria for classification (as defined by the Dangerous Substances Directive, 67/548/EEC).

This is certainly a first significant step towards the recognition of IM specificity within the context of EU legislation, and we may be satisfied by the positive outcome of IMA's action.

The IMA Chemicals Task Force now has to assess the residual impact of REACH on our sector and prepare a REACH strategy for circumstances under which exemption would not be granted.

Food & Feed and Related Issues

This year, the food and feed legislation was dominated by the recasting of Directive 70/524/EEC on the authorisation of feed additives, and the revision of the annexes of Directive 2002/32/EC on undesirable substances in animal nutrition.

With regard to the recasting of Directive 70/524/EEC, IMA continued its fruitful co-operation with FEFANA for developing guidelines for the assessment of feed additives. These guidelines propose a pragmatic and simplified procedure for assessing simple and safe technological additives (e.g. industrial minerals). In the meantime, IMA's members are considering the opportunity of this recasting to request the replacement of the current "binders" group by two more precise and targeted groups, i.e. pelletising aids and mycotoxin adsorbents in accordance with the feedstuff industry's technological developments and requirements.

The revision of the annexes of Directive 2002/32/EC raised tremendous interest within IMA's membership, as it aims to reconsider the limit values for heavy metals, dioxins and dioxin-like PCBs in products used in animal nutrition. With regard to heavy metals, IMA's response consisted in creating distribution curves to identify the possible limit values which could be met by industry. Regarding dioxins, the Commission recently decided to waive a dioxin limit for bentonite and diatomite. The proposal is expected to be adopted at the beginning of August 2003.

In addition, following the call for data on possible dioxin-like PCBs' contamination, IMA-Europe launched a new dioxins and dioxin-like monitoring exercise on about 130 samples. The results clearly demonstrated that there was no reason for concern for dioxin-like PCBs (content < 25 pg WHO-TEQ/kg) and confirmed the insignificant level of dioxins in minerals used in animal nutrition.

Finally, IMA-Europe will need to continue the close monitoring of the food contact materials legislation, where amendments to the Framework Directive and to the Plastic Directive are expected.

Horizontal Issues – Environment

Directive for the Management of Mining Waste

After a two-year extensive consultation process with all the stakeholders, the Commission is close to releasing its final proposal for a directive on the management of waste from the extractive industries. Following the contributions of IMA's experts and other colleagues from the sector, DG Environment stepped down from its initial position, which has become less prescriptive. For instance, most of the technical details have been moved to the BAT Reference Document, with industry largely contributing to its drafting. Moreover, unpolluted soil would be excluded from the scope of the Directive. With regard to the timetable, the Commission's proposal would be submitted for approval to the Council and the European Parliament by September 2003, which means that the final text will not be adopted before 2005.

Recalling that the key challenge for IMA's members is to prevent topsoil and overburden being considered as waste, IMA has already launched an information campaign to provide the Members of the European Parliament with the appropriate evidence. Most MEPs approached so far have shown interest in the arguments of the industrial minerals sector.

BAT Reference Document

In September 2002, the Commission released the first draft of the Reference Document on BAT for the management of tailings and waste-rock from the extractives industries. Currently, this document of approximately 375 pages consists mainly of a comprehensive introduction (i.e. chapters 1-3). After the submission of extensive comments on this first draft, IMA's experts worked closely on the preparation of an input on techniques to be further considered as BAT (i.e. chapter 4). A second draft is expected by the end of May. In the meantime, the Secretariat, with the support of several members, organised a one-week visit programme for Mr Theben (civil servant in charge of this exercise) in order to show him how the IM industry manages its tailings. Unfortunately, Mr Theben had to report these visits for administrative reasons.

Thematic Strategy for Soil Protection

As announced in the Communication on Soil Protection – COM(2002) 179 final – the Commission set up an Advisory Forum bringing together representatives from Member States, industry, NGOs and the European Commission. IMA-Europe successfully applied for a permanent seat on this Forum. The objective of this Forum is to define the mandate of five Working Groups (Contamination, Monitoring, Erosion, Research, and Organic Matters) and to co-ordinate the work of each group. Beside the needs to monitor any further developments in these groups, IMA's active participation should be seen as an opportunity to alert the decision-makers to one of the most important stakes for the IM producers, which is the access to resources.

Horizontal Issues – Sustainable Development

Sustainable Development Indicators

In June 2002, a multi-stakeholders group (SDI WG) finalised a set of Sustainable Development Indicators (SDI), aimed at tracking and promoting the extractive industries' sustainability performance. The first reporting exercise, based on 2001 data, was launched in autumn 2002, and all IMA's members were invited to participate in this project. So far, a forty percent response has already been achieved. However, IMA-Europe will continue to promote this important exercise of transparency and aims to obtain the participation of all its members. This would demonstrate the sector's commitment to sustainable development. For that purpose, the IMA SDI WG is developing a guidance document to accompany the questionnaire. The second reporting exercise for the collection of the 2002 data will be launched in the autumn of 2003.

The SDI WG is currently writing the report, which will only disclose consolidated data, i.e. aggregated at European level and for all the industrial minerals. The European Commission will issue a press release upon its publication in view of giving visibility to this initiative. The publication, expected by August 2003, will be posted on the Commission's web site. In the meantime, the SD indicators and the 2001 results were presented at an international conference "Sustainable Development Indicators in the Minerals Industries", held on 21-23 May in Milos (Greece).

ETAP: Environmental Technologies Action Plan

In March 2002, the Commission issued a Communication on "Environmental Technology for Sustainable Development" which argued that environmental technology could contribute to sustainable development by protecting our environment and at the same time contribute to economic growth. However, currently, market barriers and a number of other obstacles prevent companies from realising their full potential. Therefore, in COM(2003)71, the EC proposes to develop an action plan with stakeholders to tackle obstacles to the development, take-up and use of environmental technologies. The aim is to identify promising technologies, their barriers, and the appropriate measures to overcome these barriers. This Communication sets out a number of issues emerging from a preliminary situation analysis, and invites stakeholder feedback.

Since the extractive industry is implicated in this action plan, the IMA TC has added this item to its work programme.

Horizontal Issues: Communication

IMA Communication Strategies

As the concept of Corporate Social Responsibility (CSR) settles in, IMA-Europe's members recognise the importance of enhancing their communication with stakeholders. Transparency and dialogue have thus become key elements of IMA-Europe's communication strategies.

It is in this context, that IMA-Europe launched its Awareness campaign; "*Essential, Smart and Beneficial Minerals: Your world is made of them*", the communication tools of which were successfully developed in 2001-2002.

In a first phase, communication efforts are being directed towards authorities (e.g. recent initiatives to establish dialogue with a selection of MEPs) and local communities to increase the understanding and knowledge of the sector, its activities and the essential raw materials it provides. The campaign material creates public awareness, making it clear that industrial minerals are all around us in thousands of products and applications.

The awareness campaign was launched in Brussels on 5th and 6th of June, at **IMA-Europe's 2002 Conference**, which was hosted by the European Commission's Enterprise Directorate General (DG) under the Patronage of Mr Erkki Liikanen, Commissioner responsible for Enterprise and Information Society. The event brought together more than one hundred participants, among which MEP Malcolm Harbour, Member State representatives, European Commission officials from different DGs and many chief executives from the industrial minerals industry.

Under the banner "*Industrial Minerals: A world of possibilities - From quarry to high-tech*", the conference featured prominent speakers from end-user industries to illustrate the use of industrial minerals in high-technology applications, such as the high-speed magnetic levitation train (ThyssenKrupp Transrapid), hydrogen fuel cell technology (Millennium Cell, USA), nanocomposite fillers (Süd-Chemie), and ballistics protection through high-tech ceramics (ETEC). IMA was also honoured to welcome a representative from ESA, who highlighted the use of industrial minerals in space programmes.

The Awareness campaign greatly increased IMA-Europe's visibility and has started to create a **corporate identity** for the industrial minerals sector, which will soon be reinforced by the creation of an IMA-Europe charter.

To further increase its visibility, IMA-Europe and its members continue to promote the campaign at international exhibitions and conferences, such as the: *Société de l'Industrie Minérale* (SIM) Conference and Exhibition, October 2002 in Liège; Minerals 2003 - Corporate Social Responsibility (CSR) Conference, January 2003 in Brussels; SDI Conference, May 2003 in Milos.

A wider recognition of the Association was evidenced by the significant increase in website visits and requests for information from around the globe. In addition, Industrial Minerals regards IMA-Europe as an authority on EU regulatory affairs and offered to publish articles written by IMA on a bi-monthly basis in its "Legal Eye". The articles published so far are: "An introduction to EU Regulatory Affairs"; "Testing times in store for Minerals" (on the New Chemicals Policy); "The devil in detail" (on the new Mining Waste Directive), "Sustainable development - it's a reality" and "New authorisation for minerals' use as feed additive".

Horizontal Issues: Research & Development

IMA-Europe's involvement in RTD

Since October 2002, IMA-Europe has been a member of the Advisory Board of NESMI, the Network on European Sustainable Mining and Processing Industries. NESMI provides a platform for dissemination of information on RTD activities in the mining and mineral processing industries. This Network is made up of industries, associations, consultants and universities and is supported by the European Commission. At the same time, IMA-Europe has also joined EMIREC, the European Minerals Resource RTD Council, for which Euromines provides the secretariat.

Both organisations aim at identifying the sector's priorities in RTD and at promoting research projects relative to the extractive industry in the EU 6th Research Framework Programme (FP6). Through these affiliations, IMA-Europe should be able in the future to inform and assist its member companies in obtaining EU funds for research projects of interest to them. The Secretariat informed all IMA-Europe Members of this new involvement in RTD issues and identified a contact list of 15 people particularly involved and interested in these issues.

On 14 January 2003, EMIREC and NESMI organised a special information day on R&D, which was open to all interested companies from the mining/mineral sector. Eight IMA-Europe Members participated in this event. The intention was to agree on joint proposals for research projects from the extractive industry in the frame of FP6.

As a result of the meeting, one Integrated Project called MISTRESS, (Mining Industry Solutions to Reinforce Europe's Sustainable Society) was submitted for funding to the European Commission and is currently under evaluation. An integrated project is a large project with horizontal and vertical sub-projects. Several IMA-Europe companies are involved in this project.

On 27-28 March in Orléans, NESMI held its annual network meeting. At this meeting, the achievements of the organisation and its future objectives were presented to the 60 participants, among which one IMA representative.

The two main objectives of NESMI for the coming year are to define a common RTD strategy for the extractive industry, and to set up an RTD database. Within this aim, five different areas of research, called work packages, were identified, i.e. waste minimisation and resource management; recycling and ecological production; market and competitiveness; eco-efficient and intelligent mineral processing and metallurgy; and health & safety.

From the cluster meetings on these different work packages, it was concluded that further and more precise information should be collected among NESMI's members so as to further develop the RTD strategy. A questionnaire will be posted on NESMI's website (www.nesmi.net) to clearly identify the competency and demands of the sector in RTD in general, and for each work package.

The next event organised by NESMI will be a Conference in Prague in autumn 2003. Through IMA's involvement in these RTD activities, IMA's members may have a better chance of getting access to RTD opportunities.

Overall Activities - External Relations

Interaction with the EU Stakeholders

While maintaining its activities within the Commission, in the Raw Materials Supply Group within the frame of the SDIs initiative and, more recently, on Enlargement, as well as in various DG Environment consultation processes (mining waste, NCP, BAT), IMA has extended its network to new areas and directions.

With respect to the new topics, these cover notably research, standardisation and social dialogue.

This year IMA became a member of two research platforms: NESMI and EMIREC (see R&D, page 13). The association has also applied for liaison membership status of CEN TC 137 "Assessment of workplace exposure", and of CEN TC 327 "Animal feedingstuffs – Methods of sampling and analysis". IMA's bentonite association EUBA is already a member of CEN TC 189 "Geosynthetics" and was represented at a TC meeting in Gdansk, Poland in April 2003.

Finally, to reinforce its presence in H&S discussions at EU level - i.e. on OELs settings, on the standardisation of occupational diseases recognition criteria - the Association now wishes to take active part in the Mining Social Dialogue Committee to address these issues in a forum that will certainly have a greater impact in the future. At a Committee meeting in Jan 2003, the Secretary General held a presentation on silica, which had been very well received by the EC and social partners. In view of a possible membership, IMA-Europe was subsequently invited to a conference in Bucharest, Romania, on the "Promotion of sustainable development in the mining industry", on 25-26 April, which was also attended by many social partners from the accession countries. Good initial relations have been established so far.

Finally, IMA-Europe has also decided to enlarge its sphere of activities to make the industrial minerals sector better known within the European Parliament (EP) (see COM SC, page 5).

Partnerships

To complete this brief review of extensive activities, one should mention the involvement of the Association in the Non-Energy Extractive Industries Panel (NEEIP), in UNICE (employers' association), in CEFIC Food Contact Panel and feed additives sector group (FEFANA), but also with colleague associations, such as the long established co-operation with EUROMINES, Cerame-Unie, as well as more occasional contacts experienced this year such as with the construction industry (FIEC) and the super absorbents producers (EDANA).

With the creation of our sister organisation IMA North America in April 2003 based on IMA-Europe's model, IMA-Europe welcomed both the extension of industrial mineral industry representation towards a more global coverage, and a unique chance of fruitful co-operation and information exchange between the EU and the US producers. IMA-Europe representatives were invited to the IMA-NA Spring General Assembly last April in Florida, where they worked actively with the IMA-NA silica and ball clay sections. They identified common banner issues. IMA-Europe's Secretary General reported on the EU activities and contributed to the Sustainable Development Session in presenting our 2003 SD Programme. Further exchanges are planned with the participation of IMA NA Chairman, Rick Shearer, to the IMA-Europe General Assembly.

Vertical Issues – Sections' Activities

One of the key success factors of IMA-Europe is that the Industrial Minerals producers join forces on common issues, while addressing mineral-related matters through their own sections..

CCA-Europe: Acknowledging the great importance of the food and feed markets for the calcium carbonate producers, CCA-Europe set up its own Technical Committee in October 2002. This Committee mainly deals with issues relating to the legislation of products authorised in the food chain, but its scope could be extended according to members' needs. The CCA TC experts have been very active and they submitted a concrete proposal to the European Commission, aimed at getting realistic limits for heavy metals in calcium carbonate for use in animal nutrition. The CCA TC brings together some 11 representatives from almost every CCA member company or group.

CCA-Europe's membership has recently been extended with the joining of separate Imerys' business units from Belgium, Sweden and Italy and now consists of some 32 companies.

EBA: In 2002, Bormine , a Lausanne based Swiss company which grinds, distributes and markets borate minerals, applied for membership of EBA. The application process for this company, which is a subsidiary of the Dutch company Ankerpoort, is expected to be finalised mid 2003. The European Chemicals Bureau (ECB) working group on classification and labelling proposed a provisional category 3 for borax and boric acid. In the event of classification being ratified which is still being vigorously challenged by EBA, the absence of any specific preparation limit would result in a limit of 5% borax decahydrate and 5% boric acid. EBA's successful intervention resulted in a preparation limit of 5% B₂O₃, considerably higher than the default limit. The first harmonised safety data sheet for borax decahydrate was issued by EBA. Thus, consumers will have a single unconflicting source of safety data and borate producers will avoid the need for duplicated translations. The EBA website was completed and is now accessible to both members and the general public.

EKA / EUROARGILLA: With the joining of EuroArgilla under IMA-Europe's umbrella, the EKA Board has worked closely with EuroArgilla on a proposal to merge both sections into a single entity. The driving force behind this initiative was the fact that both sections deal with similar issues and, therefore, a merger would increase the synergy between the producers and reduce work duplication and its subsequent costs for member companies. Subject to the approval of their respective General Assemblies, it is expected that the merger between EKA and EuroArgilla will be effective by January 2004

This year, the 2003 EKA Conference devoted to Sustainable Development will be organised in Cornwall-Devon (UK) on 26-27th June and is kindly hosted by Goonvean, Imerys and WBB Minerals. EuroArgilla members will hold their General Assembly in Bordeaux on 17-18 June. On the technical side, EKA and EuroArgilla held a joint TC in March and a second joint TC meeting is scheduled for 3rd July. Taking the example of other IMA-Europe Sections, EKA has developed its own harmonised safety data sheet (SDS) and the plastic clays producers decided to update their 5-year old harmonised SDS. Issues of common interest were also identified for further consideration.

EUBA: The activities of the bentonite producers were focussed on the development of standards for the bentonite tests, i.e. the analytical procedures for the determination of the methylene blue value and of the swell index. After having successfully raised this issue at European level through the CEN/TC 189 "Geosynthetics", EUBA succeeded this year in submitting these tests to ISO (International Standardisation Organisation), for consideration. This was achieved thanks to the effective involvement of EUBA's members at national level, i.e. through their national standardisation bodies (e.g. DIN, BSI, AENOR, etc.).

EUBA welcomed Bentonite Performance Minerals (BPM) as a new member, but received the resignation of Minsol.

EUROFEL: In June 2002, EUROFEL's members held their Annual General Assembly in Viseu (Portugal), which was magnificently hosted by Felmica. The 2003 AGM will be hosted by DAM in Perpignan and for the first time, ESAN, the leading Turkish feldspar producer which manifested an interest in joining EUROFEL, will attend the meeting as special guest.

On the technical side, the biannual inter-laboratory exercise gained a new dimension with the development of internal feldspar standards. These standards will be particularly useful for the calibration of quality control equipment.

EUROSIL: With the submission of comments to SCOEL, the preparation of a good practices document and of a socio-economic study, and the completion of two important research projects, EUROSIL members have again developed extensive activities during the last year (see also chapter Product Regulation, Crystalline Silica for more details). A stronger co-ordination of these various initiatives was achieved thanks to both the creation of two new committees, one on regulatory affairs (RAC) and one on research, and through regular co-operation with partner associations, such as IMA-NA, National Industrial Sand Association (NISA) and IDPA.

EUROTALC: Further to the impetus of Patrick Delord (Luzenac, IMA FFC's TC Chairman), the talc producers contributed actively to the revision of the feed legislation. On the other hand, they successfully requested the Joint Expert Committee for Food Additives (JECFA) to review the talc monograph. Indeed, the last updated monograph released in 2000 has jeopardised the conditions for talc use as food additive. The revision has been put on the agenda of the next JECFA meeting of June 2003. Due to the international impact of this issue, a co-operation was initiated with the talc section of IMA-North America.

IDPA: Joining IMA-Europe in January 2003, the International Diatomite Producers Association got rapidly involved in IMA-Europe's activities. They participated in the new IMA-Europe SD Programme, especially in the drafting of the Charter, and enthusiastically joined the Awareness Campaign on Industrial Minerals. They immediately established good co-operation with the silica section, with which they share special concerns. They are notably active members of the EUROSIL RAC and discuss possible common research projects for the silica and diatomite industries through the Research WG.

Financial Report

In 2002, collected membership fees amounted to € 668.843. They included the additional funding for the communication project and the membership fees from the new plastic clays section, created on 1st July 2002. With the bank interest, this gave a total income of € 671.429.

The expenses for 2002 amounted to € 633.954 against a budgeted expenditure of € 674.860, resulting in a surplus for the year of € 37.475 instead of a deficit of € 40.755. This was due to the unexpected income from the newly created plastic clays section, and the fact that the funds allocated to the communication project were not entirely spent in 2002. The balance sheet of 2002 shows a closing surplus of € 128.262.

The accounts of IMA-Europe and its Sections have been revised by a company auditor.

The 2003 membership fees will amount to € 625.000. With the expected bank interest, the total revenues will be € 627.500. The 2003 budget proposal takes into account a salary revision, the hiring of a new staff member (Scientific Officer), the up-grading of the computer system (instalment of an extranet) and the follow-up of the hygiene and communication projects.

For 2003, the value of one share has been rounded to € 25.000.

The 2003 plan foresees the use of € 128.262 of the 2002 carried forward surplus, which should result in a closing surplus of € 84.062 at the end of 2003.

At the IMA Board meeting held in March, it was recommended that the 2002 accounts and the 2003 budget be approved by the IMA General Assembly (4 June 2003).

Financial Report

Budget

	2002 BUDGET	2002 ACTUAL	2003 BUDGET
<u>REVENUES</u>			
Membership fees	482.105	482.100	625.000
Bank interests	2.000	2.586	2.500
Extra funding	150.000	150.000	
New Plastic Clay Section fees		36.743	
Total	634.105	671.429	627.500
<u>EXPENSES</u>			
Employment	317.200	315.933	389.000
Office rent & fixed charges	35.700	35.886	37.500
Office running expenses	41.403	47.337	47.500
Legal & accounting expenses	3.840	2.135	3.900
Meeting and travel costs	34.705	41.986	39.000
Tax/Insurance/Bank	3.400	3.400	4.000
Equipment	2.500	3.010	53.000
Office maintenance	7.300	2.324	7.300
Consultancy/Research support	6.000	0	6.000
Industrial Hygiene Project	29.062	29.593	35.000
PR & Communication	187.000	152.350	47.000
Conference support & sponsoring	6.750	0	2.500
Total	674.860	633.954	671.700
Surplus <Deficit> for the year	<40.755>	37.475	<44.200>
Accumulated surplus B/FWD	90.785	90.785	128.262
Closing surplus C/FWD	50.030	128.262	84.062

IMA Board Members (on 1 June 2003)

IMA - Europe	President	Mr A.J. Talmon	
CCA - Europe	President	Mr G. Majewski	Omya GmbH
	Vice-President	Mr N. Trivedi	Minerals Technologies Europe
EBA	President	Mr S. Murray	Representing Borax Europe Ltd
	Vice-President	Mr R. Akgunduz	ETI Holding AS
EKA	President	Mr. O. Vandermarcq	Imerys
EUROARGILLA	President	Mr R. Shuttleworth	WBB Minerals
EUBA	President	Mr C. Watkins	Stetley Bentonite & Absorbants Ltd.
	Vice-President	Mr K. Anavlavis	Silver & Baryte Ores Mining Co.
EUROFEL	President	Mr M. Lebrun	Denain Anzin Minéraux
	Vice-President	Mr O. Hieber	AKW-Kick
EUROSIL	President	Mr H. Grosspeter	Quarzwerke
	Vice-President	Mr A. Speeckaert	SCR Sibelco
EUROTALC	President	Mr C. Stenneler	Talc de Luzenac
	Vice-President	Mr W-D. Keller	Mondo Minerals
IDPA	President	Mr M. Mirliss	IDPA Secretary General
	Vice-President	(non-nominative)	
IMA-NA	President	Mr R. Shearer	US Silica Corporation
IMA TC	Chairman	Mr J. Rainer	Borax Europe Ltd.

IMA TC Members

TC Chairman	Mr. J. Rainer	Borax Europe Ltd
CCA - Europe	Mr. I. Smith Mr T. Schlegel Mr. B. Vaux Mr. J. Mansell Dr. H. U. Hoppler	Omya UK Lhoist Omya AG BCCF Omya AG
EBA	Mr. P. Bonini Dr. M. Gündüz	Societa Chimica Larderello Eti Holding
EUBA	Dr. P. Maraboutis Dr. M. Stefanakis Dr. W. Moll Dr. F. Ruf Dr. H. Griethe Mr. F. Escribano Mr. L. Sorensen	Silver & Baryte Ores Mining Co Silver & Baryte Ores Mining Co. Oil Dri. Corp. Süd-Chemie Süd-Chemie Tolsa Damolin
EKA	Mr. R. Taylor Mr. P. Larson Dr. R. Bown	Imerys Imerys Imerys
EUROARGILLA	Mr. G. Roch Dr. W. Fiebiger Mr. J-N. Gony	Imerys Stefan Schmidt Gruppe APPMI
EUROFEL	Mr. F. Evano Mr. J. Siegert	Denain Anzin Minéraux AKW-Kick
EUROSIL	Mrs. A. Buttiens Mr. C. Catteau Dr. C. Kirby Mr. A. Price Mr. P. Masurel	SCR-Sibelco Sifraco SAMSA WBB Minerals Denain Anzin Minéraux
EUROTALC	Mr. M. Van den Hout Mr. E. Turner Mr. Y. Le Mailloux	Mondo Minerals B. V. Talc de Luzenac Talc de Luzenac

IMA FFC Members

FFC Chairman	Mr. P. Delord	Talc de Luzenac
CCA - Europe	Mr. L. Bertoux Mr. J. Mansell Mr. A. Horeczky Mr F. Ponchon Mr. N. Peschen Dr. T. Schlegel Mr. A. Ribeiro Dr. N. C. Trivedi Dr. H. U. Hoppler Mr. B. Vaux Dr. B. Tavakkoli Mrs. C. Delfaux	Ankerpoort BCCF / Omya UK Carmeuse Carmeuse Damman Lhoist Minerals Technologies Europe Minerals Technologies Europe OMYA AG OMYA AG OMYA GmbH Provençale S.A.
EBA	Dr. M. Gündüz	Eti Holding
EKA	Mr. F. Picart	SOKA
EUBA	Mr. L. Bertoux Dr. W. Moll Dr. S. Stefanakis Dr. H. Simmler-Hubenthal Dr. H. Griethe Mr. F. Escribano	CECA Oil Dri Corp. Silver & Baryte Süd-Chemie Süd-Chemie TOLSA S.A.
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EUROSIL	Mr. C. Catteau Mr. A. Price	SIFRACO WBB Minerals
EUROTALC	Mr. M. Mondonico Mr. Van den Hout	IMI Fabi Mondo Minerals

IMA Communications Steering Committee

Chairman	Mr C. Stenneler	Talc de Luzenac
CCA - Europe	Mr. G. Majewski	Omya GmbH
EBA	Mr. S. Murray	Borax Europe Ltd. (on behalf of)
EUBA	Ms I. Bardani	Silver & Baryte Ores Mining Co.
EKA/EUROFEL	Mrs. A. Leroux	Denain Anzin Minéraux
EUROSIL	Ms. S. Holz	Quarzwerke
EUROTALC	Mrs. L. Jones	Talc de Luzenac

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	Mr. F. Kiechle	Omya AG
EKA	Mr. A. de Vallois	DAM
EUROFEL	Mr. J. Siegert	AKW
EUROSIL	Dr. E. G. Astrup	Elkem AS
	Ms. A. Buttiens	SCR Sibelco
	Mr. F. Meunier	SCR Sibelco
	Mr. A. Price	WBB Minerals
EUROTALC	Dr. M. Réfrégier	Talc de Luzenac
CONSULTANTS	Dr G. Auburtin	CNAM-IHIE
	Mrs C. Barat	CNAM-IHIE