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Message from the President



*Gisbert Majewski
President*

On the occasion of our General Assembly, the time has come again to measure the achievements of the year. This year is also time for me to look at the developments during the last four years, since in June my mandate as IMA-Europe's President will end.

First of all, I would like to commend the foundation of IMA-North America warmly. Founded in April 2002 on IMA-Europe's organisation and structure model, IMA-NA gives us confidence that we were right in our choices when setting up IMA-Europe almost ten years ago.

I wish IMA's counterpart on the other side of the ocean, a success comparable to the one we have known in steadily gathering together the members of the industrial minerals industry on common objectives and projects. In this respect, IMA-Europe has this year welcomed some new member companies, notably in EUBA with the joining of Tolsa and Minsol, in EUROFEL which was joined by Felmica and in CCA-Europe joined by Solvay. I am also delighted to see the first clay producers joining IMA-Europe in July this year. Since 1998, when I took the Presidency, IMA-Europe has grown from five to seven, and soon eight sections.

Another aspect which is essential to the success of the associative life is the ability to establish relations with an ever increasing number of stakeholders and to gain their attention on the issues of concern to the Association. I am particularly pleased that, since we acknowledged the need at IMA's 2000 Conference on Communication, IMA has progressively reinforced its contacts with the Members of the European Parliament.

So, I can now pass the baton to André Talmon. I am confident that he will not only take good care of the interests of our Association, but I am certain that he will give IMA-Europe a new impetus. I wish him every success in his mission and as many joys as I have experienced during my mandate. I shall obviously remain at the Association's disposal and give André my full support.

Finally, I would like to warmly thank all IMA's Members for their confidence, and a special thanks to the IMA team for their kind support. Indeed, the success of our Association is only granted by the professional work and the outstanding engagement of our permanent staff in Brussels.

Message from the Secretary General



*Michelle Wyart-Remy
Secretary General*

This year marks another turning point in IMA's young existence.

In June, IMA's presidency will change and Gisbert Majewski will hand over to André Talmon. Our Presidents have always imprinted their own style upon the Association and this will certainly be the case once again.

As IMA's President, Gisbert Majewski has given IMA size and visibility. His two mandates have seen the joining of the kaolin producers association EKA and the setting up of the borates association, EBA. Gisbert also actively contributed to the creation of the bentonite producers association, EUBA. At the same time, in his capacity of CCA's President, Gisbert Majewski was responsible for the successful development of the calcium carbonate association.

With his extraordinary enthusiasm, Gisbert has opened numerous contacts, not only with potential new members, but also within the regulatory circle. He also pushed IMA to develop a real strategy for communication, and the launching of the Industrial Minerals "**awareness**" campaign on the occasion of our 2002 Conference. For this and for his continuous support to the Association's goals, we should thank him warmly.

Looking to the future, but taking stock of existing achievements, André Talmon has announced his intention to give IMA a new dimension, with emphasis beyond technically-orientated issues towards more long-term strategic issues such as Sustainable Development. André also launched the idea of creating an Industrial Minerals Chief Executives Council (IMCEC). The Council, which will be inaugurated at the time of IMA's Annual General Assembly, is aimed at discussing and providing long-term, strategic direction to the Association. This initiative will certainly provide the European Industrial Minerals industry with a more focused driving force on important issues.

One of the key events of the last months, which will significantly influence IMA-Europe's future, is certainly the creation of IMA North America. The establishment of IMA's sister association in America and Canada announces the beginnings of a global approach of the issues faced by our industry, through enhanced synergy and co-operation.

Finally, several important projects have been completed this year. To mention a few: the industrial minerals "**awareness**" campaign, the development of a standardised dust monitoring protocol and the training course associated with it. In co-operation with other associations of the extractive industry sector, the development of Sustainable Development indicators. These successful initiatives, which have been completed thanks to the commitment of several members from all IMA's sections, demonstrate clearly that IMA is entering a new era. We have indeed gained the maturity and recognition from the European Commission and the European Parliament allowing IMA to better voice industrial minerals industry positions, and, at the same time, developing ambitious projects intended to make IMA more credible and more visible.

These successful developments would certainly not have been possible without the support of the IMA Board and the committed involvement of IMA's section delegates, not forgetting the exceptional enthusiasm of my colleagues from the IMA team. To all of them my warmest thanks.

Report from the Statutory Bodies

Board of Directors



*André Talmon
IMA-Europe President-Elect*



*Graham B. Lawson
IMA-Europe Vice-President*



*Sean T. Murray
EBA President*



*Olivier Vandermarcq
EKA President*

Anticipating Gisbert Majewski's Presidency ending in June 2002, the Board designated André Talmon as President Elect. End of 2001 also saw Roger Preston retiring from his professional activities. In its December meeting, the Board paid him a warm tribute for his significant and friendly commitment to IMA's actions. Olivier Vandermarcq replaced Roger Preston as EKA's President and IMA's Director.

At André Talmon's initiative, the Board reflected on IMA's future with a view to better address actual implementation of sustainable development concepts in our industry. Before establishing priorities for the coming years, the Board first assessed IMA's achievements since its establishment. The results were very positive, IMA having succeeded not only to assemble the European producers of seven, and soon, eight, key minerals, but the association led these competitive sectors to successfully work together on common projects. The Board acknowledged that IMA has achieved its founding goals, gaining reputation and credibility as the representative of the industrial minerals sector, building a real information centre for this sector and establishing in Brussels a secretariat supported by a competent team. On this basis, the Board designed a programme that will be submitted in June to the newly-created Industrial Minerals Chief Executive Council (IMCEC). The concept of IMCEC was agreed by the Board to provide IMA with guidance on future policy and strategy, especially regarding promotion and implementation of sustainable development principles in the industrial minerals industry.

In parallel, the Board monitored the progress of the communication and industrial hygiene projects which were launched this year. Keeping an eye on a series of regulatory dossiers - in particular the proposal for a mining waste legislation, the new strategy on chemicals and crystalline silica regulation - the Board decided to set up within IMA a new committee, the Food and Feed Committee (FFC). The mission of the new committee is to address all the relevant aspects linked to the Community initiatives in the area of food, feed and food contact additives.

In October, the Board visited Talc de Luzenac's plant and quarry in Trimouns, following the new tradition that the Autumn Board should take place at one of the Board's members operations.

At the occasion of the Industrial Minerals magazine 15th Congress, held in April in Paris, the Board organised a cocktail party where they welcomed some fifty IMA Members and colleagues from the industrial minerals industry.

Technical Committee

Under the chairmanship of Jonathan Rainer (Borax Europe), the Technical Committee and its 26 delegates reviewed this year an increasing number of issues. With the support of a SDI Shadow Group opened to our colleagues from other sectors of the extractive industry, the TC continued to be involved with a steadily interest in the development of Sustainable Development Indicators (SDI).

This year, particular emphasis was given to the early monitoring of regulatory developments at the time a series of thematic strategies are debated. This was the case of the strategies related to soil protection, the sustainable use of non-renewable resources, and the future of chemicals'



Chris Watkins
EUBA President

policy. For this last file, a small Task Force was designated to draft IMA's position. In the same way, the TC prepared our industry comments to the early draft documents of the future proposal for a mining waste directive.

Finally, the IMA TC joined the European industry wide movement addressing an unsound initiative of the European Parliament (EP) regarding the Physical Agents Directive on noise and on vibration. In both cases, the Members of the European Parliament (MEP's) requested severe amendments on a EU Council Position which would have made some activities impossible to conduct, in particular in the extractive industry, but also in agriculture and forestry (vibration) and in aeronautics and musical entertainment (noise). In this particular file, industry's strong and logical arguments were heard and the EP withdrew most of the concerning amendments.

Food and Feed Committee



Marc Lebrun
EUROFEL President

Acknowledging the recent dramatic evolution of the food and feed legislation and the importance of the possible consequences for a majority of IMA Members, the IMA Board agreed to set up a new committee dedicated to these issues. The Food and Feed Committee (FFC) chaired by Patrick Delord (Luzenac), groups together some 20 representatives from all IMA's sections, from whom a dozen regularly attends the meetings.

The FFC held two meetings since its creation in January '02 to which they invited Mr. Verstraete (Commission, DG SANCO), and the Secretaries - General of two European associations of feed additives manufacturers FEFANA and EMFEMA. The FFC delegates who fixed the scope and working practices of their committee, have indeed privileged co-operation with, on the one side, the regulatory authorities, and on the other side, customers' organisations. They concentrate on the recast of the old legislation authorising feed additives in a new Regulation on animal nutrition and on the legislation under preparation related to contaminants in animal feed, i.e. dioxins, PCBs and heavy metals.

Communication Steering Committee



Peter Overdick
EUROSIL President

The Communication Working Group has made a recommendation to the IMA Board for developing the project of an awareness campaign on industrial minerals proposed by one of the communication agencies that have been consulted. The project was adopted in June 2001 and the task delegated to a Steering Committee made out of the Working Group. During the last twelve months, the Steering Committee followed the development of the awareness campaign: "**Industrial minerals - essential, smart and beneficial : your world is made of them**".

The delegates from all IMA's sections, responsible for communication in their company were supported by some IMA Board Members and the Secretariat. Everyone worked intensively to draft the content of the information materials that were developed and to review the artwork designed by the agency.

Hygiene Steering Committee



Claude Stenneler
EUROTALC President

The Hygiene Task Force has delegated the development of the IMA standard dust monitoring protocol to a Steering Committee of eight experts in health & safety from all IMA 's sections who actively supported the "Institut d'Hygiène Industrielle et de l'Environnement" (IHIE, Angers). They took care of harmonising dust monitoring practices in our sector, taking account of national obligations and company policies. They also provided a pragmatic approach and practical exercises for the IMA hygiene training organised in March '02.

Horizontal Issues - Health and Safety

This year was sadly marked by Dr. Giorgio Aresini's sudden death. Advisor to DG Employment and Social Affairs, this Italian Medical Physician, whose thesis was on silicosis mortality, joined the Occupational Medicine and Hygiene Unit of the Commission in 1981, where he occupied notably the chairmanship of the Scientific Committee for Occupational Exposure Limits (SCOEL) from 1994 till 1999. All those, in industry and in the scientific community, who had a chance to meet him and to work with him, paid with sorrow a warm tribute to his memory.

IMA Industrial Hygiene Project

Launched two years ago, the IMA 4-Phase Industrial Hygiene Project aims at developing a harmonised dust monitoring strategy in our sector and the job-exposure matrix of the industrial minerals industry. Its preparatory Phase I, completed last year, identified current dust monitoring practices in IMA's member companies and national regulation in this area.

This year has seen significant further progress, with the completion of the project **Phase II**. It consisted in the elaboration of a standard protocol by the institute project leaders (Dr. G. Auburtin and F. Meunier, IHIE, Angers) with the support of IMA's Hygiene Steering Committee. As a result, a **two-day training course** was organised to help IMA's member companies to implement the protocol.

Attended by 35 participants from 23 IMA companies, the Hygiene Training organised on 21–22 March '02 was a great success. While the course content was well assimilated, the discussions and information exchanges between the participants were also particularly fruitful. It was suggested that in the future IMA should organise other training sessions on health and safety issues. A discussion forum will be set up on the IMA website. Dedicated to the Hygiene Project, it will enable the companies participating in the dust measurement campaigns to share experience, and hopefully to receive answers to their questions.

It is planned to translate the protocol into different languages. Further training sessions will be held in the UK, and for French-speaking Members. Additional sessions might be organised in other countries too.

Phase III, i.e. the implementation phase of the programme, is now under way. IMA's Members have received an English copy of **IMA-Europe's dust monitoring protocol**, requesting their commitment in **Phase III**. About twenty companies should participate and collect the first dust exposure data. Two campaign surveys (summer and winter) are foreseen and the final report and job-exposure matrix are planned to be released in June 2003. At that time, a debriefing meeting and reinforcement of the training are planned (**Phase IV**).

With a view to obtaining national accreditation, IMA's protocol was sent to various Institutes. It was also passed on to the CEN TC 137 "Workplace Atmospheres". Within the frame of their work on the standardisation of the monitoring of workplace atmospheres, we suggested to the CEN experts to take into consideration the industrial minerals industry initiative for harmonising European practices.

Dr. Wyart promoted the project at a Workshop on Sustainable Development in the Extractive Industry organised by the Commission in Oviedo on 20-21 March. This type of voluntary initiative by industry is highly welcomed by the Commission, and IMA was invited by DG Enterprise to give another presentation on it in the near future.

The IMA Board has given this project a high priority. It is indeed vital for our sector to provide authorities with exposure data. Developing a common strategy will help to develop adequate preventive measures, and, for the long-term, collect data that could at any time be integrated into an epidemiological study.

Physical Agents

The Physical Agents Directive has two main parts and aims at laying down minimum health and safety requirements regarding the exposure of workers to the risk arising from Vibration and Noise.

As it stood at the end of June 2001, the Council Common Position related to the vibration proposal did not raise any significant concern for the industry. However, in October, the European Parliament proposed a reduction of the whole body vibration (WBV) exposure limit value which, for instance, would restrict mobile plant operators in quarries to a shift length of less than 2 hours! IMA-Europe as well as a number of other associations, have made extensive effort to raise our concerns to the politicians. These efforts were rewarded on April 2002, when the European Parliament finally voted the initial WBV exposure limit value proposed by the Council position.

A similar scenario occurred for the Directive on Noise. While the Council Common Position issued on October 2001 set up workable maximum and action exposure limit values, the EP rapporteur proposed an amendment which would not allow the use of individual hearing protectors when assessing individual's exposure to noise. Moreover, the EP report sought more than a 50% reduction in the upper exposure action value. Such measures would have had serious consequences for many industrial processes. For instance, a grinding mill might not be legally operated due to noise exposure during mill charging! The whole industry all over the EU strengthened its contacts with the MEPs in order to explain the unrealistic position of these plans. As a concrete example of such an action, IMA's Members sent a position paper prepared by the Secretariat to their local MEPs, and a positive feedback was received from several of them. The rapporteur did reconsider his position in almost all the controversial areas. It was great news for industry when, in March 2002, the European Parliament now returned to much of the original Common Position, which industry can cope with, while at the same time still fully protecting workers from known risks.

Horizontal Issues – Product Regulation

Crystalline Silica

The ongoing discussion on crystalline silica carcinogenicity has recently made significant steps towards a regulatory solution. Leading industry's input since IARC's Monograph publication in '97, IMA's industrial silica section, EUROSIL, has significantly invested in research. Both projects currently running have progressed. Analysis of the exposure data needed for updating a mortality survey amongst UK silica sand workers was achieved by the Institute of Environment and Health (Leicester, UK) and the death certificates analysis should soon be completed. The preliminary results of their in vitro – in vivo genotoxicity study were presented by Profs Borm (University of Düsseldorf) and Bruch (Uni-Essen) in the Berlin Workshop on Quartz organised by the German Ministry of Labour.

In Germany, AGS, the Dangerous Substances Committee of the Labour Ministry, following MAK's scientific recommendation, considered crystalline silica (respirable fraction) as a human carcinogen. However, taking into account the most advanced data presented in Berlin, they have decided not to list crystalline silica in the TRGS 905. This means **not to request regulatory classification of respirable crystalline silica (RCS)**. Quartz and cristobalite respirable fractions will be regulated as carcinogens at work. AGS called for developing research projects investigating the crystalline silica variable toxicity and its effects at low exposures. Very importantly, AGS specified that **crystalline silica will be exempted from the general substitution principle** which applies to workplace carcinogens.

In France, the Ministry of Labour Committee on Pneumoconiosis has discussed for more than two years the criteria for pneumoconiosis and silicosis compensation (Table 25). The social partners' difficult negotiation came to an end beginning of 2002. While separating the description of silicosis from coal dust and other silicates pneumoconiosis, **the revised Table 25 plans for compensation of lung cancer, but only as a pathological symptom of silicosis**. This final decision, far beyond unions' initial request, took into account the scientific arguments developed by the referent experts and employers' delegation supported by EUROSIL Secretary-General.

In the UK, the HSE Advisory Committee on Toxic Substances (ACTS) has launched an assessment of respirable crystalline silica (RCS) fibrogenic and carcinogenic potency. Giving special emphasis to the variability of RCS toxicity, the project aims at developing guidance for the exposure circumstances which will be judged of most concern, but not at reviewing the current British occupational exposure limit (MEL), nor at defining a UK position regarding classification and labelling. EUROSIL was invited to comment the working documents.

The Scientific Committee for Occupational Exposure Limits (SCOEL) of the EU Commission continued its consideration of RCS' file with a view to recommend an occupational exposure limit (OEL). Conclusions are expected at the end of this year. Our industry's views, supported by scientific experts' advise, have regularly been passed on to the Committee. It is expected that the Committee favours the control of silicosis to prevent lung cancer. The Commission will then decide on the legal framework for setting up RCS OEL. The limit may be fixed in Annex III of the Carcinogens Directive or in the Chemical Agents Directive. EUROSIL is developing socio-economic data to document the tripartite social dialogue which will take place in the case that a binding limit value would be set up, this being the most probable scenario.

The EU industrial silica and minerals industries, supported by the EU Crystalline Silica TF, US Silica Coalition and Crystalline Silica Panel of the American Chemistry Council, have up to now contributed to a scientifically sound approach of this complex file and are prepared to continue to do so.

Strategy for a Future Chemicals Policy

Published in February 2001, the White Paper on a Strategy for a Future Chemicals Policy (COM(2001)88 final) launches the basis for a deep revision of chemical substances regulation. The White Paper concludes on the failure of existing legislative instruments governing dangerous substances, preparations, and existing substances, only a few having been assessed for their risks to man and the environment. In addition, it recommends to regulate existing and new chemicals in the same way. Therefore, the White Paper plans for a new registration, evaluation and authorisation system for chemicals (REACH).

To achieve this ambitious notification for 2012, the REACH system plans for a tiered approach based on production figures. As a consequence, industrial minerals would be at the forefront of registration and testing procedures. IMA-Europe has passed on to DG Enterprise Chemicals Unit the industrial minerals position claiming that testing and regulation of minerals should reflect the distinction between minerals and chemicals.

Food Contact, Food and Feed Additives

As announced in the White Paper on Food Safety, Commission DG Health and Consumers Protection has increased initiatives aimed at attaining a higher level of protection in the whole food chain. This year, IMA faced not less than 8 new legislative proposals in this field. Among these, the recast of the Directive 70/524/EEC on the authorisation of feed additives, and the recast of the Directive 1999/29/EC on the undesirable substances in animal nutrition have been challenged as priorities by the Food & Feed Committee.

The first initiative has been managed in co-operation with FEFANA, which has set up Task Forces for developing guidelines for the testing procedure foreseen in the forthcoming regulation authorising feed additives. IMA's experts have made an input in the Technological Agent Task Force which covers most of the industrial minerals applications.

Additionally, the recently adopted Directive on the contaminants in animal feed imposes dioxin limits to the whole food chain, and also foresees limits for dioxin-like PCBs. However, it should be pointed out that thanks to an IMA monitoring exercise, the minerals, which were imposed limits through Regulation 2439/1999/EC, have demonstrated the absence of concern and will be exempted from any limit. The dioxin limit for talc and sepiolite has already been lifted, and the civil servant in charge of this dossier has repeated that bentonite, calcium carbonate and kaolin will soon be exempted too. Therefore, encouraged by the results obtained on the dioxin issue, the FFC has recommended to launch a PCB monitoring campaign. This new monitoring exercise would be necessary to avoid a generic PCB limit being imposed on our products from end of 2004.

In the case of substances intended to come into contact with food (coating, paper & board, and plastics), no significant progress has been made. However, disappointed by the work done so far by the Council of Europe, the Coating industry has requested the Commission to take over this dossier. This means that the Commission will prepare a new Directive for the substances used in the manufacturing of coatings intended to come into contact with food. A similar request is currently discussed for paper and board.

Horizontal Issues – Environment

Directive for the Management of Mining Waste

The announcement of this forthcoming legislation has aroused huge interest among IMA's Members, who as a result wished to be deeply involved in the decision-making process. IMA's contribution to the drafting of the Commission proposal would not have been possible without the strong commitment of the two nominated IMA experts, An Buttiens (Sibelco) and Joachim Siegert (AKW). Through their inputs, IMA has requested a number of amendments to DG Environment working documents. These aimed at preventing the management of mining and quarrying waste to be covered by the Landfill Directive, and topsoil and overburden, which are not intended to be discarded, to be regarded as waste. These claims supported by sound and scientific arguments were presented in a joint IMA-Euromines position paper, which addressed the main concerns of the extractive industry. This joint initiative has been welcomed by the Commission, which always favours industry speaking with one voice. The release of the third working document, expected for June 2002, will tell us how far our views have been taken into account, and will probably need another contribution to be prepared.

Best Available Techniques

This Reference Document on BAT aims at recommending the Best Available Techniques for the Management of Tailings and Waste-Rock in Mining Activities. In this context, "Best" would *mean providing a high level of environmental protection*, while "Available" should be understood as *economically viable and technically feasible*.

The IMA sections involved in this exercise (EUBA, EBA, EKA, EUROTALC, and EUROFEL) have all submitted their first input focussing on an industry overview, the mineral process and the tailings generation analysis. In order to collect the data needed for the second submission, which should address the tailings management aspects, the Secretariat has launched a survey in the form of a questionnaire sent to IMA's Member companies. The first draft of this BAT Reference Document should be available mid-July 2002.

Amendment to the Seveso II Directive

Among the measures undertaken further to the Communication on Safe Operations in Mining Activities (COM (2000) 664 final) end of 2000, the amendment to the so-called Seveso II Directive has demonstrated the ability of the extractive industry as a whole to speak with one voice. Indeed, within the RMSG Working Group on Safe Operations in Mining Activities, all the associations supported by several Member States, and DG Enterprise agreed with a common position which has been accepted by DG Environment. IMA is now ensuring an appropriate follow-up of this dossier which has been submitted for approval to the European Parliament and to the Council in order to avoid any more stringent amendments to this proposal.

Thematic Strategy for Soil Protection

The Communication - COM(2002)179 final - released end of April 2002, only mentions the extractive industry as a potential source of local soil contamination. Among the measures put forward by this Communication and affecting the extractive industry, two of them are already in progress, namely the Reference Document on BAT, and the Directive on the Management of Mining Waste. A third one, a Communication on "Planning and Environment: the territorial dimension", has been identified as a forthcoming issue which is already followed by IMA's staff with the support of the IMA TC.

Horizontal Issues – Sustainable Development

Sustainable Development Indicators

One of the initiatives launched by the Commission, in co-operation with Member States and industry, as a follow-up of the *Communication promoting Sustainable Development in the Extractive Industry* (COM (2000) 265 final) is a *voluntary initiative* which aims at developing a set of indicators for assessing the sustainability of the Extractive Industry. A Sustainable Development Indicators (SDI) Working Group had been set up, mandated by the Raw Materials Supply Group (RMSG) of Directorate General Enterprise. After one and a half year of work, and further to a pilot testing step in industry, the SDI WG has finalised the set of indicators, which are well-balanced between the three pillars of the Sustainable Development (SD), namely the economic, social and environmental aspects. In total, 19 indicators have been adopted: 12 to be documented by the industry, and 7 by the Member States.

The Commission acknowledged the increasing commitment of IMA-Europe to this initiative and asked IMA's Scientific Officer, Dr Doome, to report on the outcome of the SDI WG to the RMSG Plenary. In June 2002, the first reporting exercise will be launched, and will be repeated on an annual basis. For that purpose, IMA and its sister associations from the Non-Energy Extractive Industry (NEEI) will dispatch a questionnaire, which will be available in all the EU languages. Participating in this exercise is essential for industry's credibility and all IMA Member companies are invited to join. Their full commitment will be necessary to demonstrate industry's responsible attitude and ability of organising itself on a voluntary base. The **consolidated** data gathered by the Associations will be passed on to the Commission, which after a review by the SDI Working Group, will publish the results per sector, i.e. metallic ores, aggregates, and industrial minerals.

Strategy on the Sustainable Management of Natural Resources

The 6th Environmental Action Programme adopted last year has addressed this issue and describes the objective for the thematic strategy on the **sustainable use of natural resources** as: "*ensuring that the consumption of resources and their associated impacts do not exceed the carrying capacity of the environment and breaking the linkages between economic growth and resource use*". To reach this objective, the draft Communication advocates a *decoupling* between economic growth and resource use. This means that an increase in economic growth should generate a relatively lower increase in the use of natural resource (*relative decoupling*) or a decrease in resources use (*absolute decoupling*). IMA has been active in the earlier discussion on this topic, and attended in April '02 the first Stakeholder Meeting dedicated to this strategy.

Committed since the adoption of the *Communication promoting Sustainable Development in the Extractive Industry* to contribute to SD implementation, and intending to further develop SD programmes in the future, IMA-Europe positively welcomes this strategy. Life Cycle Analysis and Recycling are nowadays key issues for the Commission and IMA should prepare views on both aspects. This is however a difficult subject: many different opinions on the relevance of Recycling and LCA are expressed and no quantitative data have been collected yet for our sector. The draft Communication on the strategy is not totally clear on this, but it may be deduced that LCA is the final objective. Therefore, industry should develop the data and arguments necessary to document a common position, and this will be hopefully achieved in the coming year. With this in view, the IMA Technical Committee is preparing a working paper.

Horizontal Issues: Communication

IMA Communication Strategy

In June 2001, the IMA Board took an important strategic decision to raise extra funds for the development of a awareness campaign which will be used to establish a strong positive image of the sector. Subsequently approved by the General Assembly, the extra budget allocated for communication allowed IMA to contract a professional advertising agency which has been working over the past year to create a set of new tools under the guidance of the IMA Communication Steering Committee.

The Committee, consisting of communication experts from IMA member companies, Board members and IMA staff, met several times to assess the work carried out by the agency, provide guidance and worked closely together to draft the contents of the new tools. This team of professionals provided an effective platform for quick decision-making and a swift follow-up of the work in process.

These important joint efforts resulted in the following tools: a new folder, advertising subjects, posters, a new IMA brochure, a new design for IMA's website homepage, an exhibition stand, a new logo etc.

These tools will not only serve the Association's own PR activities, but they have also been designed to allow implementation at company level to complement local and national communication strategies. The main characteristic of the concepts developed is the fact they represent applications of industrial minerals in everyday life, thus illustrating their importance to society and bringing them closer to the public.

Now that the tools have been developed, the next phase of the communication strategy can start, i.e. the implementation of the awareness campaign. The campaign will be officially launched at the IMA 2002 Conference. Press files are being prepared to be sent to press agencies and trade magazines.

Shortly after the Conference, the translation of the new material in the required European languages will begin in order to facilitate the implementation on local and national level. The new tools, developed to create awareness on the essential role industrial minerals play in everyday life, will no doubt contribute to a better understanding of our sector.

Awareness Campaign

Industrial Minerals - Essential, Smart & Beneficial :
Your world is made of them

BENTONITE



BORATES



at work and play at school

CALCIUM
CARBONATE

in a healthy and hygienic environment

FELDSPAR



KAOLIN

at the hub of communications

PLASTIC
CLAYS



improving automotive technology

SILICA



TALC

at leisure



at critical moments

Overall Activities - External Relations

Interaction with the EU Regulatory Bodies

IMA-Europe's contribution to the decision-making process rests on soundly based technical dossiers and our capacity to disseminate positions through a pertinent network of experts and authorities in charge of these files.

IMA was particularly active this year in the Raw Materials Supply Group (RMSG) of DG Enterprise. The industrial minerals industry took indeed a leading position in the development of Sustainable Development Indicators (SDI) organising industry's input through several Shadow Group Meetings. Furthermore, the January meeting of the RMSG Working Group on Safe Operations of Mining Activities (SOMA) was organised in Sibelco's Museum 't Kristallijn. This gave to Commission's experts, including DG Environment's civil servant in charge of the Mining Waste Directive, an occasion to visit SCR Sibelco's site in Dessel.

In February '02, IMA organised jointly with the Irish Government and EUROMINES, a conference on Mining Waste Management in Dublin. On that occasion, a case study from our sector was presented by Imerys. Looking for a more transparent dialogue in 2001-2002, DG Environment regularly organised Hearings to collect stakeholders' opinions. IMA's Scientific Officer participated in those related to the preparation of the Mining Waste and Seveso II Directives and the development of thematic strategies related to Soil Protection and Sustainable Management of Natural Resources.

The Association and its member associations were also represented at the June '01 Kick-off Meeting of the Technical Working Group on Management of Tailings and Waste-Rock in Mining Activities. Organised in Seville by the European Bureau of DG Joint Research Centre, this meeting marked the launching of the BAT exercise for minerals processed through flotation.

On the occasion of the Workshop organised in March by the Commission and the Spanish Presidency of the EU in Oviedo on *Sustainable Development as the Basis for Improvements in Health and Safety at Work in the Extractive Industry*, the Secretary-General presented *A contribution to Sustainable Development: Harmonisation of Health Protection Concepts in the Industrial Minerals Industry* which promoted IMA's hygiene project. IMA's President Elect, André Talmon, took part in the Closing Round Table Discussion of this Workshop, which gathered Commission, Unions and representatives of the various extractive sectors.

End of April '02, IMA's President, Gisbert Majewski, attended the kick-off meeting of NESMI, the Network on European Sustainable Mining and Processing Industries, which put under rails at Commission's initiative a new research consortium.

IMA-Europe was present at the Seminar on *Dioxins in the Air* organised in Bruges last November by the Belgian Presidency, and in the same month at the Austrian Ministry for Environment Conference on the *Role of Precaution in Chemicals Policy* in Vienna. IMA also attended the Closing Conference of the European Week for Safety and Health at Work 2001 jointly organised in November in Brussels by the Bilbao Agency and the Belgian Presidency.

In the field of health and safety, the Association was invited to contribute to the work related to silicosis recognition criteria of the Health Protection Committee of the SHCMOEI (DG Employment Health Committee for the

Mining and Other Extractive Industries) and attended a number of key events such as the ISSA International Symposium on *Dusts, fume and mists in the workplace - Risks and prevention* (Toulouse, June '01), and the BOHS *Inhaled Particles Symposium* (Cambridge, September '01).

It is also noteworthy to mention IMA's reinforced relations with Member States delegates and Members of the European Parliament from Austria France, Germany, the UK, etc., on a series of topical matters including the Physical Agents Directive, the crystalline silica and borates evaluation, kaolin authorisation as a feed additives, etc, not forgetting to mention the liaison recently granted to the bentonite association, EUBA, by the CEN TC 189 on geotextiles and geotextile-related products.

Partnership

IMA-Europe has been closely involved in the creation of its sister-association in North America, IMA-NA. While a long history of good working relationships always existed between IMA-Europe and American producing companies, notably in the silica, talc and kaolin sectors, the foundation of IMA-NA on IMA-Europe's model announces strong promises of a wider and fruitful co-operation between the European and North American industrial minerals producers. As mentioned above, the IMA-Europe Board of Directors offered to IMA-NA a non-voting seat and the same offer was made by our American colleagues in order to strengthen at the highest level the relations between both organisations.

Within the context of the Global Mining Initiative (GMI) launched by the major mining, metals and minerals industries, the International Council on Mining and Metals (ICMM) was installed last year in London to contribute more effectively to sustainable development (SD). With a view to IMA-Europe's further involvement in SD principles implementation, IMA became an association member of ICMM. André Talmon and Gisbert Majewski attended the world conference on mining and sustainable development in Toronto in May which reviewed the conclusions of the Mining Minerals and Sustainable Development (MMSD) project. ICMM intends to be the principal vehicle for industry to carry forward the outcomes of MMSD and to present these at the Johannesburg World Summit on SD in August.

Building new links obviously did not prevent us from enhancing existing relations with our colleagues from the Non-Energy Extractive Industry Panel (NEEIP), the end-users associations and UNICE, the European employers' association. In this respect, the common work on SDI, Seveso II and the mining waste legislation, notably the co-ordination of IMA's and EUROMINES' positions must be emphasised, with a special mention to the issuing of a joint excerpt of the Good Environmental Practices Guide dedicated to industrial minerals with EUROGYPSUM. IMA has actively taken part in UNICE Working Groups on Chemicals Agents, Waste and Water, and in the Task Forces launched this year on Waste Definition and on the Sustainable Use of Natural Resources.

Finally, while maintaining the well-established links with Cerame-Unie being a member of its Chemicals Agents WG, and FEVE and CPIV (glass associations), IMA has established, through its FFC, permanent working relations with the feed additives manufacturers of FEFANA and EMFEMA.

Vertical Issues – Sections' Activities

While contributing to IMA's committees, events and projects, IMA's member associations have as usual developed their own section activities and achieved success in a series of projects.

Amongst these, we have to highlight the work done by all the experts of the sections involved in the drafting of Best Available Techniques (BAT) Reference Documents, i.e. the Technical Committees of CCA-Europe, EKA, EUROFEL and the Ad Hoc Expert Group of EUROTALC.

Besides the continuous steering of the two research projects mentioned in *Product Regulation* chapter above (see p.8), EUROSIL developed a questionnaire to collect socio-economic data in relation with the setting up of a European RCS exposure limit. Several members of EUROSIL's German federation, Steine und Erden, and the Secretary-General, Dr. Wyart-Remy, were invited to present papers at the Quartz Symposium organised in March '02 in Hennef by the German Insurance Institute for Work Safety (BIA/BG). The Secretary-General was invited to publish a paper in the July/August issue of the BIA journal *Gefahrstoffe Reinhaltung der Luft*. She was also invited to make presentations in a SILMARK meeting in Prague and in the EUROSIL British federation (SAMSA) Conference in The Northamptonshire. EUROSIL AGM was hosted in Valencia by IBERSIL, the recently created Spanish federation, where the Members enjoyed a very hospitable reception. Last but not least, the EUROSIL website has been finalised this year. Its address is <http://www.ima-eu.org/eurosil.html>

Over the year, EBA's members faced various issues, which required the collection of an extensive amount of data. In October '01, EBA finalised the submission to the IUCLID database for the purpose of the risk assessment started last year, and in March '02, they have complied with all the requirements for the biocide notification. The Borates producers have also replied to a Dutch proposal aimed at lowering the dust exposure limit value for disodium tetraborate and boric acid. Further to this input, the Dutch Expert Committee (DECOS) has decided to reconsider the assessment of the scientific data on borates. The voluntary commitment of ETI Holding, which is the sole EBA member having mines in Europe, in the BAT exercise should also be highlighted. Finally, convinced of the need to improve communication, the borates producers have set up the **Borate Information Office (BIO)** which would act as the main information platform for all the stakeholders interested in boron. The first step of this ambitious project was the development of a BIO web site, which would be on line in autumn '02.

The bentonite producers Association, EUBA, continued the smooth increase of its membership with the joining of Tolsa and Minsol in January 2002. The interlaboratory exercise aimed at harmonising bentonite testing methods within EUBA gained a new dimension, since these are now considered by the CEN/TC 189, for which EUBA was granted formal liaison status. In order to harmonise their views on that matter, EUBA's members have organised, in February '02, a workshop on bentonite testing kindly hosted by Süd-Chemie. This workshop proved to be a success as it led to an agreement on a standardised protocol for the tests to be considered. The EUBA website, which was developed by a Communication Working Group, is now active. You may visit it at <http://www.ima-eu.org/euba.html>

Besides the BAT exercise, the kaolin section has also been actively involved in the discussion for a new kaolin specific entry in the feed additives legislation. In this respect, they have commented on a number of questions raised either by the Rapporteur or by the members of the Standing

Committee for Animal Nutrition. EKA has also initiated a reflection on a clay nomenclature in order to provide authorities with appropriate information. Indeed, much confusion arose from an incorrect knowledge of the clay nomenclature, and such a confusion has already given rise to unsound issues. Since this nomenclature would involve different IMA sections, the project was taken over by the IMA FFC. With regard to communication aspects, the EKA web site has been finalised. You may visit it at <http://ima-eu.org/eka/html>.

In September 2001, EUROFEL's Members met for their traditional General Assembly which was hosted this year by AKW. All the participants acknowledged the good organisation, which included a comprehensive visit of AKW's site. Regarding the technical issues, the third edition of the inter-laboratory exercise saw a positive feedback from customers, which demonstrates all the benefit of such an initiative. The EUROFEL Technical Committee has also called for an harmonisation of the LOI method within EUROFEL. For that purpose, a draft standardised protocol has been prepared by the TC. This willingness of harmonisation was already achieved for the MSDS, a copy of which has been made available on line in all available languages (7). Regarding membership, it has been extended with the joining of Felmica, which kindly proposed to host the 2002 AGM.

This year, CCA-Europe's activities were dominated by the BAT initiative, which is a very-demanding exercise in terms of data collection. As limestone is listed in the scope of the BAT exercise, a joint approach was developed with EuLA, the European Lime Association. This co-operation was concretised by the participation of Dr Oppermann, EuLA's Secretary General, in the CCA BAT Expert Group meetings. On another front, an impressive number of CCA members have contributed to the newly installed Food & Feed Committee in order to share their expertise in food and feed regulatory aspects. Finally, end of may 2001, CCA-Europe acknowledged the retirement of Dr Hans-Peter Schlumpf, who was particularly active in all the technical issues related to calcium carbonate and to whom the members paid a warm tribute.

Having seen the comments they submitted last year accepted by the US National Toxicological Programme (NTP), EUROTALC members continued to follow the possible developments of the NTP discussions, in close co-operation with the US cosmetic association, CTFA. As others, EUROTALC Members were also particularly active in the FFC and SDI Working Group initiatives. Mondo Minerals welcomed IMA's Scientific Officer, Roger Doome, for a technical visit of the Kaavi site with a view to the drafting of the talc BAT.

Financial Report

In 2001, membership fees for a total amount of € 459.148 were received. Including bank interest, this led to a total income of € 462.717.

The expenses for 2001 amounted to € 442.298 against a budgeted expenditure of € 502.548, resulting in a surplus for the year of € 20.419. This is due to the fact that the costs related to the IMA Hygiene project had not all been invoiced and paid yet. The balance sheet of 2001 shows a closing surplus of € 90.785.

In view of pending new Belgian legislation governing international not-for-profit associations which will require the maintenance of a double-entry system, the Secretariat has changed its practices accordingly and has appointed an auditor to revise its accounts on a yearly basis, starting in 2001.

The 2002 membership fees will amount to € 482.148 with an additional extraordinary funding of € 150.000 for the communication campaign. With the expected bank interests, the total revenues will be € 634.105. The 2002 budget proposal takes into account the costs related to the communication campaign and related PR activities for a total budget of € 187.000, and also the 2001 reported costs for the IMA Hygiene Project.

The three-year budget, decided on in 2001, maintains ordinary membership fees almost unchanged, with a yearly increase of 5%. The extraordinary funding of € 150.000 represents a one time fee raised for the financing of the communication project and, in particular, the development of new communication tools.

The 2002 plan foresees the use of € 90.785 of the 2001 carried forward surplus, which should result in a closing surplus of € 50.030 at the end of 2002.

At its March Board meeting, the IMA Board recommended that the 2001 accounts and the 2002 budget be approved by the IMA General Assembly (5 June 2002).

Financial Report

Budget

	2001 BUDGET	2001 ACTUAL	2002 BUDGET
<u>REVENUES</u>			
Membership fees	459.148	459.148	482.105
Bank interests	2.000	3.569	2.000
Extra funding			150.000
Total	461.148	462.717	634.105
<u>EXPENSES</u>			
Employment	305.000	299.686	317.200
Office rent & fixed charges	34.000	34.618	35.700
Office running expenses	37.428	31.557	41.403
Legal & accounting expenses	2.000	2.457	3.840
Meeting and travel costs	29.620	33.984	34.705
Tax/Insurance/Bank	3.200	552	3.400
Equipment	2.500	5.208	2.500
Office maintenance	7.300	0	7.300
Consultancy/Research support	6.000	2.062	6.000
Industrial Hygiene Project	40.000	8.213	29.062
PR & Communication (incl. GEPG)	30.500	23.380	187.000
Conference support & sponsoring	5.000	581	6.750
Total	502.548	442.298	674.860
Surplus <Deficit> for the year	<41.400>	20.419	<40.755>
Accumulated surplus B/FWD	70.366	70.366	90.785
Closing surplus C/FWD	28.966	90.785	50.030

IMA Board Members (June 2000 – June 2002)

IMA - Europe	President	Mr. G. Majewski	Omya GmbH
	Vice-President	Dr. G. B. Lawson	WBB MINERALS
	President-Elect	Mr. A. J. Talmon	
CCA - Europe	President	Mr. G. Majewski	Omya GmbH
	Vice-President	Dr. N. C. Trivedi	Minerals Technologies Europe
EBA	President	Mr. S. T. Murray	Borax Europe Ltd.
	Vice-President	Mr. H. İçten	Eti Holding AS
EKA	President	Mr. O. Vandermarcq	Imerys
EUBA	President	Mr. C. J. Watkins	Stetley Bentonite & Absorbents Ltd.
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EUROTALC	President	Mr. C. Stenneler	Talc de Luzenac
	Vice-President	Mr. W.-D. Keller	Mondo Minerals OY

IMA TC Members

TC Chairman	Mr. J. Rainer	Borax Europe Ltd.
CCA - Europe	Dr. B. Tavakkoli	Omya GmbH
	Mr. B. Vaux	Omya AG
	Mr. M. Nocivelli	BCCF
	Dr. H. U. Hoppler	Omya AG
EBA	Mr. P. Bonini	Societa Chimica Larderello
	Dr. M. Gündüz	Eti Holding
EUBA	Dr. P. Maraboutis	Silver & Baryte Ores Mining Co
	Dr. M. Stefanakis	Silver & Baryte Ores Mining Co.
	Dr. D. Taylor	Oil Dri Corp.
	Mr. B. Vetere	Oil Dri Corp.
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EKA/EUROFEL	Ms. M. Picot	Denain Anzin Minéraux
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	Mr. J. Siegert	AKW
EUROSIL	Ms. A. Buttiens	SCR Sibelco
	Mr. C. Catteau	Sifracco
	Dr. C. Kirby	SAMSA
	Mr. A. Price	WBB MINERALS
EUROTALC	Mr. M. Van den Hout	Mondo Minerals B. V.
	Mr. E. Turner	Talc de Luzenac
	Mr. Y. Le Mailloux	Talc de Luzenac

IMA Communications Steering Committee

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EBA	Mr. S. Murray	Borax Europe Ltd
EUBA	Ms I. Bardani	Silver & Baryte Ores Mining Co
EKA/EUROFEL	Mrs. A. Leroux	Denain Anzin Minéraux
EUROSIL	Mr. M. Burkard	Lieben Minerals
EUROTALC	Mr. C. Stenneler	Talc de Luzenac
	Mrs. L. Jones	Talc de Luzenac

IMA FFC Members

FFC Chairman	Mr. P. Delord	TALC DE LUZENAC
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	Mr. M. Nocivelli	BCCF
	Dr. T. Schlegel	LHOIST
	Dr. B. Tavakkoli	OMYA GmbH
	Dr. N. C. Trivedi	Minerals Technologies Europe
	Mr. B. Vaux	OMYA AG
EBA	Dr. M. Gündüz	Eti Holding
EKA	Mr. F. Picart	SOKA
EUBA	Mr. F. Escribano	TOLSA S.A.
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	Mr. B. Vetere	OIL DRI
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EUROSIL	Mr. C. Catteau	SIFRACO
EUROTALC	Mr. Van den Hout	MONDO MINERALS

IMA Hygiene Steering Committee

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	Mr. M. Marrucci	Omya Spa
EKA	Mr. A. de Vallois	DAM
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	Ms. A. Buttiens	EUROSIL
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