



PRIMIGEA
Materias Primas Minerales

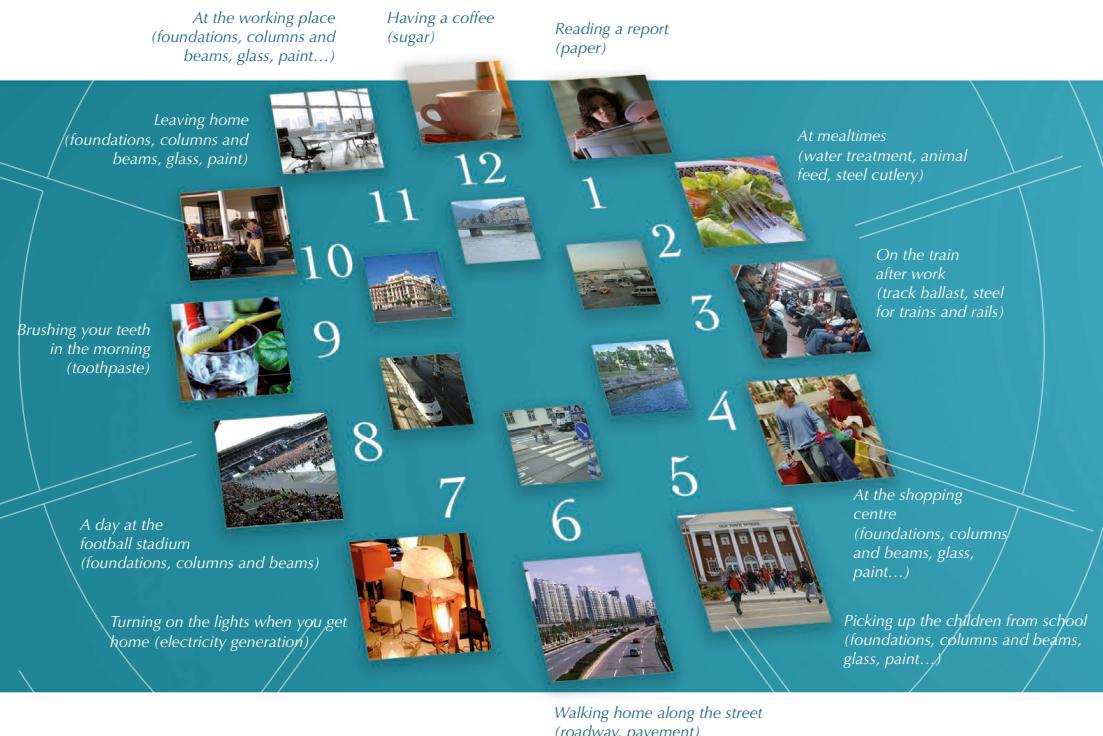
2025 Mineral Raw Materials

A sustainable, strategic,
and essential industry

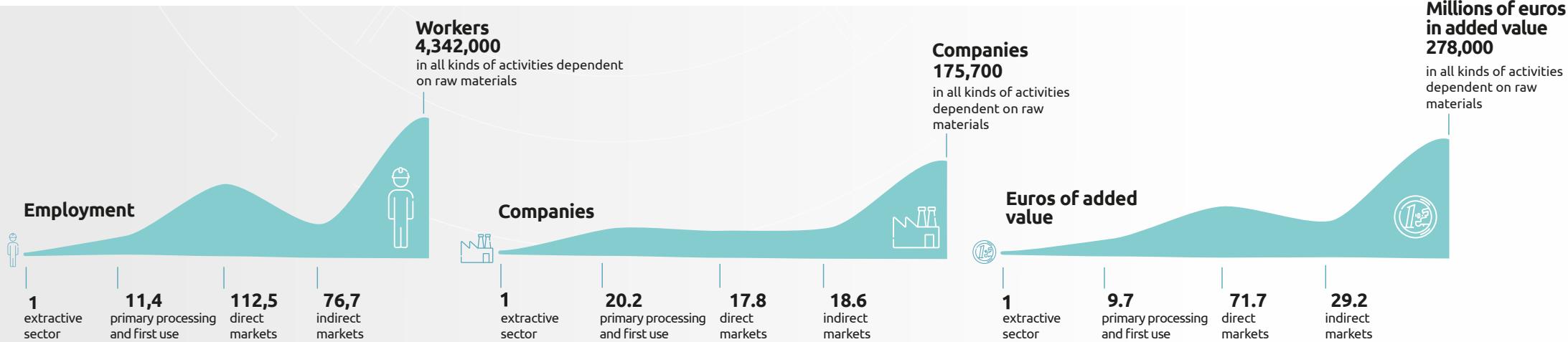
At the heart of the
Clean Industrial Deal

24 hours with mineral raw materials

A significant multiplier effect on businesses, employment and gross value added

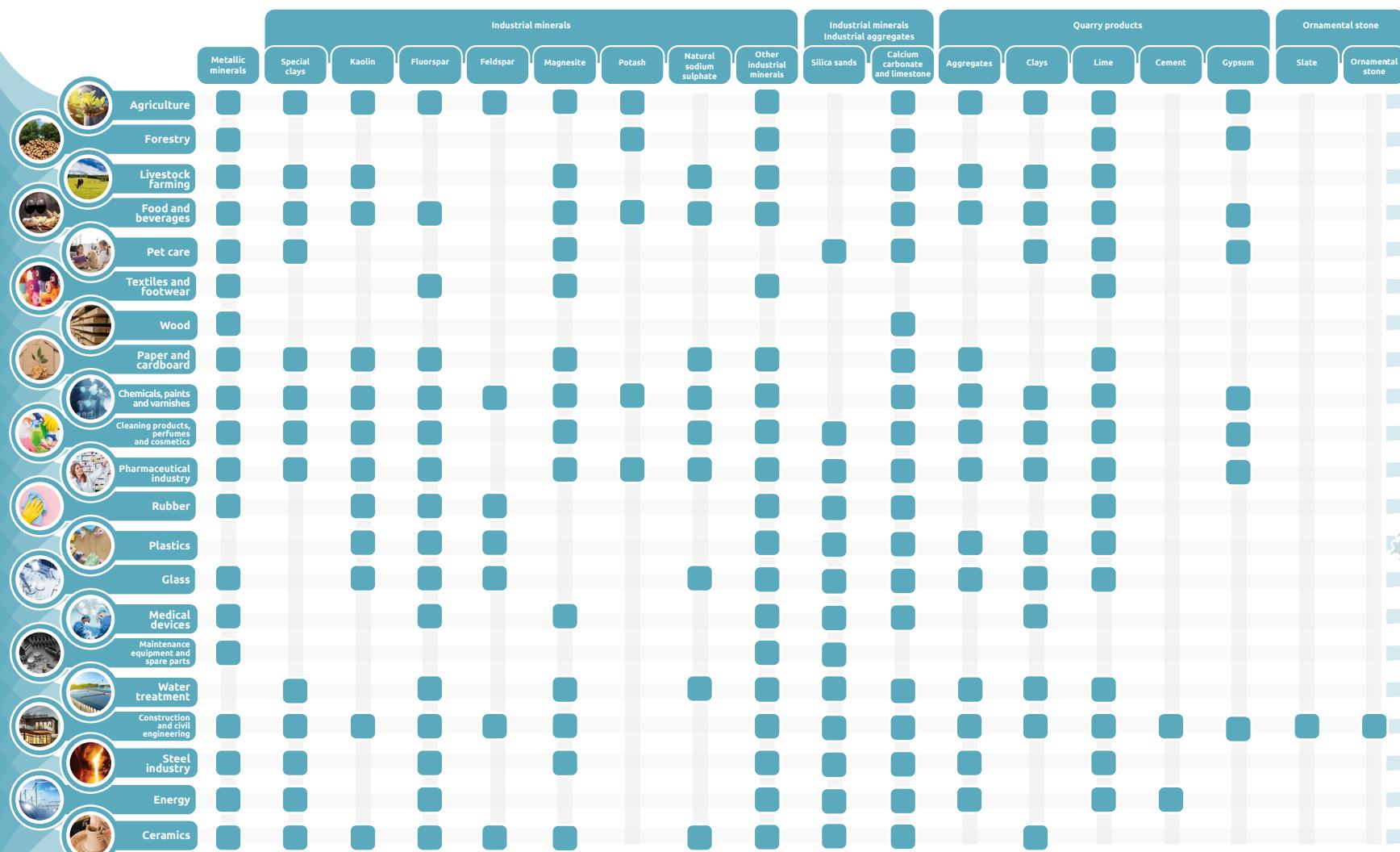


3,600
companies
4,400
mining operations and plants
218.6
million tonnes
360,000
jobs
€27.6
billion turnover
+€11.84
billion exports

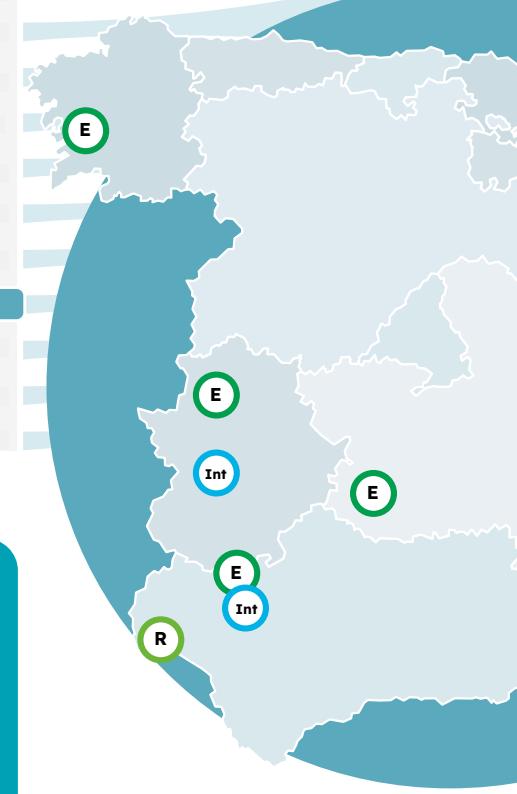


The mineral raw materials industry is a strategic and essential sector, ensuring local supply to industries critical for society

An essential and strategic industry



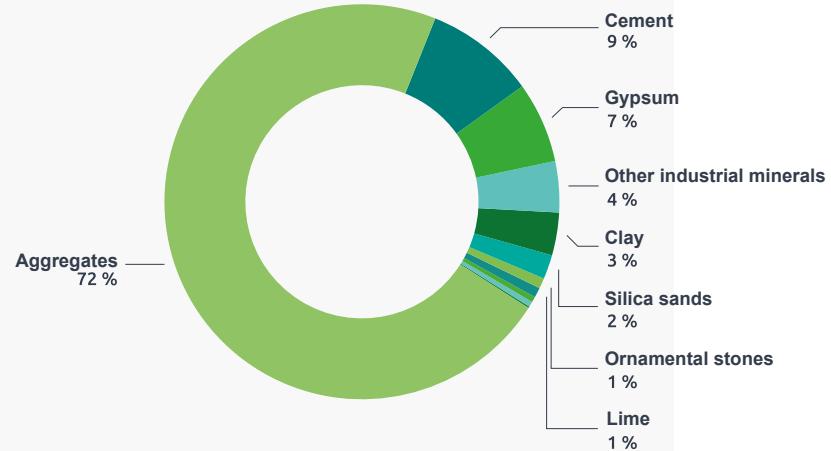
Seven EU
Strategic Projects



Figures for the non-energy mineral raw materials industry

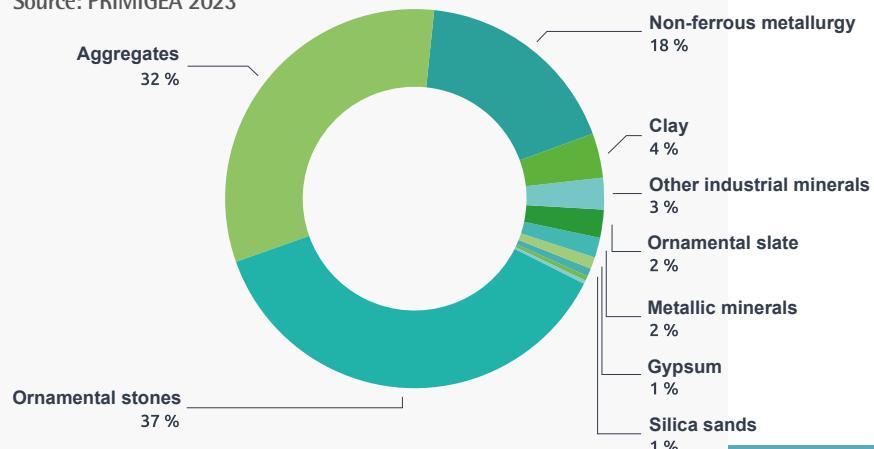
Distribution of the production volume of the mineral raw materials industry

Source: Estadística Minera de España 2023. MITERD



Distribution of the number of companies in the mineral raw materials industry

Source: PRIMIGEA 2023



4,500 kg extracted per citizen

218 million tonnes supplied each year

| | Mining production volume 2023 Mt | % |
|---------------------------|----------------------------------|-----------------|
| Aggregates | 157.4 | 72.02% |
| Cement | 19.7 | 9.01% |
| Gypsum | 14.5 | 6.62% |
| Other industrial minerals | 9.2 | 4.19% |
| Clay | 7.7 | 3.50% |
| Silica sands | 4.3 | 1.98 % |
| Ornamental stones | 1.9 | 0.85% |
| Lime | 1.8 | 0.82% |
| Metallic minerals | 1.0 | 0.45% |
| Ornamental slate | 0.9 | 0.43% |
| Magnesite | 0.3 | 0.14% |
| Non-ferrous metallurgy | 0.0 | 0.00 % |
| TOTAL | 218.6 | 100.00 % |



For every €1 generated by extraction, €6.75 is generated in the industrial part of the sector

3,600 companies,
2,604 mining operations
and 1,800 plants

A sector largely made up of SMEs that creates added value from the source.

In summary

€27.6 billion in turnover

| | Million euros 2023 | % |
|---------------------|-----------------------|----------|
| Mining turnover | 3,575 | 12.95 % |
| Industrial turnover | 24,025 | 87.05 % |
| Total turnover | 27,600 | 100.00 % |

| | Million euros 2024 |
|---------------|-----------------------|
| Exports | 11,840 |
| Imports | 10,299 |
| Trade balance | 1,539 |

| | Number of employees 2023 | % |
|--------------------------------|--------------------------------|---------|
| Direct employment – extraction | 19,801 | 5.82 % |
| Direct employment – industry | 61,015 | 17.92 % |
| Indirect employment – mining | 20,876 | 6.13 % |
| Indirect employment – industry | 258,018 | 75.90 % |
| Total employment | 359,710 | 100 % |

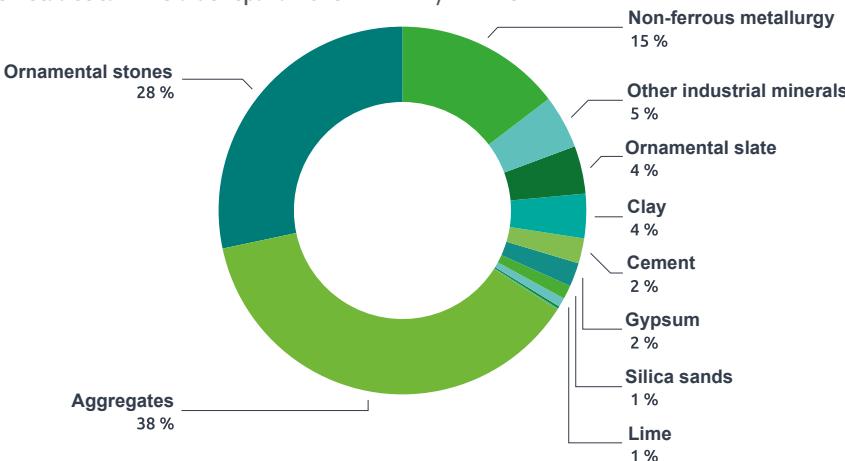
Nearly 360,000 direct and indirect jobs

More than 10,500 women work directly in the industry

... and contributes to the trade balance with €12 billion in exports

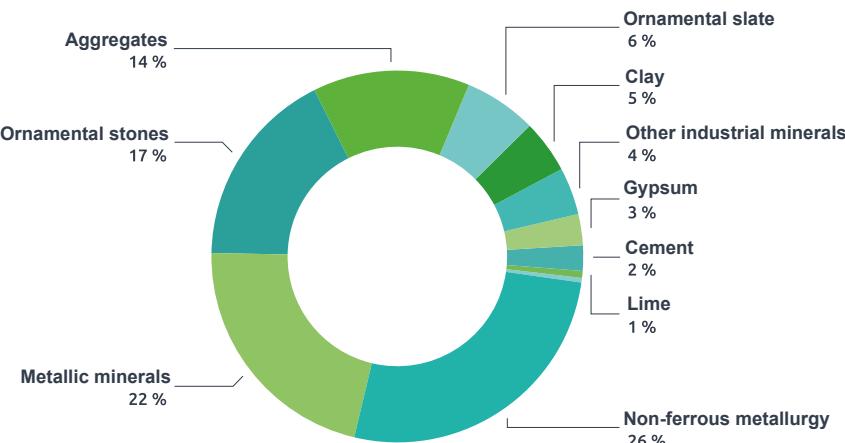
Distribution of the number of mining operations and plants in the mineral raw materials industry

Source: Estadística Minera de España 2023. MITERD y PRIMIGEA



Distribution of employment in the mineral raw materials industry

Source: Estadística Minera de España 2023. MITERD y PRIMIGEA



218.6 Mt
Industrial minerals production



4,500 kg per capita
Consumption per capita



101,700
Direct employment



258,000
Indirect employment



3,600
Companies



2,604
Mining operations



1,800
Plants



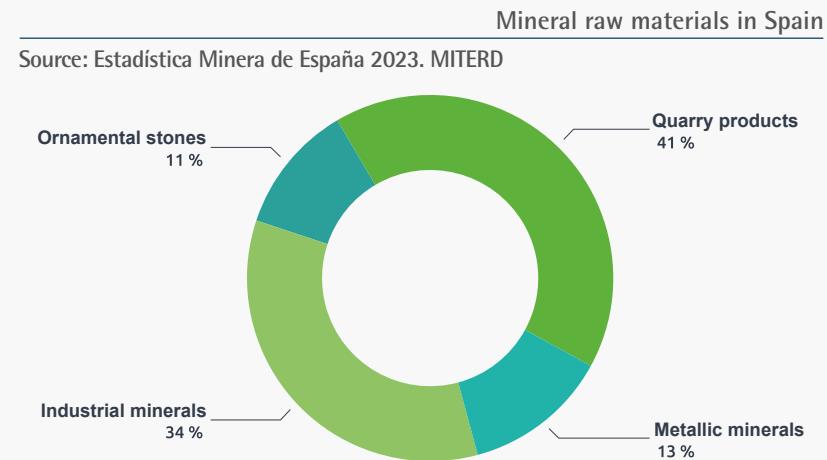
€27.6 billion
Turnover



€1.325 billion
Investments



€11.84 billion
Exports



70 different types of rocks and minerals:

9 metallic products:

gold, silver, zinc, copper, tin, iron, lead, tantalum and tungsten

24 industrial minerals:

refractory clay, attapulgite, bentonite, kaolin, celestite, potassium chloride, quartz-silica sands, fluorspar, steatite, feldspar, glauberite, leonardite, crude magnesite, mica, iron oxides, pumice stone, pozzolana, salt (rock salt, spring or marine), sepiolite, thenardite, tripoli, peat and wollastonite

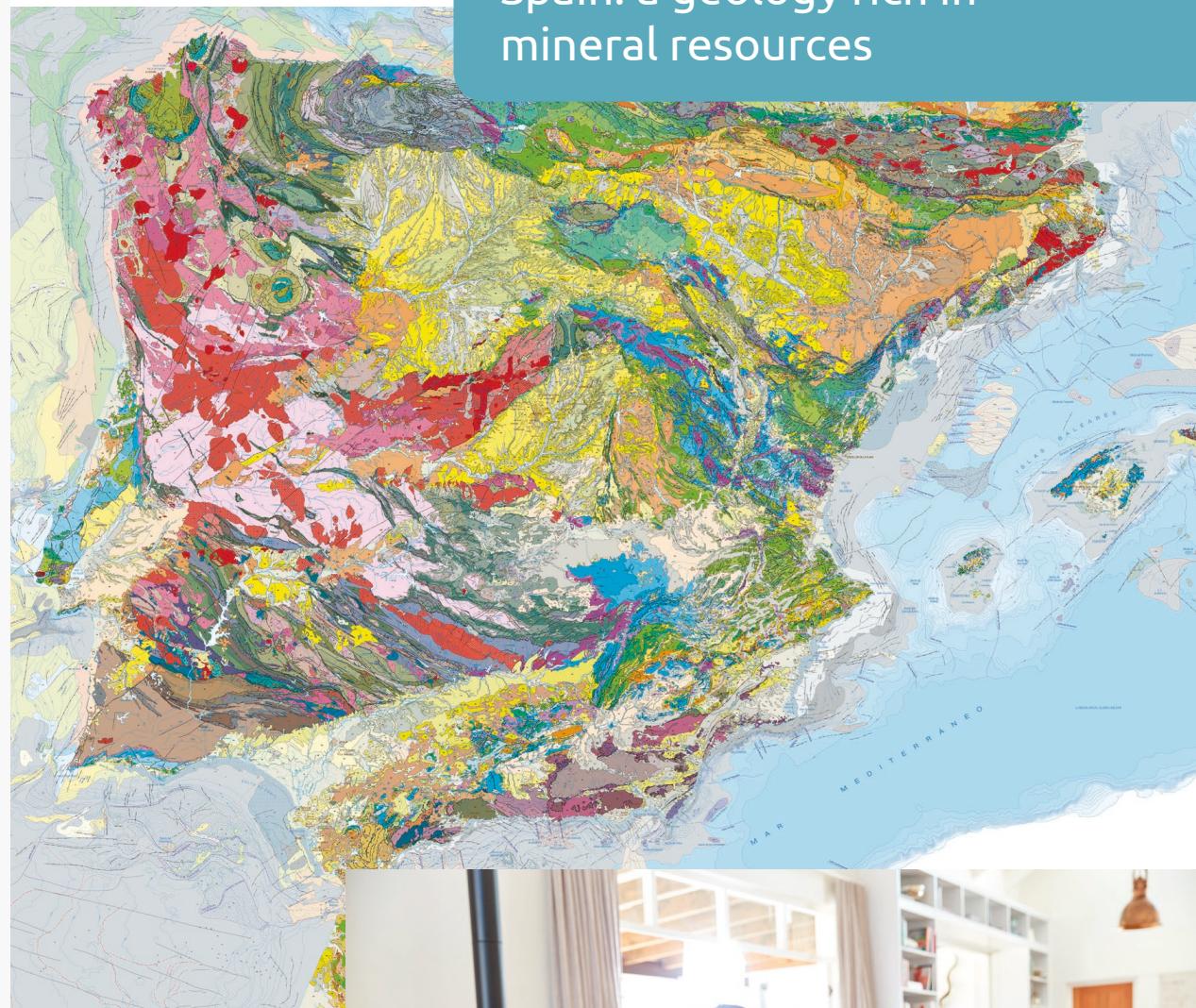
8 ornamental stones:

alabaster, sandstone, limestone/dolomite, quartzite, diorite, granite, marble, slate and volcanic rocks

29 quarry products:

andesite, amphibolite, clay, silica sand, sand and gravel, sandstone, basalt, limestone, hornfels, chalk, quartzite, diabase, diorite, dolomite, dunite, phonolite, granite, greywacke, marls, marble, mylonite, ophite, slate, porphyries, serpentinite, tuff, trachyte and gypsum

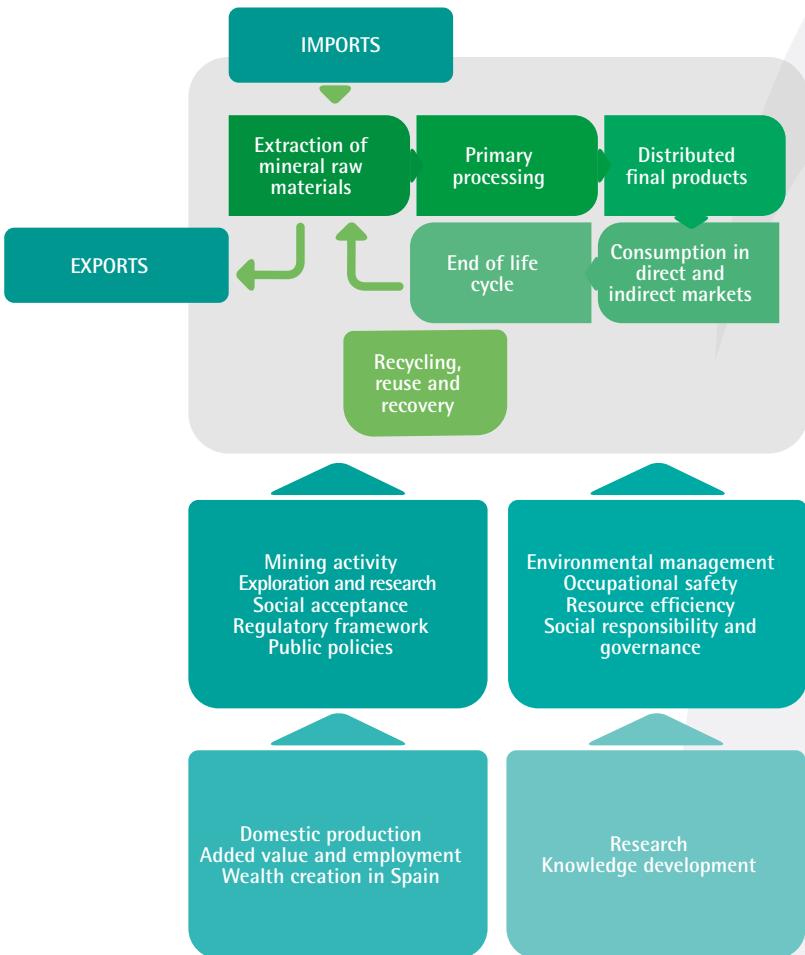
Spain: a geology rich in mineral resources



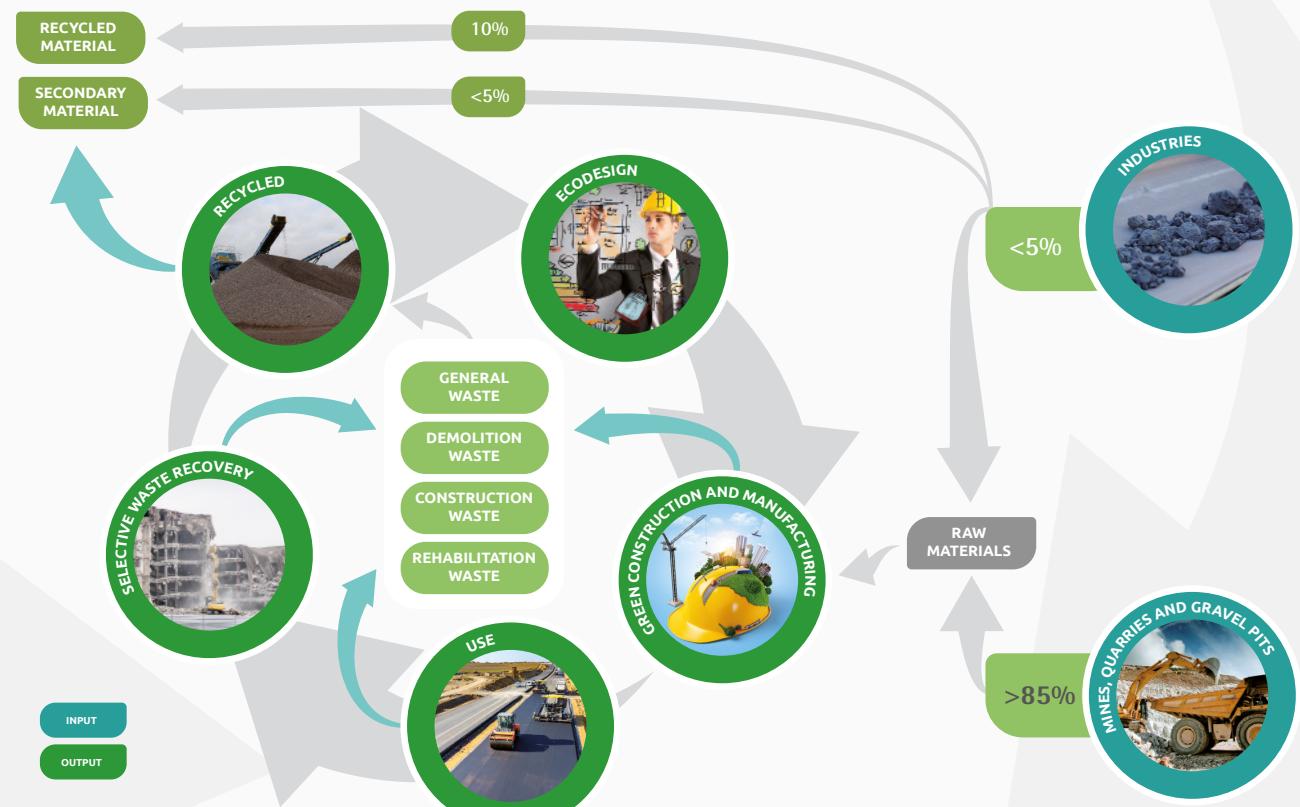
Creating sustainable wealth for society



And we also support the circular economy



Even when EU recycling targets are achieved, 85–90% of mineral raw materials will still be needed.



Energy recovery is another contribution of the industry

Mineral raw materials in citizens' daily lives

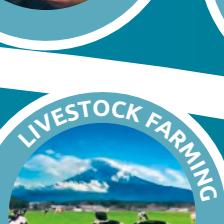
We process 4,500 kg of mineral raw materials per citizen every year (12.3 kg per day)



We supply sustainable, durable products
that contribute to the quality and safety of
construction works



Uses in construction



Industrial or other applications



A sustainable mineral raw materials industry...

Committed to the United Nations 2030 Agenda Sustainable Development Goals, in particular:

... an opportunity for biodiversity and compatible with protected areas

... fully compatible with the protection of the environment

... committed to the continuous improvement of workers' safety and health

... supplying local markets, reducing emissions and energy consumption

... committed to society

Industrial 4.0

... making a sustained contribution to the industrialisation of rural and depopulated areas

Our priorities, our commitment



Air quality through the minimisation of emissions, energy efficiency, renewable energy, electrification, flood prevention, adaptation to climate-change mitigation technologies, efficient transport and minimisation of the carbon footprint



Durability, prevention of waste generation, recycling, recovery in the rehabilitation of mining operations, resource efficiency



Water management, river basin authorities, water quality



Rehabilitation, Natura 2000 projects, biodiversity, pollinators, temporary nature, environmental impact assessment, geodiversity



Sustainable access to primary resources (rocks and minerals) and secondary resources (recycled and manufactured materials)

Natural environment

Water management

Climate change mitigation

Circular economy

Industrial and raw materials strategy

Continuous improvement and compliance with legislation





n

Sustainable construction

Construction Products Regulation, CE marking, life cycle assessment, environmental product declaration, technical codes and standards, sustainable and durable products



Safety

Zero accidents, occupational risk prevention, safe explosives, explosives traceability, machinery safety, safe subcontracting



Fight against unfair competition

Health

Prevention of exposure to: noise, vibration, dust, respirable crystalline silica, musculoskeletal disorders, high and low temperatures, solar radiation, diesel fumes



Employment

Quality and stable employment, investment in training, skills development and equality



People

Commitment to local communities, equality and diversity, support for tackling rural depopulation, territorial cohesion and connectivity, cultural heritage



Communication

Transparency, dialogue with citizens, contribution to the economy and the value chain, corporate governance, commitment to stakeholders, CSR and ESG



Strategic priorities for a sustainable mineral raw materials industry



- Contribute to the country's economic growth and sustain industrial activity in depopulated Spain
- Call for sustainable investment policies in building and civil engineering

- Call for sustainable investment policies in building and civil engineering
- Advocate for a support plan to enhance the competitiveness of the industry

Economy and competitiveness



- Actively participate in reducing environmental impact
- Promote excellence in the rehabilitation of mining operations
- Contribute to the improvement of biodiversity

Environmental management



- Actively contribute to the fight against climate change and to the decarbonisation of the economy

Climate neutrality



- A key player in the circular economy
- Make efficient use of water

Circularity



Strategic autonomy

- Helps anchor industrial value chains in Spain
- Reduce Spain's dependence on mineral raw materials, especially those sourced from conflict areas or produced without respect

for human rights, the environment, and occupational health and safety



Governance

- Advance sectoral governance
- Combat unfair competition
- Promote equality policies



Social responsibility

- Contribute to workers' health and safety
- Promote the integration of women
- Ensure continuous training and generational renewal



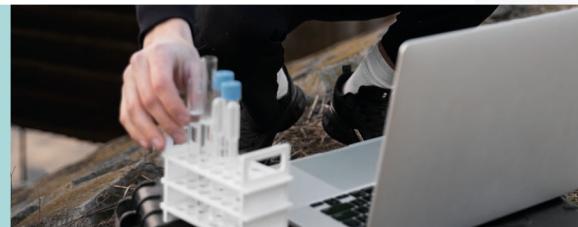
Relations with the social environment

- Promote social acceptance of the industry
- Contribute to improving the sector's image



Digitalisation, efficiency and research

- Develop Extractive Industry 4.0, making it more efficient and sustainable
- Support R&D&I for the industry
- Lead the continuous improvement of the industry



An industry with a Roadmap
approved by the Government
and recognised by the EU as
fundamental, strategic and
essential



3,600
companies
4,400
mining operations and factories
218.6
million tonnes
360,000
jobs
27.6
billion euros in turnover
+11.84
billion euros in exports



**Confederación Española de las Industrias de las
Materias Primas Minerales - PRIMIGEA**

Plaza de las Cortes, 5 – 7^a Planta; 28014 – Madrid;
T: + 34 915 021 417 · F: +34 914 339 155
primigea@primigea.es - www.primigea.es

EU Transparency Register: 526719836996-79
Register of Interest Groups of the Spanish National
Commission on Markets and Competition



Miembro de:



www.primigea.es