



PRIMIGEIA
Materias Primas Minerales

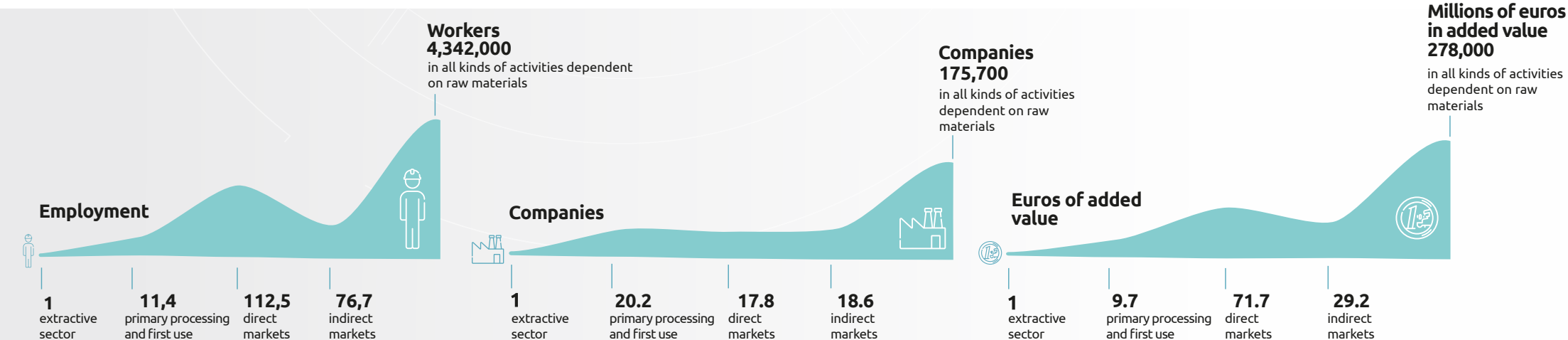
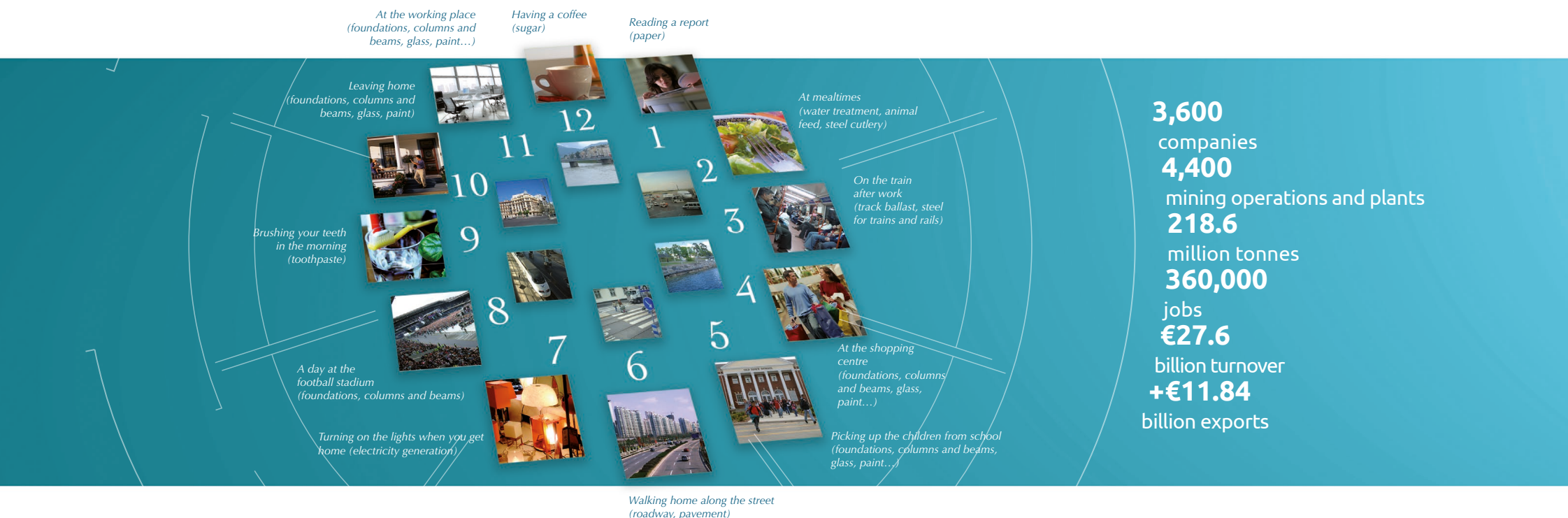
2025 Mineral Raw Materials

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

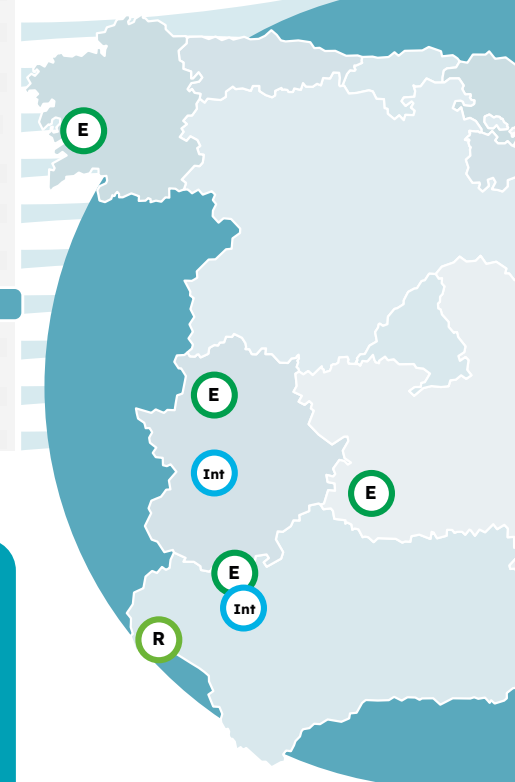


The mineral raw materials industry is a strategic and essential sector, ensuring local supply to industries critical for society

An essential and strategic industry

	Metallic minerals	Industrial minerals								Industrial minerals Industrial aggregates		Quarry products					Ornamental stone	
		Special clays	Kaolin	Fluorspar	Feldspar	Magnesite	Potash	Natural sodium sulphate	Other industrial minerals	Silica sands	Calcium carbonate and limestone	Aggregates	Clays	Lime	Cement	Gypsum	Slate	Ornamental stone
 Agriculture																		
 Forestry																		
 Livestock Farming																		
 Food and beverages																		
 Pet care																		
 Textiles and footwear																		
 Wood																		
 Paper and cardboard																		
 Chemicals, paints and varnishes																		
 Cleaning products, perfumes and cosmetics																		
 Pharmaceutical industry																		
 Rubber																		
 Plastics																		
 Glass																		
 Medical devices																		
 Maintenance equipment and spare parts																		
 Water treatment																		
 Construction and civil engineering																		
 Steel industry																		
 Energy																		
 Ceramics																		

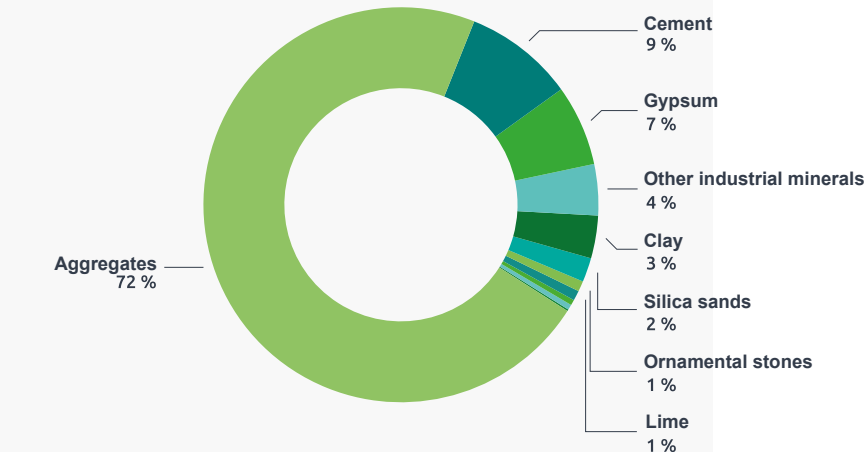
Seven EU Strategic Projects



Figures for the non-energy mineral raw materials industry

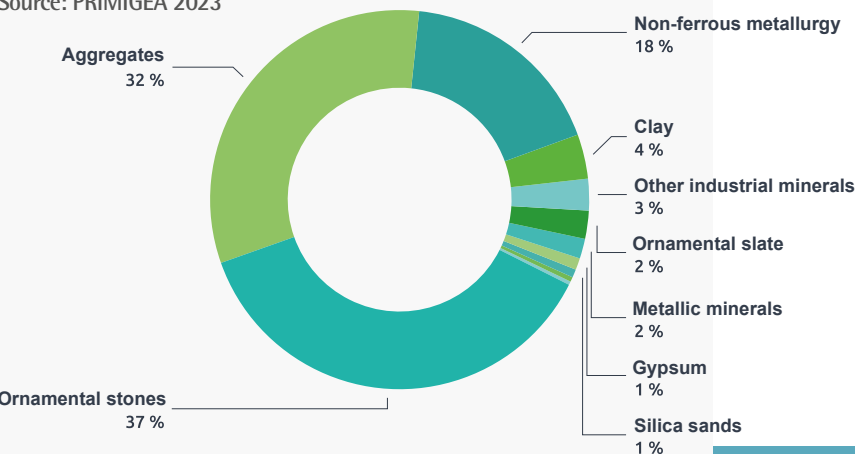
Distribution of the production volume of the mineral raw materials industry

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 %

	Number 2023
Companies	3,600
Mining operations	2,604
Other plants	1,800
Total mining operations and plants	4,404

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

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

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



€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	75.9 %
Total employment	359,710	100 %

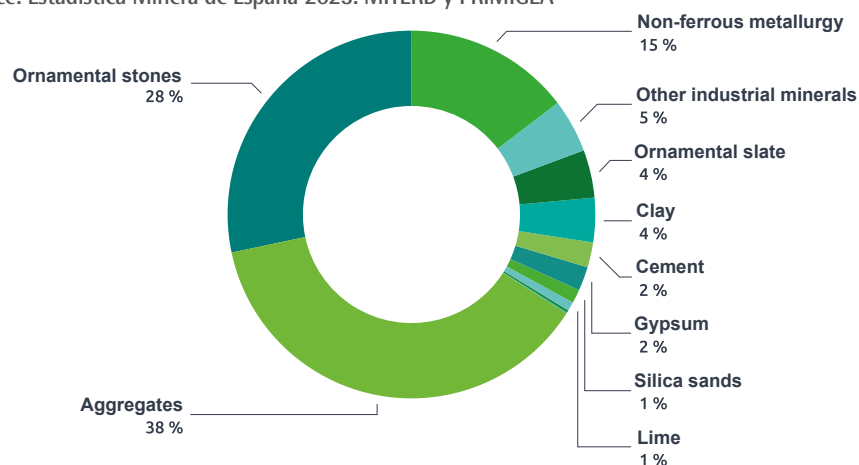
Nearly 360,000 direct
and indirect jobs

More than 10,500
women work directly
in the industry

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

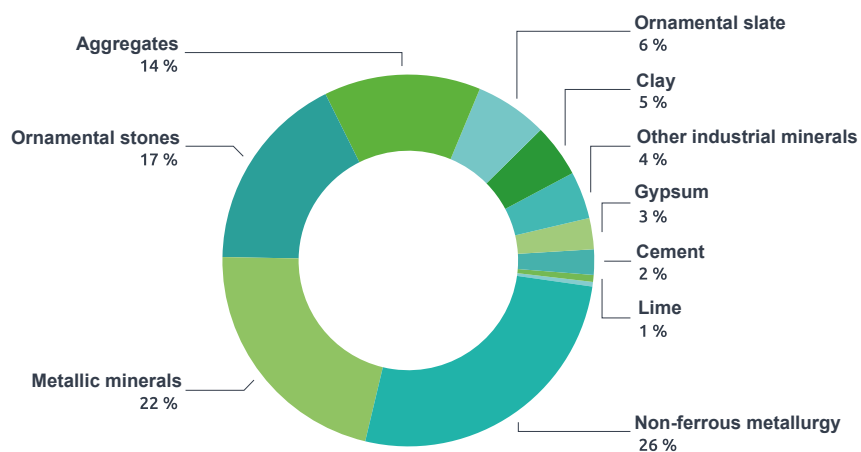
Distribution of the number of mining operations and plants in the mineral raw materials industry

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



In summary



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



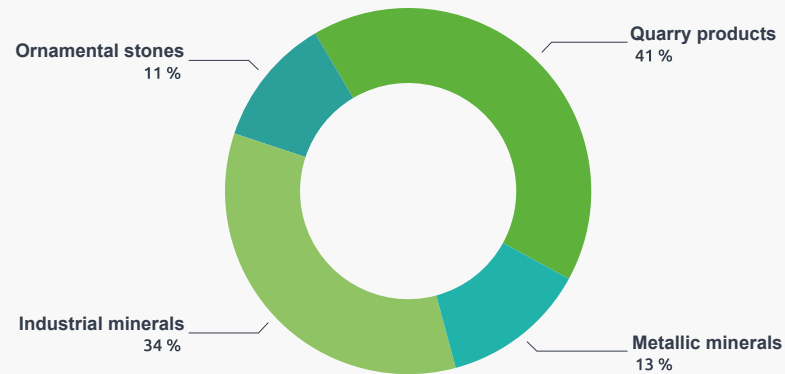
€1.325 billion
Investments



€11.84 billion
Exports

Mineral raw materials in Spain

Source: Estadística Minera de España 2023. MITERD



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

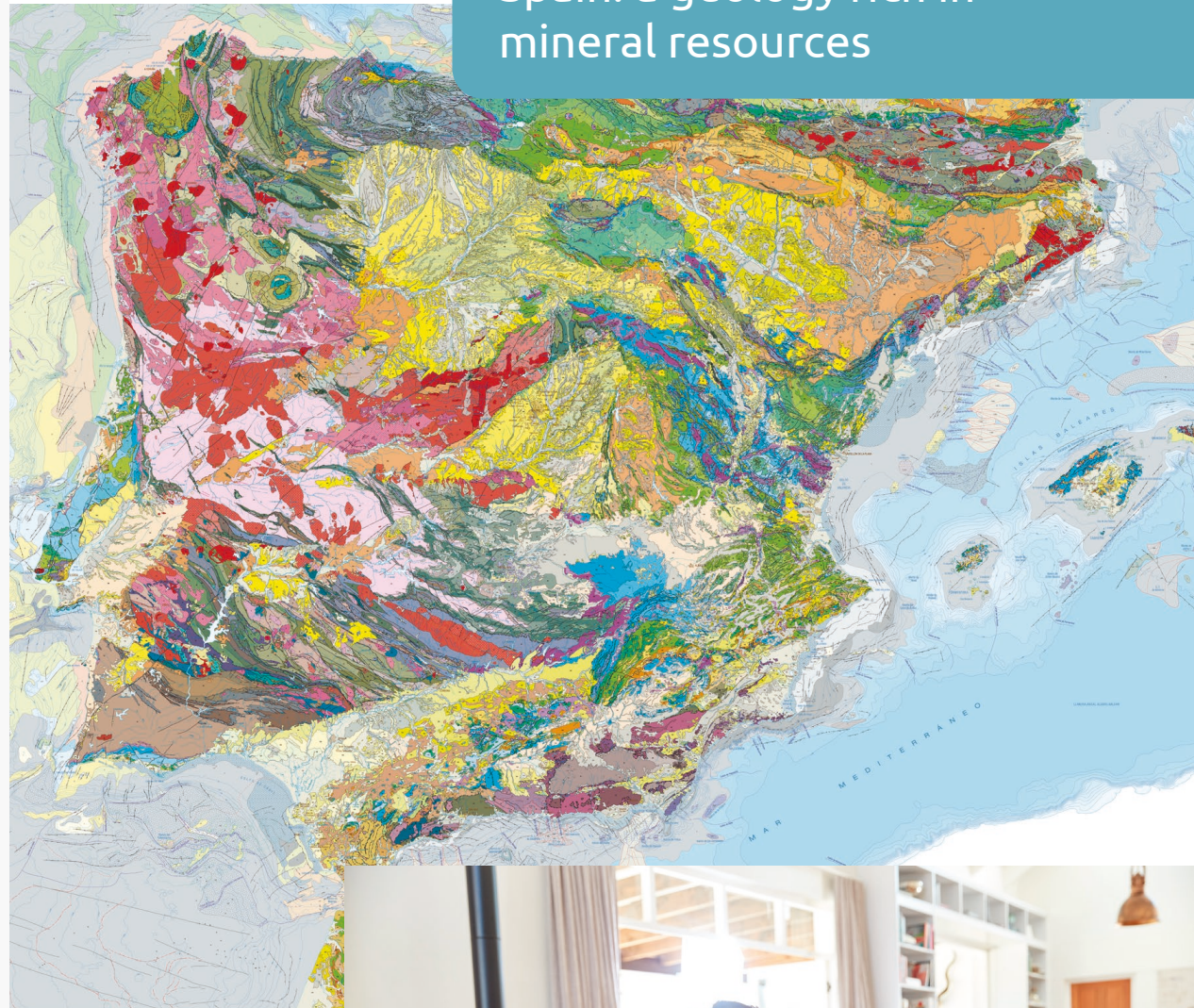
8 ornamental stones:

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

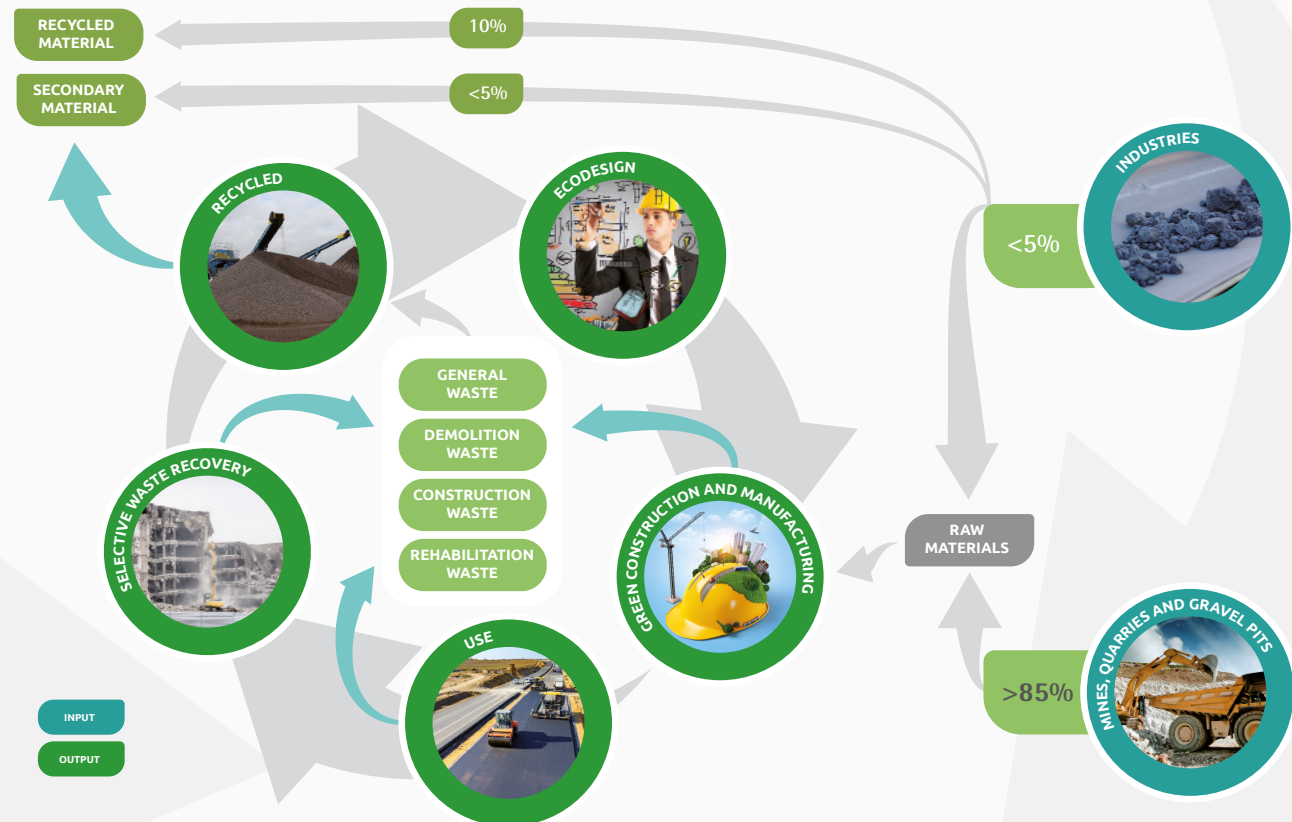
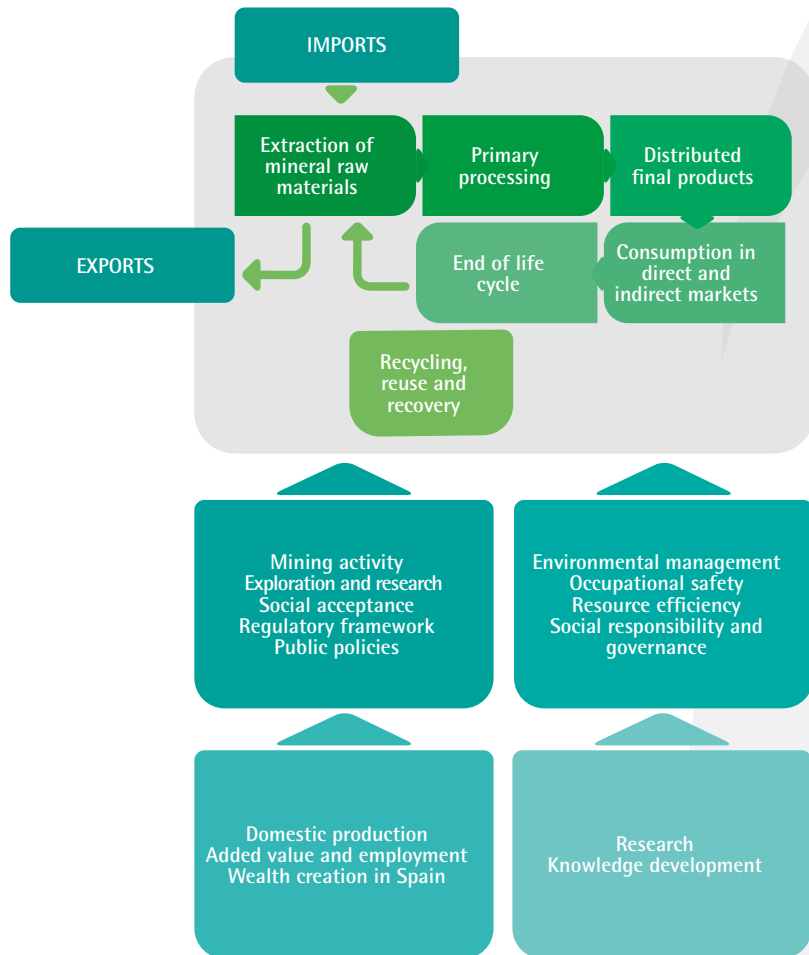


Creating sustainable
wealth for society



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

SANDS



GRAVELS



CRUSHED ROCK



MANUFACTURED AGGREGATES



RECYCLED AGGREGATES



SLATE



CLAY



SILICA SANDS



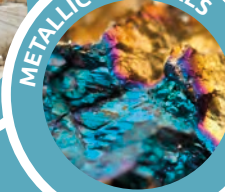
GYPSUM



ORNAMENTAL STONE



METALLIC MINERALS



INDUSTRIAL MINERALS



COPPER



MAGNESITE



ASPHALT MIXES



PRECAST CONCRETE PRODUCTS



BRICK



MORTAR



BALLAST



CONCRETE



FLAT CERAMICS



BASE AND SUBBASE LAYERS



RIPRAP



ORNAMENTAL STONE



GYPSUM BOARD



INDUSTRIAL SAND



METALLURGY



LIME



CEMENT



Uses in construction

TUNNELS



CYCLE LANES



SHOPPING CENTRES



FACTORIES



OFFICES



MUSEUMS



RAILWAYS



HOUSING



ROADS



BRIDGES



PORTS



SPORTS STADIUMS



AIRPORTS



STREETS



SCHOOLS



HOSPITALS

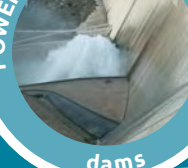


POWER GENERATION



Photovoltaic plants

POWER GENERATION



dams

POWER GENERATION



wind turbines

GLASS



PAPER



STEEL INDUSTRY



FOOD AND BEVERAGES



ELECTRONICS AND TECHNOLOGY



WATER TREATMENT



LANDSCAPING



PHARMACEUTICAL INDUSTRY



COSMETICS



CHEMICAL INDUSTRY



EMISSION REDUCTION
CLEAN



LIVESTOCK FARMING



AGRICULTURE



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

SUSTAINABLE DEVELOPMENT GOALS



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

... fully compatible with the protection of the environment



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



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



European Minerals Day

... committed to society



Our priorities, our commitment



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



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



Water management, river basin authorities, water quality



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

Industrial and raw materials strategy

Natural environment

Water management

Climate change mitigation

Circular economy

Continuous improvement and compliance with legislation



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



Sustainable construction

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

Safety

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

Health

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

Employment



People

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



Communication

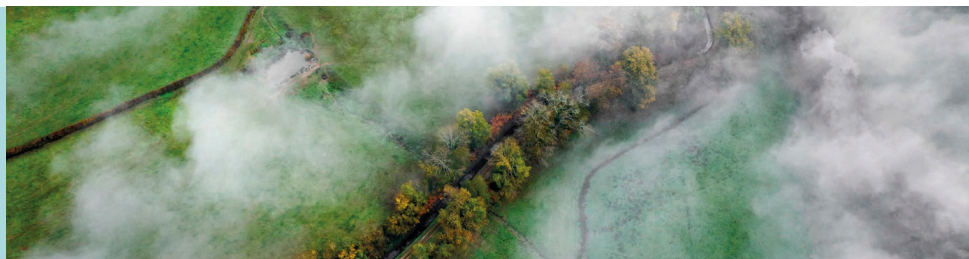
Transparency, dialogue with citizens, contribution to the economy and the value chain, corporate governance, commitment to stakeholders, CSR and ESG



Fight against unfair competition



Strategic priorities for a sustainable mineral raw materials industry



- Contribute to the country's economic growth and to sustaining industrial activity in depopulated Spain

- 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

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

- Advocate for a support plan to strengthen the competitiveness of the industry

Access to resources

- 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

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



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