

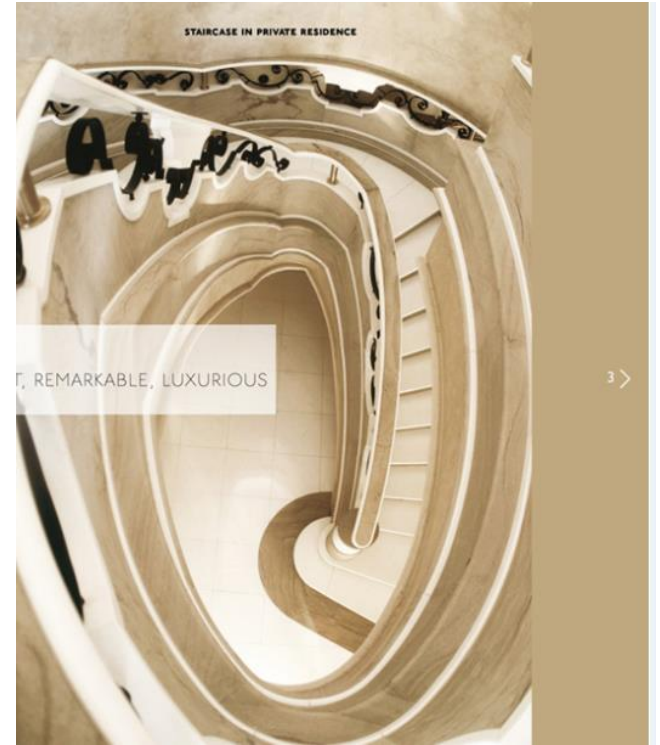
HELLENIC FEDERATION OF MARBLE INDUSTRIES OF NORTHERN GREECE

**HELLENIC MARBLE
CHALLENGES
AND
PERSPECTIVES**

Constantin BAXEVANAKIS
Dr. Mechanical Engineer
John Moschous S.A

EIT RAW MATERIALS Athens 23– 24November 2016

**FROM THE ANTIQUITY UP TO NOW
THE HELLENIC MARBLE IS IDENTIFIED
WITH THE WHITE COLOR
ETERNALLY IN FASHION**



FAMOUS ANCIENT HELLENIC TYPES OF MARBLES

Parthenon



Pentelikon Marble



Thassos marble

*The Winged Victory of Samothrace
or The Winged Nike*



Paros Marble

TODAY
THE HELLENIC WHITE MARBLES COMING
FROM NOTHERN GREECE REPRESENTING 90% OF THE HELLENIC MARBLE
EXPORTS



Volakas Marble

Additional Names: [Branco Volakas...](#)

Greece – Marble

[Find Suppliers](#) [Post Request](#)



Thassos Marble

Additional Names: [Thassos White Marb](#)

Greece – Marble

[Find Suppliers](#) [Post Request](#)



Polaris White Marble

Additional Names: [Polaris Marble...](#)

Greece – Marble

[Find Suppliers](#) [Post Request](#)



Ajax Marble

Additional Names: [Bianco Ajax...](#)

Greece – Marble

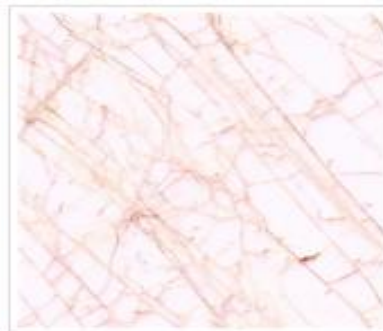
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Ariston Marble

Additional Names: [Ariston White...](#)

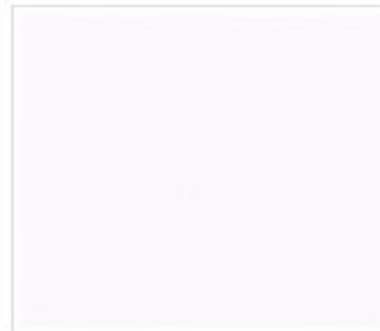
Greece – Marble



Golden Spider Marble

Additional Names: [Drama Gold...](#)

Greece – Marble



Thassos Waterfall

Additional Names: [Thassos...](#)

Greece – Marble



Pirgon White

Additional Names: [Dramas Pirgon White](#)

Greece – Marble

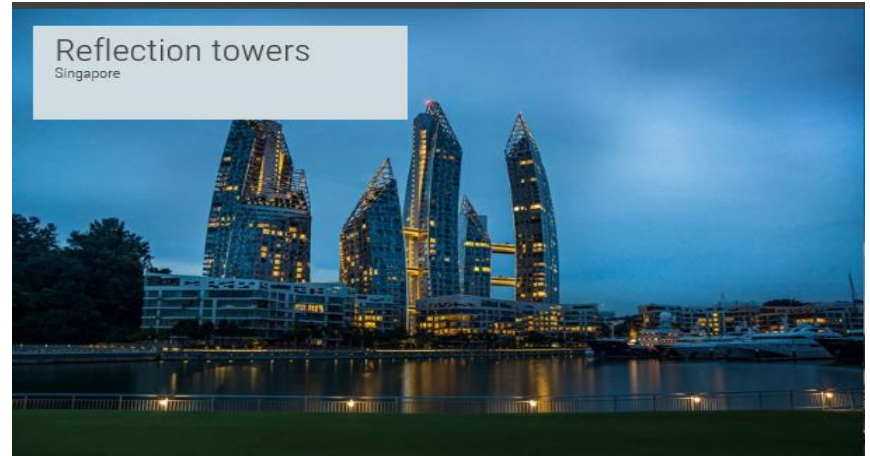
161 TRADE NAMES OF HELLENIC WHITE MARBLES ARE RECORDED WORLDWIDE

Source: stonecontact.com

NUMEROUS PROJECTS ARE DONE AROUND THE GLOBE WITH HELLENIC MARBLES



GRAND MOSQUE ABU DHABI FHL KYRIAKIDIS GROUP



PAVLIDIS MARBLE & GRANITE



STONE GROUP



MEKKAH HOLLY MOSQUE
OUTDOOR THASSOS SNOWWHITE

IN THE AREA OF DRAMA – KAVALA – THASSOS (NORTHERN GREECE) OPERATE 135 ACTIVE MARBLE QUARRIES, WITH ANNUAL PRODUCTION 300.000 m³

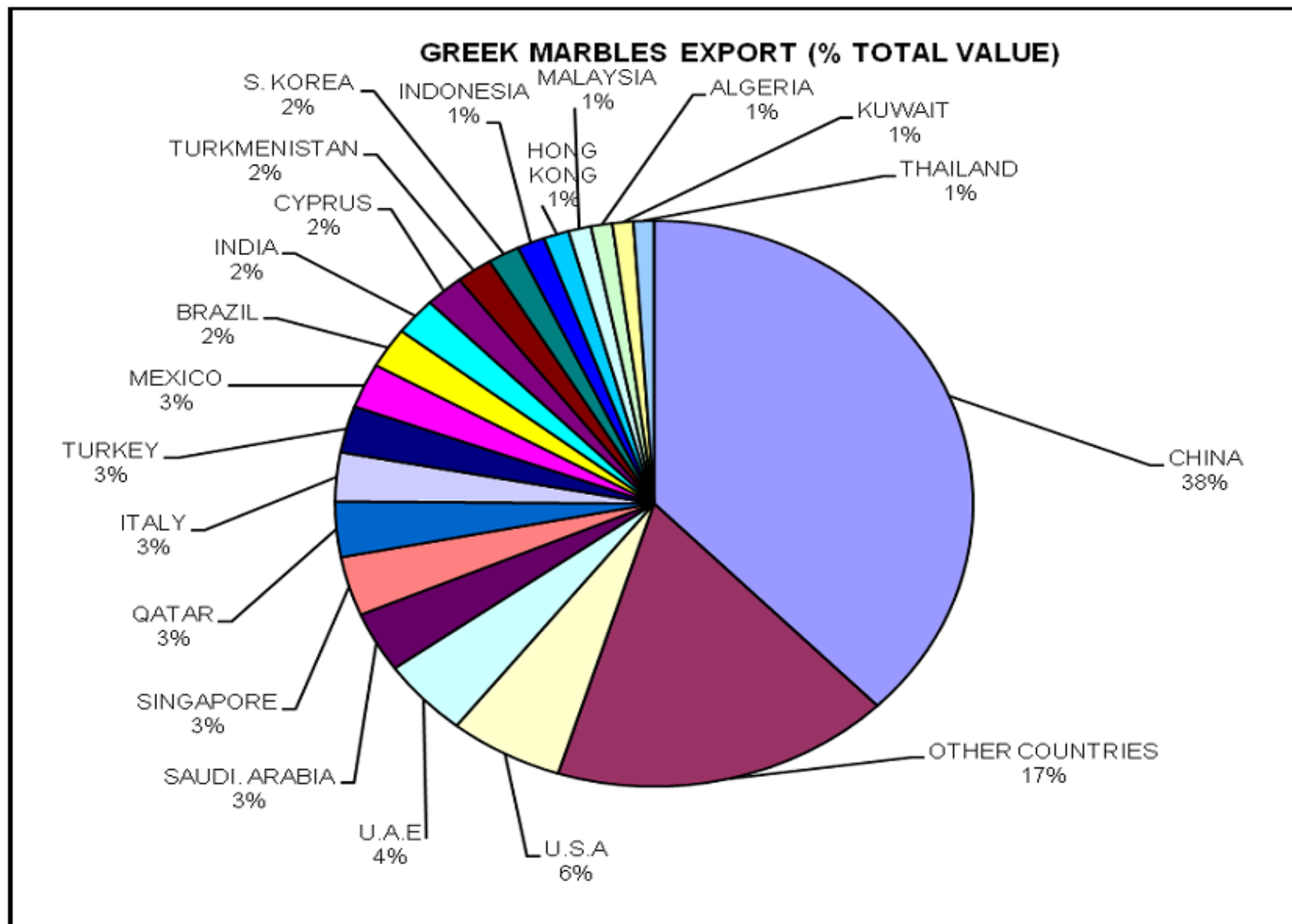


Source : Lithos

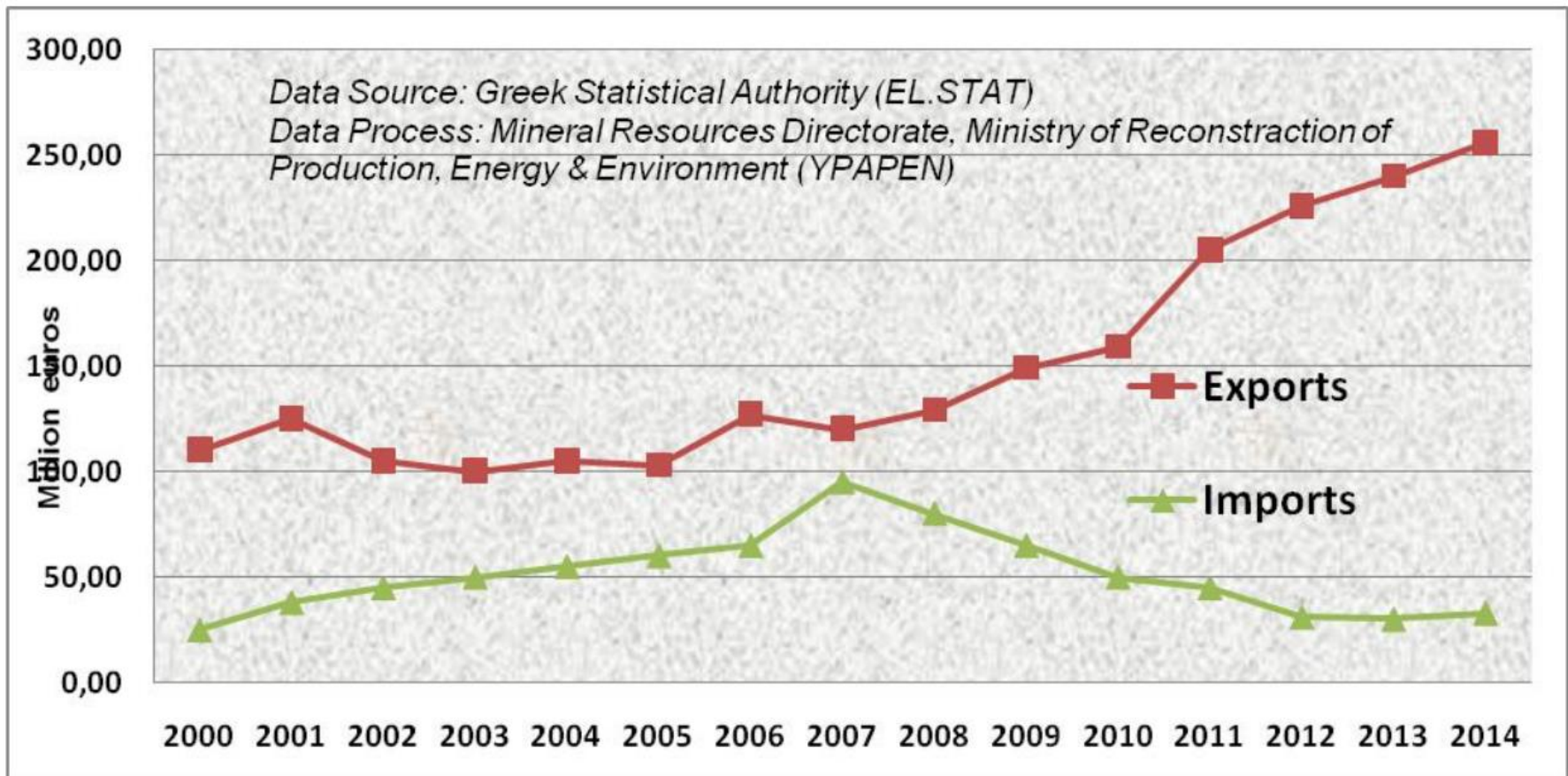
THE HELLENIC MARBLE SECTOR CONSISTS OF VERTICAL INTEGRATED COMPANIES
EXTRACTION, PROCESSING AND TRADING
5 companies have a turnover from 20 TO 50 mEuro and
more than 20 companies above 3 mEuro



EXPORTS OF HELLENIC MARBLES BLOCKS AND FINAL PRODUCTS



THE HELLENIC MARBLE SECTOR BASED ON EXPORTS STILL KEEP UP WITH A STRONG GROWTH



Source Peter TZEFERIS

DESPITE

- **THE GROWTH OF THE SECTOR**
- **THE ENDLESS RECORDED DEPOSITS OF WHITE MARBLE IN GREECE**
- **THE KNOW HOW AND THE STRONG FINANCIAL POSITION OF THE HELLENIC MARBLE COMPANIES**



OUR MARKET SHARE WORLDWIDE IS ERODING

- **SINCE OUR QUARRY PRODUCTION CANNOT KEEP UP WITH THE DEMAND, A FEW NEW QUARRIES START EVERY YEAR, 5 IN AVERAGE THE LAST 5 YEARS**
- **NEW WHITE MARBLES PRODUCERS (CHINA AND VIETNAM) ENTER THE MARKET.**

WHY?

© Can Stock Photo

...because...

- **OUR LEGAL FRAME REGULATING QUARRIES CONCESSIONS IS : HEAVY, COMPLEX AND OBSOLETE, IMPEDING THE QUARRYING DEVELOPMENT**

- **AFTER 18 STATE SERVICES LAYING THEIR POSITIVE OPINIONS AT LEAST TWO TIMES, NUMEROUS STUDIES BEING APPROVED AND FIVE TO SEVEN YEARS OF TIRELESS EFFORTS, A NEW MARBLE QUARRY IS ABOUT TO START.**



PROPOSAL No 1

THE HELLENIC LEGAL FRAME REGULATING THE CONCESSION, THE EXPLORATION AND THE ENVIRONMENTAL RESTRICTIONS OF MARBLE QUARRIES SHOULD BE ALIGNED WITH THESE OF OTHER EU COUNTRIES.

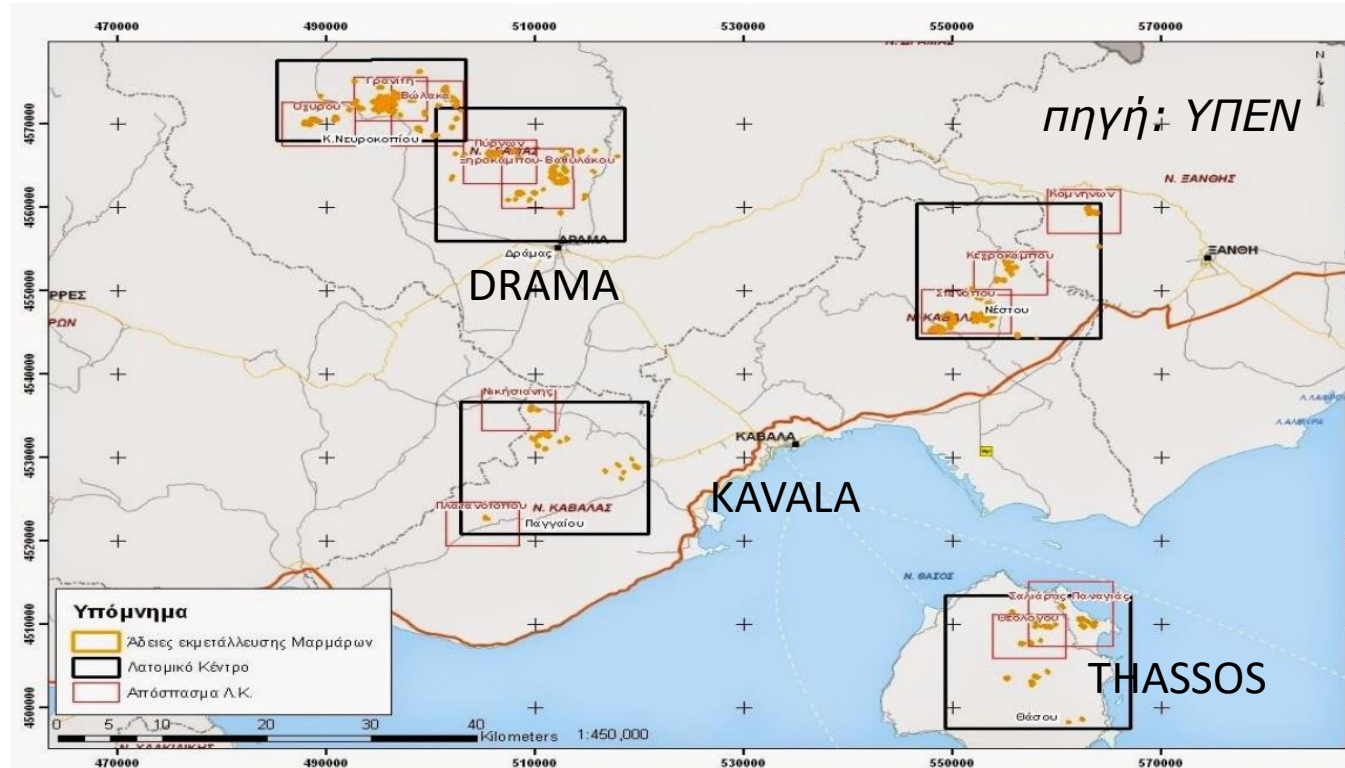
SINCE PRACTICES AND LEGAL FRAMEWORK VARY SIGNIFICANTLY THROUGHOUT EUROPE A COMMON MINING LAW MAY BE CONSIDERED AS A MAJOR PRIORITY.

EXPORTS MARBLE & GRANITE 2015 EU COUNTRIES

- ITALY: 1966 MILLIONS EURO
- SPAIN: 587 MILLIONS EURO
- GREECE: 271 MILLIONS EURO

SOURCE STONE NEWS / EUROSTAT

TURNING QUARRYING WASTE INTO WEALTH



IN THE AREA DRAMA KAVALA THASSOS

4 QUARRYING CENTRES HAVE BEEN DEVELOPPED
200 QUARRYING LICENCES, 135 ACTIVE QUARRIES
300.000 M3 ANNUAL PRODUCTION OF MARBLES
LOW BLOCK YIELD : 10%

TURNING QUARRYING WASTE INTO WEALTH

**3.000.000 M3 DOLOMITE QUARRYING WASTE OR LEFTOVERS
ARE PRODUCED PER YEAR.**

ACTUALLY:

- CRASHIERS IN EVERY QUARRY TRANSFORM QUARRYING WASTE TO AGGREGATES
- A SMALL PART OF THE AGGREGATES PRODUCTION IS EXPORTED OR USED BY THE READY MORTAR INDUSTRY (MARMODOM FHL Group)
- THE BIGGEST PART OF THE PRODUCTION IS USED FOR PAVING QUARRYING ROADS OR IT IS STOCKPILLED IN THE QUARRIES.



THASSOS: PHILIPPIDIS AGGREGATES PRODUCTION AND EXPORTS



DRAMA: MARMODOM MORTAR PLANT

TURNING QUARRYING WASTE INTO WEALTH

**3.000.000 M3 ANNUAL DOLOMITE QUARRYING WASTE ARE STOCKPILED
PER YEAR.**

RESULTING IN:

- IMPEDING OPERATIONS IN THE QUARRIES
- DETERIORATING THE ENVIRONMENT , VISUAL IMPACT
- TURNING LOCAL SOCIETIES AGAINST THE QUARRYING SECTOR



Quarrying center in Thassos island

TURNING QUARRYING WASTE INTO WEALTH IS A KEY ISSUE
FOR THE SUSTAINABILITY OF THE MARBLE SECTOR



Proposal No 2

A full market research should be carried out in order that the dolomite aggregates be transformed into commercial bi-products.

The marble industries are apt at investing in ANY required technology

UNDERGROUND MARBLE QUARRYING

- UNDERGROUND MARBLE QUARRYING IS GAINING GROUND IN THE HELLENIC MARBLE SECTOR DUE TO OPERATIONAL AND ENVIRONMENTAL REASONS
- THE METHOD HAS BEEN ALREADY ADOPTED BY 3 COMPANIES DIONYSOS MARBLE, FHL KYRIAKIDIS GROUP, PAVLIDIS IN QUARRIES IN VOLAKAS , GRANITIS AREA IN DRAMA.
- FURTHER COMPANIES ARE PLANNING TO INVEST.



FHL KYRIAKIDIS Group Volakas Quarry Drama



UNDERGROUND MARBLE QUARRYING

THE HELLENIC COMPANIS HAS DEVELOPED AN INPORTANT KNOW HOW IN :

- DESIGNING
- EXECUTING
- SECURING UNDERGROUND MARBLES QUARRIES



FHL KYRIAKIDIS Group, displacement gauge , quarry Volakas Frama

ON LINE MONITORING OF THE OPENING DISPLACEMENT OF THE CRACKS

UNDERGROUND MARBLE QUARRYING

UP TO NOW IN GREECE UNDERGROUND QUARRYING HAS BEEN DEVELOPED IN ONE QUARRY CENTER VOLAKAS AND GRANITIS DRAMA, A SOFT BUT SOLID MARBLE DEPOSIT.

HOW THIS METHOD CAN :

- BE APPLIED TO OTHER MORE FRACTURED MARBLE DEPOSITS FOR EXAMPLE IN THASSOS ?
- TEAM UP WITH ENVIRONMENTAL (NATURA 2000) AND ARCHEOLOGICAL RESTRICTIONS

Proposal No 3

- OPTIMIZING AND EXPAND THE EXISTING TECHNOLOGY AND NOW-HOW OF UNDERGROUND QUARRYING.

CONCLUSIONS: THE HELLENIC MARBLE SECTOR HAS

- A GLORIOUS PAST
- A STRONG PRESENT
- BUT IN ORDER THAT HE CONTEMPLATE THE FUTURE WITH OPTIMISM WE MUST:
 1. MODERNIZE THE LEGAL FRAMEWORK REGULATING QUARRYING ACTIVITIES
 2. TURN OUR QUARRY WASTES INTO WEALTH
 3. EXPAND OUR EXISTING QUARRYING TECHNOLOGY AND KNOW HOW



HELLENIC FEDERATION OF MARBLE INDUSTRIES OF NORTHERN GREECE



THANK YOU FOR YOUR ATTENTION



EIT RAW MATERIALS Athens 23– 24 November 2016