



Summary

ZIA recently completed its third ESG and Sustainability Performance Benchmarking study. A total of 16 members from various locations and ZIA membership categories participated to update the 2022 report. Data were collected for the period of 2018 – 2022, against 20 Key Performance Indicators. The report enables ZIA and participating members to establish an ESG data collection system, assess ESG KPIs, benchmark performance against peers, and support communication to different stakeholders. As previously, the full report, including an *Annex of data* specific to each organisation, is available to those ZIA members who participated.

Environmental

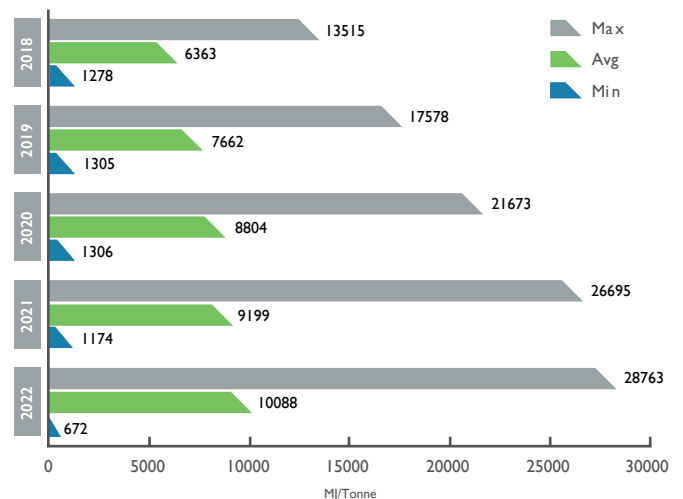
Energy and Emissions

- Energy intensity rising trend
- Compared to 2021, average GHG intensity for Producers has increased, but there is an overall decline for Consumers
- Increasing trend in water recycling initiatives
- 81% of companies had waste recycling initiatives

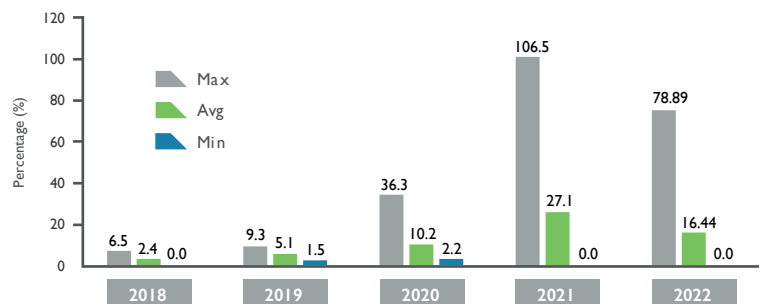
Biodiversity

- Increasing land area rehabilitated by Producers since 2018
- Increasing trend to progressive rehabilitation close behind mining rather than waiting for the whole mine to be exhausted

Energy Intensity (MJ/Metric tonne of production) ¹



Percentage of land rehabilitated (%)



Average number of environmental reportable incidents down from 0.5 in 2021 to 0.13 in 2022



Average % of renewable energy of total energy consumption up from 5.49% to 5.73%



A 29% decrease in average water withdrawn in 2022



44% of participants have ISO 14001 certified sites, a 6% increase since 2021

Social

Diversity

- Increase in female employment rates
- Increase in number of differently-abled employees
- Average of 22% of women in board/executive roles is greater than in the general workforce



3 out of 8 producers have spent between 0.06 – 0.13% of total revenue on biodiversity



Zero fatalities across the five-year period

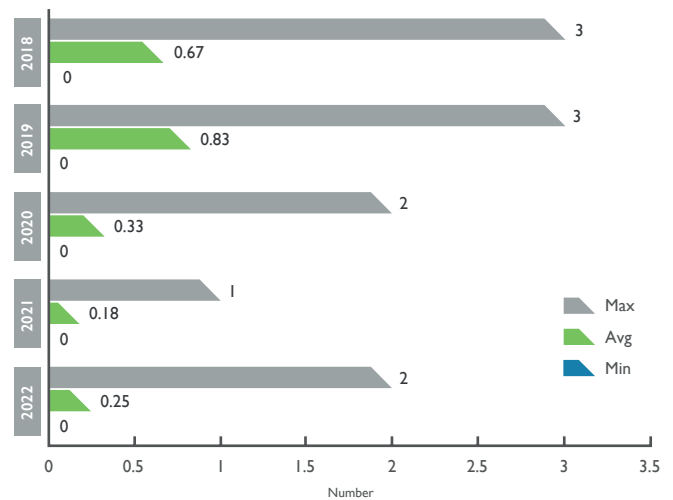


Decreases in Lost Time Injury Frequency Rate (LTIFR) and Near Miss Frequency Rate (NMFR)

Governance

- Small rise in number of lawsuits or government actions
- Improvement in establishing good ESG practices
- Majority of members have established policies on:
 - Equal opportunities & non-discrimination (94%)
 - Business code of conduct (88%)
 - Anti-corruption and anti-bribery (88%)
 - Human rights & modern slavery (94%)
 - Environmental, Social and Governance (69%)

Number of lawsuits or government actions



Approach and Methodology Summary

- Public domain data search:** Identification of ESG related Key Performance Indicators (KPIs) based on practices followed by leading mining and metal sector companies/associations with published information.
- ESG KPIs and metrics questionnaire:** Considering their sustainability and business relevance, availability of data etc. a realistic and manageable list of ESG KPIs was compiled in MS excel template.
- Data template circulation:** Circulated final set of KPIs and their assessment methodology and templates in MS Excel template.
- Engagement with member companies:** The pre-populated questionnaire was shared individually with companies via email requesting data for 2022 (and for those members who have not previously participated data for 2018, 2019, 2020 and 2021). Companies were invited to complete the questionnaire within a designated five-week period. ZIA organised two workshop sessions to support member representatives with data collection.
- Data validation and analysis:** Consultants reviewed the responses and, where necessary, contacted members directly for clarification or additional information.
- Reporting:** Summary and full report presented to ZIA. Summary report including main KPIs for individual participating members were shared directly to those company's SPOCs.

¹ Energy intensity is calculated based on summation of total renewable electricity energy (wind, solar, hydro, biomass, biogas), electricity consumption sourced from grid and total non-renewable energy (coal, furnace oil/HFO, diesel, natural gas, LPG) divided by quantity of production of product.



ZIRCON INDUSTRY ASSOCIATION
24 OLD BOND STREET, MAYFAIR,
LONDON, W1S 4AP, UK

www.zircon-association.org

ZIA operates a strict antitrust policy and Code of Conduct for all member communications and activities.

Our members commit to ZIA values, which serve to encourage the industry to operate sustainability and with integrity.