

3RD E&E EVENT
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E&E Event 2026 in Vienna: Perspectives from the Asphalt and Bitumen Sector

In June 2026, the European asphalt and bitumen industry once again came together in Vienna for the E&E Event 2026 on 11 & 12 June – a key opportunity to exchange perspectives on the future of our sector and to develop common approaches for the challenges ahead.

Organised by EAPA and Eurobitume, the event brought together policy, technical expertise and practical implementation. At a time when our industry must simultaneously deliver sustainability, resilience – particularly considering evolving geopolitical developments – and high performance, this dialogue was more important than ever.

The programme clearly reflected these priorities. It opened with a session on sustainable road construction in Europe, where national road authorities and industry representatives discussed the regulatory framework, the challenges they face, as well as practical solutions and successful examples. This was followed by a session on attracting the next generation of professionals and the future of work, exploring how our industry can recruit and retain skilled people – including through new initiatives such as Women in Asphalt Europe – as well as the growing role of artificial intelligence.

A central focus of the event was decarbonisation. Representatives from across the entire value chain – from aggregates and bitumen to the final asphalt product – presented their respective roadmaps towards climate neutrality. One of the highlights was the first presentation of the European bitumen industry's Decarbonisation Roadmap.

The second day focused on emissions management during asphalt paving, from existing asphalt surfaces and production facilities, complemented by forward-looking discussions on key industry trends, including developments in raw material markets, bio-based materials, the role of public authorities and the long-term changes that will shape our sector in the years ahead.

The E&E Event provided ample opportunities to exchange ideas with colleagues from across Europe and beyond. Interactive sessions, extended networking coffee breaks in the exhibition area and a networking dinner in a traditional Viennese setting encouraged meaningful discussions and new connections.

The exhibition area, featured around thirty exhibitors, was fully booked, as well as the Warm Mix Asphalt Workshop the previous day.

Session 1: Sustainable Road Construction in Europe – Policy, Regulation and Practice in Dialogue

This session confronted the contribution of the EU political and regulatory frameworks and the role of national administrations with industry's actions, views, challenges and expectations, towards a common objective of building sustainable roads.

Speakers:

- Jean-Pierre Paseri (European Construction Industry Federation – FIEC, Belgium)
- Miriam Frosi (Rijkswaterstaat, The Netherlands)
- Camino Arce Blanco (SEITT, Spain)

Key insights:

1. **Ambition vs. Implementation Gap:** Europe has clear low-carbon policies but faces a persistent execution and funding gap. The industry possesses the technical roadmaps and levers but needs enabling frameworks, not just new targets, to deliver on-site.
2. **Maintenance as a Decarbonization Tool:** Pavement condition materially affects rolling resistance. Systematic rehabilitation is a proven, near-term lever to reduce vehicle fuel consumption and CO2 emissions at fleet scale, transforming maintenance from a cost into an environmental and economic investment.
3. **Data-Driven Proof of Value:** The use of large-scale connected vehicle data provides a powerful new methodology to scientifically quantify the real-world impact of road surface improvements on fuel efficiency, moving beyond theoretical models and building an evidence base for policymakers.
4. **Procurement Reform is Critical:** A shift is needed from awarding contracts based on the lowest initial price to criteria that prioritize lifecycle performance, carbon footprint, and circularity. Tenders should allow for innovative variants and use fair, calibrated carbon assessment tools.
5. **Collaboration as a System Lever:** Cross-border, cross-sector alliances (public-private-knowledge) are essential to overcome fragmentation, harmonize standards, and scale sustainable road practices. National platforms or initiatives like the European Sustainable Road Alliance (ESRA) can help reduce fragmentation and enable even small authorities to make sustainable choices.
6. **The "People Problem" is the Main Barrier:** The primary obstacle to adopting sustainable road technologies is not a lack of technical solutions but a lack of awareness, trust, and education among clients, politicians, and the public. The industry must improve its communication strategy.

Main outcomes:

The discussions highlighted that the technologies and knowledge needed to decarbonize road infrastructure already exist, but progress is constrained by implementation gaps, outdated procurement practices (often still based on the lowest price), and limited awareness rather than technical barriers. Achieving meaningful change will require lifecycle-based procurement, data-driven evidence of benefits (e.g. from vehicles data), improved pavement maintenance, and stronger collaboration between industry, policymakers, researchers, and road authorities to build trust and accelerate adoption of sustainable practices.

Session 2: Next-Gen Talent acquisition and reinventing the world of work

The session included discussions on new approaches for data collection of the sector to attract future talent, AI in the world of work and the European Women in Asphalt initiative.

Speakers:

- Julia Pleyer (TOGETHER CCA GmbH & Leaders of AI, Spain). AI - Reinventing the world of work
- Juan José Potti (ASEFMA, Spain) & Aida Marza Beltran (Becsa, Spain). The Young Paving Talent initiative in Spain with a global outlook
- Siobhan McKelvey (United Kingdom) and several members of the Women in Asphalt Europe Initiative. Launch of Women in Asphalt Europe

Key insights:

1. AI & Automation: Audience polls identify AI and automation as the dominant trend shaping the future workforce. AI can streamline communication with avatars, while emergent agent simulations demonstrate complex autonomous behaviours, necessitating strong governance.
2. AI Adoption Journey: A practical, staged approach to AI adoption is recommended: start with conversational AI, evolve to reusable prompts and assistants, and then scale to automation and multi-agent systems. Context engineering is now more critical than complex prompting.
3. Talent Crisis: The asphalt and paving industry faces a critical, global shortage of skilled workers, particularly young people and women, driven by an aging workforce and competition from other "more-attractive" sectors.
4. "Young Paving Talents" Initiative: This initiative aims to attract young talent through a web platform, educational partnerships, bootcamps, and innovative tools like virtual reality machinery simulators to provide safe, engaging training experiences.
5. "Women in Asphalt Europe" Initiative: Officially launched to increase the visibility, retention, and recruitment of women in the asphalt and bitumen sectors. It is built on pillars, such as amplifying voices, visibility, networking, mentoring, and fostering inclusion. The initiative requires broad industry support from both men and women.

Main outcomes:

AI and automation are set to transform the industry, with organizations encouraged to adopt AI incrementally—from conversational tools to automated workflows and multi-agent systems—while ensuring strong governance and focusing on effective context management. At the same time, the industry faces a severe talent shortage, making workforce development a strategic priority through initiatives such as Young Paving Talents to attract new entrants and Women in Asphalt Europe to improve diversity, inclusion, and long-term recruitment and retention.

Session 3: Paving to Decarbonisation – Data, Paths, Progress

This session gave insights on Decarbonisation and Net Zero Roadmaps from the perspectives of Aggregates, Bitumen and Asphalt Industries.

Speakers:

- Brice Delaporte (Eurobitume, Belgium) – Eurobitume’s decarbonisation Roadmap for bitumen
- Dirk Fincke (Aggregates Europe, Belgium) – Sustainable production of aggregates
- Reed Ryan (Asphalt Institute, United States) – Sustainability actions of the American bitumen industry
- Breixo Gomez (EAPA, Belgium) – EAPA’s Updated Roadmap to net Zero

Key insights:

1. Eurobitume has launched a formal decarbonization roadmap for the bitumen industry, focusing on a "cradle to gate" scope (from crude oil extraction to storage) to provide a realistic pathway toward meeting EU climate objectives.
2. From 1990 to 2023, the bitumen lifecycle emissions decreased by about 36%, driven by methane management, transport efficiencies, and refining improvements. Scenario analysis indicates a potential 58% reduction from 2023 to 2050 (73% from 1990), with methane reduction and electrification as major levers; carbon capture and storage is not considered a significant lever in this context.
3. Aggregates have comparatively low emissions (3–5 kg CO₂ per ton), making near-term neutrality feasible at some sites via electrification and renewables. Sustainability in aggregates involves balancing environmental, economic, and social dimensions, ensuring future resource access, and addressing permitting and regulatory challenges. Regulatory frameworks can inadvertently hinder sustainability goals. For instance, the EU's REACH regulation threatens to make recycling aggregates economically and logistically unfeasible.
4. The American asphalt industry's updated LCA revealed a 90% reduction in refining emissions due to correcting a double-counting error, underscoring the importance of data integrity. This shows that accurate data and a willingness to revise scientific models are fundamental.
5. The carbon emissions from producing bitumen are the most significant contributor to asphalt's total footprint, accounting for over 30% of the lifecycle emissions, despite bitumen being only about 5% of the mix by mass.
6. Eurobitume’s new projected decarbonization path for bitumen production itself will drastically lower the starting point for the asphalt industry's efforts, making the 2050 net-zero goals appear much more feasible.
7. Decarbonization is a shared, collaborative responsibility that extends beyond the asphalt and bitumen industries to include policymakers, academia, road authorities, and other sectors like energy and machinery.

Main outcomes:

The asphalt and bitumen industries now have a much clearer pathway to decarbonization. Updated lifecycle assessments show that emissions have already fallen significantly and can be reduced much further by 2050, with bitumen production remaining the largest emissions hotspot for asphalt but also offering the greatest opportunity for improvement. While aggregates are already relatively low-carbon and can approach carbon neutrality at some sites, broader progress depends on coordinated action by industry, policymakers, road authorities, academia, and related sectors. Achieving net zero will require accurate data, supportive regulation, and collaboration across the entire value chain.

Session 4: Managing Safe Sites with a Focus on Emissions

This session focused on the reduction of emissions on paving sites to protect workers, findings on emissions from existing pavements, and odour management at asphalt plants.

Speakers:

- Andreas Stahl (German Asphalt Pavement Association – DAV) - Management of OEL in Germany
- Ian Lancaster (Eurobitume, Belgium) - Emissions from Asphalt pavements
- Mats Wendel (EAPA HSE, Belgium) - Odour management

Key insights:

1. UC Riverside/CARE study validates that asphalt emissions are low and decay over time, supporting a science-based dialogue with regulators and reinforcing sustainability credentials.
2. German OEL pathway: Initial measures (warm mix and paver ventilation systems) lowered exposures for some roles but not all. A second generation of ventilation systems created a more closed capture around the auger, further reducing exposures. The use of plant-based release agents significantly contributes to reduce exposure.
3. Odour emissions can become a big problem with different potential sources and with many potential solutions available in the market at a wide range of prices. Using the wrong solution can make the problem worse. Therefore, it is fundamental to assess the source before adopting any measure.
4. Continued adoption of colder technologies, implementation of best practices at plants and job sites, electrification prospects, incremental automation, and sustained science-based engagement with regulators are fundamental to ensure proportionate and informed policies.

Main outcomes:

New scientific evidence shows that asphalt emissions during service life are low and decline over time, supporting evidence-based engagement with regulators and strengthening the industry's sustainability credentials. Reducing worker exposure and odour emissions requires a combination of proven technologies, best practices, and careful source assessment, while continued innovation (including lower-temperature technologies, electrification, automation, and science-based policymaking) will be essential to further improve environmental and occupational performance.

Session 5: Future Trends for Roads and Materials

In this session, the future bitumen supply market, biobased materials, the road owner's perspective and megatrends, which will shape the sector in the coming years, were discussed.

Speakers:

- Irina Vinogradova and Jonathan Weston (Argus Media, United Kingdom) - European bitumen: Supply and demand outlook into the medium-term to long-term
- Fernando Moreno (University of Granada, Spain) - Potential of biobased materials for the construction of sustainable road pavements
- Fredy Sierra Fernandez (Rijkswaterstaat, The Netherlands) - Public leadership in sustainability transition from a national perspective
- Christophe Nicodème (European Union Road Federation – ERF, Belgium) - Megatrends in Road Construction
- Steve Philips (Conference of the European Directors of Roads – CEDR, Belgium) - National Road Authorities' Vision of the road and road transport of the future

Key insights:

1. Europe's refining industry is expected to undergo significant capacity rationalization, with more optimization and plant closures requiring increased storage capacity and longer supply chains as products are increasingly sourced from more distant locations.
2. The European bitumen market faces stagnant demand, high prices, and supply chain disruptions from geopolitical conflicts and refinery issues. While some Nordic markets are growing, overall demand is expected to remain below pre-COVID levels. The long-term forecast for fossil bitumen is a decline, driven by sustainability goals, increased reuse of reclaimed asphalt, and the emergence of bio-binders.
3. Durability is the most effective sustainability lever. High-quality bitumen and polymer-modified binders extend pavement lifespan, and life-cycle assessments (LCA) should be cradle-to-grave to reflect this, rather than just initial production impacts.
4. Bio-based materials show promise but are currently limited to being modifiers or extenders due to inferior performance, high costs, and scale limitations compared to traditional bitumen.
5. The road sector is critically underfunded compared to rail, largely due to a fragmented voice and a failure to communicate a unified, compelling narrative about its essential role in the economy and society.
6. A profound shift is needed from new construction to maintaining and upgrading ageing infrastructure, which requires smart, connected technologies to support future mobility like autonomous vehicles.
7. Successful transition requires public leadership, national and European platforms for collaboration, trustworthy data, and rebuilding trust between public authorities, industry, and researchers with clear roles and boundaries.

Main outcomes:

The European bitumen and road sectors are entering a period of structural transition, driven by refining capacity rationalization, stagnant demand for fossil bitumen, and a growing focus on maintenance, circularity, and more durable pavements. Achieving this transition will require stronger investment in road infrastructure, robust life-cycle assessment and data, continued innovation in materials, and closer collaboration between public authorities, industry, and researchers to support sustainable and resilient transport networks.

Session 6: What can we expect: Trends Shaping Our Industry

The final session was a general discussion with the audience to recap and collect the main takeaways of the programme, including the impact from the presentations of the event and the recognised future megatrends such as digitisation, future road transportation, and the changes in paving technologies.

Key insights:

- Europe should stop creating unnecessary legislative obstacles (e.g., problematic standardization mandates), over-regulating, thinking it has the only answers, and treating industry as a burden.
- Europe should start setting clear ambitions and letting organizations decide how to achieve them and becoming more self-sufficient in energy to mitigate supply shocks.
- Proposed actions for the future:
 - Improve Public Perception: Implement a unified communication strategy to change the narrative from cost to the intrinsic value of transport mobility infrastructure and make the sector more attractive.
 - Increase Collaboration: Foster cooperation across the value chain, from government to technological exchanges, to become stronger together.
 - Address the Skills Gap: Focus on attracting, retaining, and retraining the workforce. It was noted that skills are the "single scariest topic" for road authorities and industry.
 - Enhance Operational Agility: Become more flexible to adapt to supply chain issues, raw material price increases, and new technologies.
 - Push for Innovation: A call was made for more innovation beyond engineering, such as integrating more inorganic functional materials (not only a biomass), low temperature production, energy harvesting and self-healing materials, among others.

Main outcomes:

Europe should move from prescriptive regulation to outcome-based policies that encourage innovation, reduce unnecessary barriers, and strengthen energy resilience while treating industry as a key partner in achieving sustainability goals. Future priorities include improving the public perception of road infrastructure, strengthening collaboration across the value chain, addressing the growing skills shortage, increasing operational flexibility, and accelerating innovation in materials, production processes, and smart infrastructure technologies.



