

European Raw Materials Policy

„A new approach“

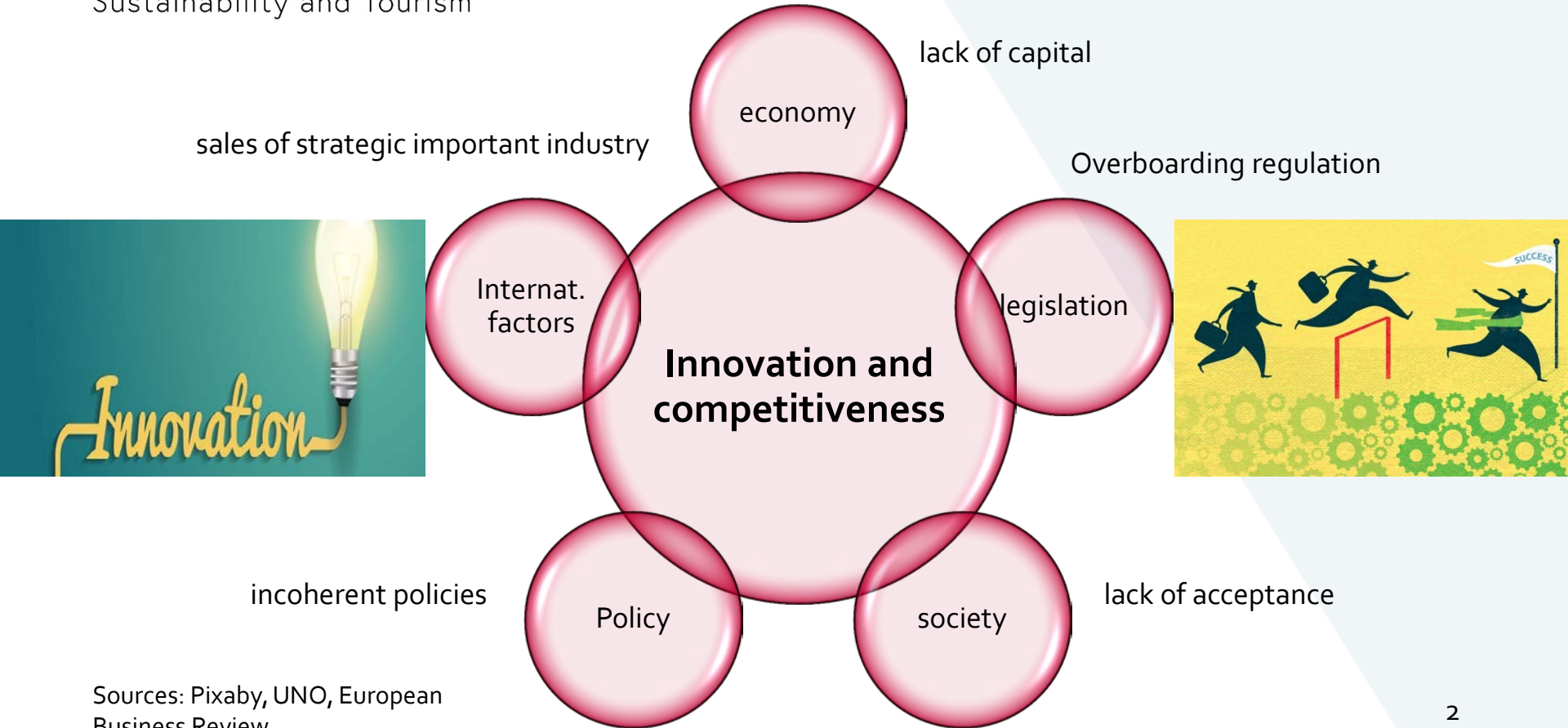
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Directorate VI/7 - Mineral Resources Policy

10th ESEE Dialogue Conference for East and South East Europe

Leoben, 27th March 2019

Major drivers of Raw Materials Policy

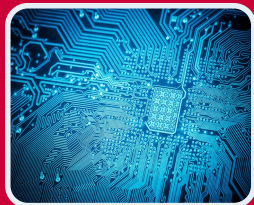


Major drivers of Raw Materials Policy





Innovation and competitiveness of EU industry



Digitization – Industry
4.0.



Transition to a low-
carbon economy



Transition to a more
circular economy.

Resilience and sustainability



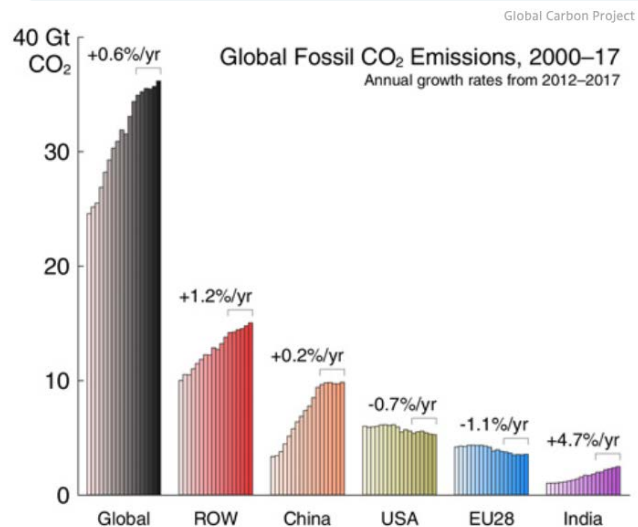
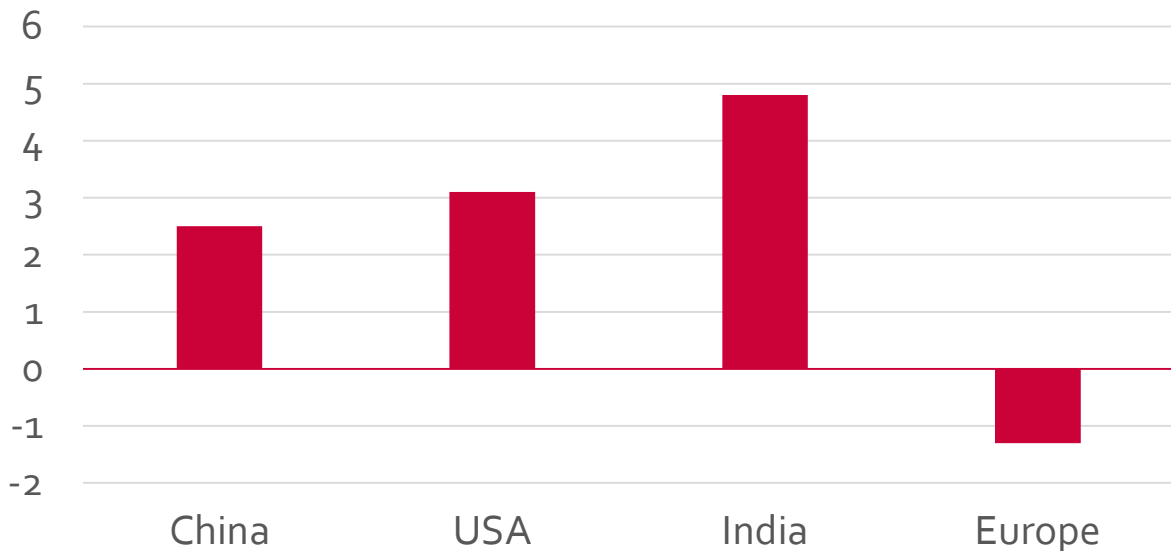
Resilience and sustainability



Sources: daily FT; Hanghoi 2018; UN

Resilience and sustainability

energy related CO₂-emissions
change 2017/2018 in %



Sources: IEA: Global Energy & CO₂ Status Report, March 2019; Global carbon project, 2018

World Mining Data 2019

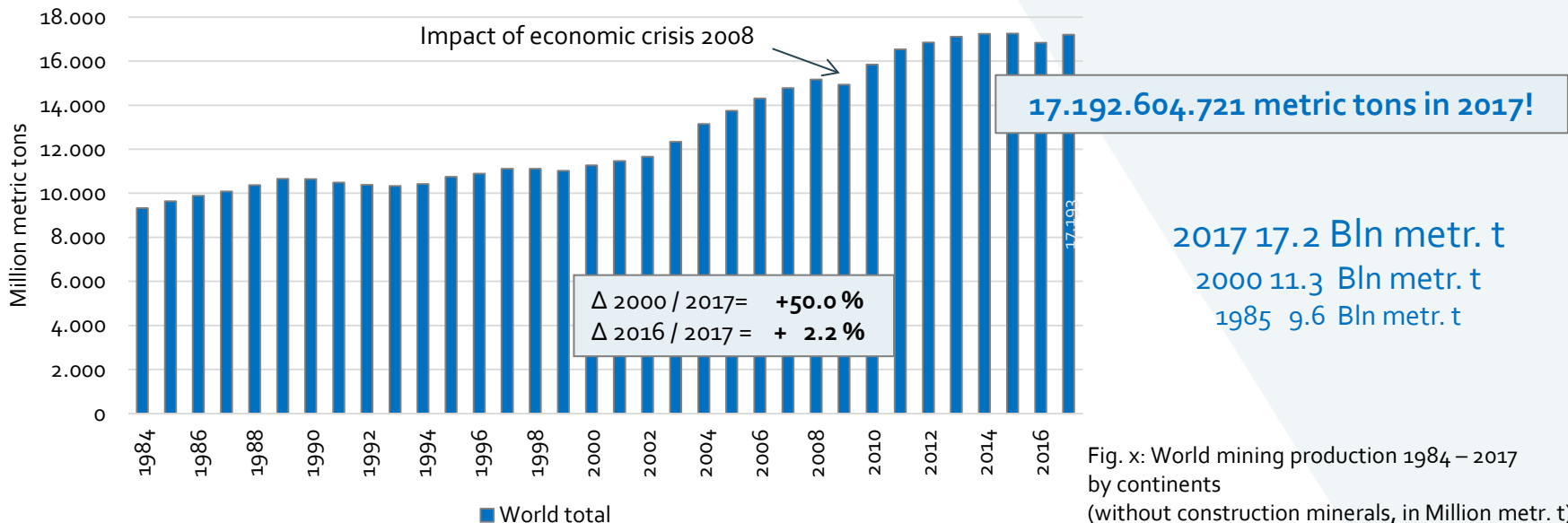
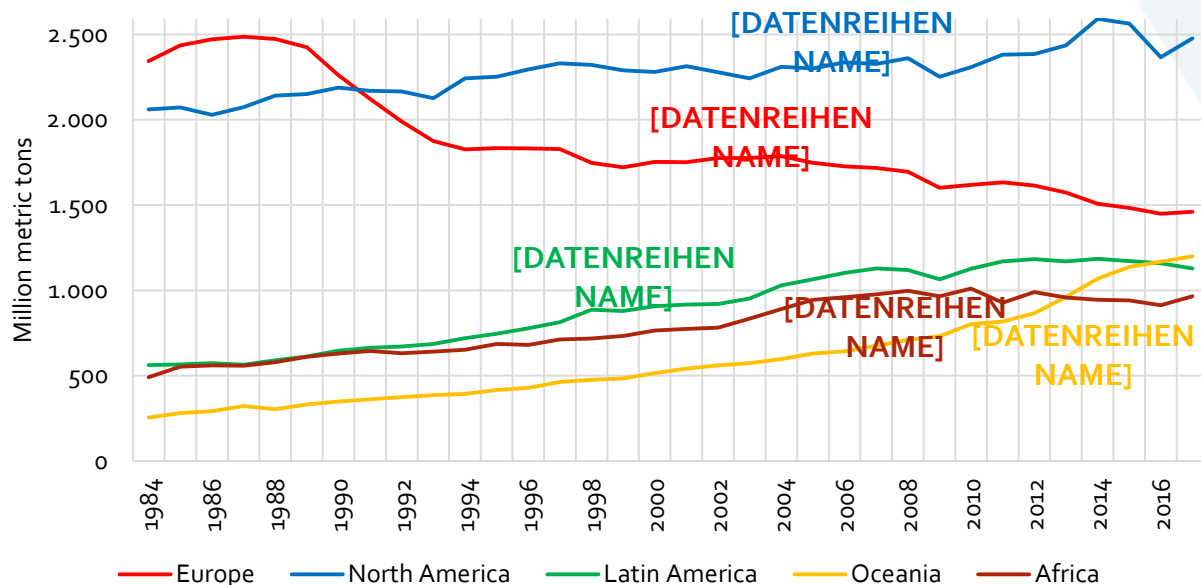


Fig. x: World mining production 1984 – 2017
by continents
(without construction minerals, in Million metr. t)

World Mining Data 2019

	Production 2017 in Million metr. t	Share %	Δ% 2016 / 2017
Asia	9,963	57.9	+1.9
North America	2,477	14.4	+4.7
Europe	1,460	8.5	+0.8
Oceania	1,199	7.0	+2.6
Latin America	1,128	6.6	-2.7
Africa	966	5.6	+5.8
Total	17,193	100.0	+2.2

World Mining Data 2019, Continents



$\Delta 2016 / 2017 = + 4.7 \%$
 $\Delta 2000 / 2017 = + 7.0 \%$

$\Delta 2016 / 2017 = + 0.8 \%$
 $\Delta 2000 / 2017 = - 16.6 \%$

$\Delta 2016 / 2017 = + 5.8 \%$
 $\Delta 2000 / 2017 = + 24.9 \%$

$\Delta 2016 / 2017 = - 2.7 \%$
 $\Delta 2000 / 2017 = + 23.1 \%$

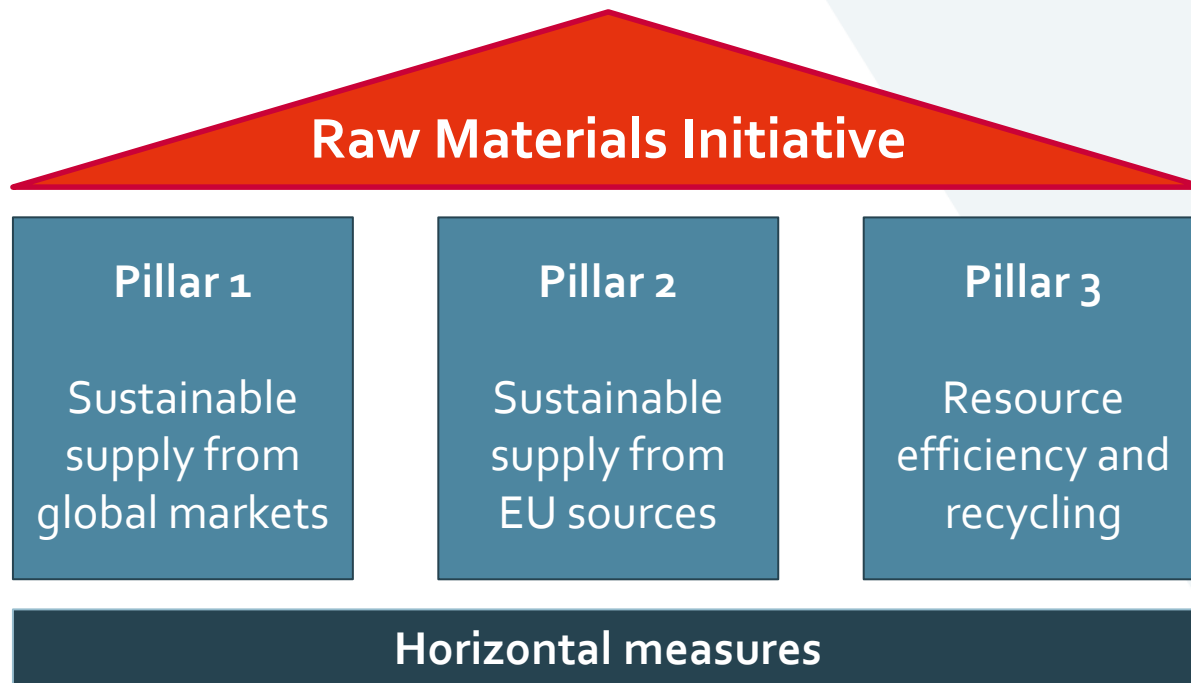
$\Delta 2016 / 2017 = + 2.6 \%$
 $\Delta 2000 / 2017 = + 120.9 \%$

Fig. x: World mining production 1984 – 2017 by continents
(without construction minerals, in Million metr. t)

European Raw Materials Policy – Why?

- **Securing a sustainable supply of raw materials is a key priority for the EU!**
 - Raw materials have become increasingly important to the EU's economy, growth and competitiveness.
 - More than 25 million jobs in the EU and many key economic sectors are dependent on a sustainable supply of raw materials.
 - Raw materials are particularly crucial for the development of modern environmentally friendly technologies and a strong European industrial base.

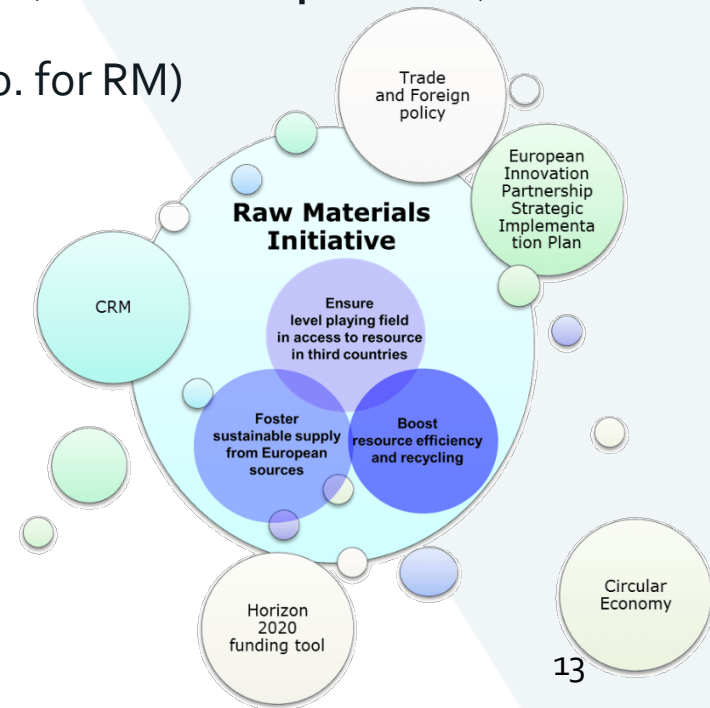
Raw Materials Initiative



Horizontal measures

- **European Innovation Partnership on Raw Materials (stakeholder platform):**
 - Strategic Implementation Plan – H2020 (€ 600 Mio. for RM)
- **Resource Efficiency**
 - Roadmap to a Resource Efficient Europe
- **Circular Economy**
 - Circular Economy Package, Critical Raw Materials
- **Sustainable Development Goals...**

European Raw Materials Policy – „A new approach“

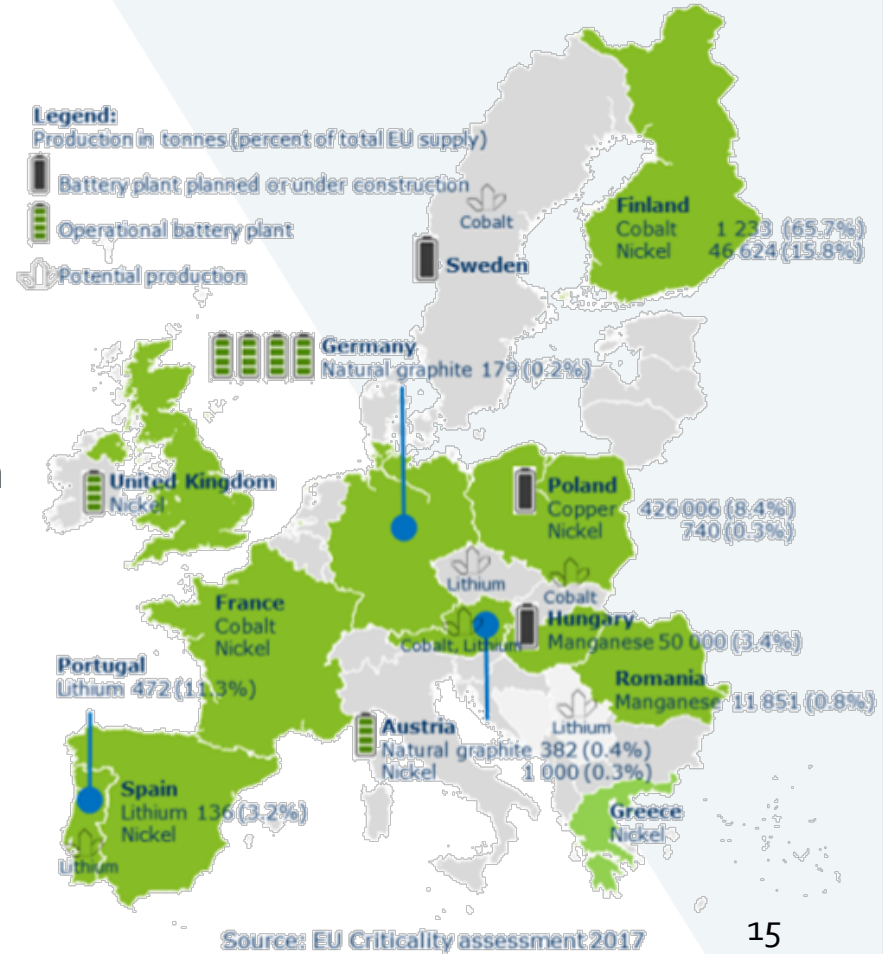


Raw Materials in EU Policy



EU Action Plan on Batteries

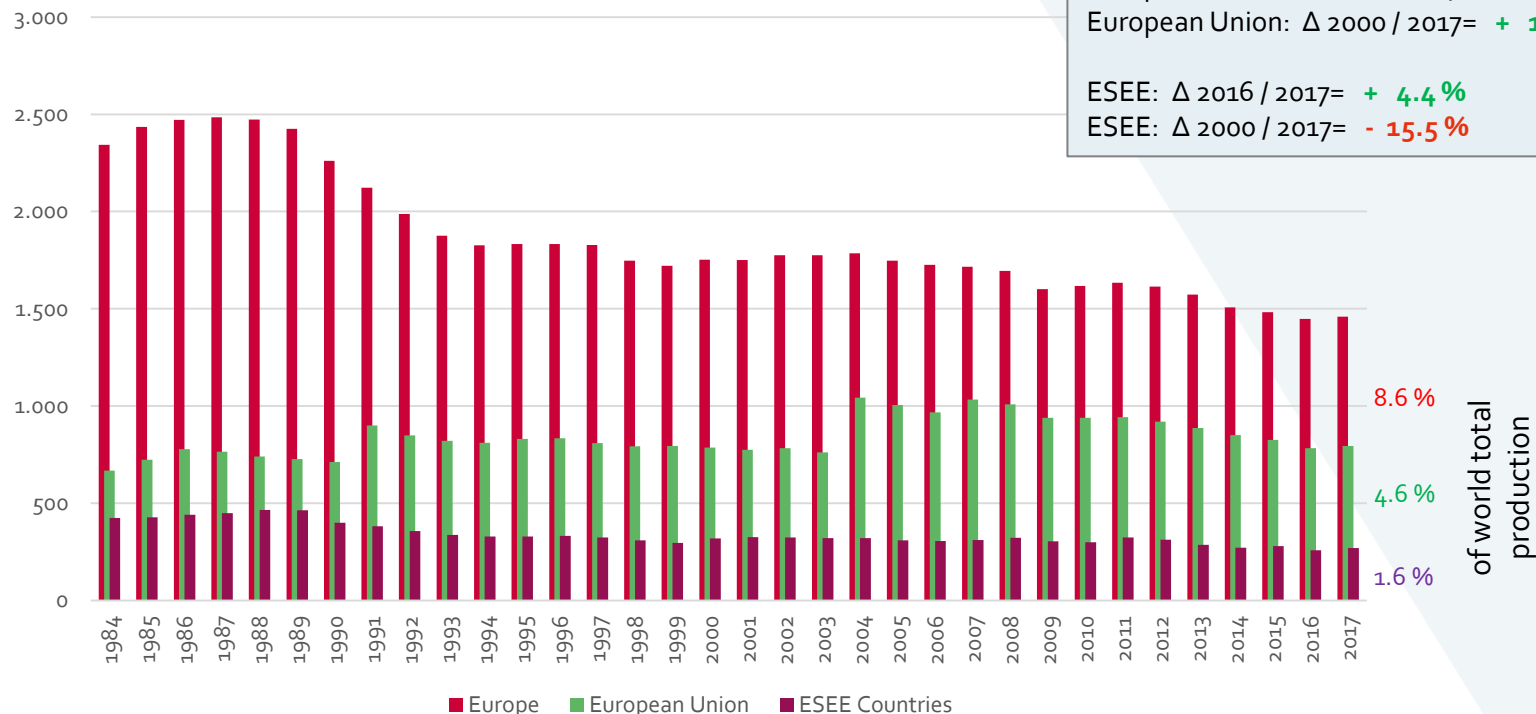
- Battery action plan (BAP) is a part of the “Sustainable Mobility for Europe”, COM(2018) 293 final
- Objective: **Make Europe a global leader in sustainable battery production and use, in the context of the circular economy**
- “Report on Raw Materials for Battery Applications”, SWD(2018) 245/2 final



BAP Action Areas

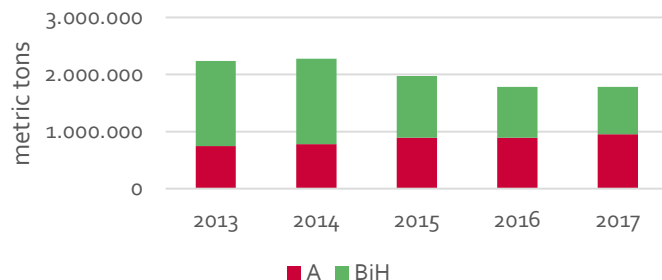
- Secure access to raw materials
- Support European battery cells manufacturing in the EU
- Strengthen industrial leadership through stepped-up EU research and innovation
- Develop and strengthen a highly skilled workforce
- Support the sustainability of EU battery cell manufacturing industry with the lowest environmental footprint possible
- Ensure consistency with the broader enabling and regulatory framework

Production Europe/EU/ESEE

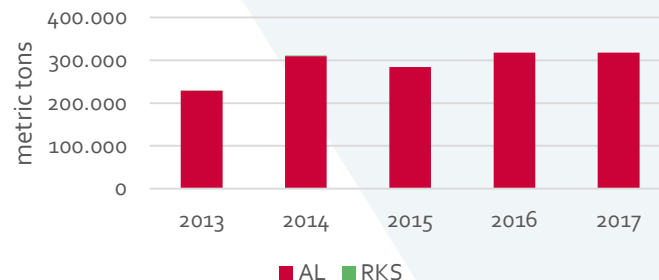


Primary Production, ESEE

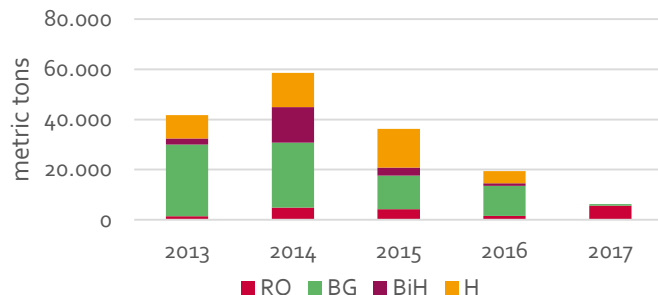
Iron Ore Fe-Content



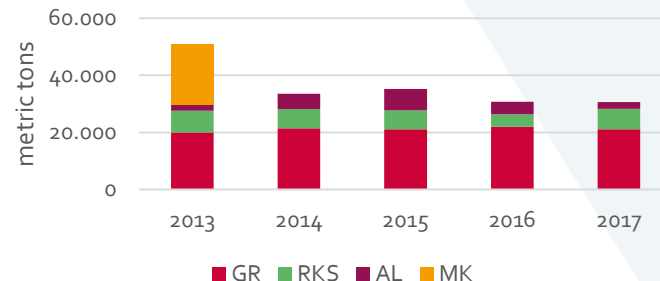
Chromite Cr₂O₃-Content



Manganese-Content



Nickel-Content



Source: REICHL, C. & SCHATZ, M. : WORLD MINING DATA 2019

Needs for boosting primary and secondary production in EU

- First class knowledge on raw materials
- More venture capital and private equity
- Attractive framework conditions for supply of raw materials
- Strengthen whole raw materials value chain



Thank you!

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