 Responsible Minerals and Metals Supply Chains – EU approach

Metals Study Groups’ Joint Seminar, Lisbon
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Sustainable Development Goals: new framework for minerals & metals value chains
EU Raw Materials Initiative

Classic economic security of raw materials supply to

Responsible and sustainable sourcing and extraction of raw materials.

Raw Materials Week 2017, Brussels

Raw materials are key for low carbon technologies

Raw materials supply and demand on the rise to deliver low carbon and circular economy

Renewable energy will make major contribution to CO₂ emissions reduction (2°C scenario)

Total renewable power generation by region

Electricity generation sources: wind, solar, hydropower, geothermal, biomass, ocean, etc.
Non-ferrous metals drive new technologies

Non-Ferrous Minerals production per continent
Asia is increasing the lead since 2000

Raw materials extraction may double by 2050

Global material extraction by resource type

Source: UNEP, World Bank database
EU industrial value chains depend on Raw Materials from third countries

- 78 raw materials evaluated with fact sheets available, revised methodology published – CRM website

### 2017 CRMs (27)

<table>
<thead>
<tr>
<th>Material</th>
<th>Symbol</th>
<th><strong>HREEs</strong></th>
<th>LREEs</th>
<th><strong>PGMs</strong></th>
<th>Vanadium</th>
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<tbody>
<tr>
<td>Antimony</td>
<td><em>Ant</em></td>
<td>Fluor spar</td>
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<td>Phosphorus</td>
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<td>Beryllium</td>
<td><em>Ba</em></td>
<td>Galium</td>
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<td>Magnesium</td>
<td>Scandium</td>
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<td>Beryllium</td>
<td>Ge</td>
<td>Germanium</td>
<td>Natural graphite</td>
<td>Silicon metal</td>
<td>Tantalum</td>
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<tr>
<td>Bleomuth</td>
<td>Mbe</td>
<td>Hafnium</td>
<td>Natural Rubber</td>
<td>Tantalum</td>
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<td>Borate</td>
<td>Mbo</td>
<td>Nickel</td>
<td>Niobium</td>
<td>Tungsten</td>
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<tr>
<td>Cobalt</td>
<td><em>Cob</em></td>
<td><em>HREEs</em></td>
<td><em>LREEs</em></td>
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<td>Coke ing coal</td>
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<td>Indium</td>
<td>Phosphate rock</td>
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</tbody>
</table>

*HREEs=heavy rare earth elements, LREEs=light rare earth elements, PGMs=platinum group metals*
EU Due Diligence policy experience

Policy areas
- EU Trade and International Cooperation
- EU Development Policy

Sectors
- Food chains
- Fisheries
- Timber
- Palm Oil

EU Conflict Minerals Regulation

To cut the links between minerals trade and financing armed groups

Conflict Mineral Regulation adopted in May 2017 will start on 1 January 2021

By 2019 adoption of a comprehensive SME due diligence support system facilitating uptake of the OECD Due Diligence Guidance
**Responsible mining and sourcing and mining – key drivers**

- Responsible Sourcing
- Responsible investors and financial institutions
- Market uptake / consumers
- Responsible Mining
- Technology

**What role can International Study Groups play?**

- Study how to address responsible and sustainable sourcing and extraction of Raw Materials
- Promote uptake of OECD Due Diligence Guidance
- Share Responsible Mining best practices