

[All redactions in the document have been done in line with Art.4.1(b)]



# Raw Materials Policy – Developments in the EU



*EU-Canada Bilateral Dialogue on Raw Materials  
17 November 2020*



*- «Energy Intensive Industries and  
Raw Materials»*

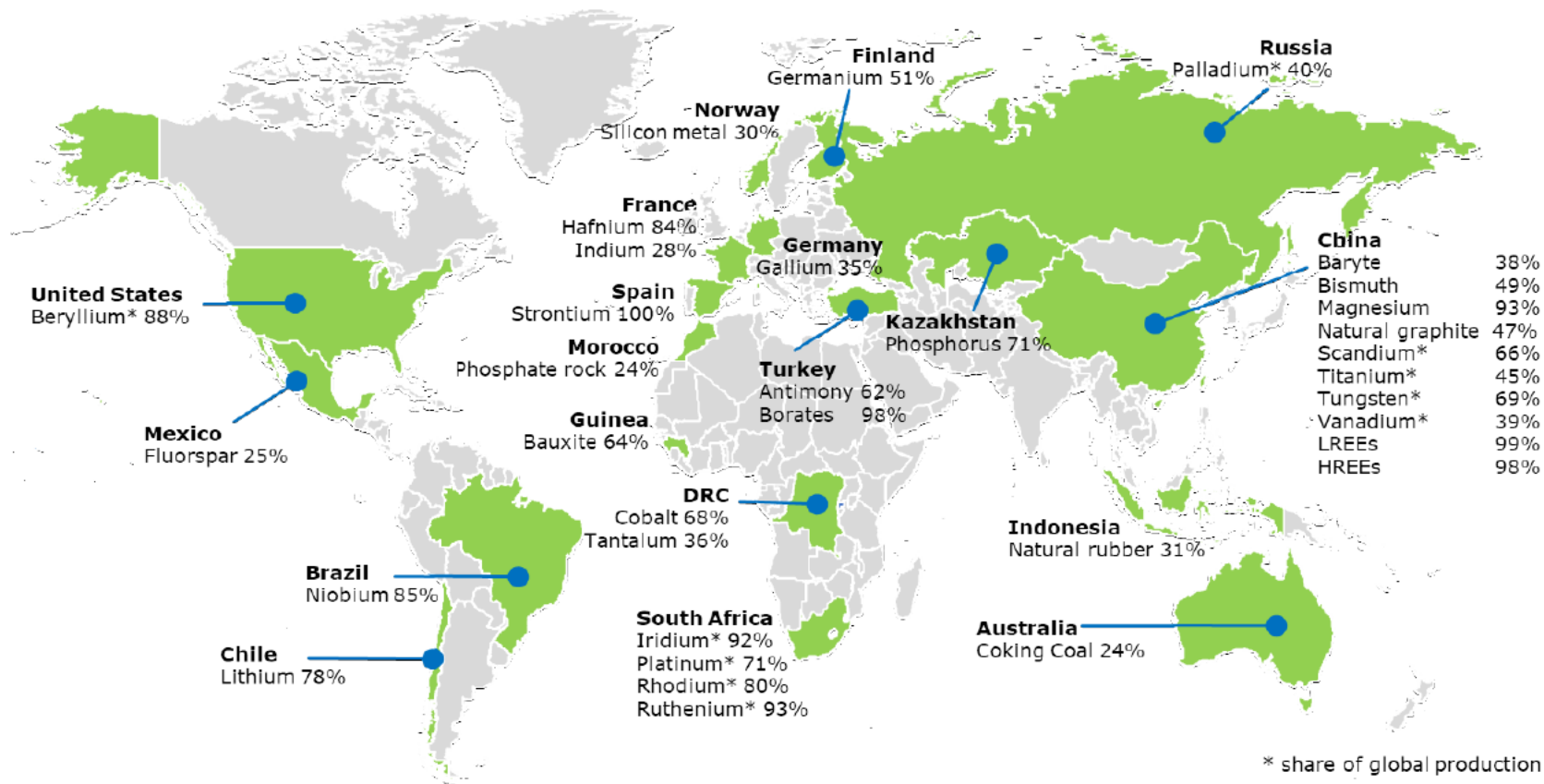
*European Commission. Directorate-General for Internal  
Market, Industry, Entrepreneurship and SME's (DG  
GROW).*

- December 2019: European Green Deal
  - Commitment to climate neutrality by 2050
  - Access to resources recognized as a “strategic security question” for Europe
- March 2020: New Industrial Strategy
  - Making industry fit to deliver the green and digital transition
  - Ecosystems approach, industrial alliances
- May 2020: Next Generation EU recovery fund
  - 750 bn EUR funding for recovery
  - New focus on resilience
  - Role of industrial ecosystems in the recovery
- September 2020: Critical Raw Materials Resilience - Charting a Path towards greater Security and Sustainability
  - New critical raw materials’ list
  - Critical raw materials action plan

# 2020 criticality assessment identifies 30 raw materials as critical

2020 Critical Raw Materials (new as compared to 2017 in bold)		
Antimony	Hafnium	Phosphorus
Baryte	Heavy Rare Earth Elements	Scandium
Beryllium	Light Rare Earth Elements	Silicon metal
Bismuth	Indium	Tantalum
Borate	Magnesium	Tungsten
Cobalt	Natural Graphite	Vanadium
Coking Coal	Natural Rubber	<b>Bauxite</b>
Fluorspar	Niobium	<b>Lithium</b>
Gallium	Platinum Group Metals	<b>Titanium</b>
Germanium	Phosphate rock	<b>Strontium</b>

# Where the EU sources from



# Critical raw materials are used throughout Europe's ecosystems

	Aerospace/ defence	Textiles	Electronics	Mobility/ Automotive	Energy-intensive industries	Renewable energy	Agri-food	Health	Digital	Construction
Antimony	✓	✓		✓						✓
Baryte				✓	✓			✓		✓
Bauxite	✓	✓		✓	✓	✓	✓	✓	✓	✓
Beryllium	✓			✓		✓			✓	
Bismuth	✓		✓		✓			✓	✓	✓
Borate	✓		✓	✓	✓	✓	✓			
Cobalt	✓	✓	✓	✓	✓	✓			✓	
Coking coal				✓	✓	✓				
Fluorspar					✓		✓			
Gallium	✓		✓	✓		✓			✓	✓
Germanium	✓		✓		✓	✓				
Hafnium	✓		✓		✓	✓			✓	
Indium	✓		✓			✓			✓	
Lithium	✓		✓	✓	✓	✓		✓	✓	
Magnesium	✓		✓	✓	✓				✓	✓
Natural graphite	✓		✓	✓	✓	✓			✓	
Natural Rubber	✓	✓		✓				✓		
Niobium	✓		✓	✓	✓			✓		✓
Phosphate rock					✓		✓			
Phosphorus	✓				✓		✓			
Scandium	✓			✓		✓				
Silicon metal	✓		✓	✓	✓	✓		✓		✓
Strontium	✓		✓		✓			✓		✓
Tantalum	✓		✓	✓	✓	✓			✓	
Titanium	✓		✓	✓	✓			✓		✓
Tungsten	✓		✓	✓	✓			✓		
Vanadium	✓		✓	✓	✓	✓				✓
PGM	✓		✓	✓	✓	✓		✓		
HREE	✓		✓	✓	✓	✓		✓		✓
LREE	✓		✓	✓	✓	✓		✓		✓

# Action Plan on Critical Raw Materials



# 10 actions to ensure Europe's access to raw materials

1. European Raw Materials Alliance
2. Develop sustainable financing criteria for mining
3. Research and innovation on waste processing, advanced materials and substitution
4. Map the potential supply of secondary CRM from EU stocks and wastes
5. Investment needs for mining projects that can be operational in 2025
6. Develop expertise and skills in mining
7. Deploy Earth observation programmes for exploration, operation and post-closure environmental management
8. Develop research and innovation projects on exploitation and processing of CRMs
9. **Develop strategic international partnerships to secure CRMs supply**
10. Promote responsible mining practices for CRMs

# The European Raw Materials Alliance

- A dedicated alliance to strengthen Europe's **resilience and open strategic autonomy** in the field of raw materials
- First priority area: Strengthening capacity in the **rare earths and magnets** value chain
- Workstreams:
  1. Consultations with a wide range of stakeholders
  2. Raw materials **investment** platform
- Launched on 29 September 2020

