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EUROPE AND JAPAN: COMMON CHALLENGES AND THREATS ON THE SUPPLY OF MINERAL RAW MATERIALS

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A secure supply of raw materials is a priority of all industrialised countries; this can rarely be achieved by national mineral production and is a challenge which extends well beyond country borders and national policies. The appropriate and sustainable supply of raw materials requires specific framework conditions which relate to mineral policies, raw materials knowledge, infrastructure and international cooperation. These conditions are not met in the same way across the globe, and in 2008 the European Union (EU) pioneered the development of a strategy on raw materials based on three pillars: (1) ensuring the fair and sustainable supply of raw materials from international markets, through the promotion of international cooperation with developed and developing countries; (2) fostering the sustainable supply of raw materials from European sources, and (3) reducing consumption of primary raw materials by increasing resource efficiency and promoting recycling. In this context, the Horizon 2020 funded project INTRAW was initiated in 2015, with the objective of establishing the European Union's International Observatory for Raw Materials by 2018, an initiative in line with the first pillar of the EU strategy on raw materials.

In its first year INTRAW used an integrated bottom-up approach to benchmark the contextual environments of five reference countries (Australia, Canada, Japan, South Africa and the United States), with regards to the evolution of their raw materials industry and raw materials supply policies. This research highlighted the fact that Japan and the EU are facing many similar challenges and threats to securing a stable supply of mineral raw materials.

This contribution will present the EU approach to ensure the sustainable supply of raw materials, along with Japan's strategy on the same topic. The authors will describe how, despite the different geography, history, culture and sets of norms and values, both (EU and Japan) face similar constraints when sourcing primary raw materials although the reasons for this differ. Issues such as the absence of mineral endowment and public opposition to mining prevent the development of domestic sourcing. In both cases the existing mineral consuming industries are well developed and highly dependent on raw materials imports from 3rd countries. In both cases the disruption of raw materials supply chains may trigger domestic economic crisis. During the commodity boom of the last decade both EU and Japan were deeply affected by the increasing competition for raw materials created by fast-growing economies and the consequent cost instability.

The EU and Japan are trying to overcome the difficulties of ensuring a stable supply of raw materials using a similar set of tools, which include diplomatic efforts, trade agreements, and research efforts

directed to resource efficiency, recycling and substitution. While to some extent a competitive exercise, the recognition of these common approaches will reinforce cooperation bonds between Japan, Europe and other countries facing similar challenges, contributing to synergistic economic development and global stability. Possible areas for cooperation between the EU and Japan, covering research, education and trade, will be highlighted.

