

Towards a sustained regulatory dialog on production and use of primary raw materials

II EU-Latin America dialogue on Raw Materials

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IMA - Europe



- 24 EU Member States + Norway, Switzerland, Turkey and Ukraine
- 500 companies: i.e. 685 mines & quarries, 750 plants
- 42,500 employees
- 180 million tpa
- EUR 10 billion turnover

more: <http://www.ima-europe.eu>



Industrial minerals at the basis of manufacturing industry



GLASS: up to 100% minerals

PAINT: 50% of minerals



CAR: up to 100-150 kg of minerals in
rubber, plastics, glass, casting

PAPER up to 50% minerals



CERAMICS and GLASS:
up to 100% minerals

HOUSE: up to 150 tonnes of minerals



And many more ...

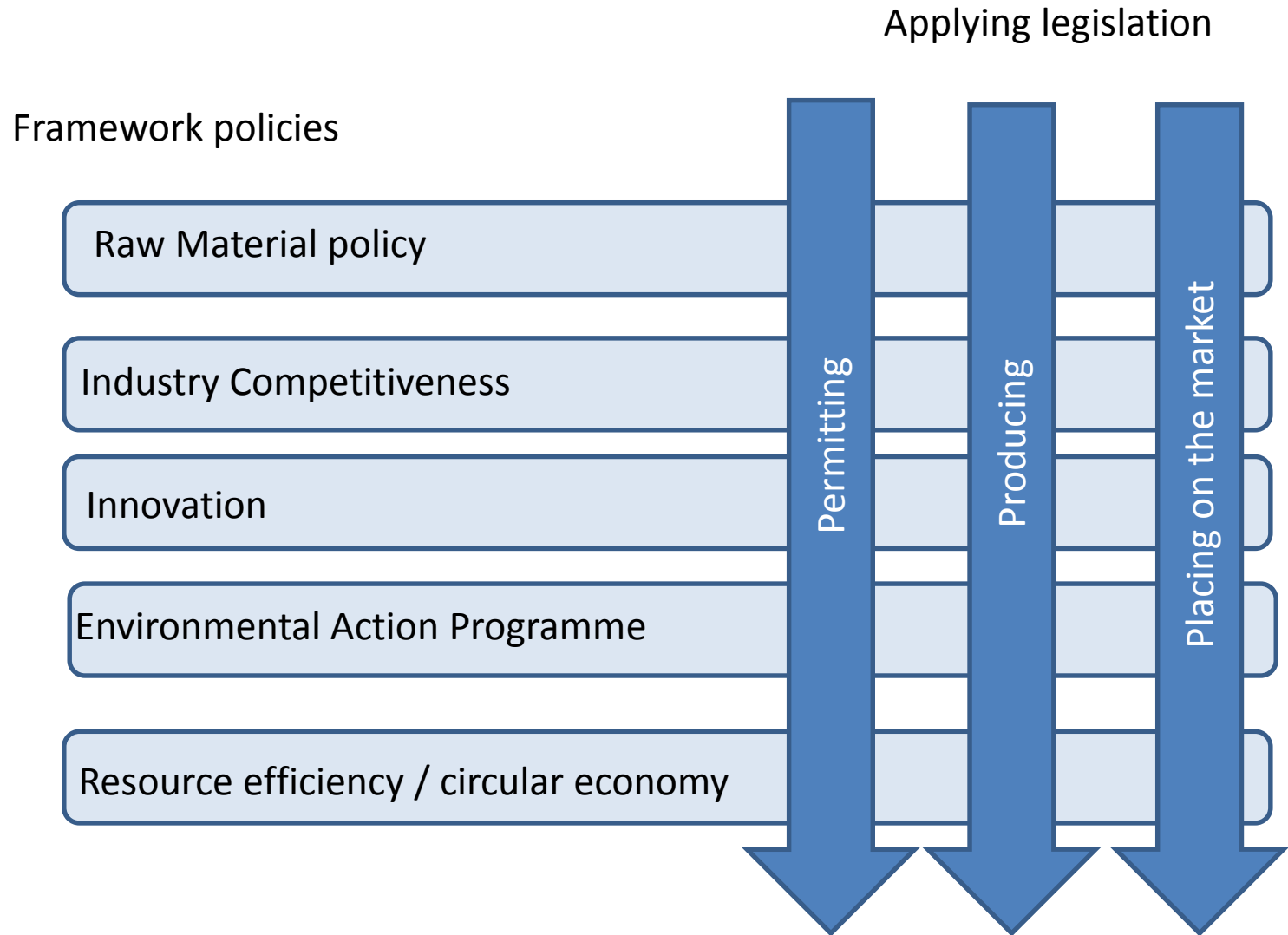


- Traditionally, only loading material / commodities
- Evolution to **material science** with tight specifications and requirements in close link with downstream industry innovation
- Chemical and physical characteristics are pivotal
- Quality of ore-body and processing

Industrial Mineral operator regulatory environment



Regulatory environment: the EU example



Permitting

- Mining codes (National)
- Environmental legislation
 - Impact assessment
 - Biodiversity / nature preservation
 - Water
 - Air
- Land use / competing land use



Producing

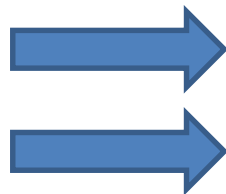
- Occupational Safety and Health
- Waste
- Emissions (IPPC, air, ...)
- Industrial sites (Seveso, etc.)
- Explosives

Placing on the market

- Chemicals legislation (REACH, Classification and Labelling, MSDS, etc.)
- Downstream legislation specific to end-uses (feed, biocides, cosmetics, ...)



- A global challenge / Growing demand
- Interdependency
- Not only have / not have
 - Quality for end-use
 - Technology to value ore
 - etc.
- Both domestic market and export important
- Direct influence on manufacturing industry



Trade measures influencing export/imports (quotas, taxes, etc.)

Legislation re. access to resources + end-uses legislation have large impact on industrial project feasibility

Regulatory environment: Learning from each other's



- Mining policies
- Mining codes
- Environmental legislation
- Occupational Safety & Health
- Chemical legislation
- End-uses legislation

How to support the move?



- Create more regulatory transparency
- Perception and trust are important
- International dialog on raw materials policies and legislations
(improve framework conditions for IM supply)
- Global monitoring of global standards and practices + sectoral approach to it
- Collect / share / promote good practices
(Occupational Safety Health, Environment, etc)



- Structured dialog and transparent interface involving regulators and industry representatives
- Lima and Cartagena meetings set a good basis
- Partnering to move to a sustained dialog



Imagine the Future with Industrial Minerals **2050 Roadmap**

For further information:

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