Summary Session
Governmental Responses to Mineral Production and Consumption

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AIMS
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Perceptions of Current Situation

• Increasing demand driven by China and others
• Demand for new metals
• Concentration of large companies
• Market price constraints, hedging, price swings
• Bottlenecks
• Decreasing grade and slow increases of capacity

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Widespread concerns about security of supply. Not true scarcity/depletion, but rather disruption of flow.
Some aspects of policy responses are consistent across regions, but in other cases significant diversion of philosophy and approach.
Areas of Agreement

• Critical Minerals (REE or Cu and Fe?)

• Need for:
  – Security of supply, resource efficiency, and sustainability (defined in many different ways), but not always an integrated approach to minerals in sustainable development
  – Technological advances in exploration, mining, mineral processing, and recycling

• Desire to:
  – Increase domestic production
  – Diversify sources, including more recycling
  – Bilateral agreements/partnerships and supply stream/chain management

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Areas of Divergence

• Sustainable consumption and dematerialization

• Focus on:
  – Domestic versus international issues and interests
  – National/centralized control versus regional management
  – Dependence upon market forces versus government mandates

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Conclusions

• Not all mineral policies are mutually compatible or consistent with free market flows of mineral resources or secure supply in all regions

• Good mineral policies require consistency and integration, which is not yet happening in all countries

• Secure supply is not necessarily synonymous with sustainable supply

• But, that said...
Conclusions

• The discussion of minerals and sustainable development has broadened and become much more complex and multidisciplinary.

• We are beginning to see a shift from mineral/material production to mineral/material management and LCA thinking.

• There is a much greater awareness of the importance of the minerals sector to sustainable development and of the fact that policies have impacts on resource availability.