

mineral producers, mineral consumers and international cooperation

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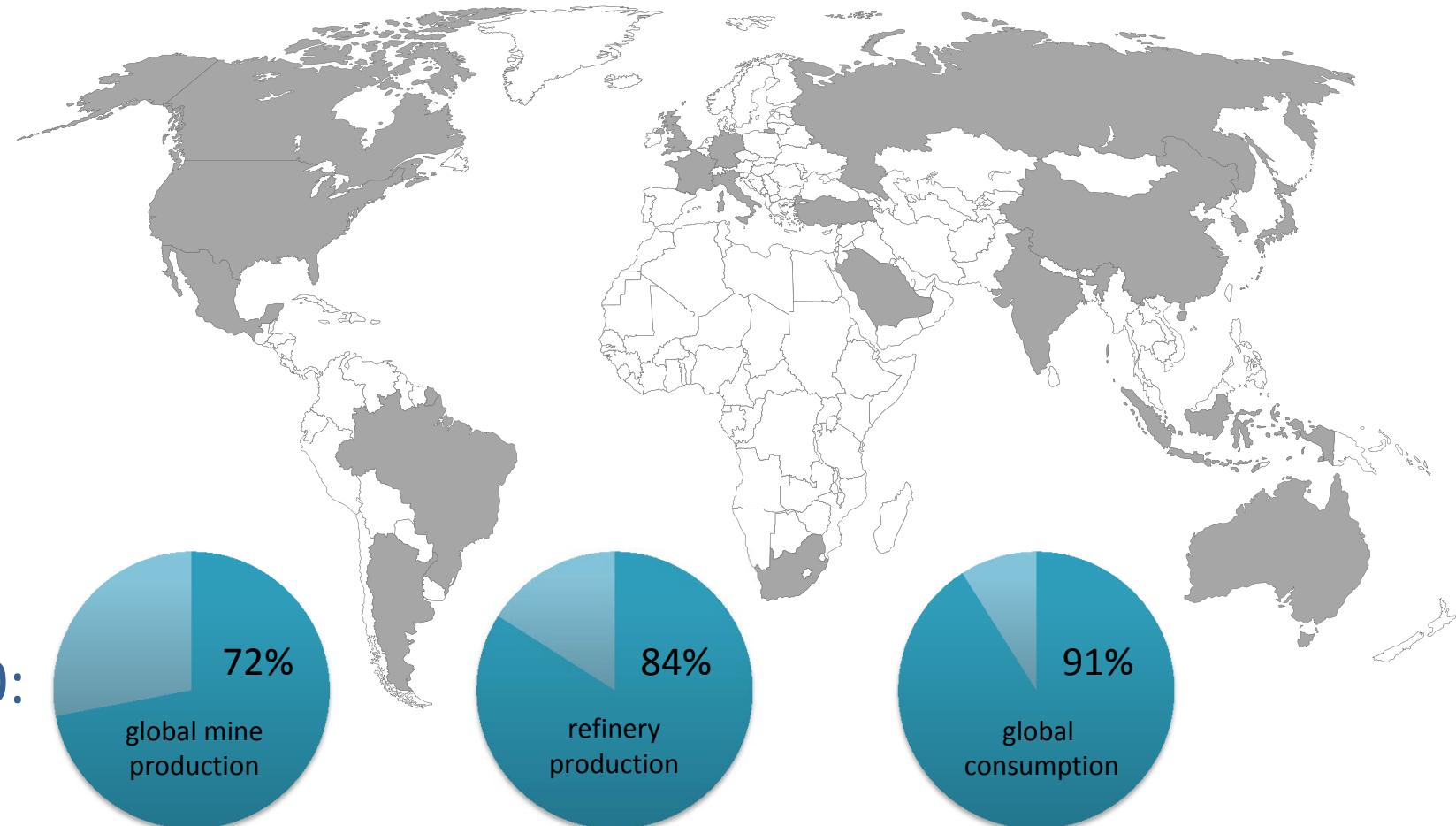
mineral producers, mineral consumers and international cooperation

scope

1. What is resource rich?
2. What does it mean for mineral strategies and international cooperation?

what is resource rich?

the G20 - the largest share of mine production, trade and consumption -

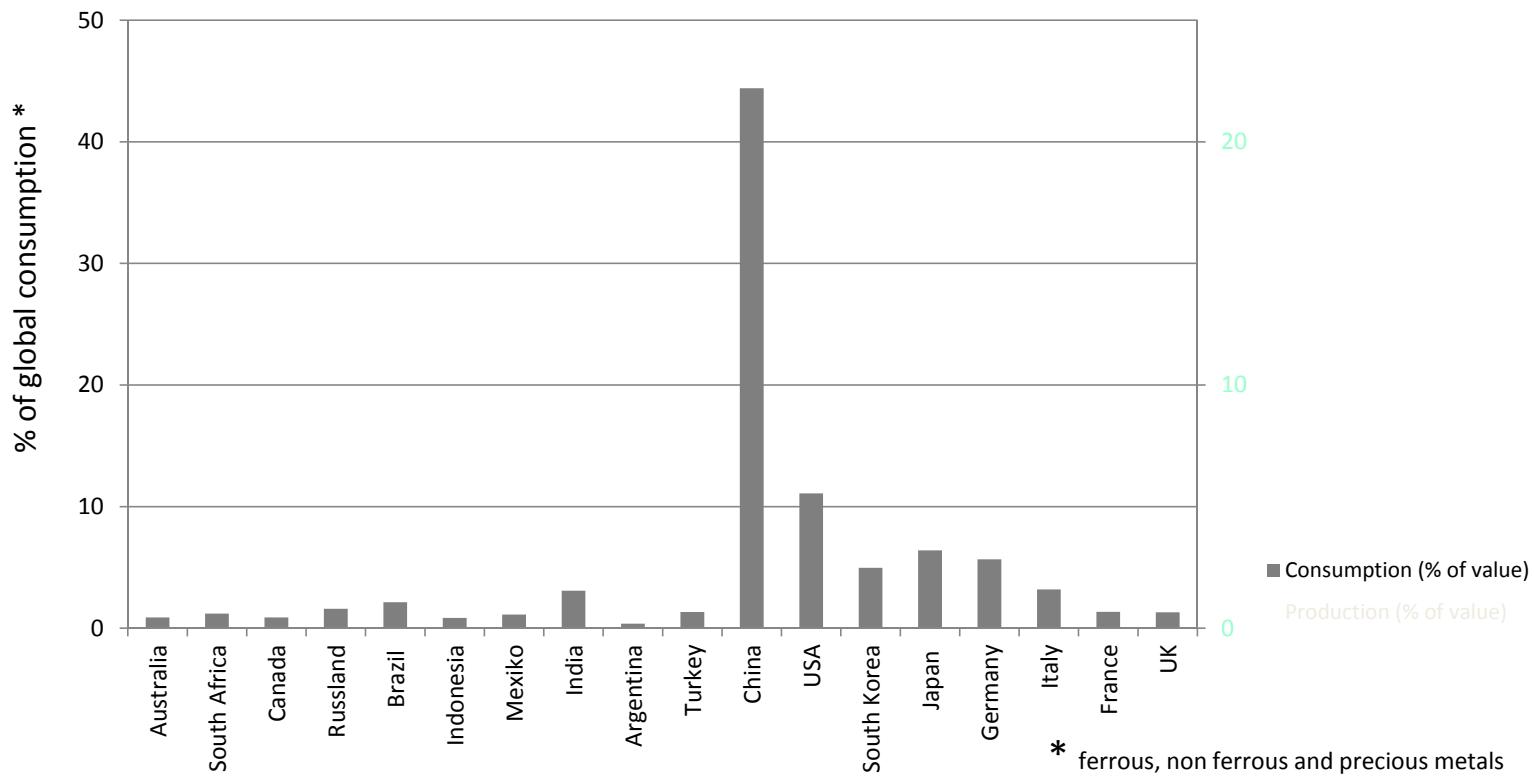


the G20:

Source: BGR, 2013, Fragmentation or Cooperation in Global Resource Governance?

G20 metal consumption (2010)

- In % of global consumption -

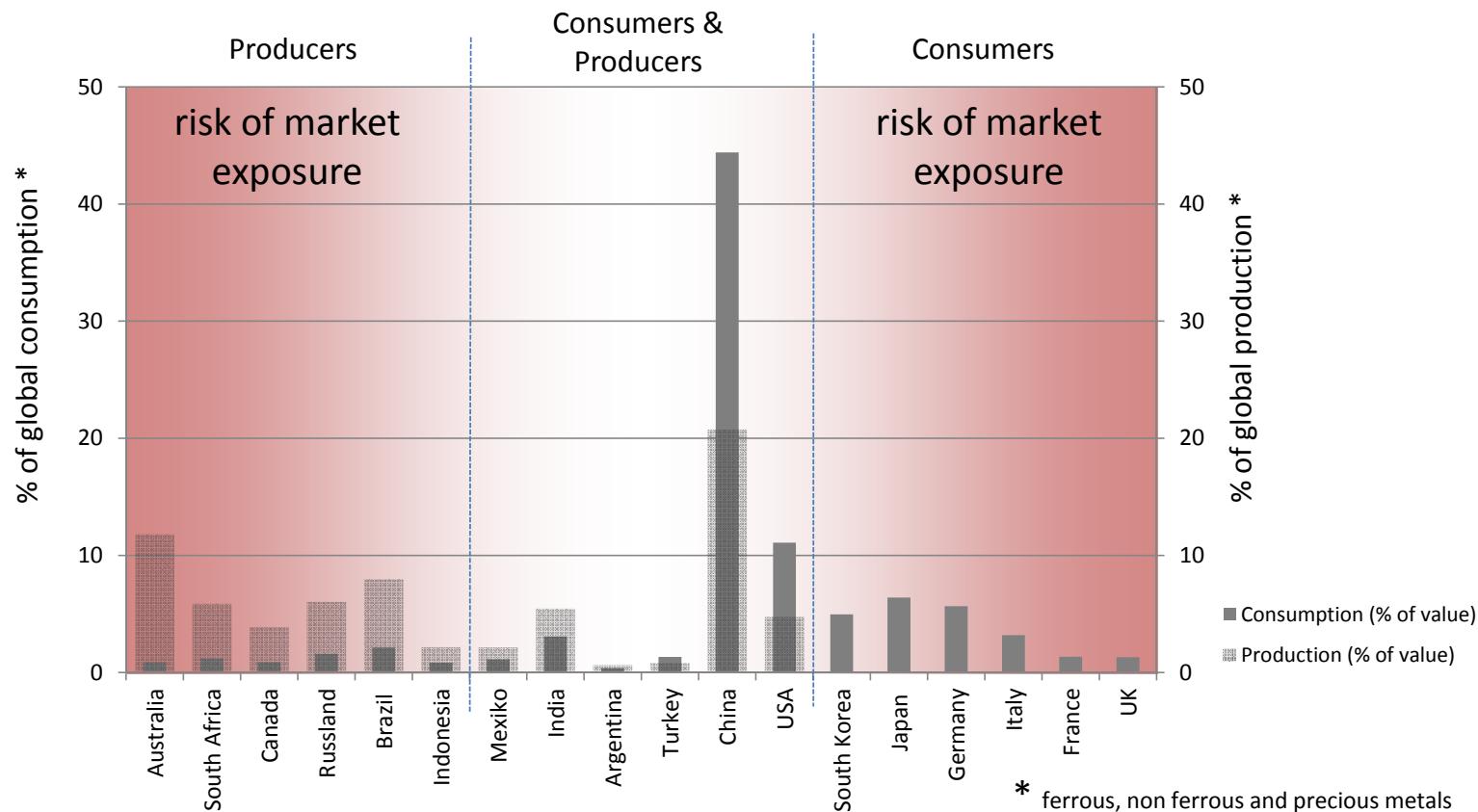


Source: BGR, 2013, Fragmentation or Cooperation in Global Resource Governance?

*non ferrous metals. Source: World Bureau of Metals Statistics (2012)

G20 metal consumption & production (2010)

- In % of global consumption & production -



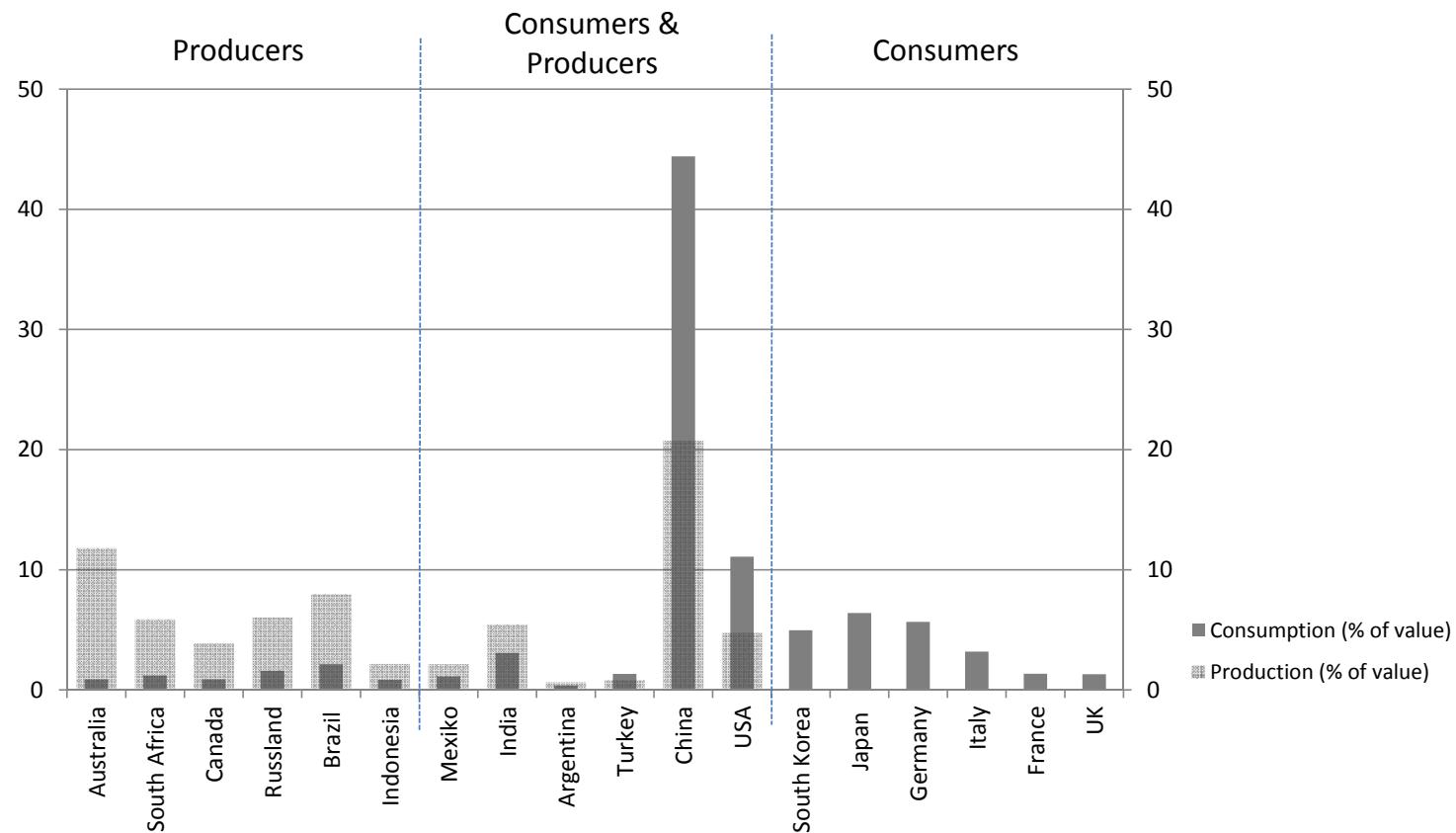
Source: BGR, 2013, Fragmentation or Cooperation in Global Resource Governance?

**ferrous, non ferrous metals. Source: ICMM (2012)

*non ferrous metals. Source: World Bureau of Metals Statistics (2012)

G20
metal
consumption
& production
(2010)

Mineral Strategy Elements

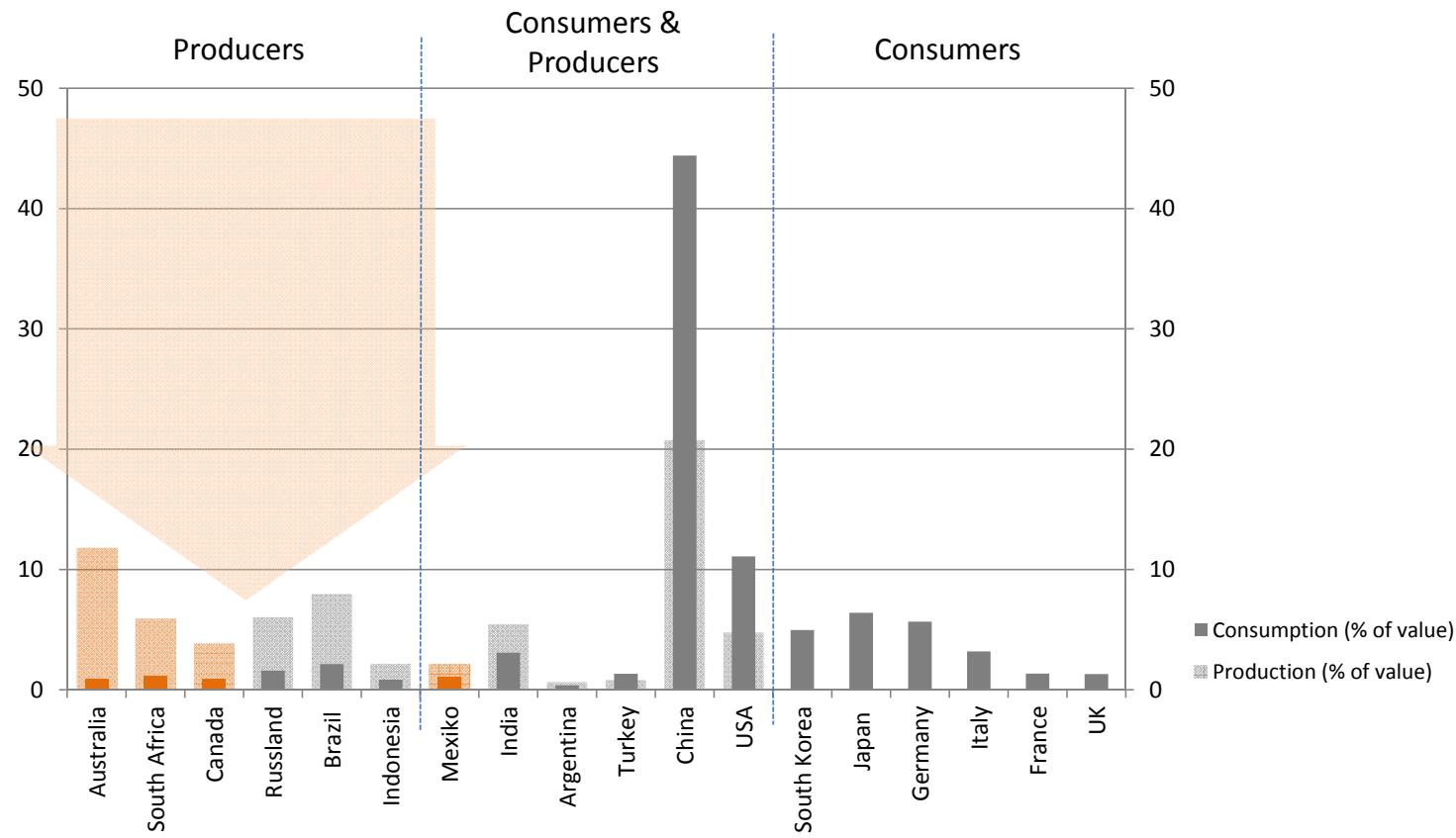


Source: BGR, 2013, Fragmentation or Cooperation in Global Resource Governance?

Mineral Strategy Elements

promoting FDI in the mining sector

G20
metal
consumption
& production
(2010)

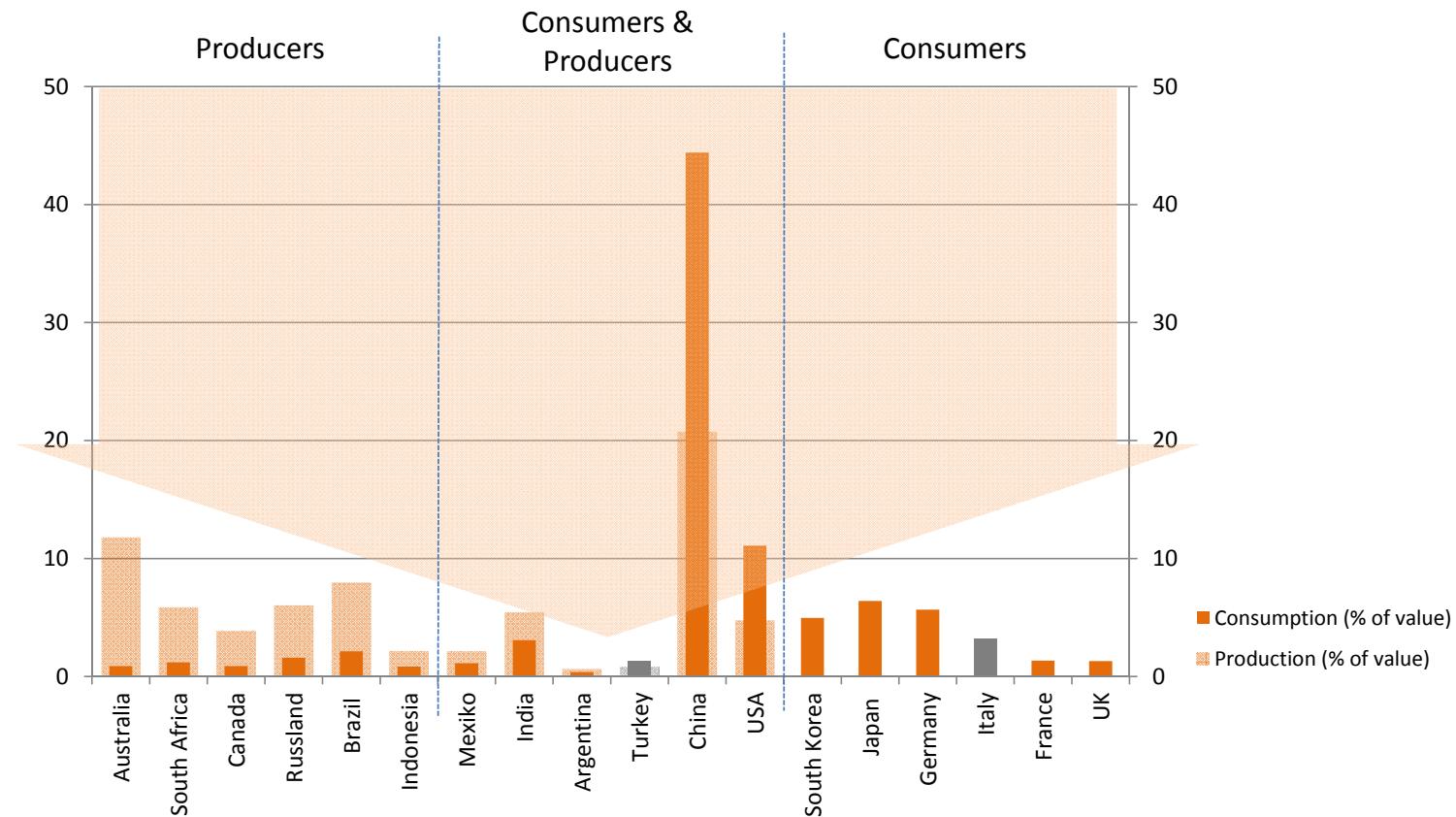


Source: BGR, 2013, Fragmentation or Cooperation in Global Resource Governance?

G20
metal
consumption
& production
(2010)

Mineral Strategy Elements

expansion of exploration and production

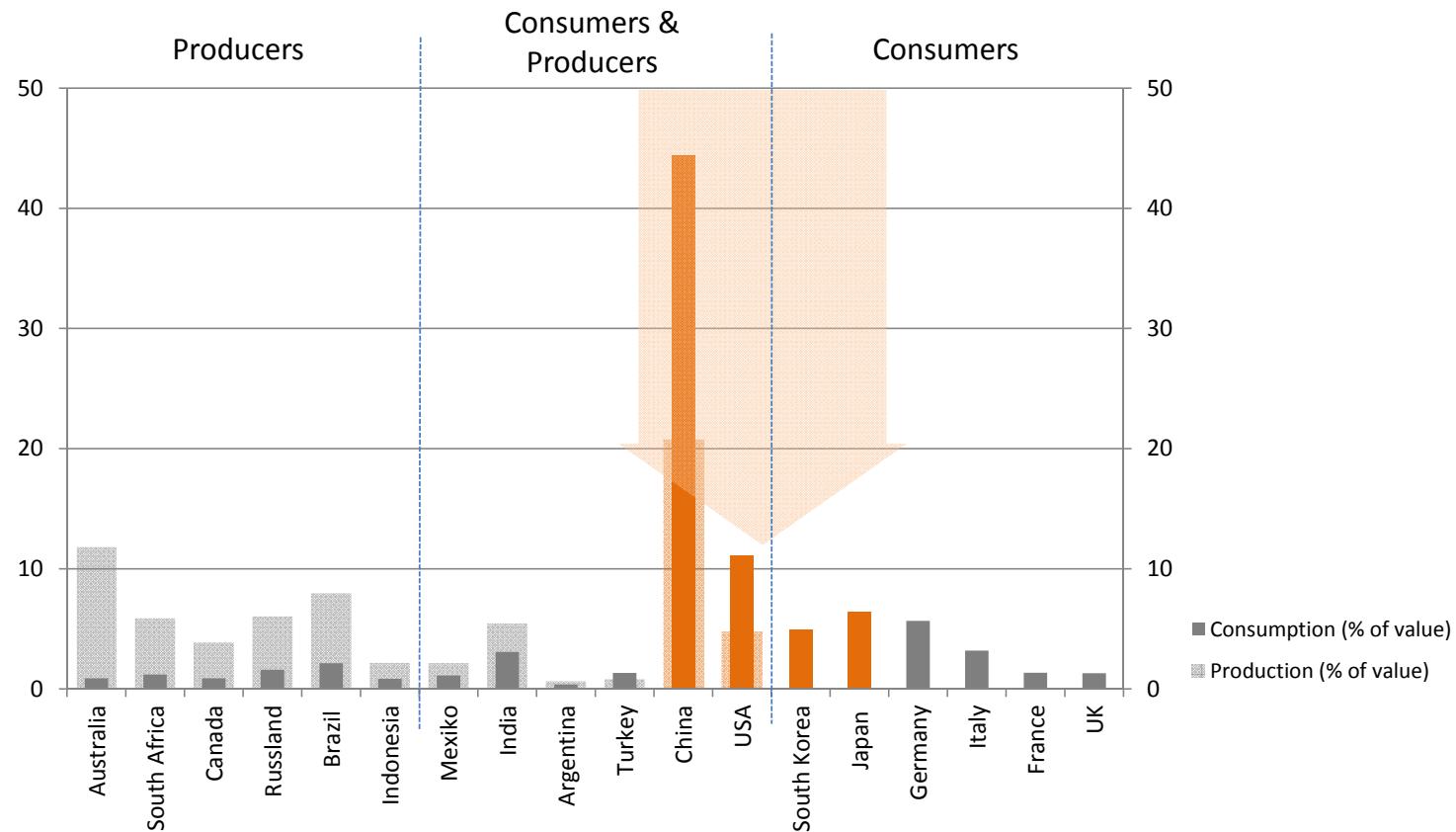


Source: BGR, 2013, Fragmentation or Cooperation in Global Resource Governance?

G20
metal
consumption
& production
(2010)

Mineral Strategy Elements

stockpiling

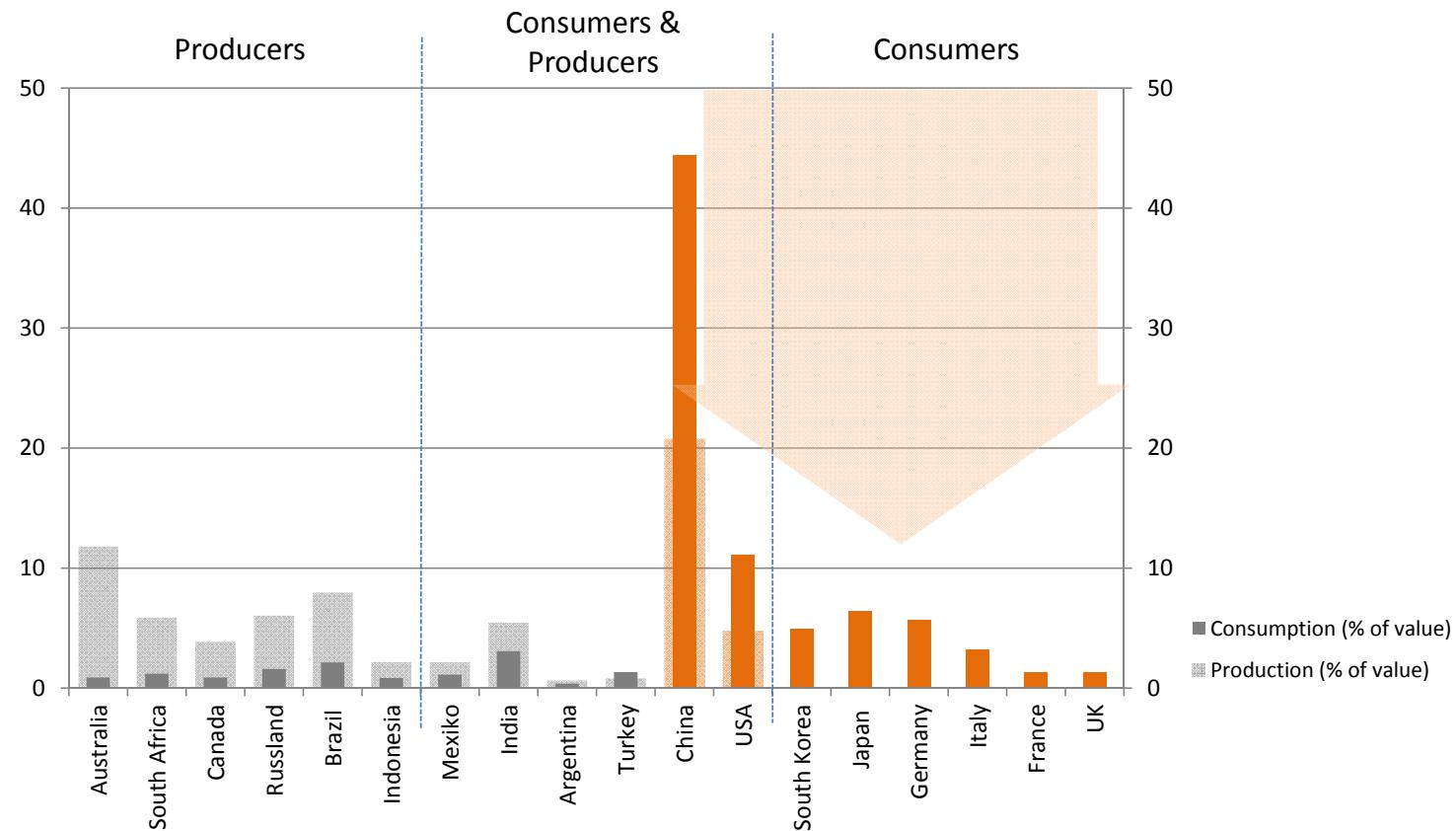


Source: BGR, 2013, Fragmentation or Cooperation in Global Resource Governance?

G20
metal
consumption
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Mineral Strategy Elements

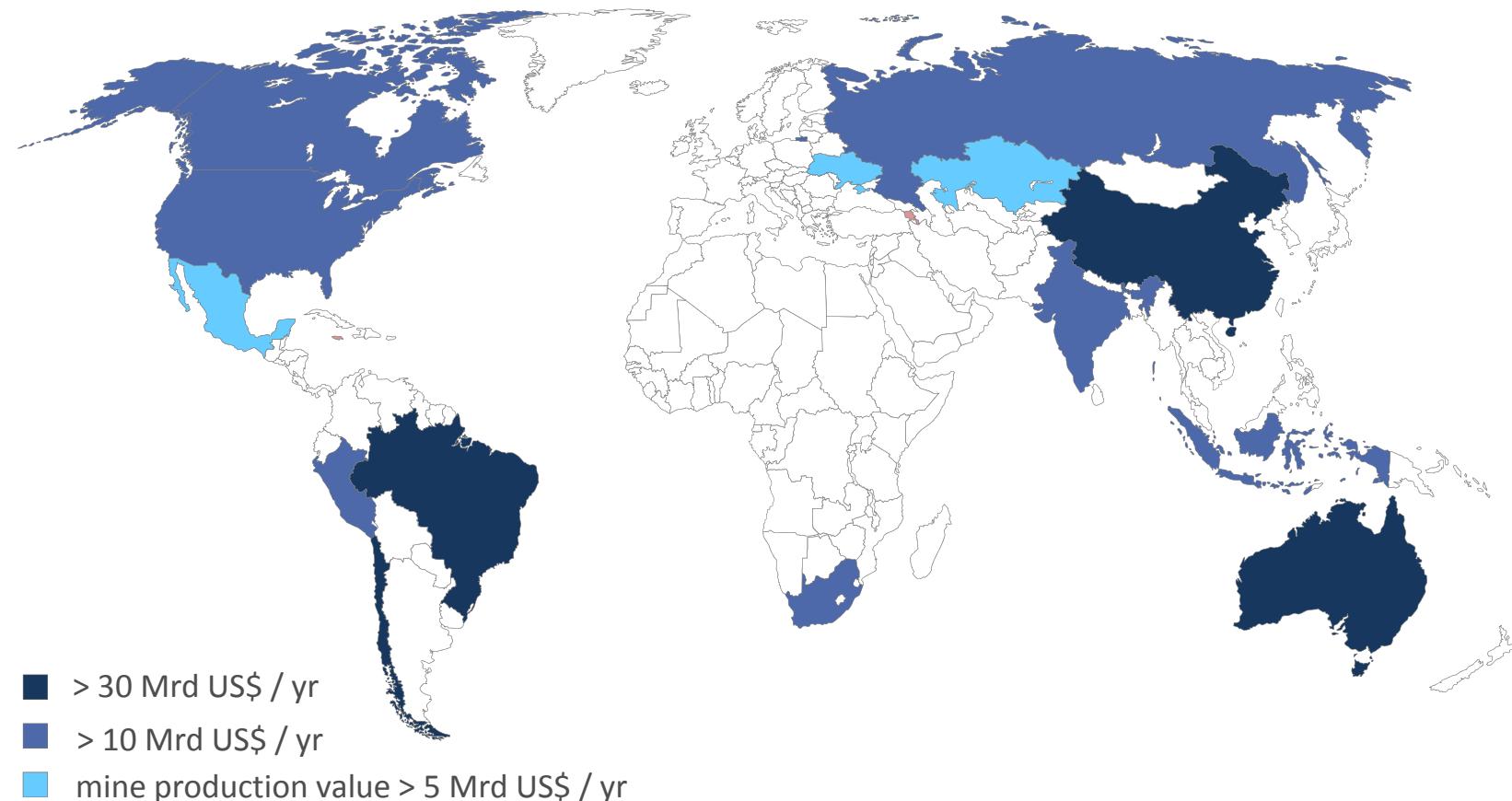
state funds for R&D on substitutes and recycling



Source: BGR, 2013, Fragmentation or Cooperation in Global Resource Governance?

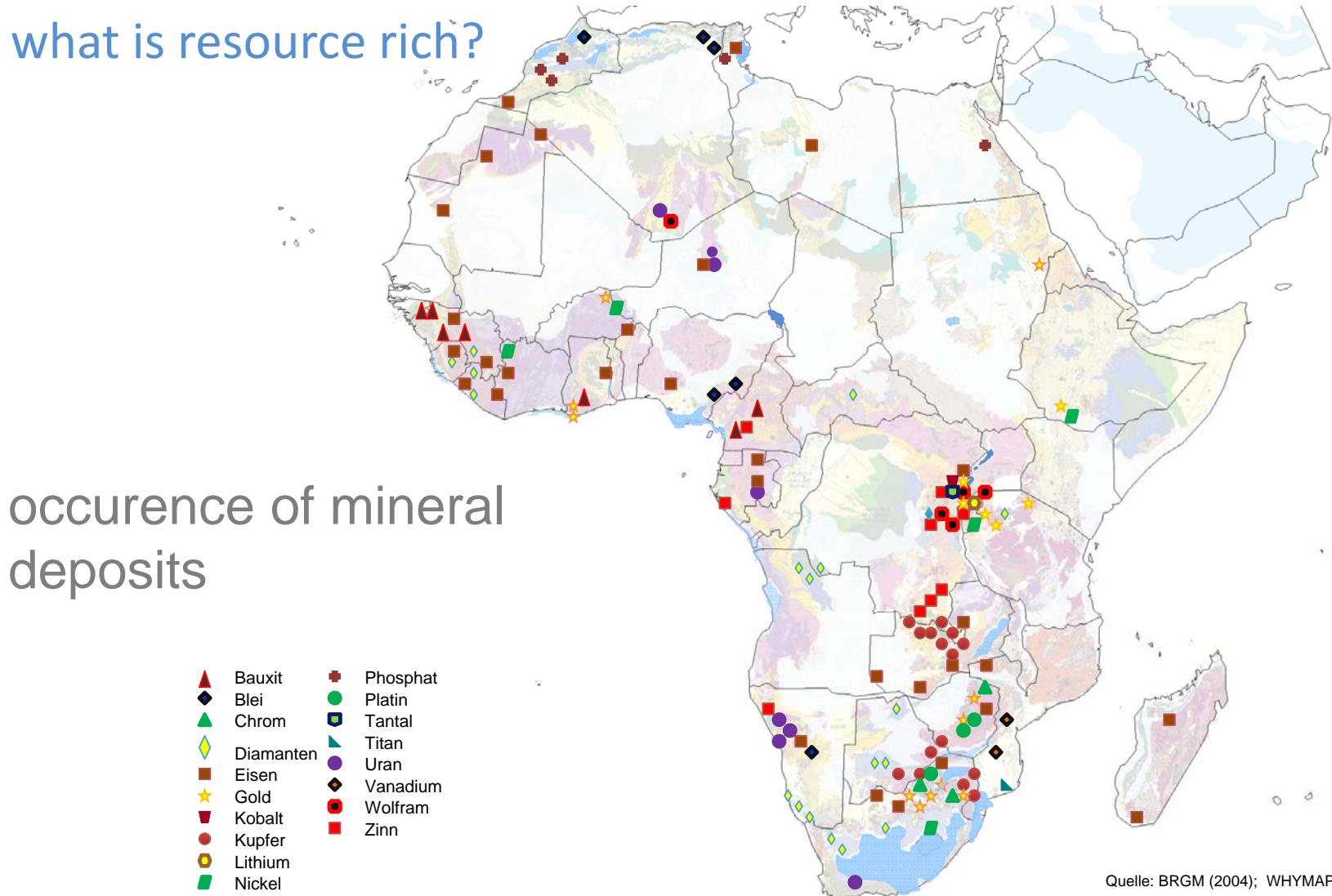
what is resource rich?

mining production by value: countries > 5 Mrd US\$/jahr



- in sum: 85% of the global mine production by value -

what is resource rich?

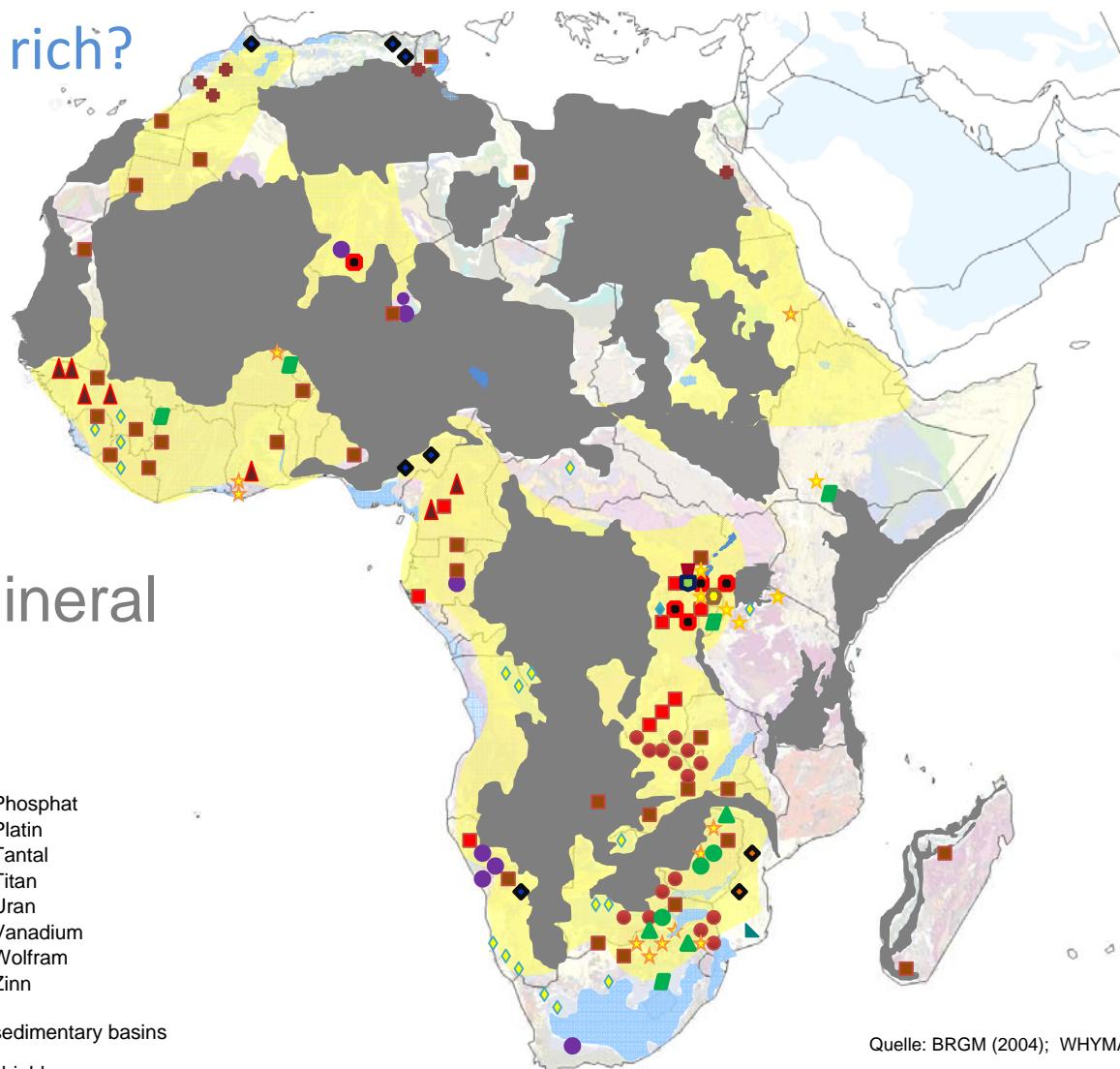


Quelle: BRGM (2004); WHYMAP (BGR / UNESCO) 2008

what is resource rich?

occurrence of mineral deposits

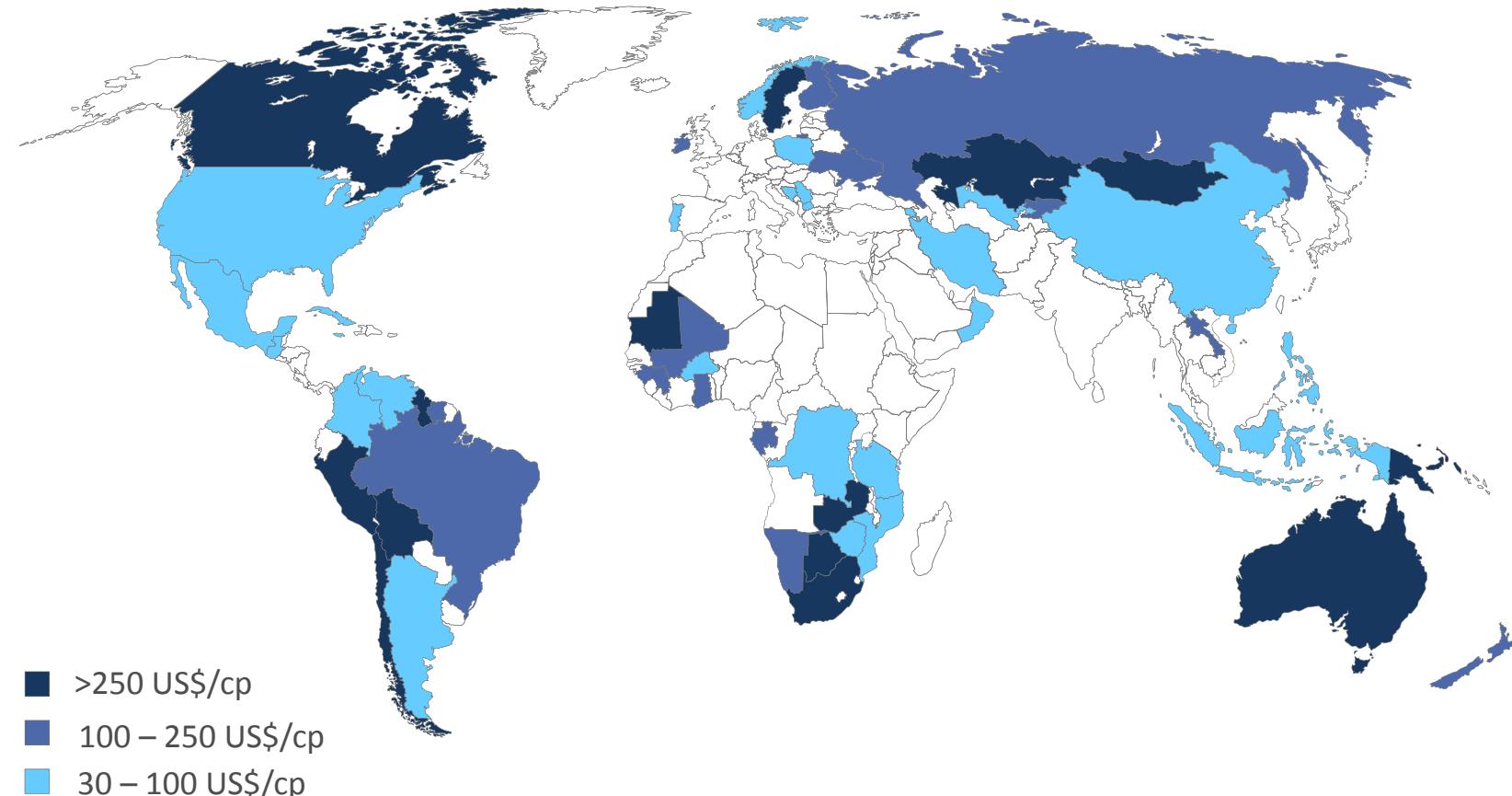
- ▲ Bauxit
- ◆ Blei
- ▲ Chrom
- ◆ Diamanten
- Eisen
- ★ Gold
- Kobalt
- Kupfer
- Lithium
- Nickel
- Phosphat
- Platin
- Tantal
- ▲ Titan
- Uran
- ◆ Vanadium
- Wolfram
- Zinn
- sedimentary basins
- shields



Quelle: BRGM (2004); WHYMAP (BGR / UNESCO) 2008

what is resource rich?

production value p/c and yr in US\$ (2013)



what is resource rich?

economic dependency on the mining sector (2013)



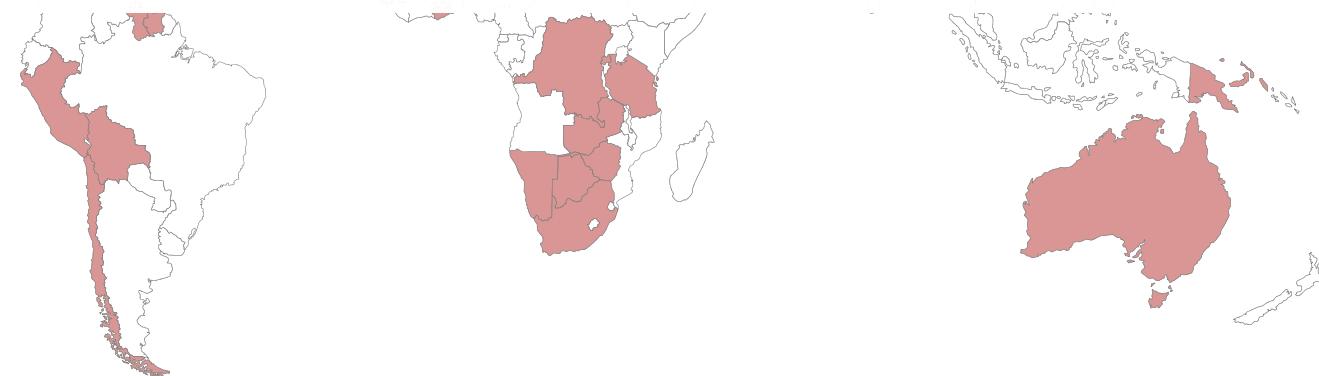
...is a challenge for development



...requires good financial governance on the national level



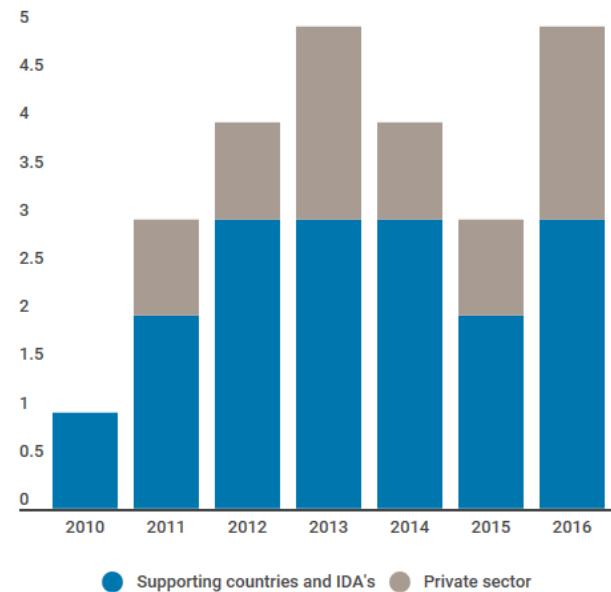
...calls for diversification of the economy (local value)



■ Min RS >20% of Export

development cooperation in the mining sector: GFG

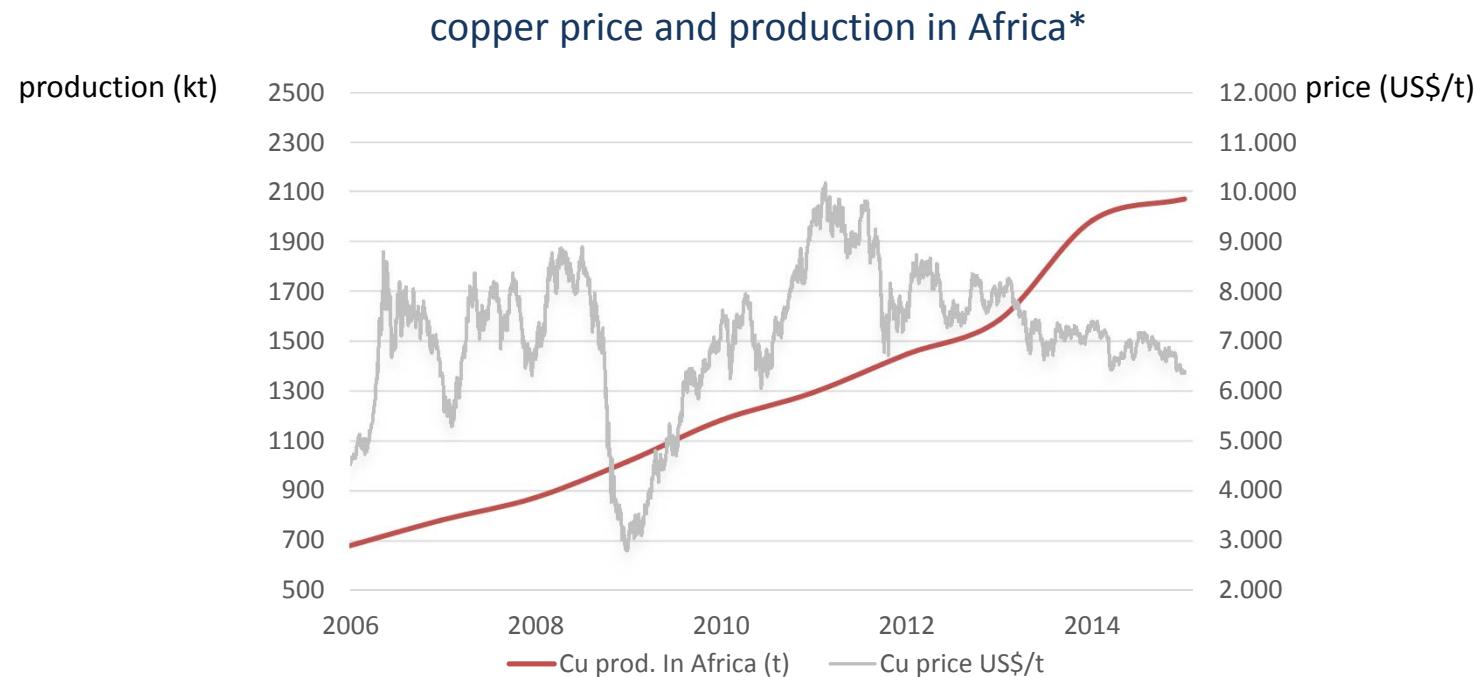
in USD millions



Funding of EITIsecretariat

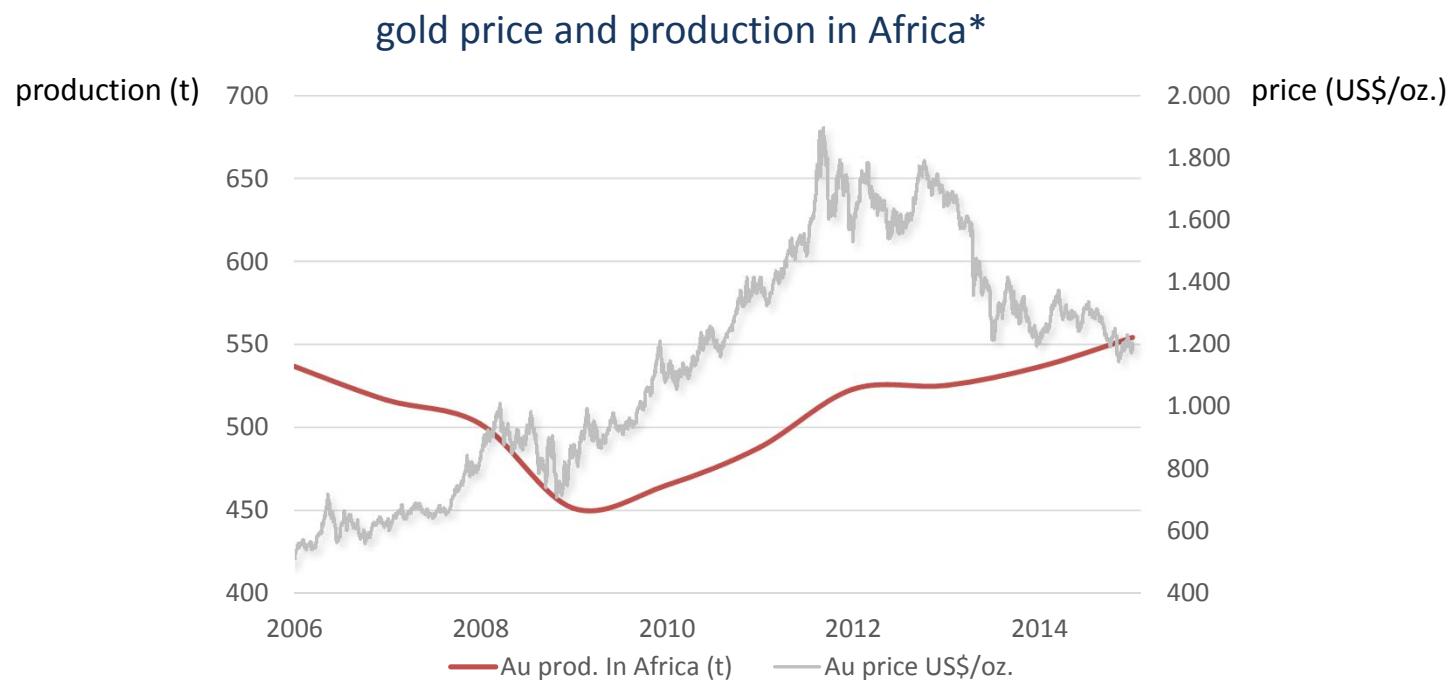
Implementation of
transparency cost
50 Mio US\$ / yr

development cooperation in the mining sector: local value



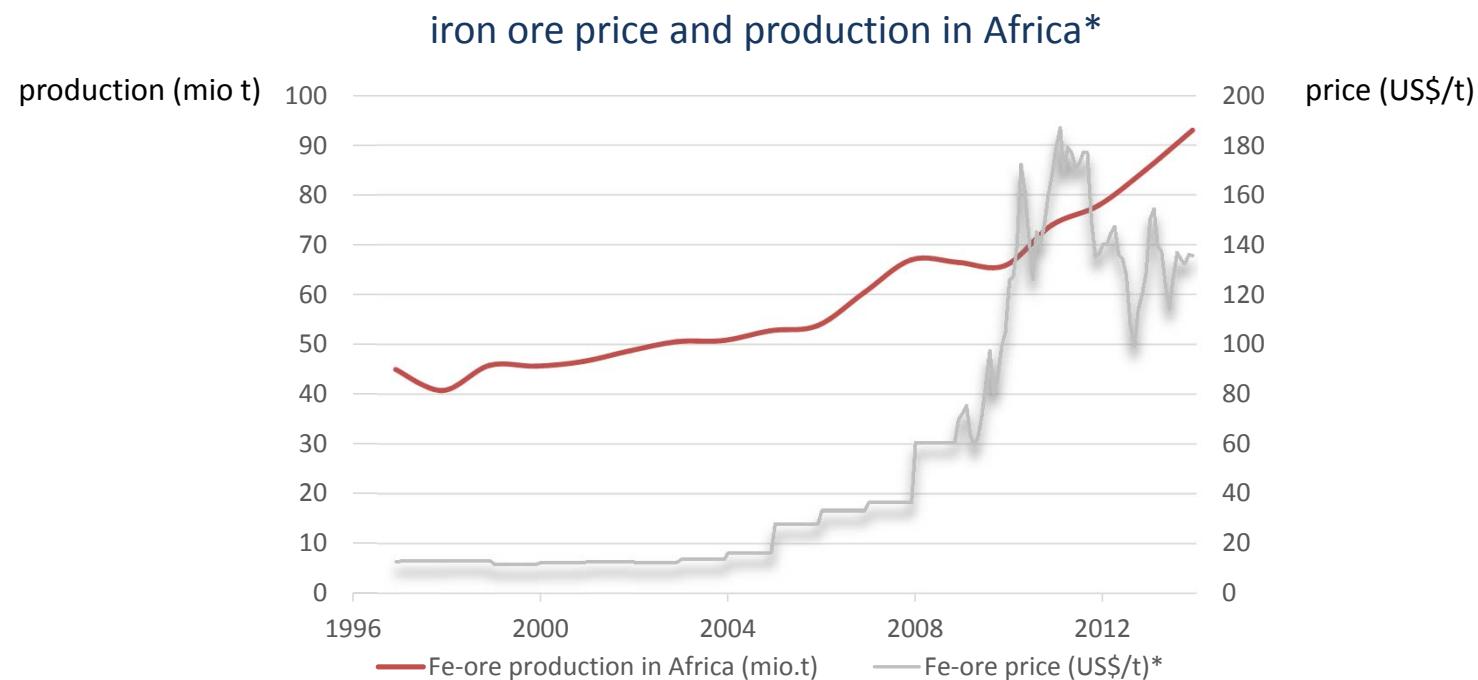
*data: SNL, 2016

development cooperation in the mining sector: local value



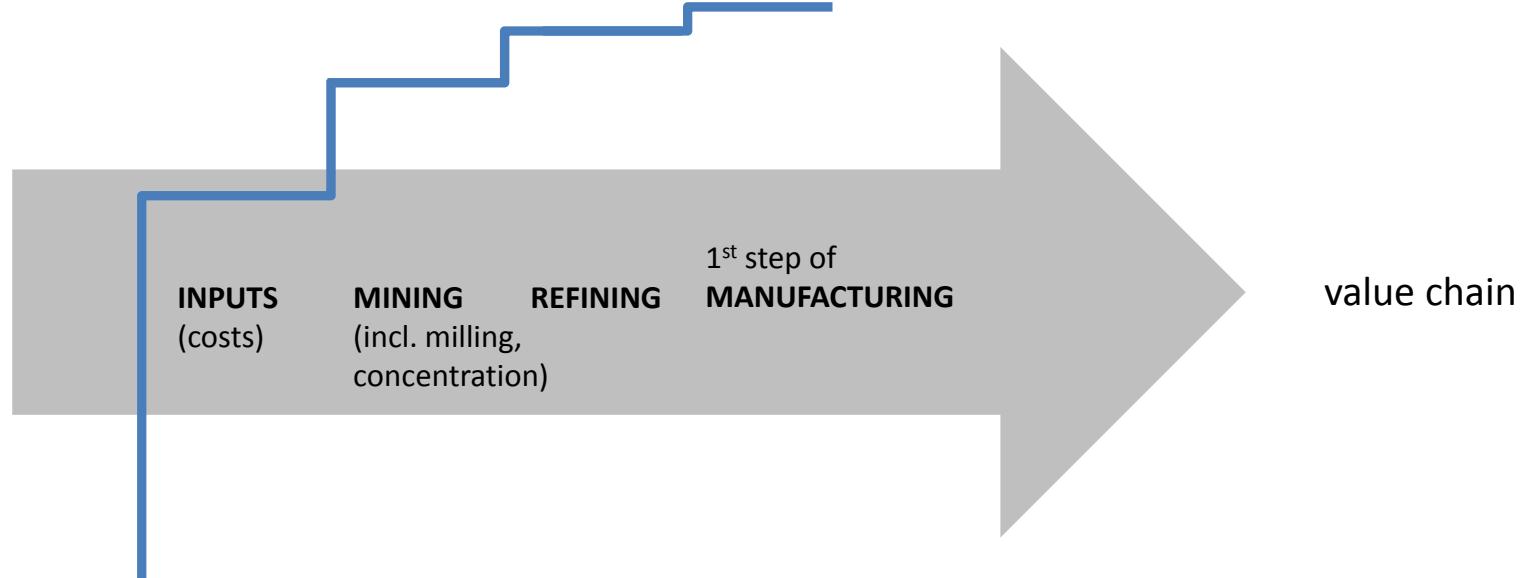
*data: SNL, 2016

development cooperation in the mining sector: local value



*data: SNL, 2016, China import iron ore fines 62 % Fe, spot (cfr Tianjin port)

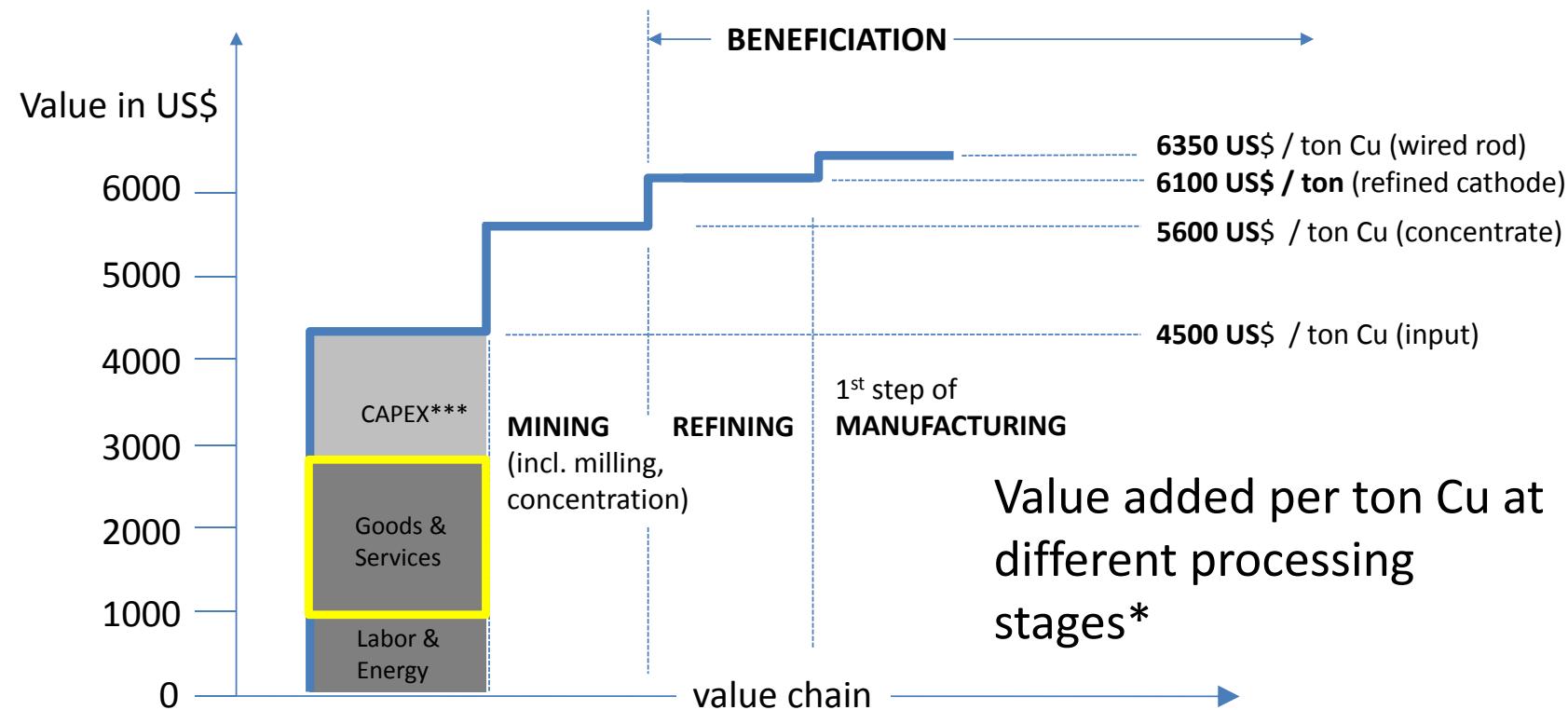
where is the value added?



* Copper price of 6100 US\$ / ton (LME Jan. 2015); Data: SNL

** World Bank: Increasing Local Procurement by the Mining Industry in West Africa (2015)

where is the value added?



* Copper price of 6100 US\$ / ton (LME Jan. 2015); Data: SNL

** World Bank: Increasing Local Procurement by the Mining Industry in West Africa (2015)

*** Cochilco (2016)

Goods &
Services

thank you