



# Introduction to KU Leuven Green Deal Resources Study

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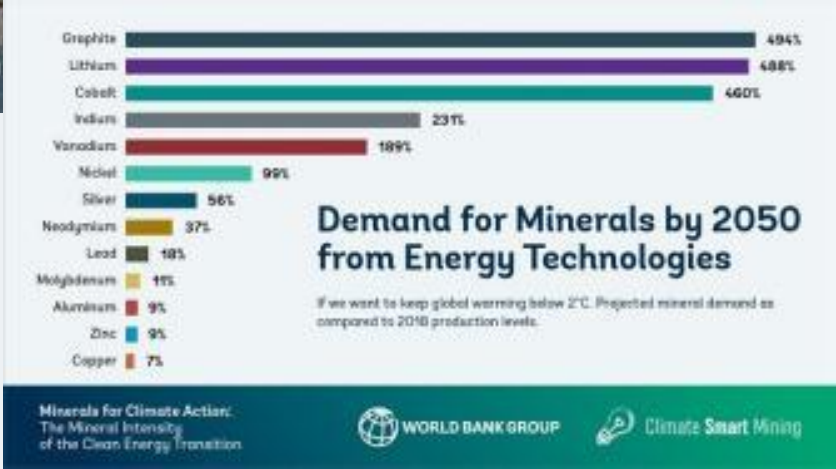


# An external study on the EU Green Deal's resource needs and supply scenarios

*Global studies on Metals demand/supply*



*Translated to EU context*



# Green Deal Resource Map

A study in 5 analyses for a number of commodities

## Analyses

1. The impact of the Green Deal on global and European commodity demand
2. Commodity supply potential (recycled, EU mined (+ refined), imports)
3. European sustainability scenarios: impact of circular economy on commodity demand and supply
4. Supply-Demand Analysis
5. Sustainability assessment of the Clean Technology Production Chain

## Commodities

1. Tier 1: Cu, Al, Pb, Zn, Ni, Li, Co, Ag, Si, REE
2. Tier 2: Au, PGMs, Mn, Cr,

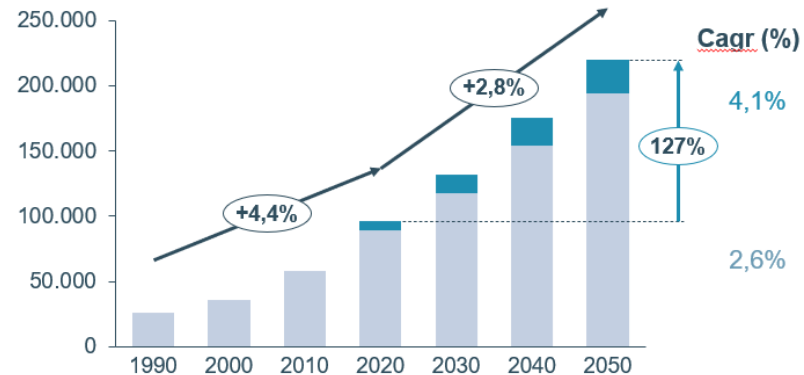
Data partner: McKinsey  
& Company



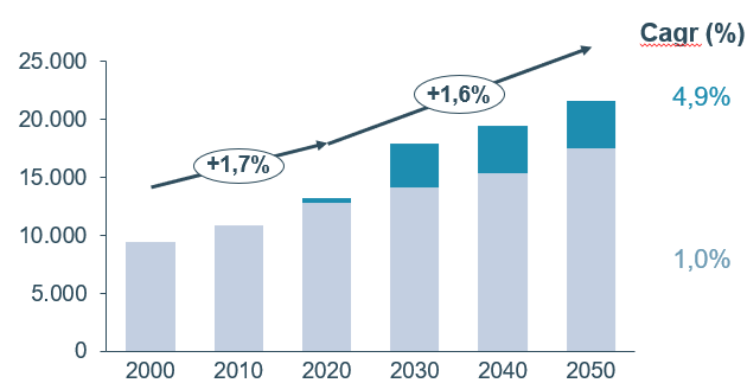
# First demand scenarios now under review

## Global and European demand until 2050, plus technology breakdown

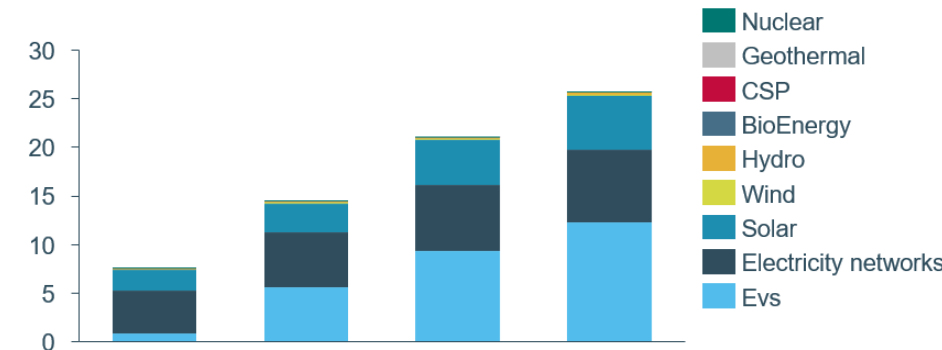
**Global aluminum demand outlook**  
Kt aluminum (semis)



**European aluminum demand outlook**  
Kt aluminum (semis)



**Global aluminum transition demand outlook (STEPS)**  
Kt aluminum



*Including scenarios for Europe's success in setting-up value chains for batteries, PV, permanent magnets etc.*

# Commodities have provided initial support in September with data and bilateral interviews



7 September



10 September



14 September



23 September



1 October



9 September



Lithium  
companies  
17 September



+ discussions with downstream sectors – batteries, wind, solar

*Now we'd like to work with Euromines for supply and sustainability sections*

# Euromines membership support requested

- **Review** of KU Leuven's overall demand and supply analysis through the project development
- **Interview** of Secretariat and selected members with KU Leuven on EU mining sector's growth potential, competitiveness situation, sustainability performance and challenges (90 minutes)
- **Input** to KU Leuven's supply analysis with information covering the known potential European mining projects for EU domestic supply, plus exploration status in Europe
- **Input** to KU Leuven's sustainability chapter with information and data (where/if available) demonstrating the climate and environmental leadership of the European mining sector
- **Support** to release of the study at EU and Member State level

*Actions will be discussed further with Euromines Secretariat following this meeting*