**Business mission and dialogue no. 1 – concept note**

Table 1: The event at a glance

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| --- | --- | --- |
| **Date** | **Place** | **Overarching theme** |
| **14-20 April 2024**Business mission: 15-19Dialogue: 18Travel days: 14 and 20 | **BRA**Business mission: Brasília, Minas Gerais, São PauloDialogue: São Paulo | ***Promoting EU-BRA investments and innovation in sustainable and responsible CRMs value chains*** |
| **CRMs in focus** | **Selection of potentially relevant stakeholders** |
| Primary: **natural graphite**, **niobium**Secondary: rare earth elements, lithium  | **BRA**: Ministry of Mines and Energy (MME), Ministry of Development, Industry, Trade and Services (MDIC), Ministry of Science, Technology and Innovation (MCTI), Ministry of Foreign Affairs (MRE), Brazilian Mining Association (IBRAM), Brazilian Trade and Investment Promotion Agency (ApexBrasil), Minas Gerais state government, Federation of the Industries of the state of Minas Gerais (FIEMG), Geological Survey of Brazil (SGB), Companhia de Desenvolvimento Econômico de Minas Gerais (Codemig), CBMM, Nacional de Grafite, Sigma Lithium**EU**: DG INTPA (EU), DG GROW (EU), EIT RawMaterials (EU), EIT InnoEnergy (EU), European Battery Alliance (EU), AMG (NLD), ANZAPLAN (DEU), Aqseptence (DEU), BASF (DEU), Bauer (DEU), BMW (DEU), Eramet (FRA), FAM (DEU), FLS (DNK), IMERYS (FRA), ING (NLD), Kemira (FIN), KGHM (POL), Mercedes-Benz (DEU), Metso (FIN), Polestar (SWE), Renault (FRA), Sandvik (SWE), Santander (ESP), SocGen (FRA), Stellantis (NLD), Umicore (BEL), Vektor (FRA), Volkswagen (DEU), Volvo (SWE)  |

# General background

**Critical raw materials** (CRMs) are crucial for the European Union’s (EU) economy, forming the bedrock of necessary technologies for strategic sectors, from e-mobility and renewable energies to aerospace and defence. Currently, the EU relies almost exclusively on imports for many CRMs, a dependency further amplified by the concentrated presence of a limited number of third-country suppliers, both at the extraction and processing stage. To address this vulnerability, the European Commission (EC) has introduced various policies and initiatives, such as the European CRMs Act, the European Battery Alliance, the European Chips Act, the European Climate Law and the European Green Deal strategy.

The proposed CRMs Act is especially important as it aims to secure the EU’s access to a reliable and sustainable supply of CRMs by, among other things, developing strategic international partnerships and associated funding to secure a diversified and sustainable supply of CRMs, including through undistorted trade and investment conditions.

In line with these efforts, the **EU-LAC Critical Raw Materials Support Action** (Project), funded by the EU, seeks to establish sustainable and responsible strategic partnerships covering extraction, processing and refining in resource-rich countries of Latin America and the Caribbean (LAC), including Argentina (ARG), Bolivia (BOL), Brazil (BRA) and Chile (CHL). It does so by organising **business missions and dialogues between EU and LAC stakeholders**, including government, business, and civil society representatives, to identify the needs of the LAC stakeholders and match them with those of the EU industry.

# Business mission and dialogue no. 1

## **Date and place**

**We suggest organising the Project’s first business missions and dialogue from Monday, 15 April to Friday, 19 April 2024, in Brasília, Minas Gerais and São Paulo, BRA. We would formally start the business mission with visits to government stakeholders in Brasília, then facilitate up to three visits in Minas Gerais, and conclude with a dialogue in São Paulo.**

## **Overarching theme and CRMs in focus**

The business mission and dialogue would bring stakeholders together to cover extraction, processing and refining along the value chains of preselected CRMs, with the overarching theme: “**Promoting EU-BRA investments and innovation in sustainable and responsible CRMs value chains**.” It would include policymakers and business representatives from the EU and LAC regions and promote and facilitate government-to-business and business-to-business dialogues on investment opportunities and innovation to achieve a sustainable and responsible integration of selected CRMs value chains.

The event would primarily target the value chains of natural **graphite** and **niobium**. Additionally, it would address rare earth elements and lithium to a lesser extent.

## Preliminary programme

* **Day 1 (Sunday 14)** – Arrival in Brasília via São Paulo (all day)
* **Day 2 (Monday 15)** – Visit MME, MCTI, MDIC, MRE, ApexBrasil and IBRAM (am). Travel to Minas Gerais (pm)
* **Day 3 (Tuesday 16)** – Visit CBMM in Araxá (all day). Alternatively, visit Nacional de Grafite in Pedra Azul or Itapecerica (all day)
* **Day 4 (Wednesday 17)** – Visit the Minas Gerais state government, Codemig and the FIEMG in Belo Horizonte (am). Travel to São Paulo (pm)
* **Day 5 (Thursday 18)** – Dialogue: *Promoting EU-BRA investments and innovation in sustainable and responsible CRMs value chains* (all day)
* **Day 6 (Friday 19)** – Visit the commercial office of Sigma Lithium or Nacional de Grafite\* (am). Alternatively, business breakfast co-organised with the *EU Policy and Outreach Partnership in Argentina and Brazil* project (am).
* **Day 7 (Saturday 20)** – Departure from BRA (all day)

\**If we do not visit them in Minas Gerais.*

We would offer simultaneous translation services (English and Portuguese) throughout the business mission and dialogue.

## Relevant stakeholders

We have divided the potentially relevant stakeholders based on their origin (BRA, EU), the sector they represent (government, business) and the appropriate CRMs (graphite, niobium, rare earth elements, lithium).

We will liaise with the relevant EU businesses to identify **up to 10 participants** for the business mission. The Project would cover their travel and accommodation expenses. However, financial institutions would bear their costs. Finally, we welcome up to 10 additional self-funded participants to join us.

***\*\*\* The following table contains potentially relevant stakeholders. However, the Project has not approached them, and the list is subject to change based on ongoing consultations with the EC, EU Member States and government stakeholders in BRA. \*\*\****

Table 2: Relevant stakeholders

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **No.** | **Name** | **Origin** | **Sector** | **CRMs** | **Notes** |
| 1 | AMG Critical Materials | EU (Netherlands) | Business | Graphite, niobium, rare earth elements, lithium | <https://amg-nv.com/>AMG is a leading lithium producer with mineral processing operations in graphite. Moreover, they have production facilities in BRA focused on, among other things, niobium oxides. |
| 2 | ANZAPLAN | EU (Germany) | Business | Graphite, niobium, rare earth elements, lithium | <https://www.anzaplan.com/>ANZAPLAN is a German provider of analytical and engineering services for industrial and speciality mineral and metal projects worldwide. They design graphite beneficiation plants. They also develop flowsheets and process designs for niobium, rare earth elements and lithium. |
| 3 | ApexBrasil | BRA | Government | Graphite, niobium, rare earth elements, lithium | <https://apexbrasil.com.br/br/en.html>ApexBrasil, the Brazilian Trade and Investment Promotion Agency, works to promote Brazilian products and services abroad and attract foreign investments to strategic sectors of the Brazilian economy. |
| 4 | Aqseptence | EU (Germany) | Business | Graphite, niobium, rare earth elements, lithium | <https://www.aqseptence.com/en/>Aqseptence offers specialised filtration and separation solutions for the mining industry, including water treatment and waste management systems. |
| 5 | Atlas Copco | EU (Sweden) | Business | Graphite, niobium, rare earth elements, lithium | <https://www.atlascopco.com/>Atlas Copco provides industrial tools, air compressors, construction and mining equipment, such as drill rigs and rock excavation machinery. |
| 6 | BASF | EU (Germany) | Business | Graphite, niobium, rare earth elements, lithium | <https://www.basf.com/global/en.html>BASF is the largest chemical producer in the world. BASF develops innovative materials and technologies for lithium-ion batteries that use natural graphite. They have a chemical complex in BRA.Moreover, their water solutions division offers chemicals and technologies for water treatment in mining, including flocculants for solid-liquid separation, process water treatment and wastewater treatment. |
| 7 | Bauer | EU (Germany) | Business | Graphite, niobium, rare earth elements, lithium | <https://www.bauer.de/en>Bauer provides equipment and services for mining, including raise-boring technology. |
| 8 | BMW | EU (Germany) | Business | Lithium | <https://www.bmwgroup.com/en.html>BMW has a sustainability strategy that includes electromobility. The company’s strategic goals imply an interest in ensuring the responsible sourcing of lithium. |
| 9 | CBMM | BRA | Business | Niobium, rare earth elements | <https://cbmm.com/en/>CBMM is the global leader in the production and commercialisation of Niobium products. Moreover, they are developing projects to recover and improve rare earth elements as a byproduct. |
| 10 | Codemig | BRA | Business | Niobium, rare earth elements | <http://www.codemig.com.br/>Brazilian state-run multi-business company owned by the State of Minas Gerais. It operates in the mining, energy and infrastructure sectors. |
| 11 | Dassault Systèmes | EU (France) | Business | Graphite, niobium, rare earth elements, lithium | <https://www.3ds.com/>Dassault Systèmes offers GEOVIA, an end-to-end software solution for mining, infrastructure and urban planning environments to drive productivity, efficiency and sustainability. |
| 12 | DG GROW | EU | Government | Graphite, niobium, rare earth elements, lithium | n/a |
| 13 | DG INTPA | EU | Government | Graphite, niobium, rare earth elements, lithium | n/a |
| 14 | DMT | EU (Germany) | Business | Graphite, niobium, rare earth elements, lithium | <https://www.dmt-group.com/>DMT provides consultancy services to support all aspects of mine development across nearly all commodities. |
| 15 | Eiffage | EU (France) | Business | Graphite, niobium, rare earth elements, lithium | <https://www.eiffage.com/en>Eiffage works on mining projects involving earthworks, civil engineering, and transport infrastructure. |
| 16 | EIT InnoEnergy | EU | Government | Graphite, niobium, rare earth elements, lithium | n/a |
| 17 | EIT RawMaterials | EU | Government | Graphite, niobium, rare earth elements, lithium | n/a |
| 18 | Epiroc | EU (Sweden) | Business | Graphite, niobium, rare earth elements, lithium | <https://www.epiroc.com/>Epiroc is one of the leading drill rig manufacturers in the world. They offer rock drilling machines and other machinery for mining. |
| 19 | Eramet | EU (France) | Business | Graphite, niobium, rare earth elements, lithium | <https://www.eramet.com/en/>Eramet owns a lithium deposit in CHL and is exploring opportunities to expand its footprint to BOL and CHL. |
| 20 | European Battery Alliance | EU | Government | Graphite, niobium, rare earth elements, lithium | n/a |
| 21 | FAM Minerals & Mining | EU (Germany) | Business | Graphite, niobium, rare earth elements, lithium | <https://www.beumergroup.com/>FAM offers machines along the complete transport chain for bulk materials. Their solutions cover extraction, conveying, loading and storage, and processing of various raw materials. |
| 22 | FIEMG | BRA | Business | Graphite, niobium, rare earth elements, lithium | <https://www.fiemg.com.br/>FIEMG provides education, technology and consultancy services to industries, including the mining sector. |
| 23 | FLSmidth | EU (Denmark) | Business | Graphite, niobium, rare earth elements, lithium | <https://www.flsmidth.com/>FLSmidth provides technologies and services for the mining industry. The firm offers a comprehensive portfolio of technologies and services for processing plants for raw materials, including lithium and rare earths. They have offices in BRA. |
| 24 | Grundfos | EU (Denmark) | Business | Graphite, niobium, rare earth elements, lithium | <https://www.grundfos.com/>Grundfos is the largest pump manufacturer in the world. |
| 25 | IBRAM | BRA | Government | Graphite, niobium, rare earth elements, lithium | <https://ibram.org.br/en/>IBRAM, the Brazilian Mining Association, represents the companies and institutions operating in the Brazilian mining sector. |
| 26 | IMERYS | EU (France) | Business | Graphite | <https://www.imerys.com/>IMERYS specialises in the production and processing of industrial minerals. They have a facility to produce synthetic graphite in Switzerland. |
| 27 | ING Group | EU (Netherlands) | Business | Graphite, niobium, rare earth elements, lithium | <https://www.ing.com/Home.htm>ING Group is interested in developing an investment portfolio in the CRMs sector in LAC. |
| 28 | Kemira | EU (Finland) | Business | Graphite, niobium, rare earth elements, lithium | <https://www.kemira.com/>Kemira provides chemicals and solutions for water treatment processes. |
| 29 | KGHM | EU (Poland) | Business | Graphite, rare earth elements, lithium | <https://kghm.com/en>KGHM owns a copper field in CHL and might be interested in expanding its operations in LAC. |
| 30 | Mercedes-Benz | EU (Germany) | Business | Lithium | <https://group.mercedes-benz.com/en/>Mercedes-Benz is interested in ensuring the responsible sourcing of lithium for their electric fleet. |
| 31 | Metso | EU (Finland) | Business | Graphite, niobium, rare earth elements, lithium | <https://www.metso.com/>Metso is a global frontrunner in sustainable technologies, end-to-end solutions and services for the aggregates, minerals processing and metals refining industries. They offer processing technology and crushing, grinding, screening and recycling equipment. |
| 32 | Minas Gerais state government | BRA | Government | Graphite, niobium, rare earth elements, lithium | <https://www.mg.gov.br/>The Minas Gerais state government |
| 33 | MCTI | BRA | Government | Graphite, niobium, rare earth elements, lithium | <https://www.gov.br/mcti/pt-br>The Ministry of Science, Technology and Innovation of BRA. |
| 34 | MDIC | BRA | Government | Graphite, niobium, rare earth elements, lithium | <https://www.gov.br/mdic/pt-br>The Ministry of Development, Industry, Trade and Services of BRA. |
| 35 | MME | BRA | Government | Graphite, niobium, rare earth elements, lithium | <https://www.gov.br/mme/pt-br>The Ministry of Mines and Energy of BRA. |
| 36 | MRE | BRA | Government | Graphite, niobium, rare earth elements, lithium | <https://www.gov.br/mre/en>The Ministry of Foreign Affairs of BRA. |
| 37 | Mota-Engil | EU (Portugal) | Business | Graphite, niobium, rare earth elements, lithium | <https://www.mota-engil.com/en/>Mota-Engil provides industrial engineering services, including earthworks services to the mining sector. They have been active in the LAC region for over 20 years and have offices in BRA. |
| 38 | Nacional de Grafite | BRA | Business | Graphite | <https://www.grafite.com/en/>Nacional de Grafite is a leading natural graphite producer. It has the right to exploit one of the world’s largest reserves of crystalline graphite in BRA. |
| 39 | NETZSCH | EU (Germany) | Business | Graphite | <https://www.netzsch.com/en/>NETZSCH provides high-performance grinding equipment for speciality applications. |
| 40 | Polestar | EU (Sweden) | Business | Lithium | <https://www.polestar.com/us>Polestar uses blockchain technology, supplier risk assessments, and audits to source materials and parts responsibly across the supply chain. |
| 41 | Renault | EU (France) | Business | Lithium | <https://www.renaultgroup.com/en/>Renault is interested in securing its supply of lithium. |
| 42 | Sandvik | EU (Sweden) | Business | Graphite, niobium, rare earth elements, lithium | <https://www.home.sandvik/en/>Sandvik provides products and solutions for mining and rock excavation, rock processing and metal cutting based on innovation, digitalisation and sustainable engineering.DSI Underground, part of Sandvik, is the world’s leading supplier of ground support products, systems and solutions for the underground mining and tunnelling industry. |
| 43 | Santander | EU (Spain) | Business | Graphite, niobium, rare earth elements, lithium | <https://www.santander.com/en/home>Santander is interested in developing an investment portfolio in the CRMs sector in LAC. |
| 44 | Seli Overseas | EU (Italian) | Business | Graphite, niobium, rare earth elements, lithium | <https://selioverseas.com/en/home-en/>Seli Overseas specialises in underground construction and offers various services, including tunnelling and raise-boring. |
| 45 | SGB | BRA | Government | Graphite, niobium, rare earth elements, lithium | <https://www.sgb.gov.br/en/>The Geological Survey of BRA. |
| 46 | Sigma Lithium | BRA | Business | Lithium | <https://sigmalithiumresources.com/>Sigma Lithium is ramping up spodumene hard rock production in BRA. It aims to become one of the world’s largest hard rock lithium producers. |
| 47 | Skanska | EU (Sweden) | Business | Graphite, niobium, rare earth elements, lithium | <https://www.skanska.com/>Skanska has expertise in constructing infrastructure for the mining industry, including excavation and transportation. |
| 48 | SocGen | EU (France) | Business | Graphite, niobium, rare earth elements, lithium | <https://www.societegenerale.com/en>SocGen is interested in developing an investment portfolio in the CRMs sector in LAC. |
| 49 | Solvay | EU (Belgium) | Business | Niobium, rare earth elements | <https://www.solvay.com/en/>Solvay has invested in a new processing project for rare earth elements in France. |
| 50 | Stellantis | EU (Netherlands) | Business | Lithium | <https://www.stellantis.com/en>Stellantis has made several lithium-related investments recently, including one in ARG. |
| 51 | STRABAG | EU (Austrian) | Business | Graphite, niobium, rare earth elements, lithium | <https://strabag-international.com/>STRABAG provides a broad range of services for the mining industry, including tunnelling, excavation and transportation infrastructure. |
| 52 | Umicore | EU (Belgium) | Business | Rare earth elements, lithium | <https://www.umicore.com/en/>Umicore is a leading circular materials technology company. They have expertise in material science, chemistry and metallurgy, and business units focused on rare earth elements and lithium.Umicore has facilities in BRA, where they produce automotive catalysts, compounds of noble metals, products and processes for electroplating and engage in metal recovery, recycling, and refining. |
| 53 | Verkor | EU (France) | Business | Graphite | <https://verkor.com/en/>Vektor aims to fast-track low‑carbon battery production in France to serve the European market. Their batteries will use graphite as feedstock. |
| 54 | Volkswagen | EU (Germany) | Business | Lithium | <https://www.volkswagen-group.com/en>Volkswagen plans to invest in lithium mining to become a major supplier of electric vehicle batteries globally. |
| 55 | Volvo | EU (Sweden) | Business | Lithium | <https://www.volvogroup.com/en/>Volvo provides comprehensive sustainable transportation solutions, including heavy- and medium-duty trucks, construction and mining equipment, buses, and industrial power applications.Volvo is considering taking direct equity stakes in suppliers of lithium and is building a plant for battery production in Sweden. |

## Dialogue

We propose organising a **one-day dialogue** on 18 April 2024 in São Paulo during the Brazil-EU Forum organised by the Euroamerica Foundation. We would invite **up to 50 participants**, including those joining in the business mission.

The dialogue would commence with 20-minute **statements from EU policymakers** and **representatives of the government of BRA**. A master of ceremonies would introduce the speakers in a 5-minute segment. EU representatives would spotlight initiatives like the Global Gateway and the Critical Raw Materials Act. The BRA speakers would highlight recent policy developments, including investment promotion schemes and specific opportunities for European investors across the CRMs value chain in the country.

Following this, two 60-minute **panel sessions** would delve into the targeted value chains: natural graphite and niobium. A moderator, introduced by the master of ceremonies, would open each session by introducing the theme and speakers within 5 minutes. Each session would feature three speakers (10 minutes each), two of which we would select from the business mission participants. An open discussion of 25 minutes, including questions and answers, would conclude each session.

The dialogue would conclude with **final reflections** from EU and BRA representatives (15 minutes). We would provide coffee breaks, lunch and networking opportunities throughout the day, with a schedule as follows:

* **09:00 – 09:30:** Registration, coffee and networking
* **09:30 – 10:15:** Opening of the dialogue and policy statements
* **10:15 – 11:15:** Investment opportunities and innovation along the natural graphite value chain
* **11:15 – 11:45:** Coffee break and networking
* **11:45 – 12:45:** Investment opportunities and innovation along the niobium value chain
* **12:45 – 13:00:** Closure of the dialogue
* **13:00 – 15:00:** Lunch and networking

In addition to securing a conference room capable of accommodating 50 participants, we would try to obtain a smaller room for private meetings, which we could facilitate upon request.