

# European competitiveness and raw materials security

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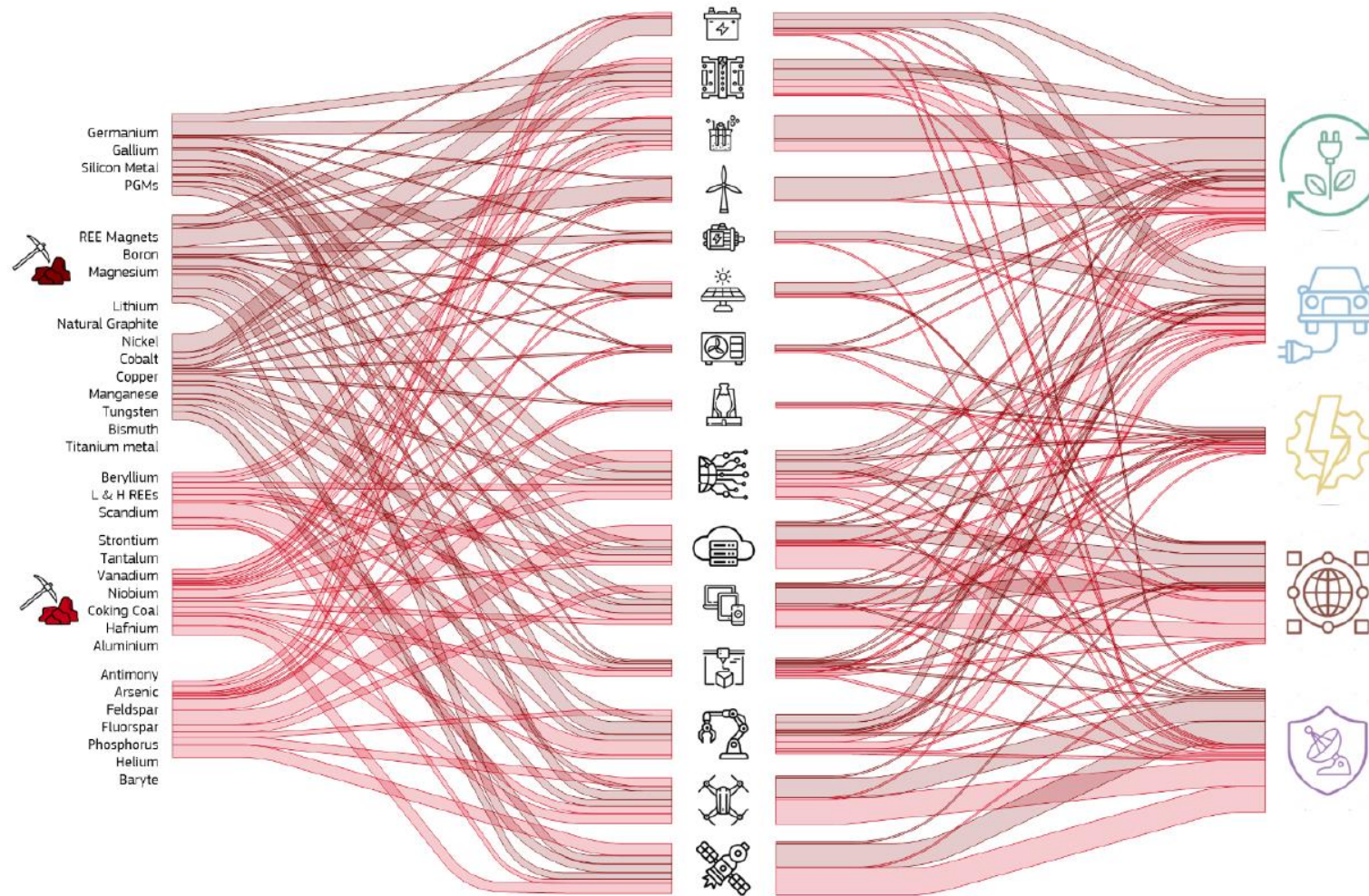
Policy Officer

GROW I.1 – Energy Intensive Industries and Raw Materials

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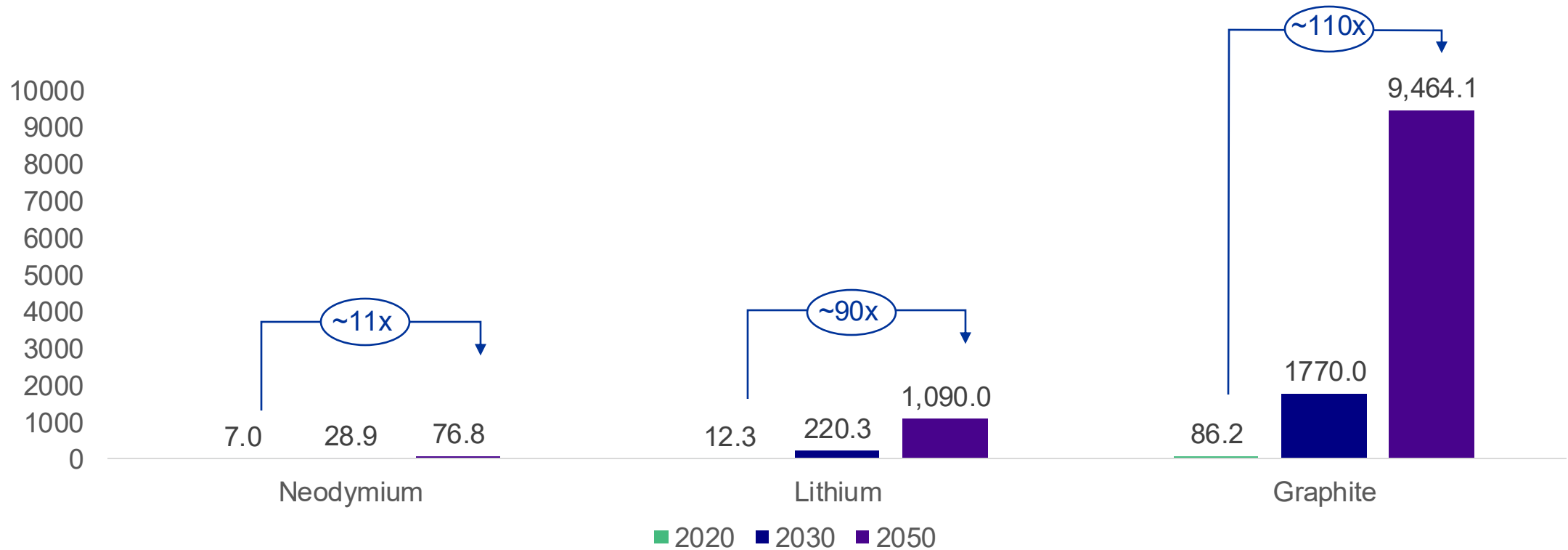
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# Critical and strategic raw materials are used across several relevant technologies



# The demand for raw materials is expected to increase significantly until 2050

Material demand forecast (across fifteen technologies – global) [kt]



# We differentiate between 17 strategic and 34 critical raw materials

## EU Critical Raw Materials, 2023 based on economic importance and supply risk

- Antimony
- Arsenic
- Bauxite
- Baryte
- Beryllium
- Coking Coal
- Feldspar
- Fluorspar
- Hafnium
- Helium
- Niobium
- Phosphate rock
- Phosphorus
- Scandium
- Strontium
- Tantalum
- Vanadium

### EU Strategic Raw Materials, used in strategic technologies and strong projected demand growth

- Aluminium
- Bismuth
- Boron
- Copper
- Gallium
- Germanium
- Magnesium
- Silicon metal
- Synthetic Graphite
- Titanium metal
- Tungsten

#### Battery Raw Materials

- Cobalt
- Nickel
- Natural Graphite
- Manganese
- Lithium

#### Light Rare Earth Metals

- Cerium
- Lanthanum
- Neodymium
- Praseodymium
- Samarium

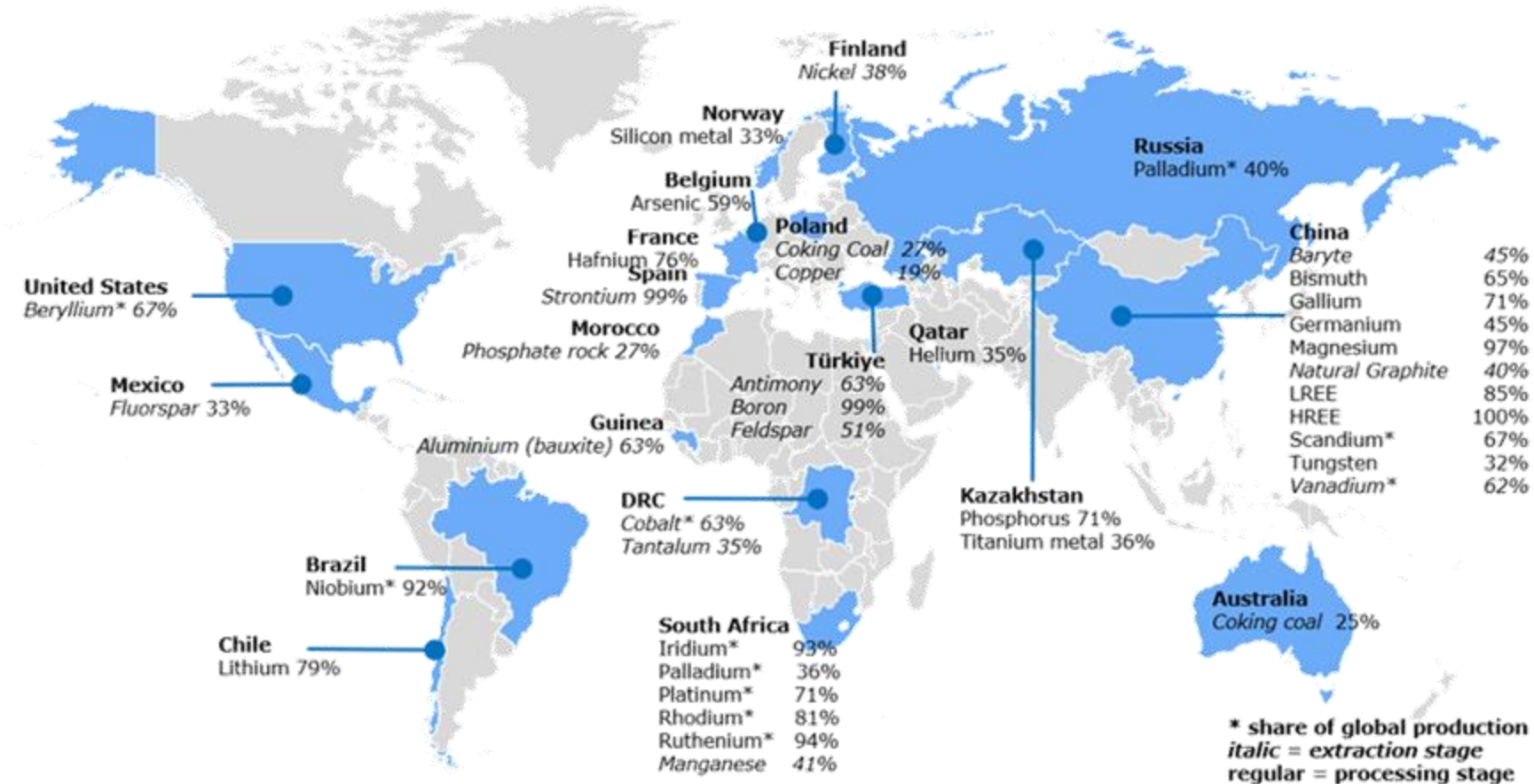
#### Heavy Rare Earth Metals

- Dysprosium
- Erbium
- Europium
- Gadolinium
- Holmium
- Lutetium
- Terbium
- Thulium
- Ytterbium
- Yttrium

#### Platinum Group Metals

- Iridium
- Palladium
- Platinum
- Rhodium
- Ruthenium

# The EU is heavily dependent on third countries for supply of CRMs



Source: "European Commission, Study on the Critical Raw Materials for the EU 2023– Final Report"



# ...and of further downstream materials and products

Market shares from rare earths mining to wind turbine manufacturing (2019 estimated)

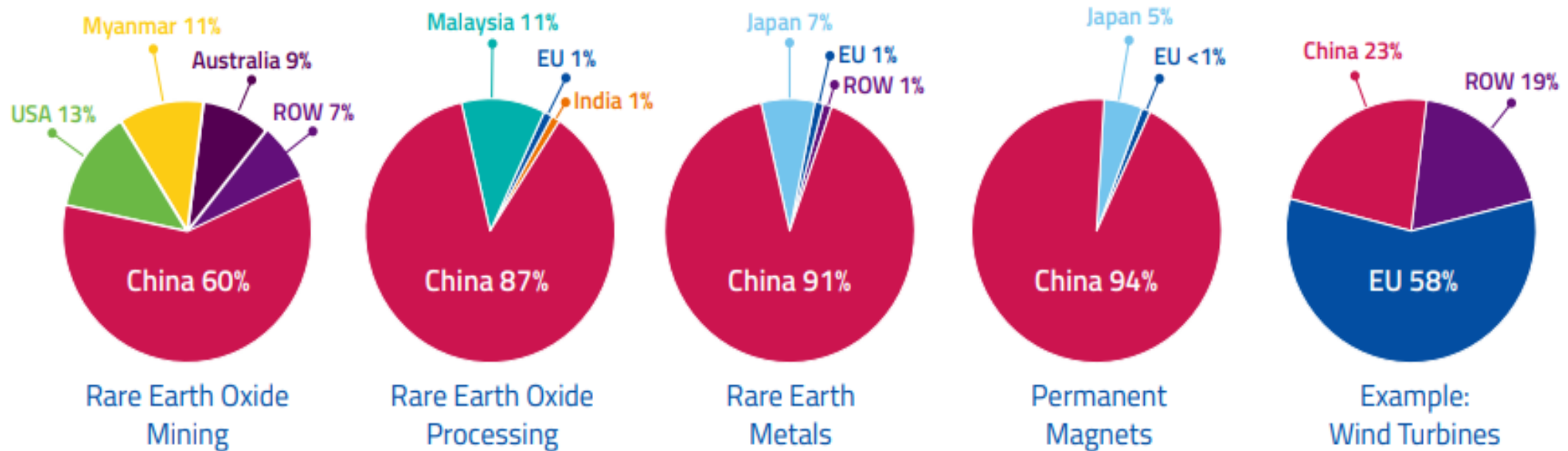


Fig. 3: From rare earths mining to wind turbine manufacturing: estimated market shares in 2019. Sources: Team analysis and Roskill 2018; Adamas Intelligence 2019; Peteves 2017; Carrara et al. 2020; IEA 2021; USGS 2021.

# The 2024 EU CRMA aims to ensure a secure and sustainable supply of CRMs

 Focus of next slide

## Objectives of the 2024 EU Critical Raw Materials Act



Strengthen all stages of the European CRM value chain



Diversify EU CRM imports to reduce strategic dependencies



Improve EU capacity to monitor and mitigate risks of disruption to CRM supply



Improve CRM circularity and sustainability



## 2030 CRMA Benchmarks

### Towards more SRM supply security

- EU's extraction capacity cover at least **10%** of the EU's SRM consumption
- EU's processing capacity cover at least **40%** of the EU's SRM consumption
- EU's recycling capacity cover at least **25%** of the EU's SRM consumption

### Towards more diversification of supply

- Not more than **65%** of EU consumption of each SRM should come from a single third country.





# In March 2025, we announced 47 Strategic Projects to strengthen EU value chains

The EU Strategic Projects span extraction, processing, recycling, and substitution

## Benefits for Strategic Projects

### Strategic Projects for the EU

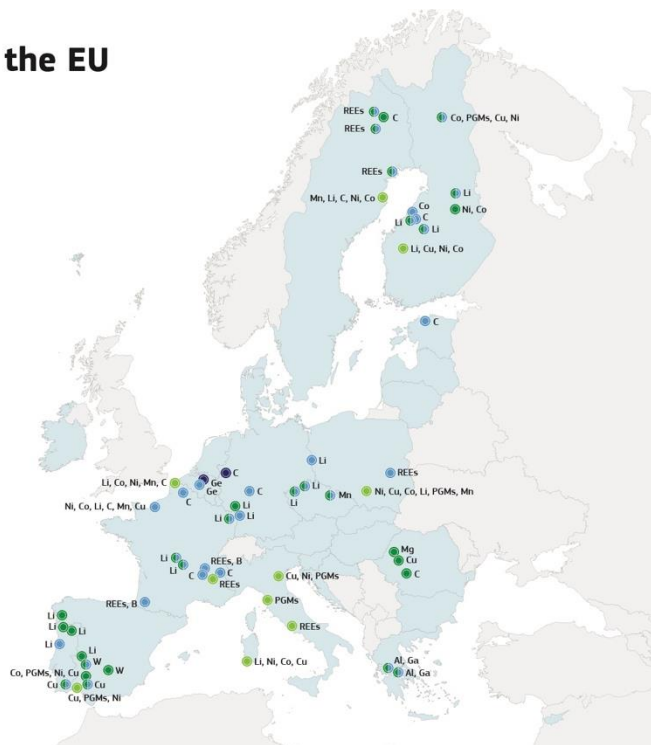
#### MAP LEGEND



Al	Aluminium
B	Boron
BRMs	Battery Raw Materials <sup>1</sup>
Co	Cobalt
Cu	Copper
Ga	Gallium
Ge	Germanium
C	Graphite
Li	Lithium
Mg	Magnesium
Mn	Manganese
Ni	Nickel
PGMs	Platinum Group Metals
REEs	Rare Earth Elements
W	Tungsten

<sup>1</sup> Battery Raw Materials refer to lithium, cobalt, nickel, manganese and graphite

Disclaimer: The location of projects is based on a regional scale and doesn't reflect their exact geographical locations



- Priority Status in national and EU law: for administrative and judicial procedures
- Points of Single Contact in Member States
- Permitting - Legal time-frames
  - Extraction: 27 months
  - Processing & Recycling: 15 months
- Provisions to facilitate and timely deliver environmental assessments and authorisations without weakening environmental and social protection

*We will also soon announce a list of Strategic Projects in third countries*





# However, the EU also relies on third countries to reduce supply dependencies



# How you can help support our efforts

## Objectives of the 2024 EU Critical Raw Materials Act



**Strengthen all stages of the European CRM value chain**



**Diversify EU CRM imports to reduce strategic dependencies**



**Improve EU capacity to monitor and mitigate risks of disruption to CRM supply**



**Improve CRM circularity and sustainability**



## Potential actions for EBOs

**Support, where possible, Strategic Projects in third countries**

**Advocate for local partners to “Choose Europe - Diversification is a win-win”**

**Provide local market insight and report relevant trends back to local EU delegation or DG GROW**

**Advocate for circular and sustainable practices among local partners**



# Questions? Feel free to reach out



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