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The European Defence Industrial Base: Overcoming Critical Materials' Supply Chain Obstacles and Vulnerabilities

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RESEARCH REPORT

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RESEARCH REPORT

Introduction

In February 2025, British Prime Minister Keir Starmer promised to increase defence spending to 2.5% of GDP from April 2027, the "biggest sustained increase in defence spending since the Cold War" (UK Prime Minister's Office, 2026). This commitment fits into the wider trend of extraordinary defence investments by European and NATO states in response to the changing geopolitical and security environment in Europe (European Commission, 2025c). For instance, European defence investments reached "EUR 102bn in 2024, almost doubling the amount spent in 2021", justified by the need to develop European defence capabilities and readiness (European Commission, 2025c, p. 16). Yet Europe faces significant structural vulnerabilities in the supply of essential critical raw materials needed for defence capacity, innovation, and reindustrialisation (European Commission, 2024c, pp. 159, 165). Consequently, the assumption that increased defence spending will automatically translate into enhanced defence industrial capability is tenuous.

Against this backdrop, this paper examines the structural obstacles surrounding the security of defence-essential critical raw materials, focusing specifically on the EU's diversification strategy through partnerships with resource-rich African states. Two main challenges are identified: international competition for access to African critical raw materials, particularly from China and Russia, and policy constraints that highlight the gap between Europe's strategic objectives and the reality of strategic partnerships. Ultimately, overcoming these interrelated challenges of dependency, access, and policy requires the EU to mobilise a comprehensive toolbox of diplomatic, economic, and development statecraft instruments. Thus, a Europe-first approach to security and defence, through supply chain diversification, is not fundamentally incompatible with international engagement. Rather, it depends on the EU adopting a long-term, proactive foreign economic policy regarding critical raw materials.

Generally defined as "processed or unprocessed" substances used to manufacture "intermediate or final products", raw materials are not inherently 'critical' nor 'strategic' (European Commission, 2023, Art. 2). They are defined as such by political actors, like the EU or NATO, depending on their needs, supply, and access. In 2011, the European Commission published its first critical raw materials (CRMs) list, outlining those with high impact on the value chains of strategic sectors and a high risk of supply disruptions (European Commission, 2026). The EU also introduced the concept of "strategic raw materials" (SRMs), recognisable by their use in "strategic technologies used for the green, digital, defence and aerospace applications", and "potential supply risks in the future" (European Commission, 2026; European Commission, 2024c, p. 50). As such, all SRMs are CRMs, but not all CRMs are SRMs, as they lack the technology and sector-specific dimension. In 2023, the EU published its fifth update to its list of CRMs and SRMs (see Table 1). Of these 34 CRMs, NATO identifies 12 overlapping "defence-critical" ones (NATO, 2024). This designation underscores that secure and stable access to CRMs is not just a prerogative of the industrial or green transition, but also a defence readiness priority.

Table 1: EU and NATO Critical, Strategic, and Defence-Critical Raw Material

Antimony	Arsenic	Bauxite	Baryte
Beryllium *	**Bismuth**	**Boron**	**Cobalt***
Coking Coal	**Copper**	Feldspar	Fluorspar
Gallium *	**Germanium***	Hafnium	Helium
Heavy Rare Earth Elements*	**Light Rare Earth Elements***	**Lithium ***	**Magnesium**
Manganese *	**Natural Graphite ***	**Nickel**	Niobium
Phosphate Rock	Phosphorus	**Platinum Group Metals***	Scandium
Silicon Metal	Stronium	Tantulum	**Titanium Metal***
Tungsten *	Vanadium		

In bold: strategic (17) and critical (34) raw materials
* NATO defence-critical raw materials
European Commission (2023, Annex I & Annex II); NATO (2024)

Regarding the defence sector, CRMs and SRMs are key to technological superiority, capability development, and general defence readiness (Hackett et al., 2025, p. 2; European Commission, 2025a, p. 1). The land domain is particularly reliant on CRMs and is considered highly vulnerable to geopolitical risks and supply chain disruptions (Girardi et al., 2023, p. 24). For instance, battle tanks, infantry vehicles, and artillery systems require beryllium, graphite, aluminium, iron, and copper, all of which score highly on the supply chain risk matrix (Girardi et al., 2023, p. 24). This dependency is concerning, given the emphasis placed on Europe building a "strong, resilient and technologically innovative industrial base" that is essential to strategic autonomy (European Commission, 2025c, p. 12). Therefore, without secure and resilient CRM supply chains, Europe's defence industrial base will struggle to support policy objectives.

However, vulnerabilities, including high external reliance on non-EU suppliers, undermine European states' capacity to ensure stable, secure access to defence-critical CRMs. Among these is China, which has weaponised its dominance over CRM supply chains for economic and geopolitical purposes (European Commission, 2025a). It boasts a near-global monopoly over CRMs and rare-earth minerals processing, controlling over 60% of global CRM production and 85% of global processing (Way, 2024). Further, it is a major supplier of bismuth (65%), gallium (71%), magnesium (97%), as well as light and heavy rare earth elements (85-100%) - which feature on the EU's CRM list, and are essential for semiconductors, radars, sensors, and artillery (European Commission, 2024c, Figure 3, p. 48; Girardi et al., 2023, p. 9). By contrast, the EU accounts for just 7% of global CRM production, exposing the extent to which the EU's ambition to foster a "strong, resilient and innovative industrial" base is currently unattainable (European Commission, 2024c, p. 50; European Commission, 2025a, pp. 2-3). This dependency challenge is compounded by Beijing's inclination to use "mineral supply chain dominance as a geoeconomic weapon" (Logan & Acheampong, 2025, p. 4). For instance, during the 2023-2024 trade war between the US and China, germanium and antimony exports fell by 39% and 57%, respectively (Tanghe, 2025). For Calabrese (2025), Europe's vulnerability to these fluctuations means it responds through reactive diplomacy, which inherently contradicts its readiness objective to "anticipate, prepare for and be able to respond to any defence-related crisis" (European Commission, 2025a, pp. 2-3). This is particularly concerning given the projected global increase in demand for CRMs driven by the energy and digital transitions (European Commission, 2026). It is in this context that Müller (2023, p. 181) argues that "an increasing politicisation of supply chains can be observed", with control over secure, stable access to raw materials a core component of geopolitical competition today.

The EU's progress in addressing these vulnerabilities has been slow, with the Draghi report on enhancing European economic competitiveness, stating that in the "global race to secure supply chains, [...] Europe is currently falling behind" (European Commission, 2024b, p. 56). Just before the Draghi report was released, the European Commission published the Critical Raw Materials Act (CRMA) in May 2024, with the explicit goal of strengthening CRM supply chain resilience (European Commission, 2026). It outlines two main ways to achieve this: diversification through strategic partnerships with resource-rich states, and investment in domestic extraction, processing, and recycling capacities (European Commission, 2026). Supporting targets to be achieved by 2030 are also outlined, stating that the EU should not be more than 65% dependent on any one supplier, 10% of annual needs must be sourced in Europe, 40% should be processed domestically, and 25% should be sourced from recycling (European Commission, 2026). Considering these targets, the Draghi report advises the EU to adopt a forward-thinking "foreign economic policy" based on "resource diplomacy", mobilising all statecraft tools at its disposal (European Commission, 2024b, pp. 57-58). Considering that developing domestic mining and processing capacity can take years or even decades (ASD, 2026), investing in strategic projects with resource-rich partners is a core part of Europe's supply chain de-risking and diversification strategy.

While the CRMA does not explicitly link supply chain resilience with defence objectives, recent EU policies and strategic reports have. First, the Defence Readiness Roadmap (European Commission, 2025a, p. 10) explains that closing the EU's defence capability gap depends on "secure access to critical raw materials". Second, the ReArm Europe Plan (European Parliament, 2025, p. 3) makes a similar argument that reducing "strategic dependencies" requires "ensuring secure and independent access to critical raw materials". These examples reflect not only the EU's understanding of CRM supply chain security and defence readiness as mutually reinforcing, but also the need for corresponding action. The most recent articulation of this is the RESourceEU Action Plan (European Commission, 2025b, p. 1). Looking to accelerate the implementation of the CRMA for the EU to "deliver on its 2030 defence readiness objectives", it advocates for faster supply chain diversification through partnership-building (European Commission, 2025b, p. 2). Working towards this should draw on "all diplomatic and economic tools", echoing the Draghi Report's call for the EU to engage in proactive resource diplomacy and statecraft (European Commission, 2025b, pp. 2, 7). Therefore, there has been a noticeable shift in the EU's rhetoric on addressing CRM supply chain vulnerabilities, with defence objectives, strategic partnerships, and the importance of deploying a range of economic, political, and diplomatic instruments emerging as central components.

Rising demand for raw materials has intensified the strategic contest over their access, placing resource-rich Africa - home to one third of the world's mineral deposits - at the centre of growing international interest in its critical raw materials (Logan & Acheampong, 2025; Way, 2024). It is also widely acknowledged that it will not be possible to meet the global CRM demand "without tapping into Africa", given its "significant deposits of cobalt, copper, lithium, graphite, and a range of rare earth elements" - which are all required by the defence industry (Logan, 2024, pp. 2-3). In parallel, confronted with the urgent need to diversify supply chains by forging industrial alliances beyond the West (Calabrese, 2025), the EU has pursued an active resource diplomacy agenda in Africa, resulting in strategic partnerships on CRMs with Rwanda, the Democratic Republic of the Congo (DRC), Zambia, Namibia, and South Africa (European Commission, 2024a). Despite prioritising infrastructure investment and support for local industries and job creation as a core component of strategic partnerships, the EU remains a comparatively weak contender in the competition for CRMs (European Commission, 2025b, p. 14). Two main challenges undermine its diversification efforts: competition from the entrenched resource diplomacy of China and Russia, and a gap between policy ambition and implementation, constrained by EU regulation, African priorities, and the 2030 deadline.

A) Competition for access

The EU is no longer the economic and development partner it once was. China, Russia, and, to a lesser extent, the Persian Gulf States have pursued their own resource diplomacy strategies, capitalising on the EU's declining economic, military, and diplomatic presence on the African continent (Merritt, 2024; Pokalova, 2023; Schulze, 2025, p. 2).

First, in the case of China, there is a direct link between European withdrawal and gains in Chinese mining operations. Today, Beijing's grip on African sourcing and processing of CRMs such as cobalt, copper, and lithium is unparalleled, contributing to its global control over CRM production and processing (Logan, 2024, p. 6). This was not by chance. Rather, China pursued an effective and comprehensive CRM strategy: even though its companies were late entrants to African mining, their expansion since 2019 has superseded that of its global competitors (Logan, 2024, p. 7; Development Reimagined, 2024, p. 22). Central to this resource diplomacy has been 'infrastructure-for-minerals' agreements, where Chinese banks, financial institutions, and companies provide loans to develop local infrastructure and mining capabilities (Müller, 2023, p. 184).

Largely channelled through the Belt and Road Initiative, Chinese investment in African minerals rose from $75 million to $4.2 billion between 2003 and 2020, financing mining capabilities alongside rail, road, and port infrastructure to export minerals to China for processing (Müller, 2023, p. 184; Way, 2024). Crucially, China did not invest solely in countries and projects that promised quick returns on investment (Kalantzakos, 2020, p. 3). Rather, its long-term CRM strategy was committed to local upskilling and fostering gradual geopolitical control and dependence (Calabrese, 2025; Development Reimagined, 2024, p. 43). For instance, in the DRC - generally avoided by investors due to political instability - Beijing controlled 15 of the 19 active cobalt mines in 2020 (Girardi et al., 2023, p. 9). Therefore, through a long-term, comprehensive foreign economic policy on CRMs in Africa, China has cemented its structural dominance at every stage of raw materials' supply chains, making it impossible for Europe to directly compete (Acheampong, 2024).

Second, despite pursuing a different model of resource diplomacy from China's, Russia has also capitalised on European economic and military withdrawal to establish its influence and access to strategic raw materials, including through information campaigns that have reinforced anti-Western narratives in parts of West Africa (Pokalova, 2023; Bauer et al., 2025). Described by Shoer (2024, p. 57) as following a "transactional model of military support for access to mineral resources", Russia favours a 'security-for-materials' approach, with private military companies (PMCs) and private economic ventures key instruments of state resource diplomacy. For instance, through Wagner/Africa Corps security services, Russia secured licences to mine gold, zinc, manganese, copper, graphite, and lithium in Burkina Faso, and, in the Central African Republic (CAR), gained access to mines through its Wagner-linked shell companies in exchange for political and military support for Central African President Faustin-Archange Touadéra (Yue & Yichen, 2025, p. 80; Shoer, 2024, pp. 58-59). As shown in Figure 1, Russian PMC presence and access to African materials are extensive. This has a dual impact. On the one hand, Russian PMCs are associated with increased regional insecurity, which they profit from, reinforcing French officials' characterisation of their activities as a "factor of war, not a factor of peace" (Pokalova, 2023, p. 11). Given the risk-averse profile of European investors and the perception of Africa as high-risk, the association of Russia's presence with greater instability presents an additional obstacle to European investment (Way, 2024; Logan, 2024, p. 6). On the other hand, these lucrative relationships with African states have allowed Russia to circumvent and undermine Western sanctions and political isolation (Bauer et al., 2025, p. 1). Therefore, not only do these extraction activities contribute to Moscow's war efforts, but they also undermine "western access to strategically significant and rare African natural resources" (Bauer et al., 2025, p. 30). Thus, while China seeks to reinforce structural control over supply chains and geopolitical influence, and Russia pursues a different but equally disruptive model of resource diplomacy, both create conditions that undermine European competitiveness and limit the EU's access to essential African raw materials.

Figure 1: Russian Presence in Africa, 2018 - 2021

From: Bauser et al. (2025, p. 2)

B) Policy challenges

Facing this multifaceted decline of European diplomatic, economic, and development presence on the continent requires corresponding multidimensional solutions. Yet, the existing EU CRM strategy falls short of the comprehensive 'foreign economic policy' advocated in the Draghi report (European Commission, 2024b, p. 7). Thus, a second challenge is policy-oriented, with shortfalls manifesting across two interconnected dimensions: intra-EU failures and the disconnect between African priorities and the conditions of European partnership. First, critics point to the gap between strategic partnership promises regarding financing and investment in local value chains and project delivery. Many African countries, such as Zambia, Namibia, and Zimbabwe, have introduced export bans on unprocessed materials, aiming to compel external partners to invest in their local industries (Logan & Acheampong, 2025, p. 11; Müller, 2023, p. 191). However, while European rhetoric seemingly aligns with these ambitions, Schulze (2025, p. 6) explains that, in the case of Zambia, local value chain cooperation and infrastructure development are the domains with the weakest implementation. Similar issues have impacted the EU's strategic partnership with Namibia, with Logan (2024, pp. 15-18) highlighting that a "lack of European private sector participation" is undermining the EU's ambitious CRM policy. In fact, the EU's €20 billion annual budget to fund African investment projects through the Global Gateway initiative was reduced by €5 billion in 2024 (Merritt, 2024). Thus, achieving the objectives set out in the EU's CRM strategy depends on the convergence of economic, diplomatic, and development efforts.

Second, while the EU's commitment to human rights, environmental, social, and governance (ESG) standards, and corporate social responsibility (CSR) has positively differentiated it from China and Russia, in practice, these standards have acted as a further disincentive to private investment. For instance, Zimbabwe, Namibia, and the DRC - all CRM-rich countries - have been identified by human rights NGOs as being "at serious risk of human rights violations, transnational corruption and environmental degradation" (Joseph, 2024, p. 3). As Joseph (2024, p. 4) argues, the EU's commitment to supporting local value chain upskilling and sustainability within its strategic partnerships requires addressing these "governance failings". However, the political and financial costs associated with engaging in these mining and extraction schemes, particularly while EU regulatory frameworks remain poorly adapted to such activities, deter the private European investment needed for these partnerships to succeed (Acheampong and Logan, 2025, pp. 2, 17). This is not to suggest that the EU should retreat from its ethical and sustainability commitments. However, greater regulatory flexibility and targeted policy adaptation are necessary to enable private investment while maintaining these standards and the 2030 deadline (Way, 2024). As a result, the coordinated 'Team Europe' approach advocated by the European Commission (2025b), which encouraged the mobilisation of all diplomatic and economic tools, has failed to materialise (Schulze, 2025, pp. 2, 6). By extension, the EU's capacity to translate increased defence expenditure into defence industrial capability and strategic autonomy is undermined. This does not signify that the EU's CRM diversification strategy has failed. Rather, it has achieved limited success in addressing the deeper vulnerabilities associated with external dependencies across the defence CRM supply chain, as well as the institutional obstacles posed by the regulatory environment.

Conclusion

Overall, this paper has argued that although the EU has recognised and begun addressing its deep-rooted vulnerabilities in essential CRMs for defence supply chains, these weaknesses persist despite increased defence investment and are unlikely to be resolved by the 2030 defence readiness timeline. The EU's designation of certain materials as 'critical' reflects both their strategic importance and their exposure to supply disruption, with land-domain capabilities particularly CRM-intensive. A central structural vulnerability lies in China's near-monopoly across multiple stages of global CRM supply chains and its demonstrated willingness to weaponise interdependence, posing a clear warning to European policymakers. The core analysis of the paper then focused on evaluating the EU's strategy of supply chain diversification, in line with the CRMA's targets, through strategic partnerships with resource-rich African states and long-term local value chain and infrastructure investments. It found that two core challenges are impeding these initiatives: competition for diplomatic and economic access, and policy-related shortcomings. Regarding the first, despite the EU's desirable mutual partnership, it is facing fierce and at times hostile competition from China and Russia for access to African CRMs. Unfortunately, European CRM policies have yet to significantly boost the competitiveness of its strategic partnerships in the face of these challenges. They fall short of the holistic, wide-reaching foreign economic policy advocated by the Draghi Report, advising the EU to mobilise all available statecraft economic, political, diplomatic, and development tools. Therefore, this analysis shows that for increased defence budgets to result in defence reindustrialisation and military capability-building, structural supply chain dependencies and vulnerabilities must be addressed as a core part of achieving strategic autonomy. As such, a Europe-first approach to competitiveness and defence readiness needs to be supplemented with a range of international diplomatic, political, and development-based engagements. In fact, such external foreign policy investments, particularly in the domain of CRMs and supply chains, are prerequisites to strategic autonomy.

Conclusion

This research report has attempted to examine the EU's on-going struggle to conciliate its growing strategic ambitions, awakened by the war in Ukraine and the deteriorating relationship with the US, with a legal framework that unavoidably constraints its defence and security standing. Starting from the failure of the EDC, and the subsequent economic turn experienced since the 1957 Treaties of Rome, defence has been at the margins of EU political discussions. While the treaties concluded during the 1990s up to the current Lisbon framework reintroduced the defence and security discourse into EU legislation and politics, the instruments implemented preserved a strongly intergovernmental system of decision-making, based on unanimity and the prohibition of EU-funded military or defence expenditure.

Despite this hindering legal and political set up, the Union developed a thick web of legal workarounds, such as the use of the "industrial back door" under Art. 173 TFEU for on-budget financing of the EDTIB, or other off-budget instruments like the EPF, particularly after 2022. Nonetheless, these mechanisms show structural weakness and marked flaws. With a rapidly shifting geopolitical environment, and strained transatlantic relations with the US, traditional security guarantor for Europe, the EU and its MSs sit at a critical juncture of their history. They may stay on the same path, managing defence through legal improvisation and uncoordinated commitments, or confront directly the legal foundations of the Union and strengthen its Treaties for a coordinated and united defence. Without such reckoning, leaving aside its economic prowess, Europe may be destined to remain a "military worm", and a marginal actor in world politics.

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