

Critical Minerals Policy Tracker

Documentation

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International
Energy Agency

iea

Background

Complementing the IEA's flagship annual report, the [Global Critical Minerals Outlook](#), the Critical Minerals Policy Tracker is a tool intended to help governments explore new and existing critical mineral policies in four key policy areas:

- Ensuring supply reliability and resiliency
- Promoting exploration, production and innovation
- Encouraging sustainable and responsible practices
- Advancing minerals recycling

The Tracker's primary component is an [interactive data tool](#) that shows the policy approaches used by different countries and regions to achieve their priorities relating to critical minerals. Since its launch in November 2022, the scope and coverage of the Tracker have grown to include policies from over 60 countries and regions and more than 600 policies, laws and regulations. Initially, the Tracker focused on three key policy areas: supply reliability and resiliency; exploration, production and innovation; and sustainable and responsible practices. In 2024, its scope was expanded to include policies that support the development of recycling value chains, aligning with the IEA's analysis in [Recycling of Critical Minerals](#). Since 2025, the Tracker has also incorporated policies relating to supply chain traceability, building on insights from [The Role of Traceability in Critical Mineral Supply Chains](#) and [Critical Mineral Traceability for Energy and Economic Security](#).

While not intended to be exhaustive, the Tracker offers an overview of existing and emerging international practices and national priorities relating to critical mineral resources.

Process

We identify policies, laws and regulations for inclusion in the Tracker through desk research and stakeholder consultations. Research focuses on identifying policies within each of the focus countries and regions (see Annex). The tracker currently covers policies across more than 60 countries; however, active policy monitoring is conducted for a smaller subset of around 45 jurisdictions. The focus countries and regions are selected through a combination of factors including, whether countries are part of the IEA family, are major producers or consumers of critical minerals, or have been the subject matter of special reports prepared by the IEA.

Each policy, law or regulation is included in the IEA's cross-agency [Policies and Measures Database](#). For each entry, we have included a brief description, links to original source material and other information about the measure.

For feedback, suggestions, or to report inconsistencies or missing entries, please contact CMWP@iea.org.

Policy categorisation

In updating this database, we comprehensively review the policies, laws and regulations in each focus country or region. Each policy is categorised under the four key policy areas. To further support this categorisation, we developed a non-exhaustive list of policy subcategories grouped across the four policy areas. These subcategories are listed below, together with their definitions.

Ensuring supply reliability and resiliency

- **Strategic plans.** Many countries develop a national strategy or policy roadmap identifying key priority actions for later policy development, often captured in a strategic plan or other public document.
- **Strategic mineral lists.** Relevant authorities or governments are responsible for drawing up lists of all minerals designated as strategic or critical. Sometimes referred to as lists of critical raw materials, they often indicate why these minerals are of particular importance and outline related policy provisions.
- **International co-ordination mechanisms.** Countries may join bilateral or multilateral mechanisms to co-ordinate supply security efforts. These mechanisms may involve sharing best practices as well as collaborating on research and development, purchases, market reserves and joint stockpiling.
- **Stockpiling mechanisms.** Policies can be designed to insure against risks such as supply chain disruptions, price spikes, etc. by retaining (and maintaining) reserves of critical minerals and mineral products. Stockpiling systems can be associated with release mechanisms triggered by supply disruptions.
- **Public investment.** To develop new supply sources, countries may deploy government funds through various channels. This includes investments by state-owned enterprises, public equity investments in private companies or projects, or leveraging government procurement strategies to acquire output from designated sources for national stockpiles or other government purposes.

- **Trade mechanisms.** Countries may regulate the trade of minerals and mineral products through preferential trade agreements, export and import restrictions or non-tariff measures to facilitate economic goals for their mineral industry.

Promoting exploration, production and innovation

- **Financing.** Countries may use direct funding to support the development of domestic supplies through mechanisms such as grants, preferential loans or loan guarantees. These financial incentives can be administered to pre-existing or new extraction projects.
- **Tax incentives.** Countries may use favourable tax schemes to incentivise domestic critical mineral supply chains. They may also allow tax deductions for specific types of investment.
- **Enhanced geological surveys.** Countries may develop geological survey data on existing mineral reserves and make these data available both domestically and abroad. Geological data can be made directly accessible to the public, or governments can offer public funding for exploration and surveying activities.
- **Recycling support.** Policies that target development of a secondary-material supply market with adequate processing capability may include research and development funding, regulations to require or increase collection rates, and other support measures for new recycling facilities.
- **Innovation funds.** Measures designed to accelerate technological progress and innovation, generally through funding and information-sharing initiatives, may include direct funding through grants or subsidies for research, development, demonstration and deployment.

Encouraging sustainable and responsible practices

- **Environmental standards.** Policies designed to safeguard or protect the local, regional or global environment, may include air and water pollution standards specific to the mining sector, standards for managing tailings, environmental and biodiversity impact assessments and environmental management plans.
- **Social standards.** Policies designed to manage the social impacts can include those that foster local community and Indigenous Peoples engagement, protect human rights and worker safety and contribute to local economic development. These can also require inclusion of the views and feedback of impacted communities.
- **Transparency norms.** Rules and regulations designed to provide public information on the extractive industry (such as those required under the [Extractive Industries Transparency Initiative \(EITI\) Standard](#)) and to establish traceability systems for critical

minerals to supply chains, may include requirements to publish licences or permits, production data, and tax collection and distribution rates.

- **Due diligence obligations.** Requirements for companies to undertake supply chain due diligence in line with relevant international guidance (including the [OECD Due Diligence Guidance for Responsible Supply Chains of Minerals from Conflict-Affected and High-Risk Areas](#)) generally involve adopting risk management systems to identify, assess, report and, ultimately, minimise or eliminate environmental and social impacts.
- **Permitting regimes.** Governments can devise general or specific permitting or licensing regimes for mineral and metal exploitation and can take special measures to streamline or enhance the process.

Advancing minerals recycling

- **Strategic plans.** Announced high-level strategies on the circular economy, announcing economy-wide targets for secondary raw materials sourcing. The strategic plans act as roadmaps, with regulations eventually stemming from the objectives announced.
- **Extended producer responsibility.** Extended producer responsibility (EPR) is a policy approach that makes producers responsible for their products along the entire lifecycle, including at the post-consumer stage.
- **Financial incentives.** Countries may deploy grants, loans, tax incentives and other financial mechanisms to support domestic recycling and investment across the recycling value chain.
- **Cross-border trade.** Policies under this category may relate to the implementation of the Basel Convention and other regulations governing the movement of waste across borders, including import and export restrictions on minerals and metals. They may define waste classifications (e.g. hazardous waste, scrap or recyclable materials such as black mass) and establish requirements for processing, disposal and end-of-life management.

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Annex

Focus regions for the Critical Minerals Policy Tracker

Region	Basis for inclusion	Key minerals/strategic relevance
Argentina	Major producer	Lithium
Australia	Major producer	Lithium, cobalt, bauxite
Belgium	Processing hub; recycling hub	Battery materials recycling
Bolivia	Major producer	Lithium
Brazil	Major producer	Bauxite, graphite
Burkina Faso	Major producer	Zinc
Canada	Major producer; manufacturing market	Nickel, cobalt, uranium
Chile	Major producer; processing hub	Lithium, copper
China (People's Republic of)	Major producer; processing hub; manufacturing market	Rare earths, bauxite, cobalt, graphite, lithium
Colombia	Major producer	Nickel
Denmark	Manufacturing market	Wind energy manufacturing
Democratic Republic of the Congo	Major producer	Cobalt, copper
Dominican Republic	Major producer	Nickel, copper
Ecuador	Major producer	Copper
European Union	Manufacturing market	Processing, recycling, critical minerals demand
Finland	Processing hub; recycling hub	Battery materials

Region	Basis for inclusion	Key minerals/strategic relevance
France	Manufacturing market	Recycling, battery supply chains
Germany	Manufacturing market	Recycling, battery supply chains
Ghana	Major producer	Manganese, bauxite
Greenland	Emerging producer	Rare earths
India	Major producer; manufacturing market; recycling hub	Bauxite, recycling
Indonesia	Major producer; processing hub	Nickel, bauxite, tin
Ireland	Major producer	Zinc
Italy	Manufacturing market; recycling hub	Copper, recycling
Japan	Manufacturing market; recycling hub	Recycling, battery supply chains
Kazakhstan	Emerging producer	Rare earths
Kenya	Exploration-stage jurisdiction	Copper, nickel, graphite, lithium, rare earths
Korea	Manufacturing market; recycling hub	Copper, nickel, battery supply chains
Malawi	Exploration-stage jurisdiction	Rare earths, graphite
Malaysia	Major producer; processing hub	Aluminium, tin, rare earths
Mexico	Major producer	Copper, lithium
Mongolia	Emerging producer	Copper, rare earths, lithium, graphite

Region	Basis for inclusion	Key minerals/strategic relevance
Morocco	Major producer	Copper, cobalt
Namibia	Major producer; exploration-stage jurisdiction	Zinc, lithium, rare earths
New Caledonia	Major producer	Nickel
New Zealand	Recycling hub	Recycling
Nigeria	Emerging producer	Lithium, rare earths
Norway	Major producer; processing hub	Copper, zinc, graphite, nickel
Pakistan	Emerging producer	Copper, graphite
Panama	Major producer	Copper
Peru	Major producer	Copper
Philippines	Major producer	Nickel
Poland	Emerging producer	Rare earths
Saudi Arabia	Exploration-stage jurisdiction	Lithium, rare earths, copper, nickel, zinc
South Africa	Major producer	Platinum group metals, manganese, chromium, vanadium
Spain	Manufacturing market; recycling hub	Recycling
Sweden	Major producer; processing hub	Copper, graphite
Switzerland	Recycling hub	Recycling, commodity trading

Region	Basis for inclusion	Key minerals/strategic relevance
Tanzania	Pre-production jurisdiction	Rare earths, nickel, graphite
Türkiye	Major producer; manufacturing market	Bauxite, cobalt, nickel
Ukraine	Major producer	Bauxite
United Kingdom	Recycling hub	Recycling, critical minerals strategy
United States	Major producer; manufacturing market; recycling hub	Lithium, copper, rare earths, recycling
Viet Nam	Major producer	Tungsten, tin, bauxite, rare earths
Zambia	Major producer	Copper, zinc
Zimbabwe	Major producer	Lithium

Note: Jurisdictions may be assigned to more than one basis for inclusion, reflecting the multiple roles they play across critical mineral supply chains.