July 2026

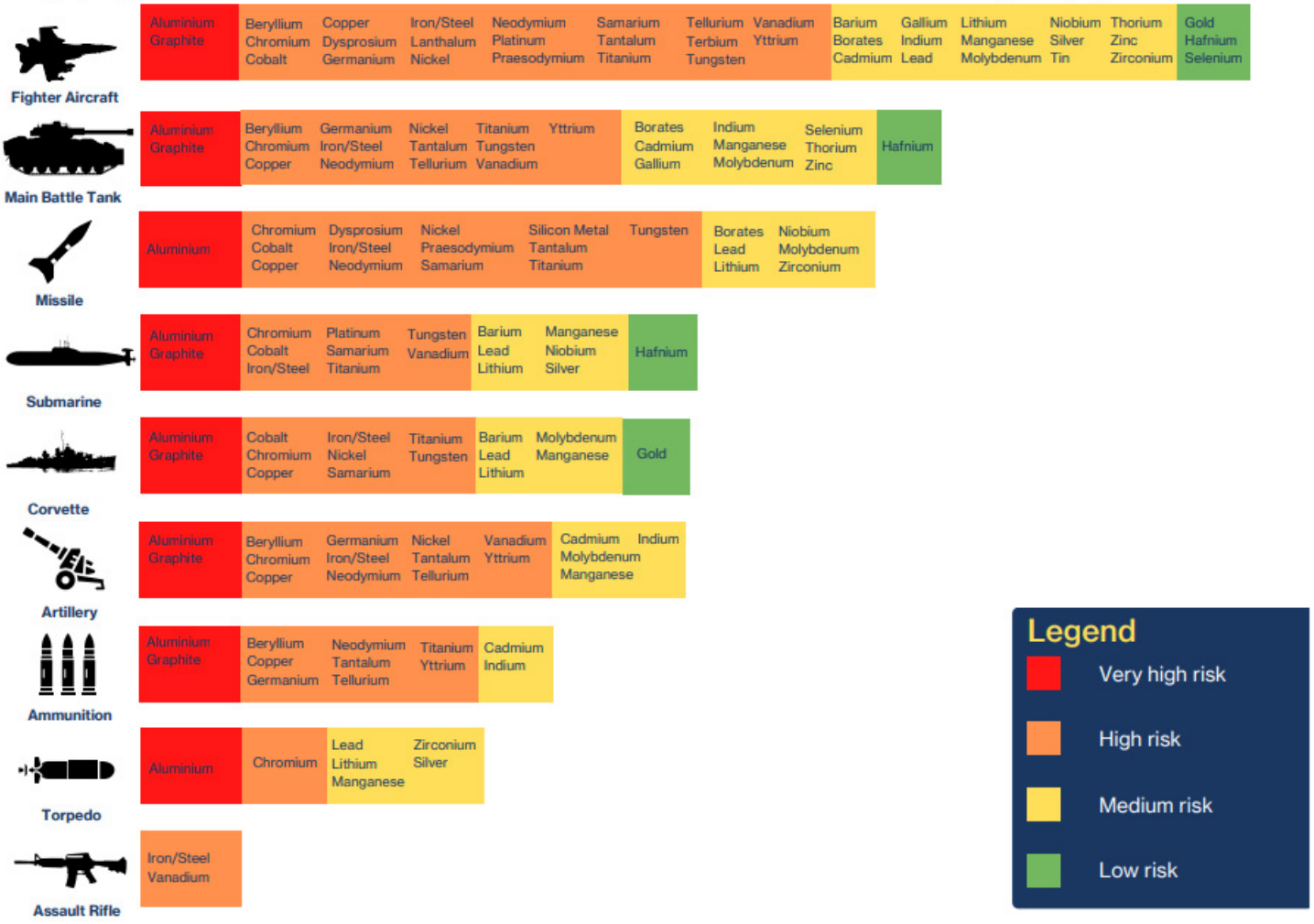
Defence-Critical Supply Chain Security Roadmap

Source: TydenBrooksUK

What is the Defence-Critical Supply Chain Security Roadmap?

- NATO Defence Ministers endorsed a defence critical supply chain security roadmap at their meeting in June 2024. The roadmap outlines specific opportunities for collective and/or multinational cooperation to protect Allies' supply chains from any possible disruption that could impact NATO's deterrence and defence.
- Five lines of effort drive the roadmap:

Supply risk for critical raw materials in military applications



Source: Strategic raw materials for defence Mapping European industry needs
Benedetta Girardi, Irina Patrahau, Giovanni Cisco and Michel Rademaker
The Hague Center for Strategic Studies, January 2023

Why is it Important?

- NATO's defence readiness is dependent on the resilience of its industrial and supply base. With supply chains being globally interconnected and exposed to geopolitical pressures, it is important to identify ways to sustain production, scale rapidly, and quickly recover from supply chain vulnerabilities, ensuring in the process a stable supply of materials and components across critical sectors even when external sources are disrupted.

- NATO leaders have repeatedly expressed their commitment to identifying and mitigating strategic vulnerabilities and dependencies, with respect to Allied supply chains. At the 2025 NATO Summit in the Hague, Heads of State and Government pledged once again to protect NATO defence-critical supply chains.

Who is Implementingt the Defence Critical Supply Chain Security Roadmap?

- Allies in the Defence Industrial Production Board, working hand in hand with defence industry mainly through the NIAG, are leading the implementation of the Roadmap. They are also engaging closely with NATO's Science and Technology community and relevant NATO partners.

Substantive Progress so Far in Implementing the Supply Chain Roadmap

1. List of 12 NATO defence-critical raw materials:

- On 11 December 2024, NATO released a list of 12 NATO defence-critical raw materials. This list focuses on those raw materials relate to general applications and systems envisaged in the defence industry; it is not capability specific. This list comprises Aluminium, Beryllium, Cobalt, Gallium, Germanium, Graphite, Lithium, Manganese, Platinum, Titanium, Tungsten and REE. This list will be reviewed and updated as necessary.

- The public release of this list highlights NATO's commitment to support Allies in securing essential materials for the development and delivery of essential and advanced Allied defence equipment, as they are integral to their manufacturing process defence capabilities. Identifying these key materials is NATO´s first step towards building stronger, better protected supply chains, crucial for Allied defence and security.

- NATO has assessed the risk to these 12 NATO defence-critical raw materials as related to vulnerabilities and potential points of failure across the Alliance that could undermine the prompt availability and access to these 12 raw materials for the defence industry.

2. Exchange amongst Allies on best practices and lessons learned:

- Allies have regularly shared best practices and national approaches on issues, including on supply chain illumination and strategic stockpiling.

3. Strategic Stockpiling:

- Encouraging industries to build stockpiles or promoting the launch of national/multinational stockpiling initiatives could help make Allies less vulnerable to supply shocks and reduce reliance on external providers, by mitigating against critical raw materials shortages which may arise during disruptions.

- NATO is supporting Allies' efforts in stockpiling of key critical materials, where appropriate, for Allies to meet their NATO and national capability targets. To that end, 12 Allies[1] signed, at the NATO Summit in Ankara, a Memorandum of Understanding (MoU) to establish a High Visibility Project for acquiring, storing, transporting and managing stockpiles of defence-critical materials, materials, components and recycled products.

4. Recycling and Substitution:

- NATO has identified key recommendations and actions on opportunities for Allies and NATO to support the recycling and substitution of materials as a means to mitigate risks of supply shortages, including documenting lessons learned/best practices from recycled and/or substitute raw materials in defence applications, as well as exploring opportunities for the increased recovery of raw materials from End of Life defence products.

[1] The 12 Allies are Belgium, Canada, Denmark, Finland, Greece, Italy, Luxembourg, the Netherlands, Norway, Spain, Sweden and Türkiye.

NEXT STEPS

- NATO will continue to implement activities under the five lines of effort in the Roadmap.
- NATO will regularly review progress towards meeting the key outcomes and action items included in the Roadmap.

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