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Industrial Minerals Manifesto

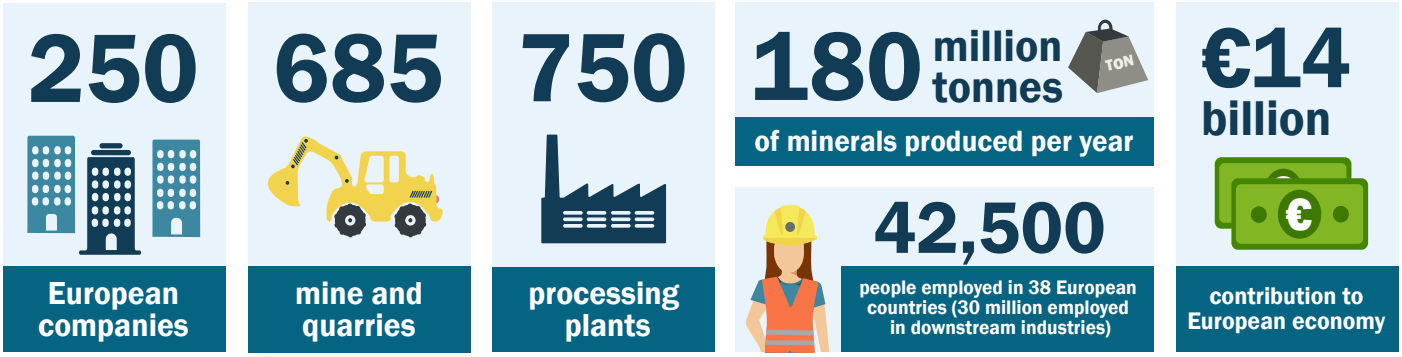
European Federation of Geologists

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Introduction

Mineral extraction in the European Union (EU) and its regional and local ecosystems plays a central role in securing a reliable, independent and responsibly sourced mineral supply for essential EU value chains, such as steel, pulp and paper, ceramics, automotive, glass, chemicals, and renewable energy infrastructures. Geological knowledge and professional expertise are essential to identifying, assessing and responsibly managing Europe's mineral resources.

Most mineral companies operate as regional value chain enablers. These value chains are a priority for supporting the EU's competitiveness agenda and achieving its green transition objectives.



An enabling sector (IMA-Europe, 2026):

- Locally sourced within the EU and locally supplied (around 200 km by truck or 1,200 km by rail).
- Every employee in the minerals sector enables 7-11 jobs further down the value chain.
- For every billion euro in turnover generated by the industrial minerals sector, at least ten times that amount is generated further down the value chains that depend on minerals.

On average, it takes between 10 to 15 years to open a new mineral extraction operation in the EU due to the complexity of the legislative framework in the Member States. Securing a stable supply of raw materials is a priority for the European Union and its Member States to strengthen economic sovereignty and competitiveness, boost infrastructure and defence capabilities, and meet EU climate goals. EU industries rely heavily on imports of critical raw materials, with over 80% of the EU's consumption of 22 critical raw materials being imported. These materials are essential for clean energy transition technologies. Fluorite, phosphate rock, baryte and graphite are striking examples of industrial minerals that the EU has classified as critical in response to market conditions.

In light of increasing geopolitical tensions and uncertainties, changes to permitting legislation are needed NOW to ensure a domestic and independent supply of industrial minerals and to anticipate possible geopolitical shocks. Although most industrial minerals are not currently classified as critical, inadequate framework conditions can jeopardise their availability and increase the EU's reliance on non-EU suppliers. If action is taken only once a crisis or trade war emerges, it will be too late, as developing mines and projects takes time.

While this Manifesto focuses on the specificities of industrial minerals, aggregates face similar challenges in permitting, land-use planning and social acceptance. They are equally indispensable to strategic sectors such as construction, infrastructure and transport, including the production of concrete and asphalt, and should receive comparable attention in the European policy debate.

This Manifesto highlights three priorities for policymakers:

Raw materials security: from the EU and for the EU

Every product we use contains industrial minerals or involves their use during the production process, from bentonite and perlite to quartz. Investors do not choose where deposits are located and cannot relocate them; they need to go where the deposits are. The availability of every mineral depends on mining and processing, both of which depend on the outcome of the permitting process.

Objective 1: How can we ensure that geology is at the service of society?	
Issue	**Solutions**
Mineral resource planning should be anticipated and conditions should be created to enable more exploration.	• Forecasting: Establish a well-defined accounting framework for raw material needs and a strategy to secure supplies of raw materials from EU deposits. • Streamlining: Improve the mining permitting process through forward-looking land-use planning and capacity support for local authorities and communities. • Simplification: Avoid duplicate permitting requirements for other activities in areas licensed for extraction. • Certification: Promote the use of recognised professional certification frameworks across Europe to help balance industrial development, environmental sustainability and the public interest. • Geological knowledge: Support geological mapping, exploration and mineral resource assessment to improve knowledge of Europe's mineral potential. • Sustainability: Make sustainability reporting an opportunity rather than a burden for companies operating in the EU.

The extractive sector is one of the most regulated sectors in the EU. In most Member States, the legislative framework is very complex and does not create an inclusive environment for investors. National governments across the European Union oversee mineral policies and regulations. However, regional authorities play a crucial role in shaping the conditions for implementing competitive and environmentally responsible mineral-related projects. Strong regional ecosystems are also vital to harnessing mining for resilient local development and strengthening social dialogue and transparency to address social polarisation against mining, which is a major barrier to project approval in the EU.

Objective 2: How can we streamline the permitting process and improve the Social Licence to Operate (SLO)?	
Issue	**Solutions**
On average, obtaining a new extraction permit in the EU takes 10-15 years.	• Coordination: In compliance with the rule of law, a one-stop shop for all extraction projects will help shorten and streamline existing permitting processes, which are currently lengthy and uncertain, ensuring that the various authorities communicate and coordinate with one another before responding to the developer. • Fast-tracking: Grant Strategic Project status and fast-track permitting to eligible industrial mineral projects, with appropriate mechanisms for projects that do not fall within the current scope of the Critical Raw Materials Act. As deposits may contain both critical and non-critical raw materials, the Critical Raw Material Act should benefit all raw materials in terms of permitting speed. • Transparency: Enhance communication strategies to improve public information about mining and strengthen the institutional capacity to mitigate the environmental impacts of mining. • Legal certainty: Limit legal disputes at the end of the permitting process. • Predictability: Once the scoping phase has been completed, consider freezing the EIA scope within the permitting process. This would limit the number of iterations, save time and ensure legal certainty for the developer.

Legal certainty is a prerequisite for companies to operate in the EU while applying the highest standards of responsible extraction and processing.

Objective 3: How can we enable a stable and predictable legislative landscape that allows extraction to thrive and contribute to EU sovereignty?	
Issue	**Solutions**
Since the introduction of the Green Deal, more legislation has been added to the permitting process for extractive projects (e.g. Nature Restoration Regulation (NRR), Soil Monitoring Law, etc.).	• Capacity: Allow time for capacity-building within the responsible permitting authorities to ensure they are ready to comply with the deadlines set out in EU legislation. • Digitalisation: Develop more digital solutions and workflows to digitalise permitting procedures, ensuring the interoperability of these tools to achieve real time savings. • Expertise: Facilitate or develop a system through which authorities and companies can draw on a pool of specialised consultants and experts to support the authorities evaluating permitting applications. • Innovation: Increase R&D funding for innovative mining technologies, recycling and the recovery and valorisation of mining by-products to improve resource efficiency and circularity. • Proportionality: Establish a clear methodology for quantifying the costs of new legislation, with a focus on SMEs and small mid-cap companies.



What are industrial minerals?

Minerals are naturally occurring, inorganic solids that have a fixed or definite chemical composition and a regular, repeating internal crystal structure. Mineral extraction refers to the process of obtaining minerals from the earth through various techniques such as open-pit extraction. Their processing involves subsequent separation, crushing, grinding, and beneficiation steps to meet end-user expectations.

Industrial minerals are natural materials precisely engineered to deliver performance and functionality in multiple applications. Minerals are essential and form the foundation of many products and value chains that are prerequisites for modern life.

Industrial minerals are defined as minerals that are not sources of metals, fuel, or gemstones. The most widely-used industrial minerals include, bentonite, calcium carbonate, clays, diatomite, dolomite, kaolin, limestone, silica and talc. Society uses industrial minerals, either in a processed or natural state, to make building materials, ceramics, detergents, electronics, filtration products, glass, medications and medical devices, paints, paper and plastics, and many more industrial and domestic products.

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