Atlantic Spotlight

Securing Supply Through Shared Values

The Canada-Germany Critical Minerals Partnership

The German Canadian Critical Minerals Partnership places shared liberal democratic values at the centre of resource security. Canada has invaluable reserves of the critical minerals Germany requires, while Germany offers the investment capacity and market demand to develop Canadian potential. Together, both middle powers can reduce their reliance on authoritarian suppliers and, conceivably, the West's more broadly. This collaboration is also testament to Canada's broader strategic pivot toward Europe on defence and security matters.

Dr. Lilit Klein, November 19th, 2025

Critical minerals have become a "pre-condition for economic dynamism and geo-political security in the 21st century" (RBC 2025). This reality motivated Canada and Germany to forge a formal partnership on August 26th, 2025, aimed at securing supply chains and co-funding new critical minerals projects (GOC 2025c). Prime Minister Mark Carney emphasised that "Canada has immense potential to be a leading and reliable global supplier of critical minerals" (PM 2025a). He positioned Canada as both the ideal partner for Germany's diversification efforts and as a stable, democratic alternative to authoritarian suppliers (PM 2025a). This article substantiates this strategic vision by exploring the rationale for cooperation, analysing the partnership's key dimensions, and examining why diversification away from Russian and Chinese supply chains has become imperative. Additionally, value alignment has increasing relevance compared to a focus on economic gain in a disorderly and unpredictable world. Put simply, like-mindedness is the lynchpin of security partnerships.

Rationale for German-Canadian Critical Minerals Cooperation

This partnership rests on complementary strengths and shared strategic imperatives. Amid efforts to reduce dependence on authoritarian suppliers, Germany faces increasing demand for critical minerals from secure sources and is actively seeking investment opportunities. Meanwhile, Canada possesses rich critical minerals deposits, enjoys stable governance, and has untapped extraction capacity ready for investment. We will examine what makes Canada an attractive partner, what both countries aim to achieve, and the key areas of cooperation.

Canada and Germany are not arbitrary partners. Their alignment rests on strategic, economic, political, and value compatibility. Germany is striving to reduce its reliance on China, recently establishing a committee to examine "security-relevant trade" (Kraemer 2025). Canada, meanwhile, sees economic opportunity in ramping up production of valuable resources to displace authoritarian suppliers (Lord 2025). The

fit is natural: Canada can help Germany diversify while reducing its own dependence on the United States as its primary export market amid recent trade tensions (Exner-Pirot 2025b). Beyond economic complementarity, the two nations share fundamental values and views of the international order. Carney drew attention to their shared commitment to Baltic security, which requires resilient supply chains, while Tim Hodgson, Canada's federal minister responsible for natural resources, emphasised shared dedication to democracy, security, and sustainability as key drivers of the partnership (PM 2025a).

Canadian officials express strong confidence in their country's potential as a critical minerals partner. Carney has declared that: "Canada has what the world needs to meet the demands for the future" (PM 2025a). Canadian officials further emphasise their countries' unique combination of abundant resources, extraction expertise, and industrial capacity to deliver critical minerals to their allies, all of which are qualities that align with Germany's need amid global uncertainty (PM 2025a). To this end, Canada is offering to establish mine-to-magnets supply chains, that would deepen bilateral ties and ensure supply security (Lord 2025).

Canada's production ambitions are well-grounded in its substantial mineral endowment. According to the U.S. Geological Survey, Canada is the leading Western supplier of aluminium, nickel, and platinum (Bergman 2025). Aluminium, a recent addition to the EU's Critical Raw Minerals Act (CRMA), is necessary for the clean energy transition as well as for building aircraft (Laing 2023). Platinum too is used in aerospace technology and is pertinent for missile heat resistance technologies (WPIC 2025). Nickel demand is projected to rise with battery production, positioning Canadian projects like Dumont Nickel, which has attracted EU attention, as strategically valuable assets (Merwat et al 2025). Beyond nickel, Canada is home to substantial reserves of copper, cobalt, uranium, lithium, and graphite, and could produce tungsten through projects like Northcliff Resources' Sisson and Fireweed Metals' Mactung Mine, offering an alternative to Chinese dominance in that market (Merwat et al 2025). Canada's resource wealth underpins its aspirations for leadership in critical minerals as part of its broader goal to become what Hodgson has characterized as an "energy superpower". Canada is demonstrating its leadership and spearheading the G7's Critical Minerals Production Alliance, announced this month (GOC 2025b).

The German government views this partnership as strategically vital. Chancellor Friedrich Merz highlights that "we are deepening our bilateral cooperation, and we are doing so with great gratitude and deep conviction" (Nöstlinger and Blanchfield 2025). Merz's rationale centres on two imperatives. First, the priority placed on reducing dependence on Russia and China, has been amplified by supply disruptions during the pandemic and by Russia's invasion of Ukraine. Additionally, Russia's recent incursions into NATO airspace signal increased hostility towards its European neighbours (RBC 2025). Berlin recognises that Canada, with its roughly two hundred mines extracting critical minerals and metals, offers a practical solution to Europe's diversification challenge (Nöstlinger and Blanchfield 2025). For Germany, the partnership secures an alternative critical minerals supplier while aligning with a like-minded country with whom it is already deepening security cooperation through other pathways.

Germany operates within a broader European framework for strategic raw materials (SRM[1]) that recognises the need for diversification away from authoritarian suppliers. In 2024, the EU imported 95% of its rare earth elements from China, Russia, and Malaysia. To this end, there is a clear strategic imperative to secure more reliable access to SRM (Bergman 2025). The May 2024 CRMA targets seventeen SRM in short supply and aims for increased self-reliance by 2030. The CRMA

[1] Note that European documents often refer to "strategic raw materials" rather than "critical minerals" or "critical raw materials" (CRM). SRM are a subset of CRM critical for defence, security, and clean energy.

identified thirteen foreign programs of interest, including Quebec's Magneto Dumont Nickel Project, a project in which Canada also recently invested (GOC 2025a). Recently, President of the European Commission Ursula von der Leyen announced ReSourceEU – a strategy to decrease raw material dependency on China – for which Canada is a listed partner.

From Ottawa's perspective, the partnership offers equally compelling advantages. Carney emphasises the boost to domestic investment, creation of lucrative jobs, aid for the clean energy transition and strengthening of transatlantic cooperation and security (PM 2025a). Canada's trade advantages under the 2017 Canadian-European Union Comprehensive Economic and Trade Agreement (CETA) and the June 2025 Security and Defence Partnership (SDP) position it as a competitive supplier because of the already agreed upon reduced trade barriers (Bergman 2025). The partnership is also in line with the federal government's recent agenda. Since the advent of Carney's administration, the federal government has created a pipeline of projects of national interest, expanded upon in the recent Budget 2025: Canada Strong.

"Realising Canada's full potential as an energy superpower" and "building our leadership in critical minerals to increase our independence" are two of the strategies listed under the tranche of projects announced this fall (PM 2025b). The Canadian government is keen to "unlock our vast natural resources" to "sell them to new markets across the country and around the world, while securing sovereign domestic supply chains" (PM 2025b). The global securitization of critical minerals and natural resources has likely invigorated the federal government's ambitions.

The 2022 Canadian Critical Minerals Strategy establishes Canada's official framework. The government designated thirty-one minerals[2] as "critical" based on three criteria: their importance to Canada's economic security among supply vulnerabilities, their necessity for the transition to a low-carbon economy, or their strategic value as reliable sources for partners and allies (GOC 2022). Six minerals receive priority focus: lithium, graphite, nickel, cobalt, copper, and rare earth elements, all of which Canada has domestic reserves to extract. The strategy posits Canada as "well positioned to be a leader in the responsible, inclusive, and sustainable production of critical minerals and resilient value chains" (GOC 2022, 33).

However, this strategy has faced criticism over whether its approach to implementation can deliver on these ambitions. Pascale Massot and Vina Nadjibulla (2025) argue that the government's current strategy of "smaller subsidiaries sprinkled across a vast array of sectors – or large, one-off individual firm support" is insufficient to reach the production and/or export levels needed to satisfy both domestic goals and allied demand. Their concern is particularly salient given that NATO's defence critical raw materials (CRM) list (2024) includes four of Canada's six priority minerals, signalling strong allied interest in Canadian supply. Meeting this demand will require more coordinated and substantial investment than current policy initiatives deliver.

Despite its resource affluence, Canada faces challenges identified by Heather Exner-Pirot (2025a), Director of Energy, Natural Resources and Environment of the Macdonald-Laurier Institute in Ottawa, which might hinder Canada upholding its side of the partnership. One key policy challenge has been that the Canadian government, for messaging purposes, conflates all thirty-four critical minerals under one umbrella, when they should be subdivided into four distinct buckets because they demand different policy responses. The buckets are critical minerals (1) for which Canada could set the price, and where the government should explore how this can be used as a strategic advantage or for alliance building, (2) for which Canada can make a profit, (3) those salient for emerging technology where Canada should position itself early on, and (4) those that

[2] The list was later updated to thirty-four minerals.

are cost-prohibitive yet important for defence. She recommends that rather

than spreading across all the four buckets, Canada focus on NATO's critical minerals list and China's export restriction list to be as valuable an ally as possible. This focused approach is necessary because critical minerals production is expensive and anticipating how much allies will purchase adds further complexity (Exner-Pirot 2025b).

Beyond critical minerals, German-Canadian partnership may extend to liquified natural gas (LNG). Carney's Budget 2025 confirmed his strategic pivot towards LNG – another resource on which Canada may profit from close partnership with Germany. Canadian officials have signalled interest in LNG exports following encouraging signals from German buyers (First Nations Natural Gas Alliance 2025). However, this expansion faces uncertainty as industry worries European demand for oil and gas is declining, raising concerns about whether Canadian LNG projects could become stranded assets (360 Energy 2025). More fundamentally, industry analysts caution that while partnership agreements generate headlines, translating them into operational projects requires "rigorous analysis, transparent impacts, and viable project development" expanding beyond preliminary commitments (360 Energy 2025).

Three Levels of Partnership

Having established both the respective and joint rationale for cooperation on critical minerals, this section examines the robust foundational relationship on which this partnership, operating across bilateral, multilateral, and corporate/industry levels, builds. Significantly, Germany's push for diversification away from China and Russia stems from concerns about supply chain reliability in times of geopolitical tension. Meanwhile, the partnership with Canada diametrically reflects mutual trust grounded in shared democratic values and a long history of cooperation. However, translating this government-level confidence into tangible outcomes will depend heavily on private sector engagement, as critical minerals trade occurs primarily between companies rather than states.

Canada and Germany have a strong track record of cooperation both through direct bilateral engagement and via the EU, where Germany plays a leading role. Economically, they are connected through the 2017 CETA. On energy, Canada and Germany have pursued bilateral initiatives including the 2021 Canada-Germany Energy Partnership and the 2022 Hydrogen Alliance. More recently, the partners strengthened security ties: this summer, Canada and the EU signed the SDP which includes Canadian investment in Readiness 2030 and European defence capabilities. Their trajectory of expanding cooperation across economic, energy, and security domains provides a robust foundation for the Critical Minerals Partnership.

Beyond bilateral cooperation, Canada and Germany interact within the broader G7 context. Critical minerals have become an increasingly salient topic in this forum, exemplified by the recent G7 Energy and Environment Ministers Meeting in Toronto, at which political leaders discussed strengthening energy security among other topics. Carney accentuated the G7's potential, noting that members are "forming a buyers' club for critical minerals so that the world can diversify away from Chinese dominance" (Carney 2025). However, Exner-Pirot (2025b) highlights that while the G7 aims to disrupt China's monopoly, Western countries have not sufficiently invested in critical minerals extraction and processing. She recommends Canada focus on niche minerals while the G7 collaboratively cover the full spectrum of critical minerals resources – a strategy that could allow them to edge out China. As previously noted, Canada's diffuse attention across the wide array of critical minerals without clear investment prioritisation risks diluting effectiveness and delaying the ability to supply allies.

While government frameworks establish the foundation, critical minerals ultimately flow through corporate partnerships. As Exner-Pirot (2025b) argues: countries do not sell minerals to

other countries; companies sell them to other companies. Early signs suggest these corporate-level partnerships are materialising. Troilus Gold and Aurubis signed an agreement ensuring Aurubis' long-term off-take of gold-copper concentrate from Quebec (Troilus Gold 2025). Similarly, Torngat Metals has partnered with Vacuumschmelze, and Rock Teck Lithium with Enertrag (PM 2025a). These agreements demonstrate that the bilateral framework is translating into tangible industry partnerships, though whether these can scale to the supply levels both governments envision remains to be seen.

Decreasing critical minerals dependence on Russia and China

Russia and China pose significant threats to critical minerals security, with implications for Germany and Canada's economies, defence sectors, and the transition to renewable energy. Alongside their Western allies, both countries have grown increasingly uncomfortable with China's near monopoly over critical minerals, which RBC (2025) terms a "dangerous concentration risk". There are reasons for concern beyond security: China is also creating an economic monopoly that threatens Western competitiveness. China's dominance is striking: it "has 75% or more of global market share of produced and refined graphite, refined rare earth elements, and refined cobalt" and controls "on

average, two-thirds of global processing/refining output" (IEA 2024 cited in Merwat et al 2025). Both China's economic dominance and Russia's propensity to weaponize resources demonstrate how dependence on authoritarian suppliers creates vulnerability. At the recent G7 meeting in Toronto, ministers jointly "condemned the use of energy as a tool of coercion and were united in their condemnation of Russia's war against Ukraine and recent attacks on Ukraine's energy system" (GOC 2025b). Russia and China range from uncooperative to adversarial on global issues; thus, CRM may, at any time, be strategically withheld or cut off as leverage to achieve their interests. Therefore, the West requires reliable supply chains.

The extent of the threat has increased in the past few years. Though China began dominating the critical minerals market around fifteen years ago, only since 2019 has it been considered a true threat to critical minerals supply chain security. Recent actions validate these concerns: similar to Russia's sudden cessation of pipeline gas supply to Germany in 2022, China unexpectedly imposed export restrictions on rare-earth elements earlier this year (Massot and Nadjibulla 2025). Critical minerals are fundamental to the defence sector and pivotal to the renewable energy transition, which is a policy imperative for both Canada and Germany and holds significant importance for their societies, making critical minerals essential not only for security but for domestic priorities. China leads the world on renewable energy production, capacity, and harvesting (Merwat et al 2025) so its near monopoly on CRM not only exposes the West to economic fluctuations but actively positions it as reliant upon an uncooperative power to undertake an energy transition.

Germany currently remains reliant on imports from Russia and China, whereas Canada is in the preferential position of not being dependent on either of the system challengers for sourcing critical raw materials. Canada has the resources yet imports some processed and refined CRM from China because China currently dominates the processing and supply chain, making it difficult for Canadian projects to compete economically. In comparison with those in China, Western projects "are beholden to higher standards by public investors, lacking in state subsidies, and are often subject to higher social license costs in foreign resource development, given the lack of political support" (Merwat et al 2025). This presents Canada with a strategic question: is it willing to invest in its sourcing and production at a higher cost to ensure more reliable supply for itself and its allies?

With the increase in international tension, von der Leyen stresses that Europe needs resource

diversification, highlighting Canada as an apt partner (Vertretung 2025). Shifting to Canadian supply will come with a cost premium, which raises the question of who will pay this cost. Exner-Pirot (2025b) argues that Canada and Europe need one another: Canada needs a large buyer for its resources and European countries, with whom Canada is closely aligned, are that preferred buyer over Asia despite the latter being a bigger market, precisely because of the value alignment. This complementarity is particularly evident with Germany, Europe's financial powerhouse, making it Canada's ideal partner. Canada's position is one of potential; it may be the solution to Germany (and other allies') critical minerals supply problem. The urgency of action cannot be overstated: "For the U.S. and its Western allies, this competition [the critical resource war] is at risk of being lost to China" (Merwat et al 2025). Exner-Pirot (2025b) recommends that Canada should consider offering a lower price to Europe to ensure it does not buy from elsewhere.

Germany is in the more vulnerable position of the two countries and should thus be a willing buyer for Canadian resources. Though Germany is working to reduce its reliance on China, it sourced 90% of magnets (which contain critical minerals) for wind energy from China in 2025, but aims to reduce to 40% by 2035 (Tagesschau 2025). Germany still imports large quantities of uranium (Bethge 2025) and nickel (Eurich and Karim 2024) among other critical minerals from Russia. Germany's phasing out of Russian oil and gas, a process that had become increasingly urgent following the annexation of Crimea and the subsequent invasion of Ukraine, demonstrates its capability and experience in shifting suppliers (BMWK 2022). Russia's war with Ukraine also motivates the drive for European energy independence because Ukraine was the "critical powerhouse" and Russia has focused on gaining control of the areas most important for energy (Muggah and Rohozinksi 2025).

Losing access to critical minerals is an untenable scenario for nations as they are paramount to the defence sector and denied access will hamper a country's ability to defend itself during conflict, as well as cause serious other economic- and energy-related issues. Critical minerals are a strategic good that can be weaponised. This is why resource diversification is so important. For Canada, who possesses these resources, this means striving for more self-reliance by investing in its potential in order to become the supplier for like-minded allies. For countries like Germany, this motivates a pivot to buying solely from reliable suppliers, such as like-minded democracies. Following Exner-Pirot (2025b), allies must prioritise source and strategy over cost during the buying process. The German-Canadian partnership is an example of this prioritisation taking root.

Conclusion

The Critical Minerals Partnership between Canada and Germany will be advantageous to both parties. It will bring economic prosperity and CRM development and refinement capability to Canada and diversification and critical minerals security to Germany. It is the strategic alignment of interests and goals undergirded by shared values that create an ecosystem of trust. This partnership points to a broader trend in international cooperation: democracies are prioritizing reliable, value-aligned partners over cheaper authoritarian suppliers; a prioritisation that reflects the realities of the instability or at least unpredictability of international order. The two middle powers can collaborate to help create a more independent and secure bloc of democratic nations. Together with other G7 members, they can disrupt China's monopoly on critical minerals needed for both their defence and economies, and diversify Europe away from relying on both Russia and China. Yet realising this vision will require sustained investment, strategic focus on priority minerals, and successful translation of government frameworks into private sector partnerships. With complementary strengths and interests, shared commitments, and the mounting security imperatives driving their actions, Canada and Germany are well-positioned to transform potential into reality.

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List of Acronyms:

SRM = strategic raw materials

CRM = critical raw materials

CETA = Comprehensive Economic and Trade Agreement (Canada and EU)

CRMA = Critical Raw Materials Act (EU)

SDP = Security and Defence Partnership (EU and Canada)

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