

Critical minerals supply chains

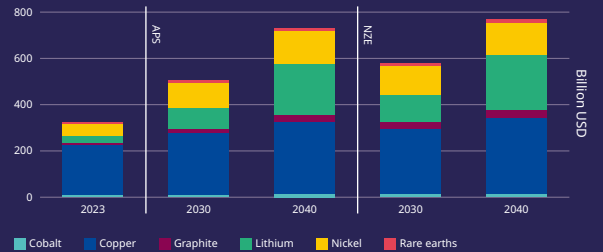
Promoting decent work,
advancing social justice
through clean energy
transitions



Why do Critical Energy Transition Minerals (CETM) matter for decent work?

With global demand expected to triple by 2030 and quadruple by 2040, CETM offer multiple entry points to promote decent work, strengthen labour rights, and advance social dialogue across mineral supply chains, while supporting an inclusive just transition.

Market value of key energy transition minerals in the APS and the NZS* 2023-2040



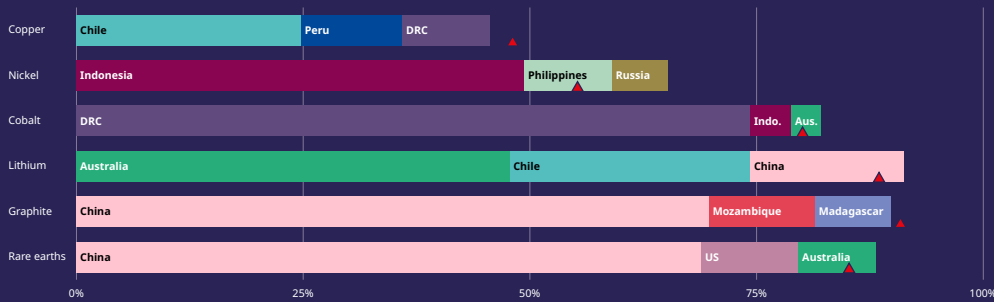
* APS stands for Announced Pledges Scenario, while NZS stands for Net Zero Scenario.

Source: IEA. License: CC BY 4.0

Concentration of the extraction and processing of critical resources

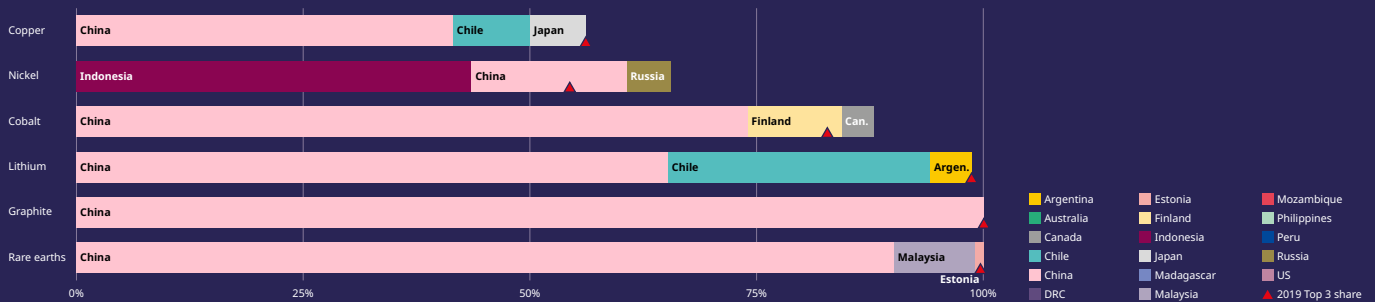
Share of top-three producing countries in total production of selected resources and minerals, 2022

Extraction



CETM supply chains are highly concentrated and unevenly distributed. In many cases, the refining and processing of critical minerals, such as lithium, cobalt, and nickel, occur far from the countries where these resources are extracted. Increasing local value addition is therefore essential to ensure resource-rich countries can derive greater economic and social benefits.

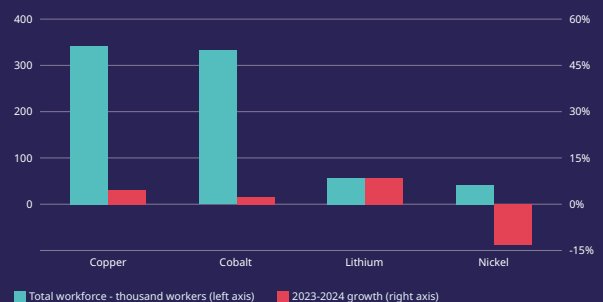
Processing



Source: The Draghi report: A competitiveness strategy for Europe (Part A), 2024

CETM generate direct jobs in extraction and processing — around 770,000 in 2024 — indirect jobs through supporting industries, and induce further employment across communities via economic multiplier effects, possibly creating additional jobs in related and local sectors.

Employment growth by critical mineral, 2023-2024



Source: IEA 2025 World Energy Employment

Promoting decent work in CETM supply chains

As global demand for minerals accelerates, pressure on producing and exporting countries continues to intensify, often exacerbating decent work deficits. This graph illustrates pathways to reduce risks and harness opportunities to create more and better jobs.



ILO in Action



Rationale for ILO's work

- Addressing decent work deficits and social justice in CETM supply chains
- Convening social dialogue to drive sustainable solutions
- Applying integrated policy approaches through coordinated interventions
- Leveraging effective application of international labour standards



Ways of working

- Providing country-specific, constituent-driven support aligned with national priorities
- Engaging with global initiatives, including the UN Secretary-General's CETM Panel actionable recommendations
- Promoting regional and international cooperation on shared challenges



Concrete deliverables

- Coherence across labour, environmental and industrial policies to advance just transitions
- Evidence-based action and knowledge products
- South-South cooperation and partnerships
- Responsible business practices and decent work in critical minerals supply chains



Become part of the change!

- The ILO supports governments, employers, and workers in realizing decent work in critical mineral supply chains.
- Partner with us to align the clean energy transition with fair and inclusive labour outcomes.

▶ ilo.org/supplychains

▶ ilo.org/justtransition

▶ ilo.org/mining