LATAM Mining & Critical Minerals Supply

Source Metadata

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IEA Technology Definition

The IEA's Global Critical Minerals Outlook and Latin America commentary identify the region as a globally significant supplier of energy transition minerals. This page synthesizes the IEA's assessment of Latin America's role across copper, lithium, nickel, rare earths, graphite, and manganese supply chains. The IEA projects Latin American mining and refining value to reach USD 154 billion amid regulatory reforms to attract foreign capital.

Technology Readiness & Deployment

Latin American mining is a mature commercial industry with world-class operations in copper (Chile, Peru), lithium (Chile, Argentina), iron ore (Brazil), and bauxite (Brazil). The region is at early stages of developing midstream processing and downstream manufacturing capacity for battery materials and components. Regulatory modernization is underway in Chile (lithium nationalization framework), Argentina (RIGI investment incentives), and Brazil (critical minerals strategy) to capture more value from the energy transition.

Key Metrics & Benchmarks

Latin America accounts for 40% of global copper production, 35% of lithium production, and holds more than half of global lithium reserves. The region supplies significant shares of nickel (Brazil, Cuba), tin (Bolivia, Brazil, Peru), and molybdenum (Chile, Peru). Brazil alone holds around one-fifth of global reserves in graphite, nickel, manganese, and rare earth elements, but as of today produces only small to moderate amounts of these materials.

LATAM Relevance

This page is the central LATAM reference for critical minerals in the Cleantech Taxonomy. The IEA highlights that Latin America's mineral wealth positions it as a pivotal region for global clean energy supply chains, but moving up the value chain requires investment in processing infrastructure, skills development, ESG governance, and enabling policies. Water scarcity in Chilean and Peruvian mining regions, indigenous community rights, and environmental regulation are key constraints on expansion.

Critical Minerals Link

Comprehensive LATAM mineral supply: Chile (copper 27%, lithium 26% of global), Peru (copper 10%, zinc, silver), Argentina (lithium 6%), Brazil (iron ore, bauxite, rare earths, graphite, nickel, manganese), Bolivia (tin, lithium), Mexico (copper, silver, fluorspar), Colombia (coal, nickel, emeralds). The IEA recommends diversifying refining and processing away from China, creating opportunities for LATAM midstream investment.

Cleantech Taxonomy Crosswalk

Maps to Cleantech Taxonomy sectors: IN (Industry) — mining, mineral processing, smelting; XS (Cross-Sectoral) — ESG governance, water-energy-mining nexus, community engagement, trade policy, circular economy; ES (Energy Systems) — mineral demand from renewable deployment.

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