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Why critical minerals are becoming Israel's next strategic asset

The recent Critical Minerals Ministerial meeting signifies one of the most consequential shifts in global geopolitics today: the transformation of supply chains into instruments of strategic power.

US Secretary of State Marco Rubio and other government officials pose for a family photo on the day of the Critical Minerals Ministerial, at the State Department in Washington, US, February 4, 2026.(photo credit: JONATHAN ERNST/REUTERS)

By EMMANUEL NAVONFEBRUARY 9, 2026

The recent Critical Minerals Ministerial meeting held in Washington, to which Israel was invited alongside dozens of US allies and partners, may not have made headlines in the Jewish state – but it should have. Beneath its technical title lies one of the most consequential shifts in global geopolitics today: the transformation of supply chains into instruments of strategic power.

For decades, critical minerals such as lithium, rare earth elements, cobalt, nickel, and graphite were treated as commercially neutral inputs, governed by markets and price signals. That era is over. These materials now underpin electric vehicles, renewable energy systems, semiconductors, data centers, and advanced weapons platforms. Whoever controls their supply chains holds leverage not only over industry, but over national security.

The American decision to elevate critical minerals to the ministerial level reflects a broader reassessment. Supply chains are no longer passive economic structures, but are rather both strategic assets and potential vulnerabilities.

Washington's response is not to pursue self-sufficiency, which would be unrealistic and prohibitively costly, but to build a network of trusted partners capable of reducing over-

concentration and resisting coercion. This effort is often described as “de-risking,” but its logic is deeper. It marks a shift from globalization as efficiency to strategic interdependence among allies.

Within this emerging architecture, Israel’s role is more significant than is commonly assumed – not despite the fact that Israel lacks major mineral reserves, but precisely because of it.

What is Israel's role in the critical minerals strategy?

The critical weakness of today’s mineral supply chains is not extraction, but processing, refining, and mid-stream control. Geological reserves are widely dispersed across continents; processing capacity is not. In several critical categories, it is heavily concentrated, creating chokepoints that can be exploited politically as well as economically.

This is where Israel’s comparative advantage lies.

Israel is not a mining power: It is a technological power, and the future of mineral security depends far more on technology than on geology. Advanced processing methods, higher recovery rates, lower environmental footprints, recycling, and digital optimization are what make diversified supply chains viable.

Israeli companies and research institutions are global leaders in materials science, chemical engineering, and process optimization. They develop technologies that make it economically feasible to process lower-grade ores, reduce waste, and relocate processing capacity to allied jurisdictions. In a sector where environmental constraints and cost pressures discourage private investment, such innovations are indispensable.

Recycling and so-called “urban mining” are equally critical. As demand for critical minerals accelerates, secondary sourcing will become a strategic necessity rather than a sustainability slogan. Israel’s experience in maximizing efficiency under conditions of scarcity gives it a structural advantage in this domain.

CRITICAL MINERAL supply chains are also becoming digital and therefore vulnerable. Logistics, inventory management, processing facilities, and transportation networks rely on data systems that can be disrupted, manipulated, or sabotaged. Supply-chain security today is inseparable from cybersecurity. Protecting mineral flows increasingly resembles protecting energy grids or communications networks. Israel’s expertise in cyberdefense, data integrity, and AI-driven logistics optimization positions it as a natural partner in safeguarding what has become strategic infrastructure.

Jerusalem’s role is further reinforced by its convergence with key Indo-Pacific democracies such as India, Japan, and South Korea – all of which are deeply exposed to mineral supply risks while being central to global manufacturing.

These countries share several defining traits with Israel: innovation-driven economies, limited natural resources relative to industrial demand, high exposure to supply disruption, and strategic environments shaped by regional power competition. All seek technological sovereignty without retreating from global integration.

Cooperation in critical minerals among these states is therefore not merely transactional. It is underpinned by shared political norms: transparency, rule-based

trade, regulatory predictability, and resistance to economic coercion. This community of values lowers political risk and enables the long-term coordination that mineral supply chains require.

Israel's added value also lies in its position as a strategic connector. With deep ties to the United States, growing relevance to Europe, and expanding partnerships in Asia, Israel can help bridge transatlantic and Indo-Pacific approaches to mineral security, enhancing allied resilience without duplicating industrial capacity.

The geopolitics of critical minerals illustrates a wider transformation in how power is exercised. Influence now flows through networks rather than territory, through resilience rather than dominance, and through alignment rather than coercion.

In this emerging order, Israel's strategic value lies not in what it extracts from the ground, but in what it enables across allied systems. By contributing technology, security, innovation, and strategic connectivity – and by deepening cooperation with partners such as India, Japan, and South Korea – Israel can play a disproportionate role in shaping the architecture of allied supply chains.

The Washington ministerial was not a technical meeting: It was a signal. Israel would do well to treat it as such.

The writer teaches international relations at Tel Aviv University and is a senior fellow at the Jerusalem Institute for Strategy and Security (JISS).