Sweden's **new mineral** strategy:

A welcome boost for miners, but old bottlenecks remain

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Sweden's government has on 23 July published a new national mineral strategy setting out how the country intends to leverage its geology to strengthen the EU's independence in critical raw materials. For an industry that has spent years complaining about slow permitting and land-use conflicts, the document contains real wins — but also plenty of unfinished business that will temper the sector's enthusiasm.

The strategic backdrop

The strategy is explicit about why now: the EU consumes around 25 percent of the world's raw materials but produces only about 3 percent, and import dependency for several critical metals exceeds 90 percent, often concentrated in a single supplier country. The International Energy Agency estimates that EU demand for certain critical metals will grow 500 percent by 2030, while China accounts for roughly 70 percent of global mining and 90 percent of processing of these metals. Against that backdrop, Sweden already produces around 90 percent of the EU's iron ore and ranks among the bloc's top producers of copper, zinc, lead, gold and silver, giving the strategy a credible platform to build on.

What the industry will welcome

The headline commitment is permitting reform. The government acknowledges that the Environmental Code needs to be reformed to meet industry's need for more efficient permitting processes, and has tasked an inquiry with proposing both procedural and substantive changes, including a new environmental permitting authority. Concretely, strategic projects under the EU Critical Raw Materials Act will benefit from a single national contact point and a maximum 27-month permitting timeline, and six county administrative boards — Stockholm, Skåne, Västra Götaland, Örebro, Dalarna and Västerbotten — have already been designated as these contact points. Miners will also welcome that Natura 2000 permitting has been folded into the environmental permit process to avoid duplicate assessments, a change expected to improve investor confidence in Swedish mining, and that the 2018 ban on uranium extraction as a by-product of metal production has been lifted.

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The strategy also opens the door to easier access to protected land — a long-standing industry grievance. The government will consider a permanent exemption for mining in protected areas that are not national parks, and seek to avoid creating new nature reserves in areas covered by an existing processing concession, while also examining designating mineral deposits, or larger areas such as the Malmfälten or Skellefte ore fields, as national interests.

On financing, the government flags interest in a possible state-owned investment company or "raw materials fund" to help finance strategically important mining and processing projects, echoing the historical precedent of state ownership in LKAB, which dates back to 1907 and was expanded to a majority stake in 1957 for national security reasons. Research funding is also flowing: SEK 328 million has been earmarked over 2025-2028 to strengthen mineral-sector research, including SEK 145 million for Luleå University of Technology's Centre for Advanced Mining and Metallurgy. Public opinion also gives the sector a tailwind: 64 percent of Swedes believe the mining industry should be given the conditions to develop to secure access to important metals, and 74 percent see the industry as important for the Swedish economy.

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Where miners will be more cautious

Despite the positive tone, several structural issues remain unresolved — or are simply deferred to further inquiries. Permitting reform is still largely a work in progress rather than delivered law: the new environmental permitting authority, the harmonisation of timelines for non-strategic projects, and the review of processing-concession procedures are all listed as measures still to be investigated rather than implemented. Junior explorers, in particular, may find little immediate relief: the strategy admits that smaller junior exploration companies struggle to understand the Swedish permitting process, with unclear allocation of responsibility for decisions such as establishing nature reserves, and that Sweden attracts only about 0.94 percent of global exploration investment in base and other critical metals despite geological potential comparable to Canada and Australia — a striking gap the strategy does not yet solve.

Land-use conflict also remains unresolved rather than removed. Areas under any form of protection are viewed by investors as high-risk, and without exemption rules, necessary prospecting investment could fail to materialise altogether, and mining projects frequently overlap with reindeer husbandry areas, creating potential consequences for Sami culture and livelihoods — a sensitivity the government says must be managed through "coexistence" rather than resolved definitively. Recycling ambitions, while directionally positive for the circular economy, highlight the industry's continued reliance on primary extraction: fewer than a third of 60 assessed metals achieve more than 50 percent recycling rates over their lifecycle, and 34 of 60 metals are recycled at less than 1 percent, meaning the EU's 25-percent domestic recycling target for 2030 will be difficult to meet without much heavier investment. Finally, public acceptance is more fragile locally than nationally: the share of Swedes opposed to having an active mine in their own local area rose from 34 to 41 percent between 2022 and 2024, underlining that national support for mining does not automatically translate into local buy-in — precisely where new projects need it most.

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The bottom line

For Sweden's mining cluster, the strategy reads as a genuine statement of political intent — faster permitting, more research funding, potential state co-investment, and a clear economic-security rationale rooted in geopolitical rivalry with China and the war in Ukraine. Russia's invasion of Ukraine has already had a serious impact on the country's mining sector, much of which now sits in occupied territory, and has increased European vulnerability in metals used for batteries, electronics and defence technology. But industry executives will note that the strategy is heavy on reviews, inquiries and future legislation, and comparatively light on immediate, binding commitments. Whether Sweden can convert its favourable geology and political goodwill into the exploration capital and faster permits that have eluded it for years will depend on how quickly these announced reforms — rather than the strategy itself — are actually enacted.

Chambers CONTRIBUTOR Global Practice Guides 2026 Mining

Authors of the Swedish section of Chambers Global Practice Guide

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Peter Dyer
Partner
+46 (0)733-22 84 29
peter.dyer@wahlinlaw.se

Jonna Sjöström
Associate
+46 (0)767-65 47 62
jonna.sjostrom@wahlinlaw.se