

5 Overlooked Risks in Lithium Supply Chains

A GeoCritical Consulting Decision Note

Executive Summary

- Hidden geology vs headline tonnage: ore quality, impurities, and processing intensity can flip feasibility.
- Infrastructure dependency: power, water, and reagent logistics are often the true bottlenecks.
- Permitting pace \neq social license: formal approvals can stall without community legitimacy.
- Data trustworthiness: public figures may mix resources/reserves and ignore uncertainty bands.
- Single-jurisdiction exposure: supply concentration magnifies policy and climate risk.

How to Use This Note

Use the checklist on page 2 to screen projects quickly before deeper technical work. For a tailored briefing, contact us.

Project Screening Checklist

- Ore quality & impurity profile understood? Processing route feasible with current inputs?
- Reliable access to power, water, and reagents at projected scale?
- Hydromet/waste plan realistic for jurisdiction and climate scenario?
- Permitting status + community engagement mapped beyond formal approvals?
- Disclosure distinguishes resources vs reserves; uncertainty bands documented?
- Logistics/FX exposure and single-jurisdiction concentration quantified?

Next: For a region- or project-specific assessment, book a 20-minute scoping call.

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