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COMMITTEE AND THE COMMITTEE OF THE REGIONS**

**EU stockpiling strategy: Boosting the EU's material preparedness for crises**

## INTRODUCTION

For decades, the European Union enjoyed sufficient supply of essential goods. But the unprecedented scale of recent crises showed that this can no longer be taken for granted. The COVID-19 pandemic exposed the vulnerabilities in the EU's supply chains for medical products, energy, agri-food products and critical raw materials. Russia's illegal war of aggression against Ukraine has underscored the strategic importance of reliable access to affordable energy, critical technologies and infrastructure and has had effects on agricultural supplies worldwide.

Today, the EU faces an increasingly complex and deteriorating risk landscape marked by rising geopolitical tensions, including conflict, the mounting impacts of climate change, environmental degradation, and hybrid and cyber threats, driven by increased activity from hacktivists, cybercriminals and State-sponsored groups. Moreover, the geopolitical challenges are often interwoven and impacting on the relations of the EU with different parts of the world, including when it comes to supply chains. The potential impacts of risks are steadily increasing, with indirect consequences and effects that cascade over time. This ultimately translates into a higher overall threat to the security and availability of essential supplies.

Following the recommendations in the Niinistö report, the **Preparedness Union Strategy** <sup>(1)</sup> announced an EU-wide Stockpiling Strategy that will (1) integrate all existing sectorial stockpiling efforts, (2) strengthen access to critical resources across the EU and (3) combine centralised EU-level reserves with Member States' contributions, supported by public-private partnerships to ensure efficiency, scalability and cost-effectiveness.

This EU Stockpiling Strategy adopts a **comprehensive approach to stockpiling and addresses its entire cycle**, from anticipation to monitoring of supply chains, measures to strengthen supply security, management of stockpiling, and deployment. It applies to **essential goods** <sup>(2)</sup>, that are understood for these purposes as any physical object necessary to maintain vital societal functions <sup>(3)</sup>. The EU Stockpiling Strategy will foster coordinated public and private reserves of critical inputs and ensure their availability under all circumstances.

The Strategy will be guided by the **underlying principles of solidarity, transparency, accountability and equitable access to resources** across the EU, which is key to ensure equality of all, particularly under severe circumstances. In line with the Union of Equality framework <sup>(4)</sup>, the implementation of the Strategy will take into account the specific needs of different groups, including in relation to gender, disability, age and racial or ethnic background.

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<sup>(1)</sup> JOIN (2025) 130 final – European Preparedness Union Strategy.

<sup>(2)</sup> For the purpose of this strategy 'goods' encompasses primary and secondary materials, commodities, natural resources, products, equipment, etc. The term is used in a broad sense without prejudice to definitions and specific terms used in sectoral frameworks.

<sup>(3)</sup> Vital societal functions are fundamental systems and structures that enable a society to operate, while safeguarding our societies, economies, cultures, and democratic institutions in any circumstances. These functions include first and foremost the safety of the EU's population, including protection from natural disasters, governmental continuity and decision-making, democratic processes, social cohesion and economic stability and internal and external security. They form the foundation of a stable and secure society.

<sup>(4)</sup> The Union of Equality strategies promote equal access to health for all.

Following the Preparedness Union Strategy, the Stockpiling Strategy reflects a mindset shift from a reactive, sectoral crisis management approach to a **proactive, agile and better-integrated preparedness approach**.

### Why we need an EU Stockpiling Strategy

**Member States across the EU have been facing similar challenges** in recent times. There is scope for unlocking synergies on collective preparedness at EU level by sharing experience and working together on how best to secure timely access to essential goods for authorities, businesses and the public in an inclusive way. Therefore, an EU-wide approach is needed to complement and support Member States' efforts.

Stockpiling is an essential component of EU's crisis preparedness and an integral part of overall deterrence and readiness for conflict scenarios. Crises and threats may not limit themselves to one Member State, making an adequate preparation at EU-level only more relevant. As one Single Market, with highly integrated value and supply chains, disruptions in the availability of critical materials or technologies require an EU-level capability to respond.

In recent years several relevant EU initiatives, strategies and laws <sup>(5)</sup> have been adopted to enhance strategic autonomy, internal and economic security, competitiveness, defence and resilience and to address supply chain vulnerabilities and dependencies. Among these initiatives are measures specifically aimed at improving access to essential goods, such as requiring Member States to hold stocks of oil; demand aggregation and joint purchasing for gas; measures to boost access to and processing and recycling of critical raw materials; jointly procuring vaccines against COVID-19; or the building up of the EU rescEU strategic reserve (see Annex 1 for an overview of the relevant EU legal and policy frameworks).

However, the overall approach remains fragmented, and experience has highlighted a number of significant, closely interrelated shortcomings in the EU framework.

1. **Limited common understanding of which essential goods are needed for crisis preparedness against the backdrop of a rapidly evolving risk landscape.** This hampers cooperation across sectors and borders. By understanding what goods are essential to face potential crises, governments and businesses alike can make informed and coordinated decisions on how to best prepare for potential shortages.
2. **Limited information sharing and coordination between the EU and Member States, and between the civilian and military sectors.** As a result, there is no proper overview of stockpiling efforts by Member States across the EU, which in turn results in a suboptimal use of available resources, capacities and expertise. Moreover, administrative, structural and logistical barriers persisting across the EU may hamper cross-border deployment, transport and access in crisis scenarios.
3. **Under-used potential for cooperation with the private sector across sectors and borders.** The private sector has significant expertise in managing stockpiles, logistics and

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<sup>(5)</sup> Such as Protect EU - the Internal Security Strategy, the Economic Security Strategy, the White Paper on the Future of European Defence, the EU Competitiveness Compass, the European Water Resilience Strategy, the Circular Economy Action Plan, the Internal Market Emergency and Resilience Act (IMERA), the Critical Raw Materials Act, the Union Civil Protection Mechanism (UCPM), the Oil Stocks Directive (currently under revision), the EU Gas Storage Regulation, the future Critical Medicines Act, and the Medical Counter Measures Strategy.

deployment. Increased structural public-private cooperation on emergency stockpiling can be fostered, best practices shared, and lessons learnt across sectors and borders.

4. **Existing national or sectoral frameworks that do not sufficiently reflect the role external action and cooperation tools can play in strengthening the national and EU's material preparedness**, for example on supply chain security. Partnerships with non-EU countries and international organisations can contribute to enhancing mutual resilience and to securing essential goods.

For the preparedness of the EU, it is crucial to address this **lack of a comprehensive, shared analysis among all relevant stakeholders, across sectors and borders**, and to coordinate efforts to prepare and respond quickly and effectively. This strategy therefore takes a **cross-sectoral and cross-border** perspective, where the EU can provide the most added value.

The overall **objective** of this strategy is to **improve access to essential goods** under all circumstances. It will improve **interoperability** of stockpiling systems both at national and EU-level throughout the entire stockpiling cycle – planning, purchasing, managing and deploying the stocks. The strategy ensures **material preparedness**, which means the readiness, availability and accessibility of essential goods as part of an effective response to crises and conflict. At the same time, it also supports **strategic autonomy for the EU**, by reducing dependencies and vulnerabilities and enhancing EU production of essential goods.

### **Building an EU Stockpiling Strategy**

This Strategy builds on existing EU sectoral frameworks and follows the principles of the Preparedness Union Strategy, set out below.

- An **all-hazards approach**, which covers the full spectrum of natural and human-induced risks and threats to material preparedness. It aims to address in a comprehensive manner increased risks and threats to security of supply, including a conflict scenario, and the interaction of risks, and their cascading effects.
- A **whole-of-government approach**, which brings together all relevant stakeholders, across all levels of government (local, regional, national, and EU), promotes collaboration, policy coherence and sharing of resources. It includes effective cooperation between the civilian and defence authorities, and the coherent integration of internal and external dimensions.
- A **whole-of-society approach**, which fosters an inclusive culture of material preparedness involving all relevant actors to security of supply, especially the private sector. It means also helping citizens to become actors of their own resilience, by having resources to ensure a minimum 72-hours self-sufficiency taking into account their specific needs, as underlined in the Preparedness Union Strategy.

In line with the findings above, this strategy identifies seven key areas for EU action:

1. improving coordination among Member States and with the EU;
2. foresight, anticipation and strategic planning;
3. filling gaps via EU strategic stockpiling;
4. enhancing a robust and interoperable transport and logistics infrastructure;
5. improving civil-military cooperation;
6. fostering public-private cooperation;

## 7. fostering cooperation in external action and international partnerships.

The Strategy focusses on cross-sectoral challenges, while seeking full complementarity with specific sectoral actions <sup>(6)</sup>. This Strategy will be implemented in close consultation with Member States and relevant stakeholders, fully respecting subsidiarity, national competences and the specificities of Member States.

### 1. IMPROVING COORDINATION AMONG MEMBER STATES AND WITH THE EU

Each Member State is responsible for its own material preparedness. However, in severe, long-term, complex, and cross-border crises, it is crucial to coordinate national measures to ensure a steady supply of essential goods and the continuation of vital societal functions. Coordination not only **fosters solidarity but also prevents disruption to the single market**. Without coordination, Member States might compete for goods, production capabilities, storage and deployment capacities, and may disrupt well-functioning markets, resulting in unnecessary duplication, costs, and inefficient crisis responses and putting further strain on already fragile supply chains.

As a first step, **mutual trust and understanding** need to be strengthened, taking national security concerns into account. The EU will further develop **secure information-sharing tools** <sup>(7)</sup>, to enable Member States, the Commission, relevant EU agencies and stakeholders, to pool information on supply chains, stockpiling arrangements, and deployment plans. These tools must be well-protected and comply with EU security requirements. Information-sharing, including with North Atlantic Treaty Organisation (NATO) when relevant, should enhance interoperability and thus improve joint crisis response efficiency.

Moreover, **enhancing synergies and interoperability** of stocked goods, arrangements, and deployment plans throughout the EU will lead to efficiency gains. **Coordination should be improved at several stages of the stockpiling cycle** – planning, purchasing, managing, and deploying stocks. This should also involve better cooperation in identifying critical supply chain dependencies, aligning diversification plans and cooperation with customs to facilitate the inflow of essential goods into the EU or ensure the application of possible export restrictions. Joint and central procurement <sup>(8)</sup> can effectively optimise resource acquisition and cooperation for essential goods among Member States and should be further improved. Cooperation on secure and strategic locations for essential goods throughout the EU, considering regional needs, will enhance overall resilience and efficiency. Best practices and lessons can be shared on stock management, real-time tracking, condition monitoring, expiry alerts, stock rotation, shelf-life, and waste management.

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<sup>(6)</sup> For example, the new Medical Countermeasures Strategy and its EU strategic plan for stockpiling of medical countermeasures (COM(2025) 529 final).

<sup>(7)</sup> Existing sectoral information exchange systems include for example, the European Community Urgent Radiological Information Exchange System (ECURIE) for radiological and nuclear emergencies; the Early Warning and Response System (EWRS) for biological, chemical and unknown serious cross-border threats to health (under Regulation 2022/2372); the Common Emergency Communication and Information System (CECIS) (under Decision 1313/2013/EU on the Union Civil Protection Coordination Mechanism).

<sup>(8)</sup> Good examples of new initiatives on demand aggregation and joint purchasing include AggregateEU, the upcoming mechanisms on hydrogen, and the EU Centre for Critical Raw Materials. Joint purchase of medical countermeasures take place since 2014.

Good examples of sectoral initiatives, coordinating and **strengthening Member States' stockpiling approaches**, include mechanisms for agri-food products, essential agricultural inputs and medical countermeasures. Reinforcing Member States' stockpiling can also be considered for nuclear fuel as part of the implementation of the roadmap to end Russian energy imports. In the agri-food products sector, the European Food Security Crisis preparedness and response Mechanism (EFSCM) should be deepened and operationalised to enhance information exchange, transparency and solidarity in stockpiling <sup>(9)</sup> among Member States, stakeholders, and EU institutions, in coordination with instruments under the Common Market Organisation (CMO). In line with the Clean Industrial Deal, the platform for demand aggregation and joint purchasing of raw materials is a first step to the set-up of an EU Critical Raw Materials Centre that should assist in jointly purchasing raw materials, coordinate strategic stockpiles, oversee supply chain monitoring, and encourage investments. Cross-sectoral learning and coordination should be ensured.

Following the European Civil Protection Pool model under the Union Civil Protection Mechanism (UCPM), options should be explored for an information exchange system for Member States to notify the EU about any **essential goods available for voluntary transfer to another Member State during crises**. This could include coordinating transport and deployment costs through the Commission within the UCPM. Lastly, the establishment of common criteria for the coordinated release of stockpiles during emergencies are essential.

**Key actions:**

- The Commission will establish an **EU stockpiling network** with Member States. The network will be a forum for discussion and have an advisory role. Without pre-empting the role of the Council on this matter, this network should discuss best practices regarding foresight, anticipation, strategic planning and cost-efficiency assessments and develop dynamic, regularly updated non-exhaustive lists of essential goods tailored to different crisis scenarios and regions, taking existing sectoral lists into account <sup>(10)</sup>. The network should formulate recommendations on issues such as volume requirements, related oversight systems and coordination of minimum requirements.
- The Commission will - within this new EU stockpiling network - enhance **interoperability of stocks and stockpiling arrangements, promote best practice exchanges** and collaborate with Member States to establish EU-wide **cross-sectoral criteria and procedures** for operational elements in the stockpiling cycle.
- Taking existing sectoral systems into account, the Commission will explore the feasibility of setting up **a platform for secure and detailed data exchanges** between the EU and Member States on emergency stockpiles, building on the capacities of the Emergency Response Coordination Centre.
- The Commission will further **promote centralised and/or joint procurement mechanisms** across sectors, building on models like the medical

<sup>(9)</sup> In conformity with EU food safety requirements and competition law.

<sup>(10)</sup> Or build on and complement lists which may be developed under relevant mechanisms such as the Internal Market Emergency Resilience Act.

countermeasures' procurement agreement, or the procurement of crisis-relevant goods under the Internal Market Emergency Resilience Act (IMERA), rescEU or the platform for demand aggregation and joint purchasing of raw materials to optimise resource acquisition. Moreover, it will revise the public procurement framework as announced in the Preparedness Union Strategy.

## 2. FORESIGHT, ANTICIPATION AND STRATEGIC PLANNING

Foresight and anticipation, identifying timely threats (and opportunities to stockpile) are crucial for effective planning of supply and stockpiling requirements for essential goods. Moreover, strategic planning is needed to determine the most appropriate, time-relevant and cost-efficient measures to ensure that essential goods are available and ready in a crisis or conflict. EU legal frameworks remain fragmented in this regard <sup>(11)</sup> and practices across Member States diverge. In some areas, such as undersea cables and onshore energy grid security, space, defence, agri-food products and essential agricultural inputs, healthcare, and chemicals for treating water, the lack of EU-level arrangements for securing supply and resilience should be addressed.

As part of the Preparedness Union Strategy, the EU will conduct **a comprehensive risk and threat assessment**. It will offer deeper insights into crisis and conflict scenarios and enhance awareness of cross-sector and cross-border risks for vital societal functions. This should support the **exchanges on risk assessments, planning, and gaps identification of essential goods and supply opportunities with Member States** and ultimately facilitate a common understanding of critical needs. Examples of current good practice in this regard include the Board set up under the IMERA and the European Food Security Crisis preparedness and response Mechanism (EFSCM).

Moreover, at EU level, insights from existing **risk and threat assessments** <sup>(12)</sup> and **supply chain monitoring** systems <sup>(13)</sup> should be brought together and regularly updated, integrating

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<sup>(11)</sup> Some existing or proposed EU legal frameworks include measures to secure the availability of specific essential goods like gas and oil, medical countermeasures, critical medicines, raw materials, civil protection capacities, semiconductors, animal vaccines, and euro banknotes. However, these measures often have limited scope. The IMERA has a broader focus and can identify crisis-relevant goods if activated under its vigilance or emergency mode.

<sup>(12)</sup> Mandatory periodic risk assessments: Critical Entities Resilience Directive (EU) 2022/2557, Drinking Water Directive (EU) 2020/2184; threat landscape reports: [\(ENISA\) annual cybersecurity threat landscape](#) and two-yearly state of cybersecurity reports; the assessment of vulnerabilities of the supply chain of critical medicines in the Commission's proposal revising the pharmaceutical legislation (COM(2023) 193 final); targeted studies on supply chain vulnerabilities: [Assessment on supply chain vulnerabilities on the first tranche of critical medicines](#), HERA 2024; [Risks and vulnerabilities in the EU food supply chain](#), JRC 2023; platforms for regular assessments and analysis: [EU Observatory of Critical Technologies](#); ad-hoc demand and supply market studies: [EU security market study](#), 2022; other relevant risk assessments: [European Climate Risk Assessment](#), European Environmental Agency, 2024; [Risk assessments for critical technology areas](#) in the context of the Economic Security Strategy.

<sup>(13)</sup> Examples of such monitoring include the [SCAN supply chain alert notification system](#), a quasi-real-time monitoring tool, used for key raw materials in green technologies and certain semiconductor supply chains; the [EU food supply and security dashboards](#); summaries on crude oil and/or petroleum products stocks under the EU's Oil Stock Directive; monitoring by the [Euratom Supply Agency](#) of high-assay low enriched uranium and medical radioisotopes; the [European Shortages Monitoring Platform](#) on the availability and supply of and

foresight studies on long-term security of supply developments <sup>(14)</sup>. Real-time, automated monitoring systems, possibly supported by artificial intelligence where appropriate, could anticipate and track market disruptions more effectively <sup>(15)</sup>. Better coordinating the different instruments will **improve cross-sector and cross-border awareness of risks and of scarcity of essential goods** and prevent duplication of efforts.

This improved coordination includes factoring in the principle of **EU solidarity in planning arrangements** – such as support from one Member State to another, or from EU strategic stockpiles – to avoid or overcome supply shortages or supply chain disruption with high costs and severe consequences and facilitate the potential movement from stock from one country to another in the EU.

Member States should discuss the **target scope** of stocks (based on the risk assessments described above, to determine focus areas) and **appropriate minimum stock levels** under specific circumstances across different sectors, also to avoid overstocking waste. A common approach to setting volumes of essential goods and needs will lead to comparable levels of material preparedness across the EU, strengthening overall readiness and resilience, solidarity and effective cooperation, and avoiding the distortion of the normal functioning and sustainability of the Internal Market.

As stockpiling is expensive and can create market imbalances, Member States and the EU **should evaluate various ways of ensuring the availability of essential goods** in their planning process and assess the relevant stockpiling methodology. This should include: the potential impact of a risk on a vital societal function; time-criticality of a response; overlap between tools and redundancy. Also, market failures, the availability of production and recycling capacities and EU dependencies on other countries – in a context of growing geopolitical tensions - need to be considered.

Stockpiling or other material preparedness measures should be designed in a way that minimises market distortions and avoids adverse effects of normal supply and demand dynamics. There are a number of ways of making supply chains more agile and more resilient, such as learning from best practices in Member States and non-EU countries, investing in research and innovation, boosting self-sufficiency of the EU and its Member States, increasing the efficiency and circularity of materials at risk and finding alternatives. Establishing arrangements with the private sector <sup>(16)</sup> to supply essential goods on short notice in emergencies should also be considered.

#### **Key actions:**

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demand for human medicines in certain situations; the [EU Customs Surveillance system](#) monitoring the movement into and out of the EU and protecting against fraud and illicit trade in essential goods.

<sup>(14)</sup> [Supply chain analysis and material demand forecast in strategic technologies and sectors in the EU](#) – A foresight study, European Commission, 2023.

<sup>(15)</sup> The proposal for the [EU Customs Reform](#), particularly the EU Customs Data Hub, is relevant, aiming to enhance risk management by real-time data sharing and analysis across all Member States to ensure better protection against fraud and illicit trade, and the gathering and analysis of relevant information on essential goods.

<sup>(16)</sup> See also chapter 6 Fostering public-private cooperation.



- The Commission will **map sectoral supply chain monitoring mechanisms** and incorporate **security of supply risks and supply chain vulnerability assessments** into the envisaged comprehensive EU risk and threat assessment (key action under the Preparedness Union Strategy). The future EU Crisis Coordination Hub shall anticipate and monitor risks connected to cross-sectoral crises.

### 3. FILLING GAPS VIA EU STRATEGIC STOCKPILING

The COVID-19 pandemic demonstrated that national systems, even when well-coordinated, can rapidly become unable to provide essential goods. Additional EU-level action was needed, to cope with a widespread and simultaneous shortage in all Member States, including in the Outermost Regions. Similar complex crises in which all countries face the same shortages at the same time, are likely to occur with increasing frequency in the future; hence the need to further **develop strategic stockpiling at EU level**. The approach at EU-level has so far been sectoral and limited.

For example, the UCPM maintains strategic EU level reserves under the rescEU initiative for rapid emergency deployment, including disaster response and medical countermeasures. ReliefEU, the European Humanitarian Response Capacity, holds worldwide stockpiles of humanitarian supplies. In relation to animal health, the Commission keeps emergency antigen and vaccine banks for transboundary diseases. The European Maritime Safety Agency has stand-by vessels for oil spill responses. The European Central Bank manages a strategic reserve of banknotes. Other examples of an EU wide stockpiling approach in the area of energy are the REPowerEU Roadmap, which sets out a coordinated, secure and gradual phasing out of Russian gas, oil and nuclear energy imports as well as the stockpiling of key components to ensure swift recovery from energy transmission and distribution blackouts.

Among these stockpiling mechanisms at EU level, **rescEU** is one of the largest cross-sectoral and most versatile. It stands at the core of the EU's emergency stockpiling arrangements, in a context where EU-level stockpiling arrangements exist in limited sectors.

Moving forward, the EU should **maintain and scale up its EU strategic reserves**, building on the rescEU model (see annex 2 for more details on consolidating the existing rescEU reserve and possible avenues for the future). The Commission will assess the appropriateness of expanding the strategic reserves to other types of capacities for which gaps are identified.

This analysis should be brought together with other **analyses and gap identifications from sectors not traditionally linked with civil protection**, such as those featuring in the recent European Water Resilience Strategy and in the EU Action Plan on Cable Security. For example, cable repair functional modules could be part of the EU stockpiling strategy to ensure prompt recovery from energy or optical cable disruptions. For certain goods, such as rare earths and permanent magnets, emergency stockpiles can also be a buffer while disrupted supply chains adapt to a new reality.

**Enhanced cooperation among public and private sector** and more innovative solutions like virtual stockpiles and vendor-based inventories will also be considered. For example, the Commission will set up an **EU Critical Raw Materials Centre** in 2026 to jointly purchase raw materials on behalf of interested companies and in cooperation with Member States. Supply chain monitoring and the coordination of strategic stockpiles are flagged as potential additional tasks <sup>(17)</sup>.

The Commission will also continue to ensure that **efficient stockpiling management practices** are followed, specifically suited to the type and nature of the reserve. Efficient stockpiling management practices are not solely about having advanced technology or systems in place, but also about having skilled professionals to design and manage the stockpiles, namely in responding to natural disasters and emergencies. Facilitating training and development of the workforce on this area is a key component of continuous improvement and efficiency.

Efficient stockpiling management includes practices as well for rotating and replenishing goods and using donations of items close to their expiry date. It also involves assessing the possibility of establishing virtual stockpiles and entering into arrangements with private sector operators for the provision of specific goods, in times of crisis. On this point, the Commission will also look at returning goods that can be reused after a first deployment, to maximise the added value of the rescEU assets.

The implementation of this strategy should also take into account the specific stockpiling and supply challenges of products that can only be stored for a short time, such as medical radioisotopes and the source materials for their production.

**Key actions:**

- The Commission will **strengthen rescEU** as the EU-level reserve of response capacities. It will expand to cover more capacities, following consultation with Member States and on the basis of a gaps assessment, which also takes account of the potential for reducing vulnerability through optimisation of resource use and possible substitution (see Annex 2).
- The Commission will **ensure replenishment of rescEU stocks post-deployment**, pursuing a proactive approach to rescEU capacity development.
- The Commission will work towards consolidating existing tools to **channel private sector in-kind assistance as part of rescEU**, both for preparedness and response, as a complement to the EU strategic stockpiles.

#### **4. ENHANCING A ROBUST AND INTEROPERABLE TRANSPORT AND LOGISTICS INFRASTRUCTURE**

Ensuring the availability of essential goods in times of crisis across sectors and borders depends on robust and interoperable transport, logistics and stockpiling infrastructure. This applies throughout the entire stockpiling cycle, from managing supply chains to deployment, and involves all parties – Member States, the Commission, the military and the private sector.

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<sup>(17)</sup> The [Clean Industrial Deal](#): a joint roadmap for competitiveness and decarbonisation, COM(2025)85 final. Any such joint purchasing will be done in accordance with EU competition rules.

Disturbances in logistics chains can severely impact crisis response, both nationally and at EU level.

The EU should enhance cooperation and coordination to create **adaptable policies and regulatory frameworks for cross-border movement in times of crisis** and disruption. This includes simplifying procedures for moving and allocating resources across borders and providing targeted flexibility in transport regulations <sup>(18)</sup>. This approach should be considered in the context of the ongoing and upcoming work on military mobility, where facilitating the seamless EU-wide cross-border transport of military equipment and personnel, notably in times of crisis and disruptions, is crucial for enhancing the EU's preparedness, responsiveness and credible deterrence posture.

Moreover, the EU should ensure that its **stockpiling infrastructure** is resilient, secure and **accessible**. **Sharing information on needs and, where possible, locations** for stockpiles is key to developing the transport network accordingly. Stockpiling can also help to safeguard the **availability of goods needed to maintain resilient critical transport entities** ensure business continuity and maintain vital transport and logistics functions.

**Lastly, interoperable civilian and military transport and logistics systems** are essential to ensure the rapid movement of personnel, equipment, and stocks across the EU during crises and conflicts. Investment in critical transport infrastructure and assets should leverage their **dual-use potential**. Planning of civilian stockpiling locations should be better coordinated with the ongoing work at EU level on **military mobility** and notably the upcoming military mobility package. Any stockpiling risk assessment should **identify and avoid bottlenecks at strategic transport routes and nodes**.

**Key actions:**

- The Commission will facilitate **cooperation between the Network of National Transport Contact Points** for improved coordination in the transport sector **and the EU stockpiling network**.
- Building on existing processes, the Commission, together with relevant agencies and other stakeholders, will work to promote **crisis preparedness** in accordance with the EU Contingency Plan for Transport <sup>(19)</sup>.
- While giving due consideration to relevant security concerns, the Commission and the European External Action Service (EEAS), together with Member States, will strive to better align **stockpiling locations with EU military mobility**. They will also promote investment in transport infrastructure and transport assets with dual-use potential.

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<sup>(18)</sup> For example, during the COVID-19 crisis, the Green Lanes initiative aimed to ensure that border crossings, including checks and screenings for transport workers, took no longer than 15 minutes. In response to Russia's blockade of goods to and from Ukraine through its Black Sea ports, the Commission introduced the Solidarity Lanes Action Plan, assisting Ukraine in exporting and importing goods using alternative logistics routes via rail, road and inland waterways. During the aforementioned crises, the Customs Risk Management System (CRMS2) with the exchange of customs risk related information, enabled faster, more accurate risk assessments by leveraging automation, and intelligence sharing. This allowed customs authorities to quickly identify high-risk shipments while expediting the clearance of critical goods.

<sup>(19)</sup> A contingency plan for transport (COM(2022) 211 final).

## 5. IMPROVING CIVIL-MILITARY COOPERATION

In many crisis scenarios, such as extreme weather events, civilian authorities require military support. Conversely, an all-hazards approach to EU material preparedness involves preparing for large-scale crises and conflicts, where civil-military cooperation is indispensable. Effectively countering and managing the consequences of all forms of attacks, including hybrid threats and armed aggression, depends significantly on civilian capabilities and resources. To develop and maintain its material readiness, logistical capability and resilience, the military relies on the functioning of wider societal systems.

For example, the Medical Countermeasures Strategy stresses that the medical countermeasures needed for civilian use in hospitals or for military use on the front lines are often the same. **Enhancing civil-military cooperation on medical countermeasures** strengthens societal and military readiness for emergencies and boosts production and deployment capacity.

The current Commission proposal for the European Defence Industry Programme (EDIP) contains major proposals on military stockpiling activities, as well as new elements relevant to **civil-military cooperation in material preparedness**. It stresses the need for an EU regime for security of supply for the defence industry, which should enable the EU and Member States to anticipate and address the consequences of supply crises through various actions, such as **adapting civilian products and creating strategic stockpiles**. Once in force, the EDIP would provide a framework for further strengthening cooperation on military stockpiling, for example through financial support for Member States' defence-related stockpiling activities. There is a clear potential for increasing the **interoperability, interchangeability and complementarity of civilian and defence assets, dual-use goods and/or shared stockpiles**, where relevant for both sectors, including for dual-use infrastructure for space-based communications, navigation and observation.

At the same time, there is scope for **enhanced cooperation and coordination between civilian and military stakeholders in material preparedness**, including like-minded partners, especially NATO. Relevant areas for increased cooperation and coordination may include **security of supplies and stocks, energy and water security, medical countermeasures and strategic resource management**.

### Key actions:

- Together with the EEAS, the Commission will facilitate **discussions within the EU stockpiling network to exchange best practices on civil-military cooperation**, in particular to explore how civilian stockpiles might take into account military requirements and needs.
- Together with the EEAS, the Commission will **expand existing staff cooperation with NATO**, in particular through the Structured Dialogue on Resilience, to address material preparedness and stockpiling.

## 6. FOSTERING PUBLIC-PRIVATE COOPERATION

Every day, businesses acquire, produce, stockpile and distribute essential goods and manage critical infrastructure. However, they are increasingly exposed to risks and threats that may impact their supply chains and normal operations. In crisis situations, these disruptions could constitute severe risks for society. Moreover, the private sector has significant expertise relevant to material preparedness, as recognised in the European Economic Security Strategy. Business involvement in all phases of stockpiling - anticipation, management of supply chains, production capacities, purchasing, management of stockpiles and deployment – is key to boost efficiency. At EU level, different frameworks facilitating public-private cooperation in this regard already exist <sup>(20)</sup>, **but a more comprehensive cross-sectoral and EU-wide approach**, will help to coordinate and complement these existing initiatives.

The **public-private Preparedness Task Force** to be set up under the Preparedness Union Strategy will effectively reach out to relevant businesses representatives to build a more agile form of preparedness that can address or anticipate supply chain bottlenecks or risks and support stockpiling and emergency production, when needed. The public-private Preparedness Task Force should give relevant input into the EU stockpiling network.

Cooperation within the public-private Preparedness Task Force can facilitate a **mapping of key European companies involved in material preparedness**, based on clear criteria. Cooperation should also promote the exchange of best practices to support **Member States' and the companies' efforts to become more resilient** to internal and external shocks to stockpiling arrangements, in accordance with competition and single market rules and principles as well as potential future minimum preparedness requirements as envisaged in the Preparedness Union Strategy.

Furthermore, the EU should facilitate cooperation between the EU, Member States and industry in **developing tools for information-sharing** on critical supply chains and stockpiling, building on existing sectoral frameworks, and in full compliance with EU competition law.

Moreover, an EU model for proactive dialogue between the public and private sectors is required to **ensure business continuity during crises**. Developing procedures for providing essential goods in emergencies, for joint stockpiling operations and crisis partnerships with logistics companies could be beneficial. Private sector expertise should be used in promoting the **development of innovative management of stockpiles**, including virtual stockpiles.

Member States have implemented successful **models to incentivise private sector cooperation** in strategic stockpiling to **offset additional costs involved in stockpiling**, for example tax incentives and guarantee schemes. These models should be further explored with the private sector and shared between Member States.

<b>Key actions:</b>
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<sup>(20)</sup> The European Food Security Crisis preparedness and response Mechanism (EFSCM), the NIS2 and Critical Entities Resilience (CER) Directives (Nos 2022/2555 and Directive (EU) 2022/2557 respectively), the UCPM, the Critical Raw Materials Act, the Urban Wastewater Directive, the Critical Medicines Act, the European Water Resilience Strategy and the Medical Countermeasures Strategy. In some areas, mandatory information requests can be directed to private operators in an emergency (e.g. the Chips Act, EDIP, IMERA, Emergency Framework Regulation for Medical Countermeasures).

- The **EU stockpiling network will map and identify best practices, novel solutions and incentives** making it attractive for companies to contribute to increased resilience and the supply of essential goods. It will link this to reflections on strategic autonomy.
- A **dedicated work strand in the public-private Preparedness Task Force** foreseen under the Preparedness Union Strategy will discuss criteria to be used in mapping key European companies involved in producing essential goods and facilitate the sharing of best practices in securing essential goods in crises, covering supply chain security, resource efficiency and circularity, interoperability, innovative stockpiling models, stockpiling management, ensuring rotations of stocks and deploying stockpiles.

## 7. FOSTERING COOPERATION IN EXTERNAL ACTION AND INTERNATIONAL PARTNERSHIPS

In today's interconnected world, ensuring access to essential goods during crises relies on global supply chains. The security and resilience of the EU and its neighbourhood are closely interlinked and constitute a factor of stability. By fostering international partnerships, exchanging good practices and using its external policy tools, the EU can enhance its material preparedness.

The EU should further strengthen **cooperation on material preparedness with neighbouring countries**, building on existing cooperation, such as with UCPM Participating States <sup>(21)</sup>, or with partner countries in the European Community Urgent Radiological Information Exchange (ECURIE) for radiological emergencies <sup>(22)</sup>. The upcoming New Pact for the Mediterranean will offer further opportunities with countries in the Mediterranean basin and the Middle East, and the recently launched EU Strategy for the Black Sea region <sup>(23)</sup> will increase Europe's preparedness by improving transport, energy and digital links. Financing from instruments such as the Neighbourhood, Development and International Cooperation Instrument (NDICI - Global Europe) or the Instrument for Pre-Accession III are essential for creating mutual resilience. In addition, the EU should specifically draw lessons from Ukraine's experience in ensuring supply of essential goods during an armed conflict. Furthermore, the EU should include Ukraine more systematically in its stockpiling efforts, including in European supply chains, given Ukraine's experiences

To mitigate supply chain vulnerabilities and strengthen its strategic autonomy, the EU should strengthen existing strategic international bilateral agreements and alliances, and, where appropriate, further develop or forge tailored, mutually beneficial **partnerships with non-EU**

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<sup>(21)</sup> Albania, Bosnia and Herzegovina, Iceland, Moldova, Montenegro, North Macedonia, Norway, Serbia, Türkiye, and Ukraine.

<sup>(22)</sup> Council Decision of 14 December 1987 on Community arrangements for the early exchange of information in the event of a radiological emergency and the Recommendation 2000/473/Euratom. All EU Member States are party as well as Montenegro, North Macedonia, Norway, Serbia and Switzerland.

<sup>(23)</sup> JOIN(2025) 135 final – The European Union's strategic approach to the Black Sea region.

**countries** in sectors such as energy, health, water, defence and raw materials, while contributing to sustainable development. Mutually beneficial partnerships under **the Global Gateway Strategy** should be leveraged when relevant. Moreover, use should be made of tools such as Free Trade Agreements, Clean Trade and Investment Partnerships, Strategic partnerships on raw materials, or in the future, strategic partnerships on critical medicines and Digital Partnerships.

The EU should further increase **cooperation with international organisations and in multilateral fora**. For instance, the EU's participation in the International Energy Agency (IEA), in particular in the Critical Minerals Security Programme, and the EU partnership with the Japan Organisation for Metals and Energy Security (JOGMEC) for tracking critical raw materials are noteworthy, as is the engagement in Gavi, the Vaccine Alliance in the sector of health, for vaccines stockpiling in the world.

The EU should also use **external economic and cooperation policies to support relevant transport, logistics and digital infrastructure**. Open and secure access to global commons and strategic domains, such as maritime supply routes and undersea cables, is also vital for security of supply. The MEDUSA submarine cable, supported by the European Commission and European Investment Bank Global, will provide high-speed connectivity between the northern and southern shores of the Mediterranean and will be extended to West Africa. In addition, the Trans-Caspian Transport Corridor and the 12 Global Gateway Priority Corridors in Africa are prime examples of the EU's focus on establishing alternative and sustainable transport routes. The proposed India-Middle East-Europe Economic Corridor (IMEC) will have the potential to strengthen connectivity across continents.

In developing its stockpiling strategies, the EU should ensure that such measures do not undermine global food security. In this context, the EU will continue its engagement in international cooperation frameworks such as the G20 Agricultural Market Information System (AMIS) initiative that promotes transparency and coordination in global agri-food markets.

Lastly, the EU should increase synergies between EU internal and external stockpiling efforts, **humanitarian aid and international partnerships**. Current reflections on strategic supply chains could lead to significant efficiency gains in view of the current dramatic funding gaps in the humanitarian sector and could serve as an example for efficiency gains within the EU. **ReliefEU** bridges the gap between the urgent needs in crisis-stricken areas and the resources available from European partners. It contributes to a flexible and responsive system that adapts to both immediate disasters and ongoing humanitarian challenges, ensuring that resources are effectively and efficiently delivered where they are most needed.

**Key actions:**

- The European Union and the EU Member States should **strengthen collaboration with neighbourhood countries, like-minded partner countries and international organisations** on crisis preparedness, such as in the area of health emergencies.
- The Commission will work with the Member States towards the closer coordination on **stockpiles, exploring options for joint procurement and shared warehousing** around the globe, in cooperation and coordination with Regional Disaster Response authorities to facilitate swift and optimal dispatch of humanitarian relief items.
- The Commission will improve **synergies between EU internal and external stockpiling efforts**.

## 8. CONCLUSION AND NEXT STEPS

Strengthening material preparedness and EU strategic stockpiles is a crucial component to enhance preparedness in European societies under increasing crisis risks and threats. The EU's Stockpiling Strategy provides an initial step towards a comprehensive and coordinated approach, supporting Member States with joint EU-level actions when needed.

Material preparedness requires investments. These costs are outweighed by gains in resilience, reduced disruptions, lower recovery expenditure, increased long-term competitiveness and likely lower costs in terms of lives and livelihoods. The principle of preparedness and security by design, a key action of the Preparedness Union Strategy, will play a significant role in ensuring sustainable, long-term financial support for enhanced material preparedness and maintenance of strategic reserves. The Commission will consider the importance of EU's material preparedness and maintenance of EU strategic stockpiles in the proposals for the next multiannual financial framework.

Going forward, the Commission will engage with Member States, the EEAS, the European Parliament and stakeholders to discuss and implement the initial actions set out in this strategy. The EU stockpiling network and Preparedness Task Force workstreams will make it possible to deepen the analysis of gaps and needs, guide the implementation of measures and identify further needs for action. In parallel, the EU Stockpiling Strategy will complement sectoral preparedness initiatives. In 2026, the Commission will take stock of the implementation of this strategy.

Continuous learning, sharing of good practices and innovation will drive a robust, EU-wide material preparedness and stockpiling policy.

By strengthening its material preparedness, the EU can ensure the availability and accessibility of essential goods, thereby safeguarding the uninterrupted functioning of supply chains and vital societal functions and enhancing the well-being and security of European citizens.