

Mexican lithium: from its “nationalization” to the dispute with China

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ABSTRACT

This article analyzes the growing global demand for lithium, emphasizing its use in electric batteries, which account for nearly 90% of consumption. It examines strategic territories, including Bolivia, Argentina, Chile, Mexico, Brazil, and Peru, which collectively hold the world's largest lithium resources. Specifically, the study focuses on Mexico. Given its lithium wealth—ranking tenth globally—former President López Obrador declared lithium a strategic element and national heritage. This measure sought to protect the resource by preventing the granting of mining concessions to private companies, which had previously seized more than half of the national territory. Nevertheless, a Chinese company has sued the Mexican government to exploit Mexico's lithium. The corporation had proposed exporting the raw clay to Asia without domestic processing. Such practices perpetuate permanent primary accumulation, accumulation by dispossession, the primary-export model, and necroeconomics.

KEYWORDS: Mining Law, lithium, strategic mineral, nationalization.



INTRODUCTION

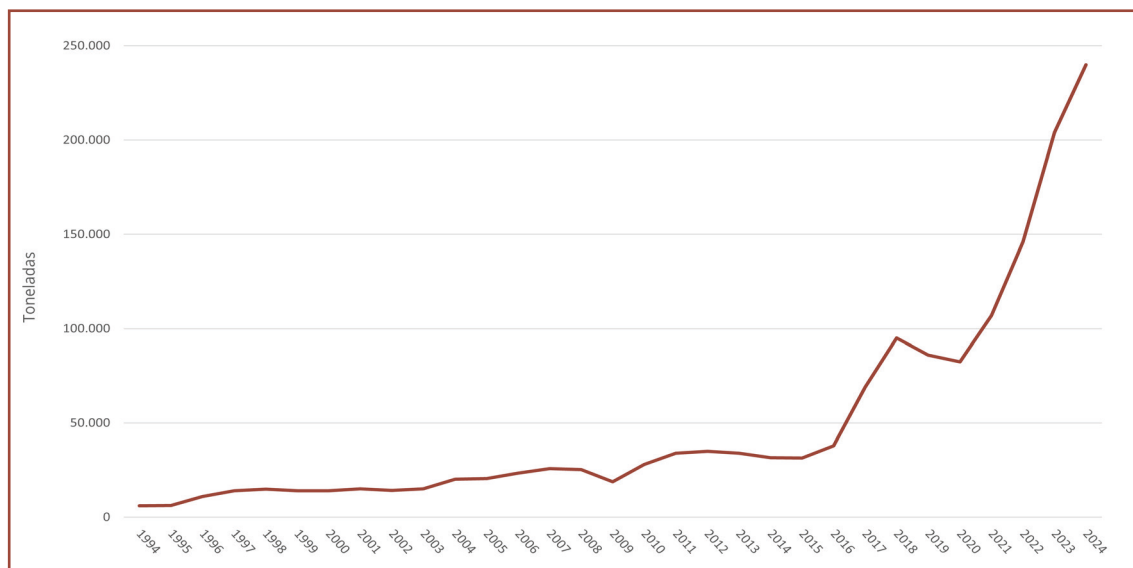
Mexico holds 1.7 million tons of lithium according to the United States Geological Survey (USGS, 2026), ranking tenth among nations with the largest lithium resources globally. Recently, however, the Mexican government announced, through Petróleos Mexicanos, the discovery of 2 million tons of lithium resources in oil brines (Presidencia de la República, February 4, 2026). Combined with ongoing state-led exploration, this finding could alter the country's global standing in the near future. Nevertheless, this lithium wealth is entangled in a series of events analyzed throughout this paper. Crucially, the federal government declared lithium a strategic element and part of national heritage, removing it from the standard mining concession regime that applies to other minerals. This decision aligns with the mining policy of former President Andrés Manuel López Obrador (AMLO), which halted the issuance of new private mining concessions to protect domestic resources. The strategy also unfolded amid skyrocketing global demand for lithium, driven by the energy transition, with emerging technologies such as electric vehicles heavily reliant on this mineral. Consequently, this study maps the path the Mexican government has taken to protect a resource considered strategic domestically and classified as a critical mineral by the United States. This path includes the formal "nationalization" of lithium, the creation of the state-run entity Litio para México (Lithium for Mexico), and the establishment of a mining reserve zone.

However, this process involves an ongoing conflict. During the AMLO administration, the Chinese firm Ganfeng Lithium partnered with and eventually acquired the capital stock of the British company Bacanora Lithium. Bacanora held concessions in the northern state of Sonora, granting access to what the company described as one of the world's largest clay-based lithium deposits. Following Mexico's Mining Law reform, which protects lithium from private exploitation, the government canceled these concessions. In response, Ganfeng Lithium initiated international arbitration against Mexico before the World Bank Group's International Center for Settlement of Investment Disputes. This unresolved lawsuit is further complicated by the broader critical minerals war waged by the United States against China. It also intersects with the upcoming review of the United States-Mexico-Canada Agreement (USMCA), in which the US could seek to expand its access to minerals through a dedicated critical minerals chapter. Mexico and its lithium sit directly within this geopolitical dispute, which has evolved beyond a mere trade war. This concise paper draws on extensive fieldwork across multiple mining regions in

Mexico, with a focus on clay-lithium deposit territories in the northern state of Sonora¹. The empirical data are paired with documentary research from the Mexican Geological Survey and the U.S. Geological Survey, as well as direct analysis of the 2022 and 2023 mining law reforms. The fieldwork and documentary analysis are theoretically grounded in the concepts of permanent primary accumulation (Luxemburg, 1913) and accumulation by dispossession (Harvey, 2004). The study also employs the primary-export model framework (Prebisch, 1949; Gunder Frank, 1966) and the lens of necroeconomics, developed from the concept of necropolitics (Mbembe, 2011). Within this necroeconomic framework, the system must destroy or extract human and non-human entities, including minerals, to sustain itself.

GENERAL OVERVIEW: LITHIUM IN THE WORLD

Graph 1 – Global Lithium Production Trend (1994–2024) (tonne)



Source: USGS, 1994-2025.

Global lithium production has experienced continuous growth. According to the United States Geological Survey (USGS), world lithium production stood at 6,100 tons in 1994. By 2024, this figure had risen to 240,000 tons (see Graph 1)², representing an increase of nearly 4,000% over three decades. The year 2017 marked a turning point for global extraction. From that year onward, pro-

¹ See the documentary report: Núñez Rodríguez, Violeta, and Ernesto Ledesma Arronte (Direction, script, research, and interviews). "México: litio al descubierto" [Mexico: Lithium Uncovered], Rompeviento TV-Universidad Autónoma Metropolitana-Xochimilco, March 17, 2022.

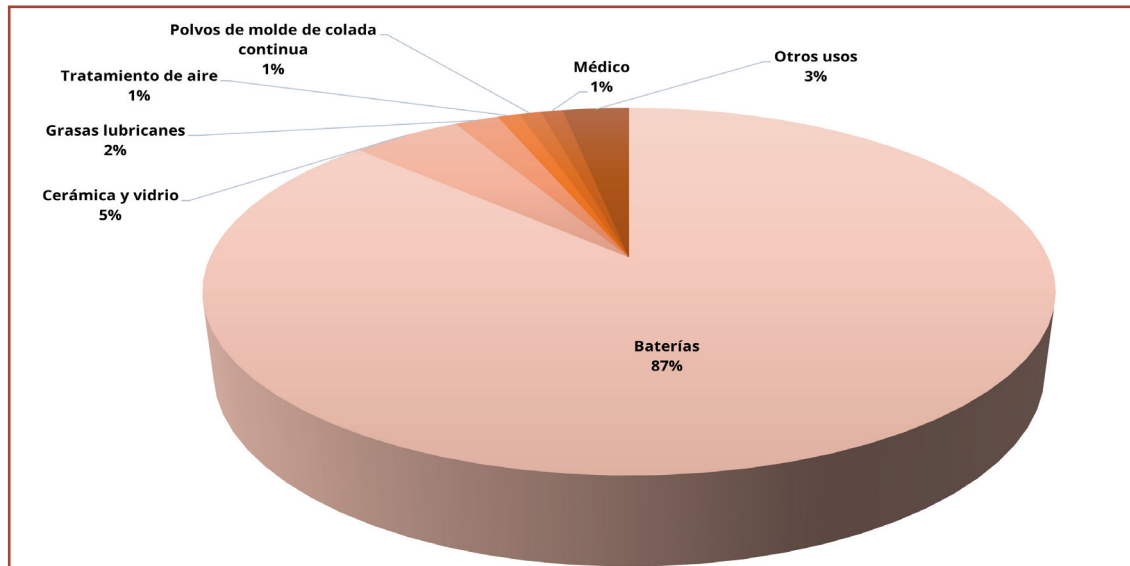
² USGS data do not include production figures for the United States.

duction has climbed steadily, with the sole exception of the COVID-19 pandemic period (Graph 1). This significant increase in extraction raises questions about the underlying drivers of the global market for this element.

The surge in demand is driven by the global battery sector, which consumes most of the extracted lithium. According to 2025 USGS data, 87% of lithium is used in battery manufacturing. Ceramics and glass follow at 5%, while lubricating greases account for 2% (see Graph 2). Regarding this dominant market destination, the USGS notes that: “Lithium consumption for batteries increased significantly because of the use of rechargeable lithium batteries in the growing market for electric vehicles (EVs), portable electronic devices, power tools, and grid-level energy storage applications” (USGS, 2025).

This contemporary distribution contrasts sharply with data from the previous decade. In 2015, the USGS reported that batteries accounted for only 31% of lithium consumption, while ceramics and glass led the global market with a 35% share. Consequently, within a decade, global utilization patterns shifted drastically, with battery use rising from a third of total production to nearly 90% (see Graph 2).

Graph 2 – Global Lithium Market (2025)



Source: USGS, 2025.

In 2024, three countries—Australia, Chile, and China—accounted for more than 74% of global lithium production (see Table 1). Although these nations do not hold the largest reserves, they remain the leading producers. Australia and Chile have dominated global output for over a decade. In 2014, their combined production accounted for more than 78% of the global total, whereas China produced only 7% (USGS, 2016).

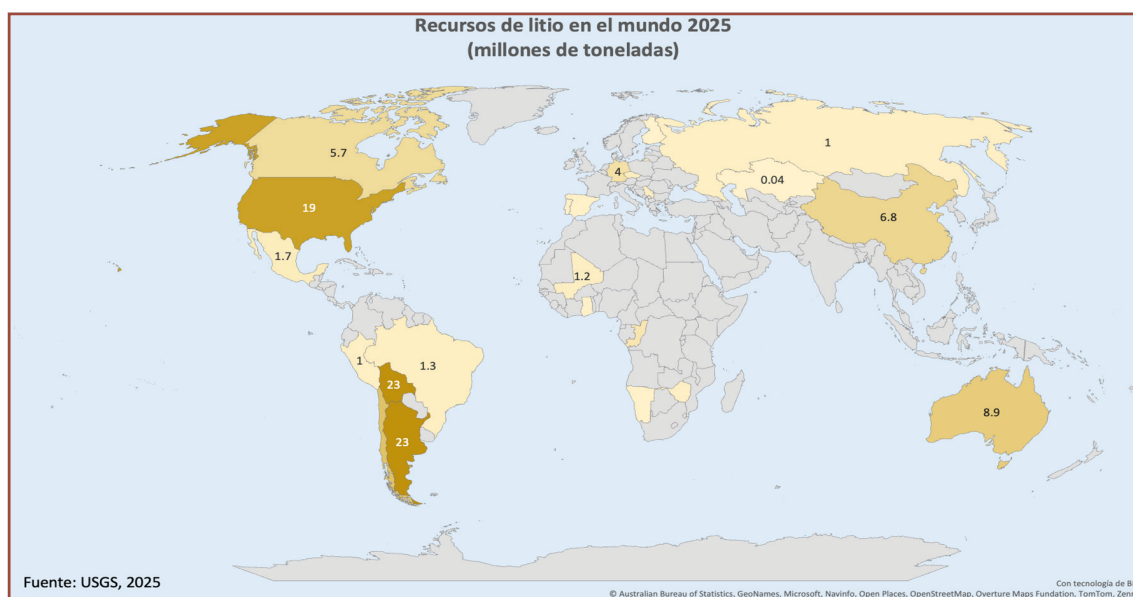
Table 1 – World lithium production, 2024 (Tons)

Country	Tons	Percentage
Australia	88,000	36.7
Chile	49,000	20.4
China	41,000	17.1
Zimbabwe	22,000	9.2
Argentina	18,000	7.5
Brazil	10,000	4.2
Canada	4,300	1.8
Namibia	2,700	1.1
Portugal	380	0.2
Worldwide total	240,000	100

Source: USGS, 2025. Note: The U.S. is not included.

Beyond current production output, the geopolitical landscape depends heavily on the territorial distribution of global reserves and resources. Bolivia and Argentina hold the largest identified resources worldwide, each with 23 million tons (see Map 1). According to the USGS, the United States follows with 19 million tons, while Chile ranks fourth with 11 million tons. Australia, China, and Canada rank fifth, sixth, and eighth, with 8.9, 6.8, and 5.7 million tons, respectively. Notably, Mexico ranks tenth globally, with a preliminary estimate of 1.7 million tons of identified lithium resources.

Map 1 – World lithium resources 2025 (million tons)



Source: USGS, 2025.

Latin America stands out within this spatial distribution. Together with Bolivia, Argentina, and Chile—commonly referred to as the “Lithium Triangle”—Mexico, Brazil, and Peru account for more than half of the planet’s identified lithium resources (see Map 1).

In the specific case of Mexico, this global positioning could be altered by recent developments. These factors include an international lawsuit initiated by a Chinese corporation seeking to reclaim concessions to what it describes as one of the world’s largest clay-based lithium deposits. Additionally, ongoing state-led exploration by *Petróleos Mexicanos* has revealed new lithium resources in oil brines. Finally, ongoing legal challenges continue to question the federal declaration that Mexican lithium is national heritage. These inter-related dynamics are examined in the following sections.

THE CASE OF MEXICAN LITHIUM

Is Mexico’s Lithium “Chinese Property”?

During his administration, former President López Obrador halted the issuance of new mining concessions because private domestic and foreign corporations already controlled more than half of the national territory. This widespread territorial control underscores the dynamics of permanent primary accumulation (Luxemburg, 1913) and accumulation by dispossession (Harvey, 2004). Despite this explicit public policy, the Chinese corporation Ganfeng Lithium—which self-identifies as the “world’s top producer of lithium metals and the second-largest producer of lithium compounds” (Ganfeng Lithium, 2023)—acquired a portion of the capital stock of the British firm Bacanora Lithium. Bacanora already held mining concessions in the municipality of Bacadéhuachi in northern Sonora. Chinese interest focused on the extensive clay-based lithium deposits within those British concessions. Ganfeng Lithium stated that “the Sonora Lithium Clay Project, located in Sonora, Mexico, is currently one of the largest lithium resource projects in the world” (Ganfeng Lithium, 2020).

Public corporate data from Ganfeng Lithium estimated the deposit’s wealth at 8.8 million tons of lithium carbonate equivalent. Because this figure reflects fully processed lithium, it underscores the Sonora deposit’s immense commercial potential. Table 2 details the corporate estimates for both raw and processed mineral content.

The Chinese enterprise planned to extract the raw clay and ship it directly to Asia for industrial processing (Núñez, 2022). Consequently, Mexico would capture only the value generated in the initial extraction phase. This dynamic

risks perpetuating the classic primary-export model (Prebisch, 1949; Gunder Frank, 1966), now applied to a critical and strategic mineral amid the global energy transition and the broader critical minerals war.

Image 1 – Ganfeng Lithium: Global Lithium Projects Portfolio



Fuente: Ganfeng Lithium, 2023.

Table 2 – Sonora Lithium Clay Project: Mineral Resource Estimates (2016)

Category	Tonnage	LCE (tons)	Average Grade (ppm)
Mesurado	103,000,000	1,910,000	3,480
Indicado	188,000,000	3,130,000	3,120
Inferido	268,000,000	3,779,000	2,650
Total	559,000,000	8,819,000	–

Although a foreign corporation acquired control of the concession holder for this massive clay-lithium deposit, the Mexican government had already moved to declare lithium a strategic resource and part of the national heritage.

Lithium as Heritage of the Mexican Nation

In late 2021, former President López Obrador introduced a constitutional reform bill to strengthen the Federal Electricity Commission (Comisión Federal de Electricidad), ensure fair utility rates, and protect domestic

lithium. The president argued that lithium exploitation belonged exclusively to the nation:

The lithium in the subsoil—all the lithium mineral in the subsoil of our homeland, of our territory—belongs to the Mexican people, to the Nation...

Modern and technological industries cannot develop without lithium. Mexico has sufficient reserves, which allows us, especially with future generations in mind, to preserve this resource for domestic development. That is why we decided that lithium belongs to the nation, to all Mexicans (López Obrador, October 1, 2021).

The bill sought to amend Articles 25, 27, and 28 of the Mexican Constitution. However, it failed to secure the required two-thirds supermajority in the Chamber of Deputies, facing united opposition from a coalition of centrist and right-wing parties (PAN, PRI, and PRD), which cast 223 votes against it. In response, the president implemented a legislative alternative known as “Plan B.” This strategy bypassed constitutional amendments by modifying the standard *Mining Law*, which required only a simple majority (50% plus one vote).

Approved in April 2022, this legislative reform retained the core national protection mechanisms of the original constitutional proposal:

- Lithium was declared an asset of public utility.
- The granting of concessions, licenses, contracts, permits, or authorizations for lithium exploration and processing was explicitly prohibited.
- Areas containing lithium deposits were designated as mining reserve zones.
- Lithium was legally recognized as national heritage.
- Exploration, exploitation, and processing were reserved exclusively for the Mexican people.
- The state assumed direct administration and control over lithium value chains.
- The state committed to protecting public health, the environment, and the rights of Indigenous and Afro-Mexican communities during lithium activities.
- The law mandated the creation of a decentralized public body to manage all lithium operations (López Obrador, April 20, 2022).

This state reform materialized through the creation of a specialized agency, called “Litio para México”, which is examined below.

The Creation of Litio para México and the Mining Reserve

Following the statutory declaration of lithium as national heritage, the federal government established a decentralized public entity, Litio para México

(Lithium for Mexico). According to its founding decree, published in the Official Gazette of the Federation (*Diario Oficial de la Federación*), the agency's objective is "the exploration, exploitation, processing, and utilization of lithium located within national territory, as well as the administration and control of the mineral's economic value chains" (López Obrador, August 23, 2022).

According to Article 6 of *Decreto por el que se crea el organismo público descentralizado denominado Litio para México*, the mandate of the decentralized public agency must:

- Develop strategic programs for the exploration, exploitation, processing, and utilization of lithium.
- Establish strategic programs targeted at lithium economic value chains.
- Design and execute engineering projects, research initiatives, and geological activities related to lithium exploration and processing.
- Research and develop technology for the industrial utilization of lithium.
- Locate and identify geological areas containing probable lithium reserves.
- Generate basic geological data regarding national lithium resources.
- Promote the sustainable utilization of lithium to support the energy transition.
- Administer and control activities linked to the production, transformation, and distribution of lithium derivatives, with the authority to form partnerships with public and private institutions. (López Obrador, August 23, 2022).

Consequently, the 2022 Mining Law reform was implemented through *Litio para México*. This state entity is the primary body controlling this strategic resource. Currently, it operates in coordination with *Petróleos Mexicanos* (Pemex) under the administration of President Claudia Sheinbaum, resulting in notable resource discoveries. Concurrently with the agency's creation, the federal government established a mining reserve zone covering 234,855 hectares in Sonora. This reserve spans the municipalities of Arivechi, Bacadéhuachi, Huásabas, Divisadero, Granados, Sahuaripa, and Nácori Chico (Gobierno de México, February 18, 2023). This territory contains the country's most significant clay-based lithium deposits, as previously documented by the Chinese corporation Ganfeng Lithium.

Lithium in Oil Brines

During the presidential transition in September 2024, state-owned Pemex proposed creating a subsidiary, "PEMEX Litio," as part of its strategic 2024–

2030 exploration and production work plan (Pemex, September 2024). The proposal envisioned “PEMEX Litio” as an internal branch responsible for the exploration, exploitation, and value chain management of domestic lithium (see Image 2). This setup led to a clear duplication of functions with the pre-existing Litio para México, created by former president López Obrador. Despite this structural overlap, President Sheinbaum had already incorporated lithium into her broader regional agenda. In June 2024, she outlined Plan Sonora, a project designed to foster a complete electromobility value chain, from raw lithium extraction to domestic electric-vehicle manufacturing (Sheinbaum, June 10, 2024).

Image 2 – Pemex litio



Source: Pemex, September 2024.

By November 2024, Pemex had begun evaluating lithium potential in its active oilfield brines. This focus incorporated an entirely different geographic territory than the original clay-based northern mining reserve. The policy was solidified with the launch of Pemex’s *Strategic Plan 2025–2030*, which aimed to ensure the company’s short-, medium-, and long-term economic viability. The plan listed lithium extraction from oil brines across five identified fields as a core element of its energy innovation and sustainable production pillar (Gobierno de México, August 5, 2025). A broader version of the plan noted that resource evaluations slated for 2030 would encompass wind, geothermal, biofuels, tidal and wave energy, as well as geological hydrogen and strategic minerals such as lithium. Initial state prospecting currently targets 15 fields in the Southern Region, 11 fields in the Northern

Region, and Marine Regions feeding into the Dos Bocas Maritime Terminal (TMDB) (Gobierno de México, August 5, 2025).

Furthermore, as part of the plans at the start of this six-year presidential term, it has been proposed to open lithium to private capital. This mechanism is legally permissible under the partnership clauses of the original founding decree of Litio para México (Gobierno de México, August 23, 2022). Specifically, the *National Strategy for the Hydrocarbons and Natural Gas Sector* outlined mixed investment projects. Developed in conjunction with the Federal Electricity Commission, these projects utilize a combination of social, state, and private property models to strengthen Pemex during this political cycle (Pemex, November 13, 2024).

As a direct result of prospecting oilfield brines, the director of Pemex announced: “We have lithium in oil brines. There, we have more than 2 million tons of identified resource across five fields in the southern region, and in 2026 we will begin operations at a demonstration plant” (Presidencia de la República, 4 de febrero de 2026). This discovery adds 2 million tons of identified resources to the 1.7 million tons previously registered by the United States Geological Survey (USGS, 2026).

Domestically, lithium and other critical minerals are treated as pillars of Plan México—the primary economic project of the current federal administration. This resource wealth also intersects with the ongoing review of the United States-Mexico-Canada Agreement (USMCA) and the “war on critical minerals” waged by the United States against China. The reality and implications of Plan México are analyzed in the following section.

The “mining plan” within Plan México: lithium and other minerals

Plan México constitutes the central economic project of the current federal administration. The strategy aims to elevate the Mexican economy from the twelfth to the tenth place globally through industrialization, import substitution (targeting Asian markets, specifically China), and strengthening regional trade through nearshoring with the United States. To achieve this objective, the initial blueprint, titled “Plan México: Estrategia Nacional de Industrialización y Prosperidad Compartida” (Gobierno de México, 2025), outlined an extensive “mining plan.” This plan proposed reforming the *mining law* framework that had already undergone deep structural modifications in 2023. This historic reform had overhauled 90% of the law’s articles, institutionalizing the right to prior consultation and free, prior, and informed consent for In-

indigenous peoples affected by mining. It also mandated Environmental and Social Impact Assessments and prohibited mining activities within Protected Natural Areas, water-scarce territories, and marine environments. These regulations dismantled a legislative framework that had persisted for over thirty years since its enactment under President Carlos Salinas de Gortari as part of the regulatory laws governing the neoliberal reform of constitutional Article 27. Conversely, the new Plan México indicated that private exploration would once again be permitted. This shift implies reactivating the issuance of mining concessions. In Mexican legislation, only a single unified type of concession exists, encompassing both the exploration and exploitation phases. As noted previously, the mining policy under the López Obrador administration intentionally halted the issuance of new concession titles because private interests already held more than half of the national territory. That prior corporate expansion had triggered widespread processes of dispossession across Indigenous territories, agrarian communities, as well as social, environmental, and cultural impacts. Furthermore, Plan México explicitly incorporates open-pit mining, despite extensive documentation regarding its severe environmental degradation through the use of explosives, cyanide, and other toxic compounds. This corporate push includes a projected investment announcement by Grupo México as part of the Plan Sonora. Grupo México, the country's largest private mining conglomerate, holds a controversial record. It was responsible for the death of 65 miners at the Pasta de Conchos mine in Coahuila (2006) and the toxic spill into the Sonora and Bacanuchi rivers (2014), which remains the worst environmental disaster in the history of the Mexican mining industry.

The industrial strategy specifically targets the development of five key minerals: graphite, zinc, barite, manganese, and tungsten (Gobierno de México, 2025). This planning, however, bypasses the conflict-ridden territorial realities that arise from resource appropriation. For instance, the extraction of barite in the southeastern state of Chiapas has resulted in the targeted assassination of entire families opposing the projects. This violence aligns directly with the theoretical framework of necroeconomics, where capital accumulation actively relies on lethal force against dissenting populations (Núñez, 2025).

Lithium also occupied a central position within the initial proposals of Plan México. Specifically, the document advocated for "developing mixed investment schemes for lithium" (Gobierno de México, 2025). Notably, the text omitted the fact that lithium had been legally designated as national heritage

and a strategic element reserved exclusively for state control since April 2022 (López Obrador, April 20, 2022).

In sum, Plan México could drive a significant expansion of extractive mining across the country, widening the scope of accumulation by dispossession (Harvey, 2004). It poses a direct challenge to the statutory protections established by the 2023 mining reform, which the industry views as a barrier because they shield vulnerable territories and strategic minerals from market forces. Furthermore, this corporate pressure threatens to extend into deep-sea environments, which hold vast mineral wealth. Mexico was originally a pioneer in granting marine mining concessions—a practice halted by the 2023 legislative reforms. However, this legal battle remains unresolved: a US corporation recently sued Mexico under investor-state dispute settlement mechanisms over a marine mining project in Baja California Sur and won an initial ruling, though the Mexican government has filed a countersuit. Looking at marine beds beyond national jurisdictions, these dynamics reflect the colonization of spaces previously unincorporated into global capital circuits, pointing toward a contemporary iteration of primitive accumulation.

This extractive drive is not limited to Mexico's northern neighbor and primary trading partner, the United States. The Chinese corporation Ganfeng Lithium continues its legal offensive to secure access to Sonora's massive lithium wealth, an ongoing conflict examined in the closing section.

CONCLUDING REMARKS: THE INTERNATIONAL LAWSUIT AGAINST MEXICO OVER LITHIUM

As demonstrated throughout this analysis, the strategic framework surrounding lithium under the current administration has expanded to include *Petróleos Mexicanos*, which actively conducts prospecting within oilfield brines. Furthermore, lithium is considered a foundational element in Plan México. Despite these domestic developments, official policy blueprints remain silent regarding the international lawsuit filed against the Mexican government in June 2024 by Bacanora Lithium Limited (British), Sonora Lithium Ltd (British), and Ganfeng International Trading (Shanghai) Co. Ltd. (Chinese) before the International Center for Settlement of Investment Disputes (CIADI) of the World Bank Group (CIADI, 2026). The core of this legal controversy involves the lithium mining concessions located in the northern municipality of Bacadéhuachi, Sonora.

In the arbitration proceedings, the claimant companies argued that the Bilateral Investment Treaties (BITs) signed by Mexico with the United King-

dom and Northern Ireland and with the People's Republic of China protect foreign investors against "expropriation" measures, discriminatory treatment, and violations of investment rights.

Specifically, the Chinese corporation stated that the CIADI arbitration was initiated after the General Directorate of Mines—an agency of the Ministry of Economy—notified its Mexican subsidiaries in August 2023 that nine mining concessions permitting operations at the Sonora Lithium Clay Project had been canceled. In response, Ganfeng filed an administrative review request with the Department of Economy. However, in November 2023, the Ministry upheld the cancellation of the concessions. The Mexican subsidiaries subsequently filed nullity lawsuits before the Federal Court of Administrative Justice in January 2024, culminating a few months later in the formal international claim. As announced by Ganfeng Lithium:

In May 2024, Shanghai Ganfeng, Bacanora, and Sonora, controlled subsidiaries of the Company, initiated an arbitration procedure before CIADI regarding a series of laws, regulations, and related measures issued by Mexico that de facto nationalized lithium resources, affected the operation of the Project, and resulted in the cancellation of the mining concessions held by the Mexican subsidiaries (Ganfeng Lithium Group Co., 2024).

The specific corporate demands against the Mexican state were summarized as follows:

Arbitration Request: Request Mexico to compensate the claimants for damages arising from Mexico's violations of the China-Mexico BIT and the UK-Mexico BIT, including interest, and to pay all relevant arbitration expenses and fees (Ganfeng Lithium Group Co., 2024).

In sum, the Chinese corporation Ganfeng Lithium is directly challenging the state's sovereign decisions to declare lithium a strategic element, prohibit private concessions, classify the mineral as national heritage, and reserve all extraction activities for Litio para México. This challenge targets "concessions" that the company had previously acquired through its purchase of Bacanora Lithium's capital stock. That is to say, Ganfeng never received a concession title directly from the Mexican state; instead, it partnered with a company that had been granted these titles during presidential terms before the AMLO administration, eventually purchasing 100% of Bacanora's capital stock between 2021 and 2022 (Bacanora Lithium, December 31, 2022). Nevertheless, as previously noted, the Mexican government's stance on mining policy was already in the public domain both nationally and internationally. This position had been a core component of its Proyecto de Nación since the

electoral campaign (Morena, 2017), reflecting the former president's explicit intent to protect national resources. Even throughout 2021, the administration repeatedly announced that lithium would be legally reserved for exclusive state control; yet, it was not until January 2022 that Ganfeng Lithium's acquisition of 100% of Bacanora Lithium took effect. Consequently, the Mexican defense must argue that the 2022 Mining Law reforms—cited by the Chinese firm in the arbitration—unfolded within a publicly announced and widely diffused mining policy framework established well before the foreign corporation chose to acquire the stock of a pre-existing concession holder. While the legal outcome remains uncertain in this World Bank-dependent tribunal, a parallel geopolitical variable cannot be overlooked: the United States' intensive demand for critical minerals from foreign nations, particularly those of its primary trading partner. Within the ongoing review process of the United States-Mexico-Canada Agreement (USMCA), proposals have emerged to establish a dedicated critical minerals chapter, with lithium occupying a central position in US industrial supply chains. Thus, this geopolitical conflict will not conclude with a CIADI ruling. The structural battle for Mexican lithium remains completely unresolved, and far from won. ●

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