

Nano One Materials and Rio Tinto Forge a Western Supply Chain Blueprint for LFP Batteries

written by Tracy Hughes | October 8, 2025

This alignment of upstream and downstream capabilities represents an emerging model for Western critical mineral strategy: integrate the mine, the process, and the end-use technology into a single framework that ensures both resilience and scalability. Rio Tinto's presence adds industrial weight to this vision. The miner has declared ambitions to grow its lithium output to over 200,000 tonnes per year of lithium carbonate equivalent by 2028, positioning itself as a key player in the hemisphere's lithium supply. By coupling that production capacity with Nano One's process innovation, both parties stand to benefit from a shared market narrative centered on secure, sustainable LFP supply.

A Little-Known British Metals Plant Scores a Hail Mary with USA Rare Earth

written by Tracy Hughes | October 8, 2025

For USA Rare Earth (USAR), acquiring LCM is a "bold and

transformative leap” in its quest to build a fully domestic rare earth pipeline. The Texas-based company controls the Round Top deposit in Texas – a rich source of critical minerals – and is constructing a 311,000 sq. ft. magnet plant in Stillwater, Oklahoma. What it lacked was precisely LCM’s specialty: making rare earth metal and alloy feedstock for those magnets. “Midstream metal making is the linchpin of the global supply chain, and LCM is the only proven ex-China producer at scale,” said USAR Chairman Michael Blitzer.

Critical Minerals Report (09.26.2025): The Pentagon Doubles Down on Antimony as Neo’s Magnet Plant Opens in Europe

written by Tracy Hughes | October 8, 2025

Taken together, this week’s developments underscore how critical minerals are increasingly treated as strategic assets rather than mere commodities. Western governments are crafting industrial policies – from equity stakes and export quotas to price floors and subsidies – in a bid to secure reliable supplies of the materials that power the modern economy. Corporations are responding with cross-border investments in mines, processing plants, and recycling facilities. And markets have begun to price in a new reality: that control of “the new oil” – whether lithium, rare earths, cobalt, or uranium – could

define economic and national security advantages in the years ahead. The critical minerals race is clearly accelerating on multiple fronts, with last week's events showing no sign of this momentum abating. The coming months will test how effectively these nascent partnerships and policies can reduce longstanding dependencies – and whether they can do so fast enough to meet the surging demand of the green and digital revolutions.

From Survival to Strength – How Amanda Lacaze Transformed Lynas Rare Earths

written by Tracy Hughes | October 8, 2025

A decade ago, few outside of niche mining circles had heard of Lynas. Today, with Lacaze at the helm, Lynas Rare Earths is the Western champion in a sector that China once dominated unchallenged. The rise of the Lynas empire – from the red dirt of Mt Weld to processing plants on two continents – underscores a broader shift: industrial supply chains are no longer taken for granted, and those who secure them wield significant influence.

Check Out Our Latest Shorts: Top 5 Wins for Listed Companies

written by Tracy Hughes | October 8, 2025

Short-form videos have evolved from social media curiosities into strategic communication and growth tools. They allow public companies to broadcast their story in creative ways, strengthen brand equity, and even drive revenue – all while aligning with how modern consumers prefer to consume content. The takeaway for any business in the public markets is clear: leveraging YouTube Shorts, Instagram Reels, and their kin is no longer optional if you want to capture the next generation of customers (and shareholders). As attention spans shrink and content feeds speed up, those brief, vertical videos may hold the key to long-term success. In the world of capital markets, savvy companies are realizing that sometimes, big gains come from thinking small – one short clip at a time.

**Ucore Rare Metals Advances as
Pentagon-Backed Refinery
Reshapes U.S.**

Rare Earth Strategy

written by Tracy Hughes | October 8, 2025

The backdrop to Ucore's progress is a shifting geopolitical landscape. The U.S., Canada, Europe, and Australia have all declared rare earths essential to their energy and defense futures. China, meanwhile, has demonstrated a willingness to wield its dominance as a strategic tool. In this context, Ucore's Louisiana plant is not just a commercial venture but part of a broader industrial policy.

Critical Minerals Report (09.19.2025): Congo's Cobalt Ban Extension, Nvidia's \$5B Intel Stake, and Qatar's \$500M Bet on Ivanhoe Copper

written by Tracy Hughes | October 8, 2025

The past week's developments underscore both the urgency and complexity of securing critical minerals. Prices for key materials like cobalt are rebounding on supply squeezes, and companies and countries alike are racing to invest. Western governments are deploying an array of tools – from Pentagon-funded refineries and strategic stockpiles to international partnerships and even threats of sanctions – to counter China's longstanding head start. China, for its part, is selectively

tightening exports while still boldly buying up assets abroad, sustaining its edge.

CEMI and the Critical Minerals Institute Sign Partnership to Strengthen Canada's Role in the Global Critical Minerals Economy

written by Tracy Hughes | October 8, 2025

The Centre for Excellence in Mining Innovation (CEMI), which manages the Mining Innovation Commercialization Accelerator (MICA) Network, has signed an Associate Partnership Agreement with the Critical Minerals Institute (CMI), a global hub for critical minerals, to strengthen Canada's leadership in mining innovation and the global critical minerals economy.

**Critical Minerals Report
(09.14.2025): Tariffs,**

Courtroom Greenlights, and a \$70B Copper Merger–Policy-Driven Upheaval in Critical Minerals

written by Tracy Hughes | October 8, 2025

Policy shifts in Washington, the introduction of a 54-element USGS Draft List, and the EU’s pro-nuclear stance are reshaping the critical minerals market landscape. Teck Resources (TSX: TECK.B | NYSE: TECK) and Anglo American (LSE: AAL) have joined forces to establish a formidable US\$70 billion copper entity at a time when LME prices soar beyond \$10,000 per metric ton. Delve into this week’s Critical Minerals Report for an in-depth analysis of the intricate interplay between politics, pricing dynamics, and strategic maneuvers unfolding in Q4 2025.

The One Metal America Still Dominates – For Now

written by Tracy Hughes | October 8, 2025

For a change, the U.S. isn’t at the mercy of others for a critical mineral – they are at its mercy. Beryllium is an example of American strength in resource security, a “national champion” situation that should be a model for other critical metals. But that model only works if it’s maintained. Unfortunately, as Ecclestone observes, the U.S. has “become

sleepy with regard to its dominance" in beryllium.