

CMI Director Alastair Neill Reveals the Top Critical Minerals at PDAC 2025

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March 11, 2025 – Speaking during PDAC 2025 with InvestorNews.com host Tracy Hughes, Alastair Neill, Director at the [Critical Minerals Institute](#) (CMI), offered key insights on the geopolitical and economic factors influencing the critical minerals market. Addressing recent initiatives by the Trump administration, Neill highlighted substantial challenges associated with mineral extraction in Greenland and Ukraine. He cautioned investors about the complexities in Ukraine, noting, “A lot of the potential resources are in the south and east, which is Russian-held territory presently,” posing considerable risk for Western investment.

Neill emphasized the strategic importance of developing fully integrated supply chains, particularly for magnets essential to the defense and technology sectors. “The target section is magnets,” Neill explained, advocating for investments beyond extraction into downstream sectors such as metal, alloy, magnet production, and final component manufacturing. He specifically pointed to Canada’s northern Quebec region as an area with significant untapped potential, contingent on strategic infrastructure development.

Neill underscored the urgency of diversifying critical mineral supply chains away from geopolitical vulnerabilities. He singled out gallium and germanium, essential components for semiconductors and defense technology, particularly due to recent Chinese export restrictions. Reinforcing his earlier foresight about gallium, Neill reiterated, “Those are very basic

in semiconductor construction, and there are limited options outside of China,” thus emphasizing the critical need for North American investors to prioritize secure and diversified mineral supply strategies.

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