Critical Minerals Report 08.15.2025 – The Rise of Critical Minerals as the Currency of Geopolitical Power

written by Tracy Hughes | August 15, 2025

"Critical minerals are no longer a niche industrial concern – they're the currency of geopolitical power, shaping supply chains from chips to clean energy." – Tracy Hughes, Executive Director, Critical Minerals Institute (CMI)

This past week the global landscape for critical minerals and rare earths deepened in strategic urgency—driven by surging demand for chips, batteries, clean energy, and geopolitical resilience. What was once a specialized industrial domain has become central to national power and investor calculus. From government-industry alliances to market infrastructure initiatives, the week's developments reveal a decisive acceleration in securing supply chains and expanding manufacturing footholds—while raising questions about policy coherence, international competition, and the pace of execution.

The Trump administration is reportedly in discussions with Intel Corporation (NASDAQ: INTC) for the U.S. government to take an ownership stake in the beleaguered chipmaker, according to Bloomberg News. This follows a meeting between President Trump and Intel's CEO Lip-Bu Tan and arrives days after sharp criticism of Tan's investments in Chinese-connected tech firms. The move sparked a 7 to 8% jump in Intel's shares, as investors greeted the prospect of federal backing to revive domestic chip fabrication and support its delayed, multibillion-dollar Ohio fab project.

Mirroring this, the U.S. Department of Energy unveiled a sweeping funding push—totaling close to US $1 billion—to shore up the American critical minerals and materials supply chain. The package covers mining, processing and manufacturing technologies—from rare earths and lithium to semiconductors and battery recycling—aiming to pivot domestic capacity back towards supply-secure production and reduce reliance on foreign sources.

In parallel, the DOE selected 11 advanced reactor firms—including Oklo Inc., Radiant Nuclear, Last Energy and others—for a Nuclear Reactor Pilot Program. The goal: bring at least three modular reactors to criticality by mid-2026. Equinix, Inc. (EQIX) immediately responded with long-term purchasing agreements: 500 MW of fission energy from Oklo's next-generation reactors, preorders for 20 Radiant microreactors, and future PPAs with ULC-Energy and Stellaria in Europe—exceeding 1 GW of nuclear power to sustain its data centers in an era of AI-driven energy demand.

India too seized its critical moment. A proposed national minerals exchange—modeled after London and Shanghai—would introduce transparent, electronic price discovery across the minerals and metals sector, including critical minerals. The effort would aim to reduce opacity and strengthen domestic pricing mechanisms. Meanwhile, India's IREL (Indian Rare Earths Limited) seeks partnerships with Japan and South Korea in rare earth magnet production: offering domestic neodymium oxide in exchange for technology and finished magnet supply—an explicit step to counterbalance China's processing dominance.

China responded by tightening scrutiny on foreign firms stockpiling rare earths—reasserting export license control and reinforcing its strategic leverage over critical resources.

On the ground, satellite imagery revealed a surge of unregulated

rare earth mining in rebel-held Shan State, Myanmar—feeding supply chains into China and threatening both environmental degradation and human rights. The situation underscores how fragility and opacity in mineral supply can reverberate through global markets.

Further afield, the U.S. appears to be losing ground in engaging Central Asia's mineral-rich states. Inconsistent policy and engagement have opened the door for China, the EU and others to deepen strategic ties—potentially undermining U.S. access to key critical minerals.

In aggregate, the week laid bare a new phase in the global critical minerals and rare earths narrative. China remains ahead in control of extraction, processing and export, deploying licensing and supply management as tools of strategic influence. The U.S., meanwhile, is significantly ramping policy and funding interventions—aimed at rebuilding industrial capacity in chips, batteries, reactor power and recycling. Investors should track which firms are positioned upstream (mining), midstream (processing), or downstream (high-tech manufacturing) and aligning with government priorities. Equinix's nuclear power alignments and potential U.S. government support for Intel show that industrial policy is now entwined with market valuation dynamics.

For those investing in this burgeoning sector, key drivers to monitor include legislative actions like the fate of the 45X tax credit, public-private partnerships in energy and mining, and international cooperation in new exchanges and supply infrastructure. Execution slowness remains a vulnerability—DOE funding and pilot projects may take years to mature, India's exchange will need broad stakeholder alignment, and China's entrenched processing dominance remains hard to displace.

Yet this sea-change in policy focus—and its cascading impact on capital flows and industrial strategy—marks a turning point. The competitive edge in supply chain resilience and innovation now maps directly onto geopolitical and investment advantage.

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- August 12, 2025 – Neo Performance Materials Reports Second Quarter 2025 Results https://bit.ly/46Skmo7
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