Jack Lifton Explains Trump's Critical Minerals Gambit – Canada vs Australia

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In a world recalibrating around supply chains and sovereignty, the **Critical Minerals Institute (CMI)** sits squarely at the fault line between geopolitics and geology. Founded to equip governments and industry with the insight and strategy needed to secure the minerals that power modern life—from lithium to rare earths—CMI connects capital, companies, and policymakers through global summits, research, and advisory programs. Its parent, InvestorNews Inc., pushes the Institute's reach into the millions through syndicated news and executive interviews.

Against that backdrop, CMI Executive Director Tracy Hughes spoke with CMI Co-Chair Jack Lifton—an American analyst whose sharp geopolitical instincts often cut through the diplomatic fog—to discuss a world where critical minerals have become strategic weapons.

"People have to understand that these things are related," Lifton said, referring to former President Donald Trump's late-night Truth Social post about Canada and the week's headline-grabbing U.S.–Australia minerals deal. "Trump is playing Canada against Australia. He knows exactly what he's doing."

Lifton outlined a geopolitical triangle that extends from Washington to Canberra to Ottawa, one that he believes is being deliberately manipulated. "Canada is a high-technology manufacturing nation with enormous natural resources," he said. "Australia is a nation with enormous natural resources and no manufacturing economy. … I believe the administration is playing

Australia versus Canada."

The implications, Lifton argued, are profound. With 75% of Australia's export earnings tied to China and Canada dependent on U.S. trade, the two resource powerhouses are, in his words, "mirror economies — and both lack the capital to develop their resources. Washington's got the high-speed printing presses."

When Hughes asked about Brazil's emergence, Lifton's tone shifted from analysis to alarm. "While Washington is thinking about what to have for breakfast tomorrow, the Chinese are all over Brazil," he said. "They're offering technology, building supply chains inside Brazil, paying with commodities, and selling cars and refrigerators. The Brazilians are very interested."

Lifton noted that "China sees Brazil as its next big source of heavy rare earths," adding that "the fastest-growing company in Brazil is China's BYD car company."

For Canada, however, he sees a different story. "Canada still has probably half of the known discoveries of rare earth deposits in the world," Lifton said. "I think the Canadian government is going to finance the development of a domestic rare earth industry. They have the people, the infrastructure, the expertise. They don't depend on the U.S. the way Washington thinks they do."

When Hughes pressed on the recent JP Morgan announcement of a US$1.5 trillion fund for critical-minerals infrastructure, Lifton didn't mince words. "I find that a little hard to swallow," he said. "I don't think JP Morgan's capitalization is $1.5 trillion. What they're really telling us is that's the bill to get America straightened out."

For Lifton, the issue isn't the absence of capital—it's how it's

squandered. “If the U.S. spent on critical minerals development what it’s pissed away on California’s railroad to nowhere, we’d be completely independent,” he said. “It’s not about lack of money; it’s about lack of direction.”

Before signing off, Hughes noted that Lifton’s grasp of both policy and production extends far beyond Washington. “I’m already talking to Brussels,” he admitted. “That’s why I know so much about it.”

The conversation, at once geopolitical and deeply personal, revealed a world where alliances shift as quickly as commodity prices—and where, as Lifton warned, “China isn’t waiting for us to figure it out.”

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