Quantum Critical Metals Advances Quebec Gallium Strategy Ahead of China's November 27 Deadline

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Quantum Critical Metals Corp. (TSXV: LEAP | OTCQB: ATOXF) is advancing an unconventional approach to gallium recovery in Quebec as China's November 27, 2026, export-control deadline approaches. In an InvestorNews interview with host Peter Clausi, CEO and Director Marcy Kiesman discussed the company's efforts to extract gallium from mica, the geopolitical implications of Chinese supply restrictions, and the growing urgency for North America to establish independent sources of a critical mineral essential to semiconductors, telecommunications and defence technologies.

Kiesman's interest in gallium intensified in December 2024, when China introduced additional restrictions on exports to the United States. Reviewing historical exploration results, she recognized that Quantum already held two Quebec properties containing gallium-bearing pegmatites. Rather than pursue new acquisitions, the company began investigating the potential of its existing assets, particularly its NMX East and Discovery projects in Quebec's James Bay region.

The company's technical approach centres on mica, a mineral not traditionally developed as a commercial source of gallium. In November 2025, Quantum reported 93% gallium recovery from preliminary bench-scale metallurgical testing of mica samples from NMX East. More recently, its September 29, 2026, mineral mapping results confirmed that gallium and rubidium at Discovery

are also associated with mica, potentially allowing the company to apply similar recovery methods across both properties. Commercial-scale recovery, however, remains to be demonstrated.

The geopolitical urgency comes from China's Ministry of Commerce Announcement No. 72, which temporarily suspended restrictions on certain gallium, germanium and antimony exports to the United States until November 27, 2026. General export licensing requirements remain in place, while the prohibition on exports of dual-use items to U.S. military users and for military end uses was never suspended. Kiesman is also watching November 10 for indications of how Beijing may handle separate export-control measures approaching their own deadline.

The economic implications extend well beyond defence. A U.S. Geological Survey study estimated that a complete restriction of China's net gallium exports for one year could reduce U.S. GDP by approximately US$3.1 billion, with semiconductor manufacturing accounting for nearly half the projected impact. Kiesman pointed to telecommunications, computers, vehicles and industrial electronics as examples of the wider economy's exposure to gallium supply disruptions.

For Quantum, the opportunity is to turn Canadian mineral resources into a dependable domestic supply chain. Kiesman emphasized that exploration alone will not resolve North America's vulnerability. Governments, processors, investors and prospective customers must work together on financing, refining capacity, feedstock traceability and commercial offtake agreements.

"We need to get working on our own sources and potential customers," Kiesman said, arguing that Canada must move more quickly toward securing its own critical mineral supply chains.

Even a further suspension of China's restrictions would not

eliminate the underlying dependence on Chinese production. For Quantum, the commercial challenge remains demonstrating that its mica-hosted gallium can be recovered economically and developed into a reliable source of supply.

“The deadline should be pushing us to run faster and to run harder,” Kiesman said.

Clausi concluded by proposing another discussion on November 28, following the Chinese deadline and the U.S. midterm elections. By then, the geopolitical outlook for gallium may be clearer. For Quantum Critical Metals, the longer-term measure of success will be whether its Quebec projects can help translate North America’s growing demand for critical mineral independence into commercially viable production.

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