Ucore’s Pat Ryan Leads a Gulf Coast Gambit to Rebuild America’s Rare Earth Supply Chain

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July 08, 2025 — Pat Ryan is betting that a cross-functional playbook—honed in Detroit’s auto plants and now redeployed on the Gulf Coast—can outrun Beijing’s tightening grip on rare earth know-how. “Capital is not going to get you anything unless you have the people with the expertise,” the Ucore Rare Metals Inc. (TSXV: UCU | OTCQX: UURAF) CEO told InvestorNews host Tracy Hughes, ticking off a string of recent hires: an operations veteran, a Ph.D. process-chemistry lead “who joined the team in the last two weeks,” and a project manager “who actually built an SX plant, both heavy and light.” Those additions anchor a company that—by design—intends to become, as Ryan put it, “very much an American story.”

Ucore’s ambitions rest on RapidSX™, a proprietary separation technology that has already logged “over 5,000 hours” on a Kingston, Ontario, demo line and just received a show-of-faith from the Pentagon. In May, the U.S. Department of Defense expanded its Other Transaction Agreement, layering US$18.4 million atop a previous US$4 million allocation. Ryan called it “about C$38 million added to the mix,” money earmarked for an 80,800-square-foot Strategic Metals Complex in Alexandria, Louisiana, slated to start shipping separated oxides in the first half of 2026.

Armed with that federal endorsement, Ucore moved quickly to thicken its own war chest. A June financing added C$15.5

million, lifting available funds to “over $50 million.” The timing, Ryan said, avoided “summer doldrums” and the market’s “China on-again, off-again” anxiety, positioning the company to pursue only “strategic equity” going forward.

Location is its own hedge. Alexandria sits inside a foreign-trade zone, giving the plant tariff insulation for concentrates shipped up the Mississippi, whether from “Brazil, Australia,” or elsewhere. “Critical rares are needed,” Ryan noted, adding that the Louisiana build-out will be modular, scalable, and buffered from Gulf hurricanes yet within “good freight in, good freight out” corridors.

Kingston remains the company’s laboratory—now doubled in size—where engineers are exploring “oddball” feedstocks such as samarium-rich concentrates banned from export by China.

Meanwhile, the visitor log hints at downstream traction: “twenty-nine visitors” in 2024, including potential offtake partners seeking REEs for magnets and “other uses” beyond motors.

Shareholders can expect, in the next quarter, an engineering schedule for Louisiana, specifics on South American and Australian supply agreements, and “three- and four-prong partnerships” linking feedstock, processing, alloying, and end users. Ryan’s view is blunt: “You don’t just (want to) have one-off transactional relationships (because they) don’t do a whole lot for building out the complete supply chain.”

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Ucore is focused on rare- and critical-metal resources, extraction, beneficiation, and separation technologies with the potential for production, growth, and scalability. Ucore's vision and plan is to become a leading advanced technology company, providing best-in-class metal separation products and services to the mining and mineral extraction industry.

Through strategic partnerships, this plan includes disrupting the People's Republic of China's control of the North American REE supply chain through the near-term development of a heavy and light rare-earth processing facility in the US State of Louisiana, subsequent SMCs in Canada and Alaska and the longer-term development of Ucore's 100% controlled Bokan-Dotson Ridge Rare Heavy REE Project on Prince of Wales Island in Southeast Alaska, USA.

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