

A Month of Mineral Realpolitik: Washington's 30-Day Sprint to Rewire the U.S. Critical Minerals Supply Chains

written by Tracy Hughes | July 15, 2025

Washington has seldom moved this fast on any industrial question, yet in the last month, Congress, the White House, and the Supreme Court orchestrated a blitz of statutes, budget riders, executive memoranda, and precedent-shifting rulings that together reset the rules of engagement for the critical minerals industry. What follows is a concise tour of the month's pivotal moves—an accelerated summer sprint reshaping America's critical minerals playbook.

Congress: From Tax Credits to Direct Appropriations

Seabed mining enters the legislative mainstream. On 18 June, Representatives Mike Ezell (R-MS) and Mariannette Miller-Meeks (R-IA) [filed](#) H.R. 4018, the ***Unleash America's Offshore Critical Minerals and Resources Act***, embedding President Trump's Executive Order 14285 in statute and instructing the Interior Department to license U.S. seabed mining in the exclusive economic zone – a deliberate counter-weight to Beijing's Pacific ambitions. House Natural Resources leadership and subsea-mining start-ups rallied behind the measure.

The budget carves a new channel. The House-passed "One Big

Beautiful Bill” (May 2025) repeals the 10 % production credit (45X) created in 2022, arguing that a subsidy born in a climate bill no longer fits an “America-First” minerals strategy. In its place, lawmakers earmark **US\$2.5 billion** to buy domestically mined minerals for the National Defense Stockpile and US\$500 million for low-interest Pentagon loans. The Senate draft, released 28 June, mirrors the stockpile money, adds US\$3.3–3.5 billion in Industrial Base Fund grants, and folds in a US\$5 **billion** Defense Industrial Base investment facility. Passed on 1 July by the narrowest margin, the text now heads to conference; if [reconciled](#), U.S. mineral policy will pivot from demand-side tax credits to **supply-side federal purchasing and equity stakes**.

Defense bills converge on minerals. Parallel FY-2026 authorization bills in both chambers authorize a **“Defense Production Act Credit Program Account”** of **US\$500 million**, channelling loans to lithium, nickel, cobalt, and rare-earth projects. Bipartisan framing as a national-security imperative muted typical partisan fault lines.

The Executive: Whole-of-Government Acceleration

One portal, less red tape. On 30 June President Trump [issued](#) the memorandum “*Simplifying the Funding of Energy Infrastructure and Critical Mineral and Material Projects*,” mandating that Energy, Defense, Interior and peer agencies **share applicant data**, halt disbursements to firms that refuse, and, within 180 days, launch a **single application portal** so miners and refiners can tap multiple programs with one submission.

DOE pivots to materials. Five days earlier, DOE’s Office of Energy Efficiency & Renewable Energy [released](#) an **RFI for the**

2026 Energy Critical Materials Assessment, explicitly tying the work to Executive Order 14154 (*“Unleashing American Energy”*). Secretary Chris Wright has re-aimed FY-2026 R&D dollars toward geothermal, nuclear, and critical minerals, cancelling 24 climate-demonstration projects worth US\$3.7 billion.

Permitting turbo-mode. After a 20 March Defense Production Act invocation, four mining projects (three uranium in New Mexico, one graphite in Alaska) obtained **FAST-41** status, gaining legally enforceable review schedules on a public dashboard—evidence that the bureaucratic gears are indeed speeding up.

Pentagon capital. DOD’s Industrial Base Policy office highlighted recent **US \$14.7 million** Title III awards [Fortune Minerals Limited (TSX: FT | OTCQB: FTMDF) cobalt, Lomiko Metals Inc. (TSXV: LMR) graphite] and previewed forthcoming rare-earth separation and lithium-processing calls, signalling that the dormant National Defense Stockpile is poised for its largest restock since the Cold War.

Courts & Regulation: Narrowing NEPA, Trimming Agencies

Chevron deference is gone, and NEPA just shrank. Two Supreme Court decisions now shape every mineral [permit](#). **Loper Bright v. Raimondo** (June 2024) ended four decades of automatic judicial deference to agency interpretation, while **Seven County Infrastructure Coalition v. Eagle County (decided 24 June 2025)** [held](#) that NEPA reviews need not examine “remote or speculative” upstream or downstream impacts. Agencies may focus on direct, on-site effects, erasing a litigation tactic long used to stall mines or refineries.

Executive downsizing of BLM. A separate Supreme Court order

(8 July 2025) lifted an injunction barring federal Reduction-in-Force plans, allowing Interior to proceed with layoffs that will cut ~1,800 Bureau of Land Management positions—effectively shrinking the cadre that once policed mine permits. Critics fear weakened oversight; miners see a faster lane.

NEPA roll-back on the table. CEQ's interim rule (25 Feb) rescinded prior NEPA regulations, and Interior's May directive lets DOI waive or truncate reviews for "vital" mineral projects. Word in Washington is that a full statutory NEPA waiver for minerals could ride on the defence bill; early court signals suggest a sympathetic bench.

Money: The Federal Spigot Opens

Draft appropriation language authorises US\$2–2.5 billion for stockpile purchases and another US\$3.5–5 billion in grants, loans, or equity for mines and processing plants—capital that commercial lenders view as loss-absorbing first dollars. A new US\$500 million pilot lending program will test low-interest debt for projects banks shun. Agencies aim to issue solicitations as early as October 2025 so money can land inside calendar 2026.

Public-private templates are multiplying. The U.S.–Canada scheme that co-funded Fortune and Lomiko is widely cited as a roadmap: bilateral cash, private equity follow-on, offtake contracts securing long-term supply. Domestically, DOE's Advanced Manufacturing Office continues seed grants—US\$15 million this month for grid-resilience storage systems that will absorb vanadium and lithium—and ARPA-E's MINER awards will inject > US\$100 million into green-extraction technologies for rare earths and battery metals.

Trade: Detente with China, Alliances with Friends

Rare-earth truce (for now). After Beijing throttled exports of rare-earth oxides and magnets in May–June, U.S. and Chinese negotiators agreed on an **emergency 90-day reversal**. President Trump’s early-July press conference [claimed](#) “full magnets up front,” but both capitals admit the arrangement is fragile; automakers have three months to build stockpiles before tariffs or quotas could re-escalate.

G7 Critical Minerals Action Plan. Announced at Ottawa on 29 June, the plan commits members to pooled stockpiles, concerted investment in African and Latin American projects, and harmonised ESG-plus-security standards—practical steps toward an allied alternative to China-centric refining networks.

Section 232 probe. The Commerce Department’s investigation into whether reliance on foreign refined lithium, cobalt, and rare-earth alloys threatens national security is due 12 October. Should the verdict be affirmative, tariffs or quotas could follow, reshaping price curves overnight.

Politics & Next Steps

White House messaging is unequivocal: critical minerals equal national security. Yet differences remain over method. Mining-state Republicans hail the credit repeal; moderate Democrats warn that ripping away 45X could strand shovel-ready projects. Former Senator Joe Manchin, testifying on 20 June, urged a balanced mix of **permitting reform plus stable incentives**. Consensus does exist on outcomes: de-risk domestic extraction, end single-supplier exposure, and restore industrial self-sufficiency.

Agency road-maps arrive soon. By late July, DOD will update its **National Defense Stockpile Requirements Report**, possibly adding copper and zinc to the “strategic” list. DOE’s 2026 assessment will redefine the “energy-critical” roster next spring. A resurrected National Science & Technology Council subcommittee is drafting a 2025 **National Critical Minerals Strategy**, resetting targets for recycling, substitution, and workforce training.

Why This Month Matters

A year ago, U.S. mineral security was a talking point. In the span of 30 days Washington produced: a seabed-mining bill; a budget that swaps tax credits for cash and stockpiles; an executive memorandum that merges siloed funding streams; Supreme Court decisions that neuter expansive NEPA challenges; agency moves to accelerate permits; and an international dance that alternates détente with China and alliance-building with G7 partners.

For investors, the headline is capital certainty: government purchase orders and grant money reduce project risk. For operators, permitting timelines now come with statutory clocks. For policymakers, the convergence of defence, trade, and climate narratives has forged an unexpectedly unified minerals doctrine. The next skirmishes—over 45X, over a possible NEPA waiver, over Section 232 remedies—will decide how rapidly theory becomes tonnage. But the direction is unmistakable: America is remaking its mineral base, and the policy cement poured this past month will harden into the foundation of that effort.

The Critical Minerals Institute (CMI) Policy Brief: U.S. Critical Minerals Developments (June 15 – July 15, 2025) – [click here](#)

Navigate Washington's fast-moving minerals chessboard with the **Critical Minerals Institute's latest Policy Brief** (June 15 – July 15 2025). In just 9 pages, we decode the month's torrent of action--from H.R. 4018's bid to open America's seabed to strategic mining and a \$2.5 billion stockpile expansion tucked into the "One Big Beautiful Bill" , to President Trump's new memorandum forcing agencies to share data and speed funding for domestic projects . We track parallel Pentagon lending programs and defense-bill mandates that channel another \$500 million toward critical-mineral loans , and dissect the fragile truce that briefly reopened China's rare-earth spigot after weeks of export curbs . Each section distills what investors, supply-chain strategists, and policymakers need to know now--legislative odds, funding timelines, and geopolitical ripples--so you can position ahead of the next headline. Secure your competitive intelligence today for just \$150 and stay one step ahead in the race for critical minerals. To purchase a **CMI U.S. Policy Brief** – [click here](#)