

America's Shortage Of This Metal Keeps Trump Awake At Night

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With JP Morgan CEO Jamie Dimon warning Washington that China and Russia are seeking to dismantle the Western world, and "World War III has already begun", access to critical metals that serve as the fuel of America's military has become the most urgent issue of our time.

Critical metals will determine superpower status and global domination.

China is winning because it controls the bulk of the world's critical metals, from mining to refining. Washington has been slow to discover domestic or friendly resources, at a time when the U.S. Army desperately needs them.

So, when a North American junior miner emerges as the owner of key critical metals properties in Europe and North America that could provide a new supply of one of these critical metals, the Western world sees hope.

The critical metal that is now poised to make or break a global superpower is antimony, and the miner is Military Metals Corp. (CSE:MILI; OTCQB:MILIF) - a little-known company that just put itself on the critical metals map through some smart strategic acquisitions.

Antimony (Sb), a critical metalloid, is a key element of the American war machine, essential for communication equipment, night vision goggles, explosives, ammunition, nuclear weapons, submarines, warships, optics, laser sighting, and more, according to U.S. Army Major General (retired) James Marks.

Not only does China control nearly half of the world's antimony production, but it also cut off antimony exports to the U.S. beginning in September this year.

The U.S. Army is Now Desperate for Antimony

China produces an astonishing ~70% of the world's rare earth minerals and controls nearly 50% of the global antimony supply.

While China was pushing ahead at full speed, America was napping instead of discovering and developing new critical metals reserves.

Then, at the height of the trade war, China threatened to restrict the export of some rare earth minerals. It made good on that threat this year, and last: First, with Germanium and Gallium in 2023, and then with antimony in September this year.

Now, the U.S. Army has found itself short on an essential element of its military production line, just as war beckons from Europe to the Middle East. And it will need large amounts of antimony to succeed with a new push to ramp up production of artillery shells at newly launched manufacturing facilities after years of destocking.

Meanwhile, American manufacturers use more than 50 million pounds of antimony each year for fireproofing compounds, batteries, ammunition, electronics, specialty glass, and other products, according to MetalTech.

Now, it's past time for America to stake its claims on critical metals reserves, and Military Metals (CSE:MILI; OTCQB:MILIF) is helping to do just that.

New Antimony Resources for the Coming Critical Demand Surge

Military Metals Corp. is on an antimony acquisition binge that's taken it as far away as EU-member Slovakia, Nova Scotia in Canada, and most recently in the US.

It's planning to help retell the American antimony story by exploring new and re-developing historical venues that could chip away at China's control over what is essentially a "military metal".

Military Metals Corp. recently announced that it has purchased one of Europe's largest antimony deposits in

Slovakia with historical resources. In the heart of Central Europe, it's a promising Soviet-era resource with an initial discovery from the 1950s and prior development in the '80s and '90s. It's already seen two phases of exploration, including drilling and adit excavation.

Source: Military Metals Corp

At the Trojarova Antimony Project, which could turn Slovakia into a European critical minerals hub, Military Metals Corp. says that underground development of this historical resource, funded by the Slovakian government, was shuttered in the 90s "prior to reaching the richest part of the deposit".

Back then, with the Cold War winding down, and antimony already having served its purpose as the hero of World War II, the motivation just wasn't there.

Today, the situation is very different, and EU'S Trojarova project--with a historical resource of over 61,998 tons of antimony worth around \$ 2 billion in situ value at today's spot prices--could now become a military kingmaker.

Figure 1 Military Metals Corp. (CSE:MILI; OTCQB:MILIF):

But Military Metals Corp. isn't concentrating all of its effects on a single continent; it's also making huge moves back in North America, in Canada's famous WWI antimony mine in Nova Scotia.

Military Metals Corp. is sitting on a recently acquired historical antimony/gold play, the West Gore Antimony Project--one of Canada's biggest past-producing antimony mines and a key supplier to the Allied Forces in WWI.

It's an impressive historical resource, with historical drilling results demonstrating over 7 meters of 10.6 gpt gold and 3.4% antimony.

It's not stopping there, however.

On October 24th, 2024, the company pounced on another opportunity to further consolidate this territory by signing an LOI to acquire more claims flanking West Gore.

The move to consolidate territory surrounding West Gore--one of the biggest heroes of WWI--is a strategic move that could tie the junior miner directly to North American defense at a time when prices are skyrocketing.

The Antimony Land Rush is a Junior Game

This smart, fast-moving investment strategy could, according to Forbes, be the "latest to generate short-term profits of more than 100% on money invested."

Forbes was right, even if it underestimated the returns.

Shares in junior mining stocks focused on antimony have surged recently, netting investors up to 800% returns in a very short time.

Australian ASX-listed companies were the first to light up the exchange, with shares in domestic Larvotto Resources Ltd. (ASX:LRV) surging over 800% in the past six months.

The Australian government has placed antimony on its critical metals list, and Australian traders are calling it an "antimony party".

But compared to its closet peer, [Perpetua Resources](#) (NASDAQ:PPTA), Military Metals Corp. appears to have quite a lot of room to run, based on resource estimates and current valuation.

Perpetua is currently valued at around \$700 million, with ~90,000 tons of antimony. The U.S. government is in the process of providing a \$1.86 billion loan to Perpetua to have their Antimony mine in production by 2029.

Military Metals Corp. is valued at only \$23 million right now; but its new play in Slovakia is valued at \$2 billion in situ of ore at today's Antimony spot prices that keeps climbing every week. And that's only one of its new antimony acquisitions. When you add the potential of West Gore in Nova Scotia, valuations could get even more attractive.

Pricing Power on the Brink of War

Military Metals Corp. CEO Scott Eldridge sees a major antimony supply crunch coming.

He's certainly not alone.

"An extreme supply shortage since April has led to the sharpest price rally ever recorded in the antimony market since Fastmarkets started pricing the metal back in the early 1980s," according to the UK's Minor Metals Trade Association (MMTA).

"The military uses of Sb [antimony] are now the tail that wags the dog. Everyone needs it for armaments so it is better to hang onto it than sell it," Christopher Ecclestone of London-based Hallgarten & Company recently told the Financial Review, calling it a "sign of the times".

"This will put a real squeeze on the US and European militaries," Ecclestone added.

Germany has essentially been demilitarized, with its own defense ministry estimating it has about 2 days of ammunition if there is a war with Russia, which it expects to happen within the next few years at most. Germany and the EU have mandated 2 million artillery shells to be manufactured by the end of 2025 with a investment of 500,000,000 euros.

Indeed, antimony prices have more than tripled since earlier this year from \$12,000 per ton to over \$38,000.

Two major wars are already involving enemies and allies on four continents, and World War III is already underway for all intents and purposes, making Military Metals Corp.'s (CSE:MILI; OTCQB:MILIF) strategic acquisition binge a fast-moving opportunity that continues to expand with every day that China squeezes supply and America is stuck playing catch-up.

Everyone from the U.S. Department of Defense to their Western counterparts around the world is now scrambling to secure new supply, and China is determined to keep the critical mineral taps turned off as it hoards the metal necessary to shore up U.S. defenses.

Other companies that are worth keeping a close eye on:

[Perpetua Resources Corp.](#) (NASDAQ:PPTA)

Perpetua Resources Corp. is at the forefront of domestic efforts to ensure a stable supply of antimony, a critical metal vital to the United States' defense and industrial sectors. Its flagship project, the Stibnite Gold Project in Idaho, is a critical component of America's response to growing global supply chain vulnerabilities.

The Stibnite Gold Project hosts an estimated 148 million pounds of antimony reserves, positioning it as a major domestic source of this essential metal. Beyond its mineral wealth, the project has also received significant federal support, including \$59.2 million under the Defense Production Act and a \$1.86 billion loan guarantee interest from the Export-Import Bank of the United States. These commitments highlight the strategic importance of Perpetua's operations in shoring up the nation's antimony supply.

In addition to producing antimony, Perpetua is working to remediate decades of environmental damage from historic mining activity at the Stibnite site. By prioritizing restoration alongside resource extraction, the company is not only addressing critical security needs but also contributing to the region's ecological and economic renewal.

Expected to begin production by 2029, Perpetua Resources is poised to play a central role in meeting the U.S. military's demand for antimony, ensuring the continuity of its supply chain for critical applications, from munitions and electronics to advanced technologies.

Northrop Grumman (NYSE: NOC)

Northrop Grumman is a leading global security company providing innovative systems, products, and solutions in autonomous systems, cyber, C4ISR, space, strike, and logistics and modernization to customers worldwide. With approximately 90,000 employees, Northrop Grumman is a major player in the defense and aerospace industry. The company is known for its expertise in developing cutting-edge technology, including stealth aircraft, unmanned aerial vehicles (UAVs), and missile defense systems. Northrop Grumman is a key partner to the U.S. government and its allies, providing essential capabilities to maintain national security.

Northrop Grumman's innovative solutions are critical to addressing the evolving threats of the modern world. The company's work in areas such as cyber security and autonomous systems is helping to shape the future of warfare. Northrop Grumman's commitment to research and development ensures that its customers have

access to the latest technology and capabilities. The company's global presence also allows it to support its customers around the world.

Northrop Grumman is focused on delivering value to its shareholders through a combination of organic growth and strategic acquisitions. The company is also committed to maintaining a strong balance sheet and returning capital to shareholders through dividends and share repurchases. Northrop Grumman's financial strength and commitment to shareholder value make it an attractive investment opportunity.

Boeing (NYSE: BA)

Boeing is the world's largest aerospace company and a leading manufacturer of commercial jetliners, defense, space and security systems, and global services. A major player in the global economy, Boeing employs more than 140,000 people across the United States and in more than 65 countries. Boeing's products and tailored services include commercial and military aircraft, satellites, weapons, electronic and defense systems, launch systems, advanced information and communication systems, and performance-based logistics and training.

Boeing's commercial airplane business is one of the company's most important divisions. Boeing is the world's leading manufacturer of commercial airplanes, and its products are used by airlines around the world. The company's defense, space & security business is another key part of Boeing's operations. This division provides a wide range of products and services to the U.S. government and its allies.

Boeing has faced challenges in recent years, including the grounding of the 737 MAX aircraft and the COVID-19 pandemic. However, the company is committed to overcoming these challenges and continuing to deliver value to its customers and shareholders. Boeing is an iconic American company that plays a vital role in the global aerospace industry.

The company's strong track record, diverse portfolio of services, and commitment to innovation make it a valuable partner to governments and businesses around the world.

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