

Critical Metals Showdown: The Race to Secure Domestic Antimony Supplies

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Antimony, a critical mineral essential for semiconductors, military applications, and energy storage, is rapidly becoming a focal point in global trade tensions. Following China's recent export ban on gallium, germanium, and antimony, the market dynamics of this vital resource are shifting dramatically-raising significant national security concerns for the United States and its allies.

"Secure sourcing of critical minerals is critical to the defense industrial base," noted Adam Burstein, technical director for strategic and critical materials in the Office of the Assistant Secretary of Defense for Industrial Base Policy. Antimony's unique properties make it indispensable for ammunition, military optics, flame-resistant materials, and high-tech devices, yet the U.S. currently has no domestic production.

In 2023, China, Russia, and Tajikistan supplied nearly 80% of the global antimony market. China alone produced nearly 50% of the world's supply in 2024 but is now limiting exports as part of a broader strategy to consolidate mineral production internally and exert control over critical supply chains. This disruption has sent antimony prices soaring-rising 250% in 2024 and currently trading at record highs between \$39,500 and \$40,000 per metric ton in Rotterdam. Traders anticipate prices climbing even higher, with some small lots already sold at \$40,000.

The stakes are high. As Ellie Saklatvala, head of non-ferrous metals pricing at Argus, noted, "The U.S. has already diversified its supply chains away from China where possible, buying more from Southeast Asia. However, it is unclear in the near term how they will be able to fill the gap now left by China."

The U.S. Department of Defense has already invested over \$439 million in building critical mineral supply chains and is backing domestic antimony mining projects, including a strategic mine in Idaho. Stockpiling and diversification efforts are key strategies to mitigate supply shocks and ensure continued production of essential military materials.

"Antimony is not just a commodity-it's a cornerstone of military preparedness and economic resilience," emphasized a defense industry expert. Its applications in ammunition, protective equipment, and military optics underscore its importance to U.S. defense capabilities.

These developments highlight antimony's growing importance in geopolitics, presenting both challenges and opportunities as nations navigate supply chain disruptions, surging prices, and the quest for secure sourcing of critical minerals.

[Perpetua Resources](#): Securing Domestic Antimony Supply

As China's export ban reshapes the global antimony market, Perpetua Resources (Nasdaq: PPTA) (TSX: PPTA) has emerged as a crucial player in the effort to secure a domestic supply of this critical mineral. The company recently achieved a major milestone with the U.S. Forest Service's issuance of the Final Record of Decision (ROD) for its Stibnite Gold Project in Idaho. This decision clears the path for the redevelopment of the only identified antimony reserve in the United States-a project that could significantly bolster the nation's strategic mineral security.

The Stibnite Gold Project is expected to produce an estimated 148 million pounds of antimony over its first six years, supplying roughly 35% of U.S. annual demand based on 2022 consumption levels. With China responsible for nearly half of global antimony production, this project marks a pivotal step in reducing U.S. reliance on foreign sources. Jon Cherry, CEO of Perpetua Resources, emphasized the project's importance: "The Stibnite Gold Project can deliver decisive wins for our communities, the environment, the economy, and our national security."

Beyond its critical mineral production, the project also promises substantial environmental and economic benefits. Perpetua plans to invest over \$1 billion in the redevelopment of the abandoned Stibnite mine site, creating an average of 550 jobs in rural Idaho during operations. Environmental restoration is a cornerstone of the project, which includes removing legacy tailings, improving water quality, and reopening miles of river habitat for native fish species blocked for over 80 years.

The Stibnite Gold Project is also poised to be one of the highest-grade open-pit gold mines in the United

States, with an estimated 4.8 million ounces of gold reserves and annual production of 450,000 ounces during its first four years. These combined outputs position the project as both an economic driver for the region and a strategic asset for the nation.

Perpetua's decade-long commitment to the community and rigorous environmental stewardship have earned widespread support. During the public comment periods for the project, over 23,000 letters of support were submitted, underscoring its importance to stakeholders. Cascade Mayor Judy Nissula expressed the local sentiment: "Perpetua Resources has shown us the type of company they are. They've partnered with local businesses, provided well-paying jobs, and demonstrated their commitment to leaving the site better than it is today."

As Perpetua finalizes permits and secures project financing, the Stibnite Gold Project represents a significant opportunity for the United States to rebuild its critical mineral supply chain, reduce dependence on adversarial nations, and strengthen its position in an increasingly competitive global market.

Military Metals Corp.

As antimony prices surge and the geopolitical landscape surrounding critical minerals becomes more volatile, Military Metals Corp. (CSE: MILI) (OTCQB: MILIF) is positioning itself as a crucial player in the effort to secure and diversify antimony supply chains in North America.

With China's recent export ban on critical minerals like gallium, germanium, and antimony, Military Metals Corp. is stepping up its commitment to addressing the growing demand for these essential materials, particularly within the defense sector. As highlighted in the earlier sections, the U.S. Department of Defense (DOD) has prioritized securing reliable access to critical minerals like antimony to maintain its technological and military edge. The current market disruption, where antimony prices have skyrocketed by 228% in 2024, underscores the urgency for Western nations to reduce their dependence on China for this critical resource.

Military Metals Responds to the Geopolitical Shift

Military Metals acknowledges the ongoing challenges posed by China's export ban and emphasizes the importance of building a sustainable and independent supply chain for critical minerals like antimony. CEO Scott Eldridge remarked, "The West can no longer afford to rely on adversarial nations for resources essential to our security and economic stability. We are taking proactive steps to meet this growing demand with future domestic and allied sources of antimony."

The company has already begun making strategic moves to secure its place in the antimony market, acquiring high-quality exploration assets in prime mining jurisdictions, including Slovakia, Nova Scotia, and Nevada. By diversifying its property portfolio, Military Metals offers shareholders a unique opportunity to participate in the burgeoning antimony sector.

Expanding the U.S. Antimony Supply Chain: The Last Chance Antimony-Gold Property

One of Military Metals' most significant acquisitions to date is the Last Chance Antimony-Gold Property in Nevada, USA. Located just over 70 kilometers north of Tonopah, Nevada, and near major gold mining operations such as Kinross' Round Mountain, the Last Chance property hosts promising antimony-gold occurrences. With historical production recorded at the site, Military Metals sees significant potential for advancing this asset and contributing to the U.S.'s critical mineral supply.

Military Metals has already staked additional claims in the region to ensure the company can capture any prospective ground before launching exploration campaigns. The Last Chance property offers an exciting opportunity to bring additional antimony production into the domestic supply chain as Military Metals prepares to embark on its first field campaign in Q2 2025.

Strategic Acquisitions and Portfolio Growth

In addition to Nevada, Military Metals has also secured projects in Slovakia and Canada.

- **Trojarová Antimony-Gold Project (Slovakia):** Adjacent to one of Europe's most significant historical antimony-gold mines, this asset holds substantial exploration potential. Military Metals is working with an independent consulting firm to digitize historical data and develop a three-dimensional deposit model, positioning the project for future exploration success.
- **West Gore Antimony-Gold Project (Canada):** This Nova Scotia-based asset is a historical producer of antimony, which was shipped to the UK during World War I. With its strategic location and historical data, the project has significant potential to contribute to North America's antimony supply.

2025 and Beyond: A Focus on Growth and Exploration

Looking ahead to 2025, Military Metals is focused on expanding its portfolio, de-risking its flagship assets, and increasing shareholder value. In addition to moving forward with exploration on its Trojarová, West Gore, and Last Chance projects, Military Metals plans to initiate drilling programs aimed at establishing a modern resource estimate and preparing for potential development.

"The momentum we've gained in 2024, with the acquisition of high-quality antimony projects, sets the stage for a very promising 2025," stated CEO Scott Eldridge. The company is also working to integrate new geotechnical and resource estimation teams, with plans to release a new NI 43-101 resource estimate for its Trojarová Antimony-Gold Project.

As the global demand for antimony reaches new heights, driven by its essential role in defense, energy storage, and advanced manufacturing, Military Metals Corp. is poised to play a pivotal role in securing domestic and allied supply chains for this critical mineral. By advancing its diverse portfolio of antimony assets and taking strategic actions to de-risk its exploration projects, MILI stands out as a key player in ensuring the West's long-term resilience in the face of shifting geopolitical dynamics and rising mineral prices.

United States Antimony Corporation (NYSE American: UAMY)

United States Antimony Corporation (USAC) is a critical player in strengthening the U.S. supply chain for antimony, a mineral essential for defense, energy, and technology applications. With operations across the U.S. and Mexico, USAC processes antimony ore into key products, including antimony oxide, metal, and trisulfide, used in flame retardants, batteries, ammunition, and nuclear waste treatment. Its Montana facility, the only primary antimony smelter in the U.S., ensures a vital domestic supply of refined antimony.

USAC has taken significant steps to expand its operations and enhance financial flexibility. The company has secured new international antimony sources from Thailand and Australia to supplement its production and filed a \$100 million universal shelf registration statement to support future growth initiatives.

In partnership with Perpetua Resources, USAC has signed a Metallurgical Testing Agreement to evaluate processing stibnite-rich antimony ore from the Stibnite Gold Project. This collaboration aims to establish an integrated domestic supply chain for antimony, a critical effort in light of China's export ban and surging global prices. As USAC CEO Gary C. Evans noted, "This agreement...advances the concept of a solely domestic supply chain for critical minerals essential to U.S. defense, energy, and technology sectors."

To position itself for long-term growth, USAC has relocated its corporate headquarters to Dallas, Texas, leveraging the state's business-friendly environment. The company has also restructured its executive team to focus on expanding mining operations and securing reliable antimony supplies for its Montana smelter.

With antimony prices soaring-up 230% in Rotterdam markets-and growing domestic demand, USAC is well-positioned to capitalize on its strategic initiatives. By strengthening its supply chain, pursuing partnerships, and expanding its operational capabilities, the company is playing a crucial role in reducing U.S. reliance on foreign antimony sources while supporting critical national industries.

[Nova Minerals Ltd.](#)

Nova Minerals Limited (NASDAQ: NVA) is advancing its Estelle Gold and Critical Minerals Project in Alaska to address U.S. demand for antimony, a mineral critical for economic and national security. The project spans 514 square kilometers in the Tintina Gold Belt and includes the Stibium prospect, which features high-grade gold and antimony deposits. Sampling has revealed a rich zone with grades of up to 141 g/t Au and 60.5% Sb, positioning the site for future resource drilling and development.

With antimony listed as a critical mineral by the U.S. and the EU, Nova is working to reduce reliance on foreign sources, particularly in light of China's export restrictions. The company has strengthened its financial position by divesting non-core assets, generating \$6.73 million to support its exploration and debt reduction efforts.

Nova's participation in the Defense Industrial Base Consortium and pursuit of U.S. government grants highlight its commitment to securing domestic antimony supplies. By focusing on this critical mineral, Nova is poised to enhance U.S. supply chain resilience and support advanced technology and defense industries.

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