

Riding the Antimony Wave: 4 Stocks to Watch as Prices Hit Record Highs

25.02.2025 | [NewsDirect](#)

Antimony, a critical but often overlooked metal, has surged to a record \$51,000 per ton, driven by tightening Chinese export controls and escalating global demand. Essential for military ammunition, missile systems, flame retardants, and advanced electronics, antimony plays a pivotal role in both national defense and modern industry. Yet, the global supply chain for this vital mineral is in crisis.

With China and Russia controlling nearly 100% of global production, NATO and Western nations are dangerously exposed to supply disruptions. The war in Ukraine has further strained resources, depleting stockpiles and underscoring the West's reliance on foreign suppliers. Without a stable antimony supply, efforts to ramp up military production and sustain industrial output face serious risks.

For investors, this crisis has created a unique opportunity. Western-backed mining projects are now at the forefront of securing alternative antimony sources, with companies like [Perpetua Resources](#) (NASDAQ: PPTA), United States Antimony Corporation (NYSE: UAMY), Nevada Exploration (NASDAQ: NVA), and Military Metals Corp. (OTCQB: MILIF) leading the charge. As governments and industries race to secure supply, these firms are positioned to benefit from rising prices and increasing importance. Let's take a closer look.

Military Metals Corp.:

As the global antimony supply crisis deepens, Military Metals Corp. (CSE: MILI) (OTCQB: MILIF) is emerging as a key player in the global antimony supply race, leveraging a portfolio of high-potential projects across North America and Europe to address the critical mineral shortage. With a portfolio of high-potential antimony-gold projects across North America and Europe, the company is strategically positioned to capitalize on soaring antimony prices, which recently hit a record \$51,500 per tonne.

Military Metals' flagship Trojárová Antimony-Gold Project in Slovakia is a standout asset. Located just three kilometers from the historic Pezinok mine-once Europe's largest antimony producer-Trojárová benefits from rich mining history and extensive historical data. The project was the focus of 63 drill holes totaling 14,300 meters and 1.7 kilometers of underground development in the 1980s, culminating in a historical resource estimate. The company is currently digitizing and georeferencing this data to build a 3D deposit model, paving the way for a NI 43-101 compliant resource estimate. As CEO Scott Eldridge noted, "We look forward to unlocking value as we examine the brownfield benefits of the property." With Slovakia's legacy as a high-grade antimony producer, Trojárová represents a significant opportunity to revive a once-thriving mining region.

In North America, Military Metals is advancing two additional projects: the West Gore Antimony-Gold Project in Nova Scotia and the Last Chance Antimony-Gold Project in Nevada. West Gore, a historically significant producer that contributed to the Allied war effort during World War I, recently expanded its land position by 388 hectares, consolidating the mineralized system for future exploration. Between 1914 and 1917, West Gore produced 7,000 tons of antimony concentrate, grading 46% antimony, alongside nearly 6,900 ounces of gold. The company plans to launch exploration programs at West Gore in Q2-Q3 2025, aiming to unlock the property's full potential.

Meanwhile, Last Chance, located just 18 kilometers west of Kinross's Round Mountain gold mine in Nevada, offers modern exploration potential in a mining-friendly jurisdiction. The property has a rich history of antimony production dating back to 1880, with limited production supporting U.S. defense efforts until the 1960s. Military Metals completed its acquisition of Last Chance in February 2025 and has already conducted an initial field visit. CEO Scott Eldridge highlighted the property's potential, stating, "We were very impressed by its past and future." With antimony prices hitting new highs, Last Chance represents a compelling opportunity to unlock value through modern exploration techniques.

Military Metals is poised for an active year, with plans to advance exploration across its portfolio. The company is prioritizing the Trojárová project, where it aims to complete a NI 43-101 resource estimate and initiate a preliminary economic assessment. Additionally, exploration programs at West Gore and Last Chance are expected to commence in Q2-Q3 2025, further solidifying the company's position as an emerging player in the antimony sector.

As one of the few publicly traded companies focused on antimony, Military Metals offers investors a unique opportunity to gain exposure to a strategically important resource with explosive demand and limited supply. With its diversified portfolio, experienced management team, and strategic projects in mining-friendly jurisdictions, the company is well-positioned to benefit from the global antimony supply crisis.

[Perpetua Resources Corp.:](#)

Perpetua Resources Corp. (Nasdaq: PPTA) is at the forefront of addressing the West's critical antimony supply gap through its Stibnite Gold Project in Idaho. This ambitious project is not only one of the highest-grade open-pit gold deposits in the U.S. but also home to the only domestically mined source of antimony—a mineral deemed critical for national defense, energy storage, and advanced technology. With an estimated 148 million pounds of antimony reserves, the Stibnite Gold Project is expected to supply 35% of U.S. antimony demand in its first six years of operation, significantly reducing reliance on foreign suppliers like China and Russia.

Antimony trisulfide from Stibnite is the only known domestic source capable of meeting U.S. defense needs for ammunition, missile systems, and other military applications. Perpetua's project has already garnered significant government support, including a \$59.2 million Defense Production Act Title III funding award to advance construction readiness and permitting.

Perpetua's vision extends beyond resource extraction; the Stibnite Gold Project is designed to restore an abandoned mining site, addressing decades of environmental damage. The company's approved plan includes removing legacy waste to improve water quality, restoring river habitats, and reopening fish passages blocked for over 80 years. This commitment to environmental, social, and governance (ESG) principles has earned Perpetua widespread community and regulatory support, including a Final Record of Decision from the U.S. Forest Service after an eight-year permitting process.

Economically, the project is a powerhouse. It has an estimated 4.8 million ounces of gold reserves and plans for an annual production of 300,000 ounces over a 15-year mine life. The Stibnite Gold Project is projected to generate over \$3.7 billion in after-tax net present value (NPV) at current spot prices. The antimony by-product, priced at \$21 per pound, enhances the project's economics, with all-in sustaining costs (AISC) for gold projected at just \$435 per ounce in the first four years of production.

Furthermore, Perpetua is advancing partnerships to strengthen the domestic antimony supply chain. The company has collaborated with U.S. Antimony Corporation (NYSE: UAMY) to explore processing options for antimony concentrate, ensuring a fully American supply chain. Additionally, a procurement agreement with Idaho Power guarantees that the project will be powered by one of the lowest-carbon energy grids in the nation, aligning with Perpetua's sustainability goals.

United States Antimony Corp.:

United States Antimony Corp. (NYSE: UAMY) is taking bold steps to diversify North America's antimony supply chain, leveraging its mines and processing facilities to reduce reliance on foreign sources. The company produces essential antimony products, including antimony oxide, metal, and trisulfide, which are vital for industries such as defense, manufacturing, and energy storage.

Recently, USAC relocated its corporate headquarters to Dallas, Texas, enhancing operational efficiency and exploring new mining opportunities. This move aligns with the company's focus on expanding its footprint in North America.

A key development is USAC's exclusive option agreement to acquire 120 antimony mining claims in Alaska, covering approximately 17,900 acres with significant mineral potential. Supported by historic exploration data, this acquisition positions USAC to bolster domestic production capabilities and contribute to national security. Executive Vice President Joe Bardswich emphasized the importance of the deal, stating, "This agreement provides us with a unique opportunity to strengthen our ownership position in antimony deposits, which are critical to our nation's security needs."

In Mexico, USAC is revitalizing its Madero smelter, with plans to process 100 tons of antimony ore per month. The refurbishment, including repairs to furnaces and air control systems, aims to improve efficiency and meet rising domestic demand. John Gustavsen, President of the Antimony Division highlighted the urgency of these efforts, noting, "Worldwide antimony prices continue to reach all-time highs, and we are working quickly to meet our nation's growing demand."

USAC has also strengthened its leadership team with the appointment of two new vice presidents. Rodney Blakestad, Vice President of the Mining Division, brings over 45 years of experience in mineral exploration and development, while Leo Jackson, Vice President of the Mexican Antimony Division, offers decades of

expertise in operations management and supply chain logistics. These appointments underscore USAC's commitment to scaling its operations and optimizing production.

As global demand for antimony continues to rise, USAC's proactive measures-from expanding its mining portfolio to upgrading its processing facilities-highlight its potential as a key player in securing a reliable supply of this strategically important resource. By addressing vulnerabilities in the current supply chain, USAC is well-positioned to deliver value to investors while contributing to national security and industrial resilience.

[Nova Minerals Ltd.:](#)

Nova Minerals Limited (NASDAQ: NVA) is positioning itself as a key contender in the race to secure critical antimony supplies through its flagship Estelle Critical Minerals Project in Alaska. Located in the prolific Tintina Gold Belt, the Estelle Project spans 514 square km and hosts multiple high-grade antimony prospects, including the standout Stibium and Styx targets. With China controlling over 50% of global antimony production and recently banning exports to the U.S., Nova's focus on domestic antimony development couldn't be more timely.

The Stibium prospect has emerged as a cornerstone of Nova's antimony strategy. Recent exploration results have revealed an 800 m x 400 m high-grade antimony zone, with rock samples grading up to 56.7% antimony and soil samples showing concentrations as high as 2.8% antimony. These results confirm Stibium as a drill-ready target for 2025, with the potential to become a significant source of domestically mined antimony. Nova's CEO, Christopher Gerteisen, highlighted the importance of the prospect, stating, "Defining an antimony resource at Stibium and advancing toward production is a top priority for the company."

Nova's exploration success extends beyond Stibium. At the Styx prospect, rock samples have returned grades of up to 54.1% antimony, with a main vein occurrence measuring 50% stibnite (antimony sulfide). These discoveries underscore the Estelle Project's potential to become a major supplier of antimony, which is essential for military ammunition, missile systems, flame retardants, and advanced electronics.

To accelerate its antimony development, Nova is actively pursuing U.S. government support. As a member of the Defense Industrial Base Consortium (DIBC), the company is well-positioned to secure Department of Defense (DoD) grants aimed at strengthening domestic critical mineral supply chains. With China's recent export restrictions, Nova's Estelle Project is strategically positioned to address the growing supply gap and reduce reliance on foreign sources.

Financially, Nova is taking proactive steps to fund its exploration and development programs. In early 2025, the company sold its non-core investment in Snow Lake Resources for \$6.73 million, using the proceeds to reduce debt and strengthen its balance sheet. Additionally, the exercise of NASDAQ warrants brought in \$0.79 million, further bolstering the company's cash position. With \$16 million in cash and no debt, Nova is well-funded to advance its 2025 exploration program, which includes resource drilling at Stibium and other antimony prospects.

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Die URL für diesen Artikel lautet:

<https://www.goldseiten.de/artikel/648728--Riding-the-Antimony-Wave--4-Stocks-to-Watch-as-Prices-Hit-Record-Highs.html>

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