

The Rare Earths War

Technology Metals Show host Tracy Weslosky moderates a timely discussion on how China poses a serious threat to the rare earths supply chain security of the United States, talking to international rare earths expert Jack Lifton and the Editor of "The Rare Metals War" Guillaume Pitron. Guillaume observed that Donald Trump as the President has been tackling the rare earths supply chain issue like no one ever done in this role. He added, "If he is re-elected, I believe, that is going to impact in a good way the US production of rare earth minerals and rare earth metals."

Jack agreed with Guillaume and added, "Trump is the first president to refocus on globalization, and he is trying to de-globalize critical materials for the security of the United States." Highlighting the seriousness of the rare earths supply chain problem, Jack said that Shin-Etsu and Hitachi, two large Japanese companies that supply rare earth magnets to the US military, have most of their production in China.

Jack also revealed that China recently announced that they would cut off Northrop Grumman, an American defense technology company, from all Chinese rare earth materials. "What Americans don't seem to be paying attention to," Jack continued, "is Grumman is the producer of the F-35 fighter plane, the greatest air superiority weapon in history. Grumman needs those rare earths to build those planes. This is going to bring real pressure on the defense department."

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Jack Lifton on Defense Department's \$2 billion spending budget for rare earths

"The US Defense Department has announced last week that it will seek \$1.7 billion for rare earths purchases in the 2021 National Defense Authorization Act that means the budget for fiscal 2021. In addition they will ask for another \$300 million, a total of \$2 billion, for rare earths for specialized weapons which they name as hypersonic missiles...This I believe explains some of the mystery of the last month where everybody had been speculating on why the Defense Department made a couple of awards to study the building of rare earths separation plants and then put those awards on hold." States critical materials expert Jack Lifton, in an interview with the Technology Metals Show hostess Tracy Weslosky.

Jack continued, "Based on my experience on Washington DC I think that announcements such as we are going to use \$2 billion to purchase rare earths related materials are not necessarily discussed with the same people who issue small awards... Such decisions for billion of dollars are made in the White House, they are not made at the local level."

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