

The Rare Earths War

written by InvestorNews | August 20, 2020

[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 and Peter Cashin talk about the scandium market and Imperial's strategic opportunity in the vital lightweighting space

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In an interview with [Technology Metals Show](#) host Jack Lifton, President and CEO of [Imperial Mining Group Ltd.](#) (TSXV: IPG) Peter Cashin discusses the scandium market and the economics of the Crater Lake Project. Peter explains how Imperial Mining's Crater Lake Project provides a strategic opportunity for an exciting new line of lightweighting products. The project also contains rare earths.

"How it (Crater Lake Project) stands out is that it is a primary bedrock opportunity in Quebec," said Mr. Cashin, Imperial's President and CEO. "The grades are exceptionally high relative to our peers for a bedrock deposit. It is exposed at surface so it would be amenable to an open pit operation. Our preliminary

metallurgy shows that we have very strong recoveries and high rejection rates of the gangue minerals from our metallurgical work so far. We are ideally located very close to the aluminum capital of Canada.”

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Jack Lifton on MP Materials (Molycorp) Return

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“Molycorp spent \$1.8 billion to redevelop the (Mountain Pass) mine and vertically integrate that output through a separation plant to salable, separated rare earths products. It didn’t work. At the end they were not able to operate the separation plant, Project Phoenix, and the company shutdown because it ran out of money.” States critical materials expert Jack Lifton, in an interview with the [Technology Metals Show](#) hostess Tracy Weslosky.

Jack went on to say, “Two years later a company that became MP

Materials purchased the mine and the refinery project from the bankruptcy trustee and they began to operate it as a mine. In the last 12 months that mine has produced 50,000 tons of rare earths concentrate containing 12,000 tons of rare earths included in which are about 2000 tons of magnet metals, neodymium and praseodymium, which could make 6000 tons of magnets.”

In the interview Tracy and Jack discussed some of the challenges awaiting MP Materials in becoming a vertically integrated domestic rare earths company. Jack also provided an update on Lynas and explained how it will be affected as MP Materials progresses with its plan.

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The Rare Earths Market in Review – June 2020

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“I think Energy Fuels is serious about going into the rare

earths business. What I was told is that they are going to begin by selecting a rare earths mineral produced in the United States...” States critical materials expert Jack Lifton, in an interview with the Technology Metals Show hostess Tracy Weslosky.

In the interview Tracy and Jack discussed some of the major news in the rare earths space for the month of June. Jack also commented on Lynas and shared his view on Alkane’s plan to demerge their poly-metallic and rare earths holding company Australian Strategic Materials Limited (ASM).

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Jack Lifton on the effect of COVID-19 pandemic on the rare earths sector

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“All producing mines have been at a standstill. Mines are extremely touchy about health and safety. Before anybody goes

into a mine, they are drug tested because the mines do not want anybody who is drunk or high on a drug to go underground and endanger lives. When something like COVID occurs, they add that too. I am sure they are testing anybody who is going underground.” States critical materials expert Jack Lifton, in an interview with the Technology Metals Show hostess Tracy Weslosky.

Jack went on to advise on what people should do in the current market situation and where the rare earths market is heading.

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Jack Lifton and Pini Althaus on USA Rare Earth's mine to magnet strategy

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“You have formally announced a mine to magnet strategy. In the rare earths business, we have seen this before, in the round one of the rare earths boom in around 2011 or 2012. A company no

longer in existence called Great Western Minerals announced a mine to magnet strategy. Then Molycorp announced a mine to market strategy. Neither of those companies ever achieved anything like that and neither of them advanced to where you have advanced which is the separation of the heavy and light rare earths. I would like to know if you are planning a vertically integrated company which would be not only mining and refining but producing metals and alloys and fabricated magnets” Asked Jack Lifton, critical materials expert and Technology Metals Show host, in an interview with Pini Althaus, CEO and Director of [USA Rare Earth LLC](#).

Pini replied, “The difference here is between announcing strategy verses implementing strategy and we have been very careful to annouce things as they actually take form and become a reality.”

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

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"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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