

Stocks to Watch as China Tightens Control Over Antimony Exports

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The U.S.-China trade conflict has reached a new level of intensity, with Beijing banning exports of critical minerals like gallium, germanium, and antimony to the United States. These materials, essential for advanced technologies and military applications, are now being leveraged as geopolitical tools in an escalating economic confrontation.

Antimony in particular has drawn significant attention. This often-overlooked mineral plays a critical role in the defense sector, powering ammunition, infrared missile systems, and advanced batteries. Historically, antimony proved vital in World War II, hardening lead for bullets and enabling the production of tungsten steel. Today, it remains indispensable for national security and technological innovation.

The stakes are high: China controls nearly 50% of global antimony mining and 80% of its production. With Beijing tightening exports, the United States faces a precarious reliance on foreign sources. This disruption is already rippling through supply chains, with antimony prices surging over 200% this year.

For defense contractors like Lockheed Martin (NYSE: LMT), the implications are profound. As the largest defense contractor globally, Lockheed relies on stable access to advanced materials for key programs, including the F-35 fighter jet and missile defense systems. The current situation underscores the urgent need to diversify supply chains and reduce dependency on adversarial nations.

Amid this crisis, several companies are stepping up efforts to secure alternative sources of antimony and other critical minerals. Let's examine a few key players addressing this challenge.

Military Metals Corp. (OTCQB: MILIF) (CSE: MILI)

Military Metals Corp. is emerging as a promising force in the critical minerals sector, strategically positioned to capitalize on the growing global demand for antimony, copper, and gold. Based in British Columbia, the company focuses on acquiring and developing mineral-rich properties in stable jurisdictions across Europe and North America. With recent acquisitions, a stronger leadership team, and a portfolio of high-potential projects, Military Metals is poised to make a significant impact on the critical minerals market.

A notable development in late 2024 was the appointment of Mark Saxon to Military's Board of Directors. Saxon's 30 years of experience in exploration geology and leadership roles in Canadian and Australian public companies brings valuable technical and operational expertise to the team. CEO Scott Eldridge expressed enthusiasm for Saxon's addition, citing his track record with high-profile discoveries and his expertise in critical metals supply chains. Saxon's involvement with projects like the Sunday Creek antimony-gold discovery further strengthens Military's capacity to advance its asset base.

The company also made a bold move in November with the acquisition of three brownfield mineral projects in Slovakia: Trojarová, Tienesgrund, and Medvedi. These properties, rich in antimony and gold, align with Military Metals' focus on critical resources essential for the defense, energy, and advanced manufacturing industries.

Trojarová, the flagship project, features extensive historical exploration, including over 14,000 meters of drilling and substantial underground development. While past resource estimates were classified using the Soviet-era Russian system, they indicate strong potential for antimony and gold mineralization. Military Metals intends to modernize these estimates under NI 43-101 standards to validate the project's true value.

Tienesgrund, another antimony-gold property in Slovakia, has a long history of mining activity dating back to the Middle Ages. Reports from the Soviet era document significant antimony grades alongside gold, with promising exploration upside confirmed by limited modern sampling. Military Metals is preparing to unlock the full potential of this underexplored property, which stretches over 13 square kilometers.

In North America, the company has expanded its presence with the Last Chance antimony-gold property in Nevada. Located near Kinross' Round Mountain gold mine, Last Chance benefits from a mineralized system surrounded by favorable geology. Military Metals recently completed additional claim staking to secure control over this prospective area, with exploration plans set to begin in 2025.

These acquisitions come at a pivotal moment for the antimony market. China's export restrictions, which escalated into a full ban on December 3, 2024, have sent antimony prices soaring by 228% this year alone. As the West grapples with supply chain disruptions for critical minerals, Military Metals' portfolio positions it as a reliable future supplier of antimony, a material vital to military applications, energy storage, and advanced manufacturing. Eldridge emphasized the company's role in addressing the West's dependency on adversarial nations for essential resources, underscoring the urgency of developing secure domestic supplies.

With its seasoned leadership, well-timed acquisitions, and a focus on high-demand minerals, Military Metals Corp. is making strides toward becoming a key player in the critical minerals sector. As global tensions and supply chain pressures reshape resource markets, the company offers investors a compelling opportunity to gain exposure to a rapidly evolving and strategically vital industry.

[Perpetua Resources Corp.](#) (Nasdaq: PPTA) is advancing the Stibnite Gold Project in central Idaho, a critical initiative focused on the exploration, site restoration, and redevelopment of gold-antimony-silver deposits. The Stibnite Gold Project is one of the highest-grade open-pit gold deposits in the U.S., and uniquely, it's the only domestic source of mined antimony capable of meeting U.S. defense requirements for small arms, munitions, and missile systems.

Perpetua is committed to a modern, sustainable mining approach, with plans to restore an abandoned mine site and produce both gold and antimony, vital for national security. To further this mission, the company has secured a \$59.2 million Technology Investment Agreement under the Defense Production Act. This funding is intended to support the construction readiness and permitting of the project, which is expected to play a key role in strengthening U.S. defense and energy infrastructure.

The project will be powered by one of the lowest carbon emissions grids in the U.S., aligning with Perpetua's environmental, social, and governance (ESG) commitments. Additionally, a portion of the antimony produced will be supplied to Ambri, a U.S.-based company developing liquid metal batteries essential for the low-carbon energy transition.

In terms of regulatory progress, Perpetua Resources reached a significant milestone in 2024 with the U.S. Forest Service publishing the Final Environmental Impact Statement (FEIS) and issuing a Draft Record of Decision (DROD) for the Stibnite Gold Project. These approvals have moved the project closer to its final Record of Decision (ROD), which is expected by the end of 2024, subject to a 45-day resolution period. The company is also advancing engineering work and securing ancillary permits to ensure smooth progress toward construction.

Financially, Perpetua recently raised \$35 million through a public offering of 3.4 million common shares. The proceeds will be used for long-lead time materials, detailed engineering, and general corporate purposes, further positioning the Stibnite Gold Project for future success.

With its focus on responsible mining, environmental stewardship, and community engagement, Perpetua Resources aims to contribute to both U.S. national security and the clean energy transition while revitalizing a historic mining site.

United States Antimony Corporation (NYSE: UAMY)

United States Antimony Corporation is a key player in processing critical minerals in North America, specializing in antimony products vital for defense, technology, and industrial applications. The company's operations span the U.S. and Mexico, producing antimony oxide, metal, and trisulfide. These materials are used in flame retardants, ammunition primers, batteries, and other high-demand sectors. In addition to antimony, USAC processes zeolite in Idaho and recovers precious metals at its Montana facilities, diversifying its product portfolio to support environmental, agricultural, and industrial needs.

USAC recently expanded its presence in Alaska's Tok region, securing 24 additional mining claims covering 3,840 acres. This brings its total holdings in the state to 14,880 acres, positioning the company in an area known for rich antimony and multi-metal deposits. The expansion aligns with USAC's strategy to develop domestic sources of critical minerals, reducing reliance on imports and ensuring a steady supply for U.S. industries. The Tok claims offer not only stibnite—an essential antimony ore—but also access to historically significant gold, silver, and copper deposits.

In its third-quarter results for 2024, USAC highlighted substantial operational improvements. The company achieved greater efficiency at its Bear River Zeolite facility and invested in key growth initiatives, including enhanced mining capabilities and expanded mineral processing operations. As the only North American antimony smelter, USAC is actively working to increase its production capacity while continuing its focus on integrating upstream and downstream operations.

This strategic approach underlines USAC's commitment to securing critical mineral supplies for military and civilian industries, solidifying its role as a cornerstone in U.S. efforts to strengthen supply chain resilience. The company's integrated business model and expansion initiatives position it to address growing demand effectively while supporting national priorities.

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