

# **The Sovereignty Trade: Washington's \$2.5B Push to Secure Critical Minerals**

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Issued on behalf of [Ares Strategic Mining Inc.](#)

USANewsGroup.com News Commentary - North American capital markets are witnessing a structural repricing as bipartisan Congressional proposals for a \$2.5 billion Strategic Resilience Reserve<sup>[1]</sup> signal a decisive federal shift toward onshoring defense-grade supply. This legislative acceleration aligns with a recent White House procurement directive<sup>[2]</sup> confirming that 100% import dependencies across twelve critical minerals now represent a direct national security vulnerability, unlocking Pentagon contracts and Defense Production Act financing for execution-ready domestic platforms. This secular transition is creating asymmetric upside for Ares Strategic Mining Inc. (CSE: ARS) (OTCQX: ARSMF), Centrus Energy (NYSE: LEU), [Graphite One](#) (TSXV: GPH) (OTCQX: GPHOF), USA Rare Earth (NASDAQ: USAR), and NioCorp Developments (NASDAQ: NB), where multi-year federal offtake agreements are de-risking balance sheets and compressing cost-of-capital spreads.

Boston Consulting Group's January 2026 supply chain analysis<sup>[3]</sup> projects demand for defense and semiconductor-grade minerals will outpace investment capacity by 20% to 150% through 2030, creating downstream bottlenecks that private capital alone cannot resolve. BMI's December 2025 forecast confirms<sup>[4]</sup> that industrial policy has become the primary mechanism for resource security, with Western governments now using sole-source procurement mandates to corner domestic production. In this environment, domestic producers are commanding valuation premiums previously reserved for tier-one defense contractors.

Ares Strategic Mining (CSE: ARS) (OTCQX: ARSMF) has been awarded a Pentagon contract to supply acid-grade fluorspar to the U.S. Department of Defense. The multi-year deal carries an initial value of \$169 million, with potential task orders reaching \$250 million over five years through an Indefinite Delivery/Indefinite Quantity agreement. The contract establishes Ares as the sole domestic supplier of acidspar to the U.S. government, supporting the replenishment of strategic mineral stockpiles.

"This is the kind of contract that transforms companies, and secures the future of U.S. industry," said James Walker, CEO of Ares Strategic Mining. "We're not just producing fluorspar; we're helping build a more resilient and secure domestic supply chain for critical minerals."

The contract addresses a significant supply chain vulnerability. The United States currently imports 100% of its fluorspar, a critical mineral used in steel production, lithium-ion batteries, semiconductors, defense systems, and nuclear fuel development. Ares operates the Lost Sheep mine in Utah, the only permitted fluorspar operation in the United States.

Recent operational progress supports the production timeline. In December, Ares completed major infrastructure work at both its underground mine and Delta, Utah processing facility.

The company completed the installation of its ramp and adit system to intersect giant, high-grade, fluorspar orebodies, and advanced construction at its processing plant where foundations and the assembly of the mechanical plant components was completed, as well as digging out the ponds. The Company is in the final stages of fitting the electrics and Control and Instrumentation systems to the assembled plant to enable first production and the commencement of the manufacturing operation.

The company is building two plants that will produce both metallurgical-grade and acid-grade fluorspar, with an initial production output of 50,000 tons per year, which has the potential to be increased with the installation of additional ramps at Ares' district scale fluorspar project.

In November, the company completed its secondary ventilation system, meeting the final regulatory requirement for industrial-scale operations. The 75-horsepower system delivers 30,000 cubic feet per minute of airflow in compliance with Mine Safety and Health Administration standards.

Financing has proceeded through non-dilutive structures. Ares closed its LIFE offering in October, raising \$10.5 million total. Sharing agreements with UK firm Sorbie Bornholm delivered approximately \$3.66 million in additional capital through hedging arrangements tied to the company's share price performance. The structure has delivered returns of 180% and 266% on Sorbie's initial \$1 million investment without issuing new shares, with funds accelerating construction of the Acidspar Flotation Plant.

The Lost Sheep project encompasses 5,982 acres across 353 claims in Juab County, Utah. Beyond fluorspar, the company has identified germanium and gallium in its ore through a research partnership with Iowa State University and Ames National Laboratory. Both minerals appear on U.S. critical supply risk lists, and gallium has not been produced domestically since 1987.

CONTINUED&hellip; Read this and more news for Ares Strategic Mining at:  
<https://usanewsgroup.com/2024/04/29/this-company-is-bringing-essential-mining-back-to-the-u-s-fueled-by-government/>

In other industry developments and happenings in the market include:

Centrus Energy (NYSE: LEU) announced it was awarded a \$900 million task order from the U.S. Department of Energy to expand its uranium enrichment facility in Piketon, Ohio, to include commercial-scale production of High-Assay Low-Enriched Uranium (HALEU). The project is expected to support thousands of American jobs including 1,000 construction jobs and 300 new operating jobs in Ohio while retaining 150 existing positions at the Piketon plant.

"This award represents a historic commitment to revitalizing America's nuclear fuel supply chain and reclaiming American nuclear leadership on the global stage," said Amir Vexler, President and CEO of Centrus Energy. "This award will catalyze additional private investment and supports the prospect of further expansion as the market continues to grow."

The company has already raised more than \$1.2 billion in private capital to support its expansion plans and has secured \$2.3 billion in LEU purchase commitments from utilities. Centrus Energy expects the first new capacity to come online in 2029 following contract finalization with the DOE.

Graphite One (TSXV: GPH) (OTCQX: GPHOF) has announced independent testing results confirming elevated magnet and Heavy Rare Earth presence at the Graphite Creek deposit, with 85% of the REEs in the garnet material comprising magnet or Heavy Rare Earths. Testing performed by Activation Laboratory found dysprosium in the garnets ranging from 32-63 ppm, yttrium ranging from 198-427 ppm, and scandium ranging from 84 to 141 ppm, with drill core samples from the anticipated pit outlined in the company's Feasibility Study completed in February 2025.

"While these results are preliminary, they are clearly promising," said Anthony Huston, CEO of Graphite One. "With Graphite Creek already confirmed by the USGS as the nation's largest natural graphite deposit 'and among the largest in the world,' the presence of 14 magnet or Heavy Rare Earths at Graphite Creek further confirms that ours is a generational deposit for the tech applications transforming our world."

Graphite One is planning a 2026 REE testing program with a U.S. National Lab to develop a testing plan for extracting the REEs from the Graphite Creek garnets. The presence of two Defense Production Act Title III materials in a single deposit underscores Graphite Creek's strategic importance to U.S. industry and national security.

USA Rare Earth (NASDAQ: USAR) reported third quarter 2025 financial results with a cash position of \$258 million and no significant debt following a \$125 million common equity investment at quarter end. The Stillwater, Oklahoma magnet facility remains on track for commissioning of commercial scale production in the first quarter 2026 while the company has entered into a definitive agreement to acquire Less Common Metals Ltd., a manufacturer of specialized rare earth metals and alloys.

"With the downstream capabilities of our magnet manufacturing plant in Stillwater well underway, which is now complimented by the metal making and strip casting capabilities of LCM, we are closing the loop within the rare earth magnet supply chain," said Barbara Humpton, CEO of USA Rare Earth. "Our strategy all along has been to take the steps necessary to secure the supply chain with the critical know-how and capabilities from mine all the way through magnet manufacturing."

The company raised an additional \$163 million from exercise of warrants subsequent to quarter end bringing current cash balance over \$400 million. USA Rare Earth is progressing toward pilot scale testing of its swarf

recycling flow sheet and moving into the Pre-Feasibility Study phase for Round Top.

NioCorp Developments (NASDAQ: NB) announced final assay results from its completed 2025 Department of War-funded drilling campaign at the Elk Creek Critical Minerals Project in southeast Nebraska with results consistent with expectations and reinforcing confidence in the continuity and grade of mineralization. The drilling program focused on areas requiring additional data density to support higher confidence classifications with highlighted intervals including 105.49 meters of 1.58% Nb2O5 and 206.57 meters of 0.88% Nb2O5.

"I am very pleased to see the completion of the assay analyses of the more than 7,000 drill core samples that our Department of War-funded infill drilling campaign produced," said Mark A. Smith, CEO and Chairman of NioCorp Developments. "The results we are seeing are very encouraging."

The results are being used to update the Elk Creek Project's Mineral Resource and Mineral Reserve with the updated Feasibility Study representing a key component to help the Export-Import Bank of the U.S. complete its diligence of NioCorp's pending debt financing application. NioCorp Developments is developing the Elk Creek Project to produce niobium, scandium, and titanium while evaluating the potential to produce several rare earths including neodymium, praseodymium, terbium, and dysprosium.

Article Source:

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SOURCES:

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3. <https://www.bcg.com/publications/2026/why-ecosystems-matter-in-critical-mineral-supply-chains>

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