

The Largest Heavy Rare Earth Metallization Plant Outside China Is Now Underway

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REalloys Inc. (ALOY) has announced a fully financed buildout of the largest heavy rare-earth metallization facility outside China, a project aimed squarely at one of the most fragile links in the Western defense supply chain just as Washington prepares to enforce its 2027 ban on Chinese-origin rare earth materials in U.S. weapons systems. Companies mentioned in today's commentary includes: Realloys Inc. (ALOY), FMC Corporation (NYSE: FMC), [Teck Resources Ltd.](#) (NYSE: TECK), [Elevra Lithium Ltd.](#) (NASDAQ: ELVR), Compass Minerals International (NYSE: CMP), The Metals Company Inc. (NASDAQ: TMC).

The timing coincides with rapidly growing concern about supply availability. Chinese and Western media reports indicate Washington may have only two months of critical rare-earth inventories available for defense manufacturing if supply disruptions deepen.

Shortages are already beginning to surface in industrial markets. Reuters reports that suppliers to U.S. aerospace and semiconductor companies have started turning away some customers as supplies of niche rare earth materials tighten.

Rare earth elements underpin key components of modern warfare, from missile guidance systems and drone propulsion to radar arrays and advanced fighter aircraft electronics.

"If China said we're not going to give you rare earths, that means no F-35s, no missiles," said Mike Crabtree, CEO of the Saskatchewan Research Council (SRC), in an interview with oilprice.com last month. The reach of these materials extends far beyond the defense sector.

"Almost everything you can point to either has rare earths in it to make it work or was produced by something that had rare earths in it to be able to produce that article," Crabtree said.

Yet the West spent decades allowing the most technically demanding parts of this supply chain to move offshore. Mining continued in various parts of the world, but the industrial stages that transform rare earth materials into usable metals and magnets steadily consolidated in China.

"In the last 10 to 15 years, the majority of the upstream and midstream supply chain for rare earth has been controlled by China," Crabtree said.

That concentration now represents a strategic exposure for Western industry and defense planners alike. Beginning in 2027, U.S. procurement rules will prohibit defense systems from using magnets derived from Chinese rare earth supply chains, forcing manufacturers to secure alternative sources. Rebuilding those capabilities is complicated and time-consuming.

REAlloys' metallization operations in Euclid, Ohio represent one of the few facilities in North America already converting rare-earth oxides into metals and magnet-grade alloys.

The rare earth supply chain moves through several stages. Ore is mined and processed into concentrates, which are then separated into individual oxides such as neodymium and praseodymium. But oxide powder is not what manufacturers use.

Before entering production, those oxides must be chemically reduced into rare earth metals and blended into specialized alloys that serve as feedstock for permanent magnets.

For decades, that metallurgical step-from oxide to metal-has taken place overwhelmingly inside China, even when the raw materials themselves were mined or separated elsewhere. That gap has long represented the weakest point in the Western supply chain. REAlloys (ALOY) is seeking to close it, quickly.

At its Euclid facility, the company converts rare-earth oxides into finished metals and magnet alloys through high-temperature reduction and refining processes. These materials supply magnet manufacturers and advanced industrial customers.

"Metallization is the least developed part of the value chain outside China," said REAlloys co-founder Tim Johnston. "It requires deep operating expertise and process control systems capable of managing complex variables in continuous production."

Even under ideal conditions, replicating that capability takes years. The project announced this week aims to accelerate that rebuilding effort.

In partnership with the Saskatchewan Research Council, REAlloys plans to construct the largest heavy rare-earth metallization facility outside China. The platform will integrate with the company's existing operations and supply materials for the U.S. defense industrial base and Defense Logistics Agency stockpiles.

SRC's processing facility in Saskatoon will produce key rare-earth materials, including neodymium-praseodymium alloys, along with dysprosium and terbium oxides. These elements enhance the strength and heat resistance of high-performance permanent magnets.

"What REAlloys will be buying from SRC will be both the bulk NdPr and the smaller but highly valuable quantities of dysprosium and terbium oxides," Crabtree said.

Those materials will then move through REAlloys' metallization and alloying processes before entering magnet manufacturing for use across defense systems, renewable energy equipment, robotics and advanced industrial machinery.

The company is also planning a large-scale NdFeB magnet manufacturing facility in the United States capable of producing roughly 3,000 tons annually in its initial phase and scaling to as much as 10,000 tons per year.

If it achieves that level of output, the facility could supply magnets for roughly 1.5 to 2 million electric vehicles each year, along with thousands of wind turbines and large volumes of industrial motors, robotics systems and medical equipment.

Defense platforms-from missile guidance systems to radar arrays and avionics-are among the most demanding users of these magnets.

By combining upstream resource partnerships, Canadian rare-earth processing and U.S. metallization and manufacturing, the REAlloys-SRC platform aims to establish a fully allied rare-earth supply chain.

If the buildout proceeds as planned, it will represent one of the largest non-Asian rare-earth magnet production hubs in the world. And it will come online just as the United States begins enforcing new procurement rules designed to remove Chinese rare earth materials from the defense supply chain.

"Rare-earth projects outside China today often rely, directly or indirectly, on Chinese inputs, including process technology, investment capital, and the procurement of key equipment, systems, or consumables.

Even many 'non-Chinese' producers remain exposed to China somewhere in their value chain, REalloys' chief technical officer, Andy Sherman, told Oilprice.com in an interview.

"REalloys' strategy is to remove this nexus entirely, because any reliance on China creates strategic vulnerability and leaves supply chains open to geopolitical influence. To be even 1% reliant on China is, in practical terms, to be 100% exposed."

Other resources to watch as the U.S. moves to diversify its supply chain:

FMC Corporation (NYSE: FMC), headquartered in Philadelphia, Pennsylvania, is a global agricultural sciences company that delivers innovative technology to farmers worldwide. While FMC is not a traditional mining company, its significant stake in lithium, a critical component in rechargeable batteries and other high-tech applications, sets it apart. Lithium is a strategic mineral in the transition to a clean energy future, and FMC's involvement in this sector positions the company for growth in the years to come.

FMC's commitment to innovation and sustainability is commendable. The company's agricultural products, such as crop protection solutions and plant nutrition technologies, contribute to increased crop yield and quality, addressing global food security challenges. In recent years, FMC has benefited from robust demand for its crop protection products, driven by higher commodity prices and strong agricultural market fundamentals.

Teck Resources Limited (NYSE: TECK) is a major international base- and battery-metals producer with significant exposure to copper, a metal central to electrification and battery manufacturing. Its world-class operations in the Americas and resource expansion projects position it to benefit from structural growth in electrified transport, renewable infrastructure, and industrial decarbonization. While Teck doesn't operate in rare earths per se, copper's role as the most critical conductive metal in EVs, charging networks, and grid expansion makes Teck a key upstream supplier to the broader critical minerals ecosystem.

Teck has also been advancing initiatives to lower the carbon intensity of its mining and smelting footprint, aligning with the demand from customers and policy frameworks that increasingly prefer low-emission metal supply. Its diversified portfolio and long-lived reserves give Teck leveraged exposure to tightening copper markets that underpin battery and electric motor deployment at scale.

Elevra Lithium (Nasdaq: ELVR) is building a geographically diversified lithium platform combining near-term concentrate sales with longer-term U.S. conversion capacity. The company was formed through the August 2025 merger of Piedmont Lithium and Sayona Mining, uniting complementary North American assets under a single platform.

The Carolina Lithium project - a legacy Piedmont asset - has secured key state-level approvals, clearing a significant regulatory hurdle toward construction. In the interim, Elevra generates commercial spodumene shipments through its Canadian operations, balancing revenue timing and capital intensity across the portfolio.

The company also retains exposure to Ghana's Ewoyaa project through its partnership structure, securing rights to 50 percent of production. Concentrate from Ewoyaa is intended to supply the proposed Tennessee Lithium conversion facility, which aims to produce battery-grade lithium hydroxide within the United States.

Compass Minerals International (NYSE: CMP), headquartered in Overland Park, Kansas, has undergone a significant strategic reset - one that positions the company as a compelling domestic supply chain play in an era of heightened geopolitical tension with China.

Having shelved its Utah lithium ambitions, management has executed what it calls a "back-to-basics" strategy, refocusing the business on its core Salt and Plant Nutrition segments, both of which are anchored in North American production. This matters: global potash supply chains remain heavily exposed to China, Russia, and Belarus, while Compass's sulfate of potash (SOP) is produced domestically at its Ogden, Utah facility, offering customers a sanctions-insulated, tariff-resilient alternative.

The reset is showing results. First quarter fiscal 2026 saw total company adjusted EBITDA of \$65.3 million, up 103% year over year, with salt volumes rising 37% and meaningful margin expansion in Plant Nutrition driven by higher pricing and an improved cost structure. The company is also actively deleveraging, reducing net debt by roughly \$92 million, or 10%, in the most recent quarter, and has entered into an agreement to sell its Wynyard, Saskatchewan SOP facility to further concentrate operations around its core Ogden asset.

The Metals Company (TMC) is the global leader in deep-sea mineral exploration, targeting polymetallic nodules on the seafloor of the Clarion-Clipperton Zone in the Pacific Ocean. In January 2026, TMC took a massive step toward commercialization by filing the first-ever consolidated deep-seabed mining application, which would grant them a permit area covering 65,000 km². This move was made possible by the 2026 modernization of NOAA's deep-seabed mining rules, which provides a clearer legal framework for U.S.-aligned companies to recover metals from international waters.

TMC is currently working with Benchmark Mineral Intelligence to finalize a Life Cycle Assessment that will prove the environmental benefits of seafloor nodules to Western automakers and defense contractors. While environmental NGOs remain cautious, the U.S. government's push to find "non-terrestrial" sources of cobalt and nickel, both currently dominated by China and the DRC, has provided TMC with significant political tailwinds. As the company moves toward its first commercial recovery in late 2026 or 2027, it stands as the ultimate "wildcard" in the race for critical mineral sovereignty.

By. Josh Owens

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