

The Rare Earth Race Has a New Front-Runner

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As Washington races to build a rare earth supply chain that can survive the Pentagon's 2027 ban on Chinese-origin materials, REalloys (ALOY) has locked in long-term supply from one of the largest known heavy rare earth deposits in the world. The company mentioned in today's commentary includes: REalloys Inc. (ALOY), [Lynas Rare Earths Ltd.](#) (OTCQX: LYSDY), Apple Inc. (NASDAQ: AAPL), Western Digital Corporation (NASDAQ: WDC), Alphabet Inc. (NASDAQ: GOOGL), Comstock Inc. (NYSE: COMST), and American Lode (NYSE: LODE).

The company announced last Thursday that it has signed a definitive 15-year offtake agreement with Critical Metals Co. for 15% of Phase 1 production from the Tanbreez project in southern Greenland, a massive heavy rare earth deposit containing Dysprosium and Terbium, the two most strategically sensitive magnet materials used in fighter aircraft, missile systems, radar platforms, drones, and advanced defense hardware.

REalloys is building one of the only integrated heavy rare earth metallization and magnet production platforms in North America. The company in Washington pushes to break its dependence on Chinese processing capacity before the Pentagon ban takes effect in 2027, a matter of months.

The company's Euclid, Ohio, operation focuses on the hardest part of the rare earth supply chain outside China: converting rare earth oxides into defense-grade metals, alloys, and eventually the world's most strongest and most advanced magnet: permanent magnet type used in missile systems, fighter aircraft, radar platforms, robotics, EV drivetrains, and advanced defense systems.

REalloys says it is scaling that Ohio platform into the largest heavy rare earth metallization facility outside China, supporting a growing network of allied-nation feedstock agreements.

The Tanbreez agreement significantly expands that network.

Under the deal, REalloys will secure 15% of monthly Phase 1 production from the Greenland project for an initial 15-year period.

This is another major announcement for REalloys as the company rushes to stay ahead of major defense deadlines.

The Tanbreez offtake deal follows REalloys strategic partnership with Saskatchewan Research Council tied to 80% of production from the Saskatchewan Research Council's commercial rare earth processing facility. It also adds to the company's previously secured rights to up to 10% of production from the high-grade Sheep Creek rare earth deposit in Montana, and its control over the Hoidas Lake rare earth asset in Saskatchewan.

GREENLAND IS EMERGING AS A WESTERN RARE EARTH STRONGHOLD

Trump didn't manage to buy Greenland, but REalloys got its critical minerals.

The strategic importance of the Tanbreez project goes far beyond scale.

The Greenland deposit is one of the largest known heavy rare earth resources globally and one of the few major Western projects capable of supplying meaningful quantities of Dysprosium and Terbium outside China.

Tanbreez isn't just another rare earths venue. It's a heavy rare earth behemoth, while most global deposits focus on less critical elements.

light rare earth production. Critical Metals estimates heavy rare earths account for roughly 27% of the project's total production, with the remainder of the project's global deposits focused primarily on light rare earth production.

The Greenland project is already fully permitted and advancing under a Western-aligned ownership structure following approval of Critical Metals' acquisition of a controlling 92.5% interest earlier this year.

For REalloys, the deal secures another long-term heavy rare earth materials now central to Pentagon supply chain plans in the Middle East conflict that is rapidly depleting the arsenal.

Johns Hopkins economists Steve Hanke and Jeffrey Weng told Fortune magazine that the U.S. has already burned through massive portions of its precision weapons inventory across Iran and Ukraine, while remaining dependent on Chinese-produced rare earth materials to replace them. The economists suggest that Washington has blown through 45% of its Precision-guided Missile inventory just in Iran, and nearly 50% of its THAAD interceptors and 30% of its Tomahawk cruise missiles, among

Those systems rely on samarium-cobalt magnets or dysprosium- and terbium-enhanced NdFeB magnets that still flow overwhelmingly through China's refining and metallization system. The authors estimate that replenishing just four major systems could require between five and ten metric tons of finished defense-grade rare earth magnets, with more than 90% of current supply chains still tied to China.

And that's the gap REalloys is helping to close, with a North American solution helmed by a leadership lineup that represents who's who of American defense.

Joe Kasper, former Chief of Staff to the U.S. Secretary of Defense, leads REalloys' advisory board, working closely with Board Chair, Stephen duMont, president of GM Defense, and seated Board member, General Jack Keane, former Vice Chief of Staff of the U.S. Army.

These are the people who've run defense procurement from the inside, the ones who decide who gets qualified, who gets the contract and who actually ends up supplying material into weapons systems.

"This is about building a completely sovereign supply chain from input to finished product, without relying on foreign production," Joe Kasper, former Chief of Staff to the U.S. Secretary of Defense and now Chairman of REalloys' advisory board, told Oilprice.com. "If the U.S. can't access domestically-processed and manufactured materials, then it does not have a rare earth supply chain at all."

All Systems Go

REalloys' Phase One operations are already turning rare earths into alloys in Ohio, amid an ongoing build-out that will begin next year alongside the Pentagon ban on Chinese-origin rare earths, its plans for Phase Two are a major scale-up.

In Phase One, REalloys intends to move into North American production of high-purity rare earth oxides that can be turned into metals and alloys, using a mix of recycled magnets and mined feedstock. This is the point at which material is produced in the United States and can move through a traceable supply chain. The capital required is about \$75 million, and the buildout is \$100 million in cash already allocated.

By Phase Two, it will all run through the Ohio facility, where REalloys already converts rare earth oxides into metal and alloys. The buildout increases throughput and expands the range of material it can process, including heavy rare earths like Dysprosium and Terbium. Feedstock is expected to come from both recycled magnets and upstream feedstock supply agreements, including from the Tanbreez project, with the material moving through reduction and alloying in-house before leaving as finished components.

Phase Two will also vertically integrate by adding rare earths magnet production to the pipeline. By 2029, the plan is to move manufacturing in Ohio, closing the full circle from processed material into finished components.

Instead of selling metal and alloys into someone else's system, REalloys would produce NdFeB magnets itself from its own integrated solution and keep that margin.

This is where the economics takes a major leap forward, and it's what prompted Clear Street in April to launch coverage of REAlloys

Clear Street initiated coverage of REAlloys with a Buy rating and a \$35 price target, even though the stock was trading \$8 at the time of the report, because the current valuation does not reflect what the system could look like once it's run at scale.

The Rare Earths End Game

Rare earths are now facing tightening restrictions on both sides of the Pacific.

And Washington is scrambling to the point of internal divisions over how fast this entire supply chain can be built.

Bloomberg reports that internal disagreements are emerging inside the Trump administration after China's export restrictions exposed major U.S. vulnerabilities. The argument is over whether the U.S. should rely on market forces to rebuild the rare earth industry or use aggressive state-backed financing and industrial policy similar to the model China used to dominate the market.

This is why companies capable of securing even a single strategic link in the non-Chinese rare earth supply chain could own some of the most valuable industrial and defense assets of the next decade.

Other companies looking to influence the rare earth supply chain:

Lynas Rare Earths Ltd. (LYSDY) remains the leading producer of separated rare earth materials outside China. The company has restructured its processing chain to mitigate regulatory risk and expand long-term throughput.

The Kalgoorlie cracking and leaching plant in Western Australia is fully operational, allowing Mt Weld concentrate to be processed domestically and radioactive residues to be managed before shipment. This shift has enhanced supply security while addressing prior Malaysian regulatory concerns.

Apple (AAPL) has emerged as the clear leader among big tech companies in rare earth magnet recycling, having pioneered the use of recycled rare earth elements in consumer electronics as far back as 2019, when it introduced them in the Taptic Engine in the iPhone 11. Today, nearly all magnets across Apple's device lineup are made with 100% recycled rare earth elements. This milestone the company has nearly achieved across its entire portfolio.

In July 2025, Apple formalized its commitment with a landmark \$500 million partnership with MP Materials, the only fully operational rare earth producer in the United States, to source American-made recycled rare earth magnets for hundreds of millions of devices.

Western Digital (WDC), one of the world's largest hard disk drive manufacturers, has taken a leading role in developing rare earth recovery from its own products at end of life. In April 2025, Western Digital announced a successful at-scale program conducted in collaboration with Microsoft, Critical Materials Recycling, and PedalPoint Recycling, in which approximately 50,000 pounds of shredded end-of-life hard drives were processed using an environmentally friendly, non-acid chemical method to recover rare earth oxides alongside gold, copper, aluminum, and steel.

Western Digital views this initiative as a blueprint for transforming the global HDD recycling industry, with the potential to significantly offset U.S. dependence on virgin rare earth mining when scaled worldwide. By partnering with downstream manufacturers and data center operators, Western Digital is helping to establish a feedstock network that feeds recovered rare earths back into the U.S. supply chain.

Alphabet (GOOGL) is the "automated chemist" of the rare earth industry. Through Google DeepMind, they released GNoME, a tool that has predicted over 2 million new crystalline structures. This isn't just a science experiment; researchers are using this database to find "rare-earth-free" permanent magnets.

The company's stock remains a cornerstone of the tech market, with Google Cloud seeing explosive growth as it becomes a major revenue driver.

preferred home for many generative AI startups. Google Cloud is also the digital backbone for the Saskatchewan Research Council's new rare earth separation facility, providing the computer vision and AI models needed to automate the complex process of separating the 17 chemically identical rare earth elements.

Every other company on this list is trying to dig something out of the ground. Comstock Inc. (LODE) is going a different way, recovering critical metals from the mountain of end-of-life solar panels that's about to hit the U.S. market.

Comstock Metals, the company's Nevada-based subsidiary, is building what it describes as the only certified zero-landfill recycling solution in North America. Its first industry-scale facility in Silver Springs, Nevada is commissioning now, designed to process up to 100,000 tons-approximately 3.3 million panels-per year. A second site in Clark County is in permitting.

By. Charles Kennedy

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