









WHAT YOU NEED TO KNOW

- China announced new export controls on gallium and germanium, further complicating U.S. attempts to stabilize mineral supply chains.
- The U.S. depends on China for over half of its supply of 26 minerals commodities used to manufacture advanced energy and defense technology.
- The Biden administration has focused on working with allies on mineral partnerships while blocking critical domestic mining projects and permitting reforms.
- To reshore supply chains from China, we must push for an all-of-the-above mineral strategy that starts with timely access to U.S. minerals.

LETTER FROM THE PRESIDENT AND CEO

JULY 25, 2023

Dear Joe,

In yet another warning shot, China recently announced export controls for gallium and germanium, two critical minerals the U.S. relies on for microchips, weapon systems, electric vehicle (EV) car batteries and other vital technology. It's the latest demonstration of China's willingness to use mineral supply chains as geopolitical weapons; an example of China's retaliatory capacity after recent attempts by the U.S. and its allies to reduce China's stranglehold on global mineral supply chains.

It's a real-life chess match and China started playing long before the U.S. and its allies realized the importance of the game. Through lopsided <u>infrastructure-for-minerals</u> agreements with African nations and methodical investments across the globe, China now dominates the extraction, refining and processing of numerous minerals – representing our country's leading supplier of 30 critical minerals. What we are left with is a <u>gaping hole in our industrial policy</u> where

regardless of how many domestic battery megafactories we open, we lack reliable sources of the base mineral inputs that supply them. Put simply, there isn't modern technology that can be built without China.

So where do we go from here?

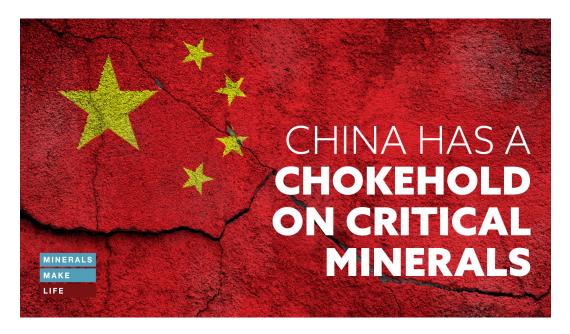
Without more domestic mineral projects, it will be nearly impossible to surpass China's industrial supply chain which is now decades ahead of the West. Instead of streamlining domestic mining reviews and permitting, the Biden administration recently announced 15 allied mineral trade agreements, including proposals to allow allies such as Australia to be designated as domestic suppliers. Partnering with allies is important, but as China's recent actions show, domestic mining should be our priority, not an afterthought.

Thank you,

Rich Nolan

NMA President and CEO

BLOG
U.S. Sets Mineral Import Reliance Record



The U.S is far behind China in the race to mineral security.

BLOG
The Global Race to Supply Our Future



In order to increase U.S. competitiveness, we'll need major updates to permitting policies that will enable quicker, more efficient mining practices.

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