

China's Antimony Export Restrictions Ignite Global Demand Surge: A Bullish Outlook on This Critical Mineral

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Antimony, an essential mineral for military and high-tech applications, is at the center of an escalating supply crisis. In August 2024, China, which controls nearly 80% of global antimony production, imposed strict export restrictions, citing national security concerns. This decision left Western nations scrambling to secure alternative sources, underscoring their dependency on China for critical minerals. "The vise-tight grip that China wields over rare minerals crucial for today's technologies is about to become even stronger," reported The New York Times, capturing the harsh reality facing many industries.

For U.S. defense contractors like Lockheed Martin (NYSE: LMT) and Northrop Grumman (NYSE: NOC), the timing couldn't be worse. Both rely on antimony to harden ammunition and enhance flame-resistant armor. Without secure, reliable supply chains, these companies face potential production disruptions, sparking concerns around U.S. defense readiness. The urgency to secure antimony has led to renewed focus on North American mining projects, one of note is the [Perpetua Resources'](#) (NASDAQ: PPTA) Stibnite Gold Project in Idaho. Backed by government funding and fast-tracked permits, Perpetua's project could provide much-needed domestic supply. CEO Jon Cherry describes it as a "win-win" for Idaho and U.S. security, stressing its potential to reduce reliance on China.

As Western nations grapple with a critical supply crisis in antimony, driven by China's stringent export restrictions, there is a pressing need for alternative sources of this essential mineral. This urgency has sparked renewed interest in domestic and European mining projects, highlighting the importance of securing reliable supply chains for defense and technology applications. In this context, Military Metals Corp. (CSE: MILI) (OTCQB: MILIF) is positioning itself to play a vital role in addressing these challenges through strategic acquisitions and resource development.

West Gore Antimony Project

In September 2024, Military Metals acquired the historic West Gore Antimony Project in Nova Scotia, Canada—a former antimony-producing site with a history dating back to the late 19th century. The brownfield project, with a record of significant antimony and gold production, represents a cornerstone of Military Metals' portfolio. At its peak, West Gore was Canada's largest antimony mine, with historic high-grade drill results revealing yields of 10.6 grams per tonne (gpt) of gold and 3.4% antimony across 7.07 meters.

Military Metals CEO Scott Eldridge noted that the acquisition aligns with the company's goal of becoming a significant global player in antimony. "Antimony prices have surged due to recent supply constraints, including China's export restrictions. West Gore is a critical step toward providing our shareholders exposure to this strategically important metal," Eldridge stated. The site offers valuable untapped resources and aligns with efforts to secure domestic critical mineral supplies.

West Gore spans 585 hectares, with additional claims in Hants County covering another 388 hectares, encompassing historic mine workings and mineralized zones. Reports of surface stockpiles and tailings from early 20th-century operations provide a potential near-term resource. This Canadian acquisition strengthens Military Metals' foothold as the company prepares to explore both legacy deposits and new mineralized zones for the 2024 season.

Expanding into Europe

Extending its reach into Europe, Military Metals recently signed a definitive agreement to acquire three key properties in Slovakia, marking its entry into the European critical mineral landscape. This acquisition includes the Trojarova and Tiennesgrund antimony projects, and the Medvedi-Potok tin project-sites that were initially explored during the Soviet era. These locations hold substantial historical data, with Soviet-era exploration indicating strong antimony potential, especially at Trojarova.

Trojarova, the most advanced of the three, contains an estimated 1.5 kilometers of mineralized strike. While Soviet classifications need modern confirmation, Military Metals intends to conduct validation drilling to bring estimates in line with National Instrument 43-101 standards. Eldridge highlighted the acquisition's strategic

importance, pointing to the European Union's Critical Raw Materials Act as a potential pathway to secure funding for regional mineral projects. These resources aim to meet European demand and diversify supply chains, reducing dependency on minerals from politically sensitive regions.

Alongside Trojarova, the Tiennesgrund Project features a 10-kilometer fault-hosted vein system with promising mineralization potential. Initial surveys will be followed by further exploration, as past production was largely artisanal. The Medvedi-Potok Project complements Military Metals' portfolio with its tin deposit, adding revenue potential within a stable European jurisdiction.

Positioning and Market Impact

With antimony prices surging from \$11,000 per tonne to over \$34,000 due to recent supply disruptions, Military Metals is positioning itself to address demand. Antimony's importance spans applications from advanced battery technologies and military equipment to renewable energy solutions, making it a designated critical mineral in the U.S., Canada, the European Union, and other Western economies. China, Russia, and Tajikistan collectively control over 90% of the world's antimony reserves, leaving the Western world vulnerable to supply issues and pushing for new domestic sources.

Military Metals' acquisitions not only expand its portfolio but align with a broader Western push to secure critical resources vital for economic and defense stability. These efforts may also benefit from regulatory support, like the EU's Critical Raw Materials Act, which could help fund mineral development on the continent. By establishing assets in stable, Western-aligned jurisdictions, the company aims to cater to North American and European markets and reduce the reliance on politically sensitive imports.

Looking Ahead: Military Metals' Growing Role in the Critical Minerals Landscape

With the recent uplisting to the OTCQB on October 30, Military Metals has gained increased visibility in U.S. markets, positioning itself to attract a broader investor base as it expands through strategic acquisitions and resource development. By securing assets across North America and Europe, the company is establishing itself at the center of the Western antimony supply chain, poised to meet both North American and European demand.

As geopolitical tensions reshape global supply chains, Military Metals Corp. is rapidly emerging as a cornerstone in Western markets for this essential mineral. With exploration underway, the industry is closely watching the company's Canadian and Slovakian projects as they promise to support a diversified and secure supply chain for the West.

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