

Beyond the Truce: Why the Rare Earths Market Needs Critical Metals Corp to Break China's Grip

BY TONY SAGE, CEO OF [CRITICAL METALS CORP](#) (NASDAQ: CRML), A LEADING MINING COMPANY FOCUSED ON CRITICAL MINERALS. ON OCTOBER 30, 2025



In a whirlwind summit between U.S. President Donald Trump and Chinese President Xi Jinping, the two superpowers struck a fragile deal: China will **delay new export controls on rare earth elements (REEs) for one year**. Make no mistake, this is a **short-term band-aid** on a gaping wound in global supply chains. With China controlling nearly **90% of the REE market**, the world cannot afford to bet its future on Beijing's goodwill. Enter **Critical Metals Corp (NASDAQ: CRML)**, whose Tanbreez project in Greenland is emerging as a beacon for Western independence.

Rare earths, which are 17 chemically similar elements like neodymium, dysprosium, and terbium, are the invisible backbone of modern life. They power **cars, wind robotics, smartphones, and missile guidance**

systems and so much more. Demand is exploding: the IEA projects a **quadrupling by 2040** amid the green energy boom and prices remain volatile fueled by supply fears.

China's Iron Fist: A Weaponized Monopoly

Beijing's dominance isn't accidental, it's state-orchestrated. In October 2025, China slapped **stricter export controls** on REEs and magnets, targeting U.S. defense chains. This follows years of "rare earth diplomacy," like the 2010 Japan embargo. The recent truce pauses escalation, but **existing restrictions stay**, and history shows China wields supply as leverage.

The Tanbreez Project – A Game-Changer for the Western REE Supply Chain

Critical Metals Corp and its Tanbreez Project in Greenland are working to be the solution for the West's REE independence. Tanbreez is one of the world's largest undeveloped REE deposits: **4.7 billion metric tons** rich in **heavy rare earth oxides (HREOs)** like dysprosium and terbium—**critical for high-performance magnets** China hoards.

Key highlights:

- **Advanced stage:** Fully permitted, with recent drilling hitting **0.40-0.42% TREO** and **26% HREO**—top-tier grades with a bankable feasibility study expected to be completed in 2025.
- **Offtake secured: 25% of near-term output** locked for U.S. buyers, including REalloys, a rare U.S. magnet processor, and Ucore Rare Metals, a leader in rare-and critical-metal resources, extraction, beneficiation, and separation technologies.
- **Funding firepower: \$85M PIPE** raised recently; U.S. Export-Import Bank eyes support.

Tanbreez is positioned to deliver secure, non-Chinese supply to North America and Europe.

Forging Western Supply Chains: US and EU Push Back

The truce buys time, but **long-term security demands homegrown capacity:**

Key Initiatives in the West

US:

- MP Materials expansion; USA Rare Earth magnets.

- Frameworks with Japan/Australia for mining/processing.

EU:

- Estonian separation plants; Austrian lithium.
- Critical Raw Materials Act targets 10% global processing by 2030.

Tanbreez aligns with these initiatives: Greenland's stability, U.S. alliances, and HREO focus make it ideal.

The Bottom Line: Act Now or Risk Blackouts

The US-China truce is only a temporary pain reliever. **True resilience means mining and processing in the US, EU, or allies like Greenland.** Critical Metals Corp isn't your average miner, it's working at the forefront of supply sovereignty.

As the U.S. eyes Asia deals, and the West scrambles to shore up its rare earth supply chains: **Critical Metals Corp and Tanbreez are the long-term solutions.** The rare earths revolution starts here.

ABOUT THE AUTHOR



Tony Sage is the Chief Executive Officer and Executive Chairman of **Critical Metals Corp**, a leading mining company focused on critical minerals. Mr. Sage has more than 35 years' experience in corporate advisory services, funds management and capital raising predominantly within the resource sector.

Mr. Sage has been involved in the management and financing of listed mining companies for the last 22 years. Mr. Sage has

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