



The weekly brief on the U.S. critical-minerals, rare-earth, and coal build-out, for the people who staff and supply it.

TOP SIGNAL OF THE WEEK

Washington puts \$75 million behind pulling rare earths and gallium from American coal

On July 1, 2026, the U.S. Department of Energy’s Office of Critical Minerals and Energy Innovation announced \$75 million for five projects that will build and operate pilot-scale plants to recover rare earth elements and other critical materials, including germanium, gallium, and aluminum, from coal and coal-based feedstocks. The National Energy Technology Laboratory will manage the five under its coal-based industry topic area: the University of North Dakota (Grand Forks), Valor Metals (New York), CONSOL Innovations (Canonsburg, Pennsylvania), American Resources Corporation (Fishers, Indiana), and Peabody Energy (St. Louis). Each will build its pilot at its own industrial site, which DOE did not individually name. For the people who staff and supply these projects, this is the newsletter’s core coal-to-rare-earth thesis moving from policy to pilot plant: five funded U.S. operators that will need process engineers, pilot-plant operators, and construction trades, and a domestic route to gallium and germanium, two metals the United States imports almost entirely and China dominates. One caveat: these are selections for award negotiations, not final awards, and DOE says it may change amounts or rescind a selection during negotiation.

Source: [U.S. Department of Energy, Office of Critical Minerals and Energy Innovation](#), July 1, 2026.

BUILD-OUT & FUNDING MOVES

ANTIMONY Jul 1

United States Antimony (NYSE: UAMY) delivered its first shipments of the second quarter under its \$245 million Defense Logistics Agency contract, about 82,000 pounds of antimony metal ingots invoiced at roughly \$2.6 million in June, and reported \$57.3 million in total DLA ingot orders since the contract began. It also commissioned the expanded smelter furnaces at its Thompson Falls, Montana plant; some Bolivian feedstock deliveries slipped on Strait of Hormuz-related diesel shortages, since mitigated. This is the week’s clearest in-window supply milestone: physical domestic antimony moving into the national defense stockpile.

Source: [United States Antimony \(ACCESS Newswire\)](#), July 1, 2026.

TUNGSTEN Jun 30

Guardian Metal Resources (NYSE American: GMTL) published a prefeasibility study for its Pilot Mountain tungsten project in western Nevada: an eight-year, 4,000-tonne-per-day open-pit mine producing 15,916 tonnes of tungsten trioxide over its life. At a base tungsten price the study shows an after-tax net present value (8% discount) of \$660.3 million, a 59.6% internal rate of return, and a one-year payback on \$288.7 million of initial capital. The company says it could build on the strength of the study and targets first ore in the fourth quarter of 2028. It would be the first new U.S. tungsten mine in over a decade; the country has not mined tungsten commercially since 2015.

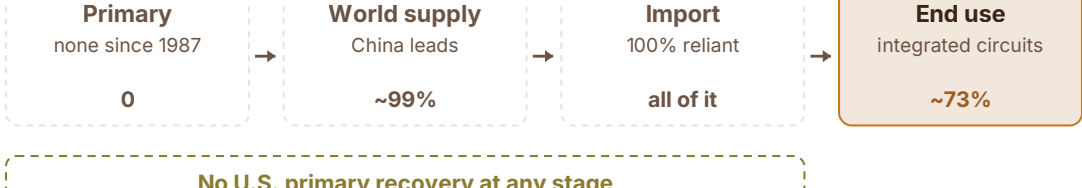
Source: [Guardian Metal Resources PFS](#), June 30, 2026; [MINING.COM](#).

URANIUM Jul 2

New Energy Information Administration data reported this week show the U.S. uranium sector’s strongest year in over a decade. In 2025, uranium concentrate production roughly tripled to 2.1 million pounds of U3O8 (mine production, a separate measure, about doubled to 1.4 million pounds); spending on land, exploration, drilling, production, and reclamation rose 47% to \$234.7 million; and industry employment climbed 41% to 711 full-time person-years, the most since 2014. Utah’s White Mesa mill restarted, while several idle in-situ recovery plants stayed on standby, a reserve of capacity that could restart as prices hold.

Source: [U.S. Energy Information Administration, 2025 Domestic Uranium Production Report](#) (data released June 23, 2026); reported July 2, 2026 by [MINING.COM](#).

WHERE U.S. GALLIUM ACTUALLY COMES FROM



No U.S. primary recovery at any stage

China imposed export controls in August 2023, banned U.S. exports in December 2024, then lifted the ban for one year in November 2025.

Source: USGS Mineral Commodity Summaries 2026, Gallium.

HIRING & STAFFING DEMAND

Where projects are ramping and what roles they need, for our recruiter readers.

HIRING Coal-to-rare-earth · ND, NY, PA, IN, MO

The five DOE-selected coal-to-critical-minerals recipients (University of North Dakota, Valor Metals, CONSOL Innovations, American Resources Corporation, and Peabody Energy) are to design, build, commission, and operate pilot-scale recovery plants at their own industrial sites, pointing to demand for process and chemical engineers, pilot-plant and process operators, metallurgists and chemists, and construction trades. Hiring will follow award negotiation rather than start immediately, and DOE did not name the individual pilot sites.

Source: [U.S. Department of Energy](#), July 1, 2026.

HIRING Antimony · Montana

United States Antimony has just commissioned the expanded smelter furnaces at Thompson Falls, Montana, and is ramping deliveries under its \$245 million Defense Logistics Agency contract. As domestic material begins moving through the plant, the near-term pull is for smelter and furnace operators, metallurgists and lab technicians, and the trades that keep a scaling processing line running.

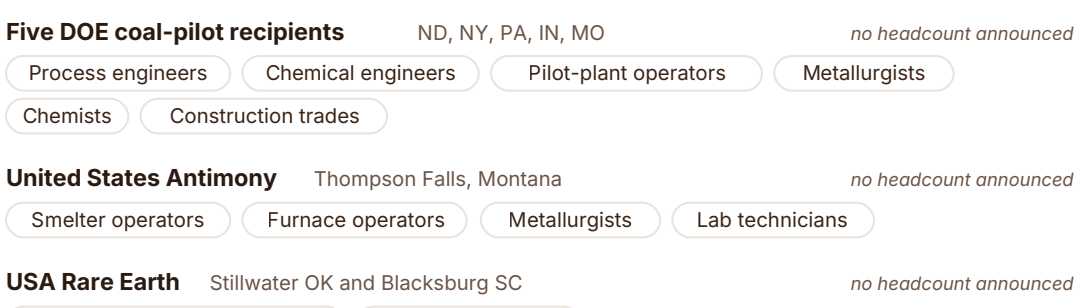
Source: [United States Antimony \(ACCESS Newswire\)](#), July 1, 2026.

HIRING Rare-earth magnets · Oklahoma & South Carolina

USA Rare Earth (Nasdaq: USAR) is scaling neodymium-iron-boron magnet capacity across Stillwater, Oklahoma and Blacksburg, South Carolina toward 10,000 tonnes per year under its June 3 agreements with the U.S. Department of Commerce. Its new \$1.2 billion Blacksburg (Bailey Park) plant is projected to create about 490 jobs when it opens in April 2028, spanning magnet-production and process operators, quality and process engineers, maintenance and electrical technicians, and construction trades.

Source: [USA Rare Earth \(SEC 8-K\)](#), June 3, 2026; job count per [The Post and Courier](#).

ROLES IN DEMAND THIS WEEK



Roles as named or directly implied by each company.

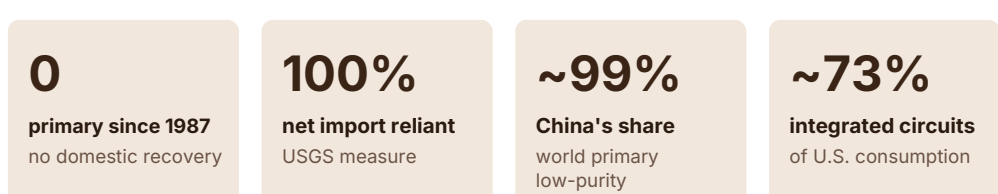
FEATURED COMMODITY EXPLAINER

FEATURED: GALLIUM

Gallium ties this week’s issue together: it is one of the byproducts the DOE-backed coal pilots aim to recover. It is a soft, silvery metal produced almost entirely as a byproduct of refining bauxite into alumina, with a smaller share from zinc processing. Its economic weight is downstream, in the gallium arsenide and gallium nitride used to make integrated circuits and optoelectronic devices for defense electronics, high-performance computing, telecommunications, LEDs, and solar cells; integrated circuits alone account for about 73% of U.S. gallium consumption. The strategic problem is concentration: the United States has recovered no domestic primary gallium since 1987 and is 100% net import reliant, while China accounts for roughly 99% of world primary low-purity production and has used that position as leverage, imposing export controls in August 2023, banning gallium exports to the United States in December 2024, then lifting that ban for one year in November 2025. That is the backdrop for the federal push, from the coal-pilot selections above to a September Department of Energy program of up to \$6 million to restart domestic gallium recovery and a November 2025 Department of War award of \$29.9 million to build a Louisiana facility recovering gallium and scandium from industrial waste.

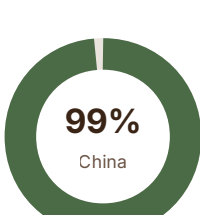
CHINA'S SHARE OF WORLD PRIMARY LOW-PURITY GALLIUM, 2025

U.S. GALLIUM AT A GLANCE



China imposed export controls in August 2023, banned exports to the U.S. in December 2024, then lifted the ban for one year in November 2025.

Data: USGS Mineral Commodity Summaries 2026, Gallium. Chart by Upstream Signals.



100% U.S. net import reliance, gallium, 2025 (no primary output since 1987)
\$580/kg Avg. customs value of U.S. gallium-metal imports, 2025 (about 30% above 2024)

Figures: [USGS Mineral Commodity Summaries 2026, Gallium](#). Federal program detail: U.S. DOE and U.S. Department of War, 2025.

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