

HOW AMERICA WINS IN THE WORLD: CRITICAL MINERAL SECURITY

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America wins the AI and technology race when we invest strategically in the critical minerals that power everything from cell phones to cars to sensitive defense systems. Right now, China controls sixty percent of the global supply of critical minerals and ninety percent of the processing capacity. Secretary of State Marco Rubio laid out the path to regaining our edge at the first-ever U.S. Critical Minerals Summit, when he called for “creating reliable supply chains that are vital...to technological innovation, economic strength, and also national security.” By drawing on the full range of U.S. civilian tools, including diplomatic and development resources, global partnerships like the Department of State’s *Pax Silica*, and loan guarantees like the Export-Import Bank’s strategic stockpile, *Project Vault*, American leadership on critical minerals can foster partnerships that promote mutual prosperity while protecting against economic coercion.

Leading the way on critical minerals will:

1. SECURE U.S. ACCESS TO CRITICAL MINERALS

Closer coordination with allies and the private sector enables U.S. companies to securely extract, process, and transport critical minerals essential to American defense and technology industries. U.S.-backed supply chain networks better shield U.S. markets from coercive interference and diversify supply routes, so the U.S. is not dependent on any single supplier.

- Minerals-based industries **contribute** more than \$4 trillion to the U.S. economy, yet China controls much of the global refining capability—particularly through its investments in Africa—and supplies about 90% of the world’s processed rare earth elements. Amid trade tensions in 2025, Beijing temporarily **restricted** rare earth exports, jeopardizing U.S. defense supply chains and spiking costs for manufacturers as they sought alternative sources.
- Recognizing the importance of our strategic partnerships, Under Secretary of State Jacob Helberg is spearheading the Administration’s Pax Silica initiative, a comprehensive economic partnership geared towards meeting demand for critical minerals and the technologies they enable. As Under Secretary Helberg has said, Pax Silica is premised “on the reality that our security is inseparable from our technological edge.”

2. BOOST ECONOMIC OPPORTUNITY AND MUTUAL PROSPERITY

Investing in communities that connect the U.S. to critical minerals will mobilize American capital and expertise to deliver long-term economic growth in Africa, Asia, and beyond—while expanding jobs and exports for U.S. companies.

- Investing in critical mineral supply chains further link the U.S. to the world’s emerging markets: in 2026, the International Monetary Fund (IMF) **forecasts** that Africa will overtake Asia as the fastest growing region of the world. However, Africa’s capital investment significantly lags behind the global average, which has created a foothold for countries like China to prop up its economic influence by acquiring mineral extraction rights and using “**debt trap diplomacy**.”
- Alongside investments in critical minerals, U.S. partnerships should target the human capital and market conditions that stimulate trade. This includes “wrap-around” investments in infrastructure, as well as education, health, and good governance that have repeatedly been **correlated** with stronger trading relationships.

3. STRENGTHEN TRADE AND CRITICAL INFRASTRUCTURE

Supply chain diversification expands transport, energy, water, and digital infrastructure—creating an enabling environment for American companies to further invest while building resilient economies in partner nations.

- Transporting critical minerals from local communities to global markets requires secure land and sea routes and reliable logistics operations. Key to enabling this connectivity is expanded electrification, which the U.S. has supported through initiatives like Power Africa that helped **33 million** people gain access to reliable electricity.
- In addition to traditional infrastructure, a supply chain security agenda should integrate digital connectivity, 5G and 6G technology, and data infrastructure—enabling modern commerce while ensuring America and our partners, not China, set the standards for the global digital economy, in line with the Administration’s **AI Action Plan**.

The Trump Administration is already implementing several broader economic partnerships that could serve as models for future critical mineral trade deals, including the Lobito Corridor in Central Africa and the Luzon Corridor in the Philippines.

LOBITO CORRIDOR

The Lobito Corridor is an [essential](#) strategic component of U.S. access to, and development of, critical minerals—most of which currently flow to China for processing.

- In **Angola**, the U.S. Development Finance Corporation is [helping](#) finance railway upgrades to move goods and critical minerals to the Atlantic port of Lobito. The railway will accelerate win-win investments in areas like energy, agriculture, and infrastructure, and includes plans to deploy fiber optic infrastructure, enhancing digital connectivity and countering efforts like those by China's Huawei Corporation to dominate the local telecoms industry.
- The United States and the **Democratic Republic of Congo (DRC)** have [signed](#) a strategic critical minerals partnership, reflecting America's growing focus on securing reliable access to key manufacturing inputs. China currently owns or has a stake in 9 out of 15 DRC cobalt mines, giving Beijing disproportionate control over a mineral central to communications and defense technologies.
- **Zambia**, a major producer of copper, lithium, and cobalt, presents a strategic opportunity for U.S. investment in mining and processing—diversifying supply chains and reinforcing America's role as a trusted partner. Through public-private partnerships, U.S. companies are already [investing](#) in the country's mining sector, delivering returns to U.S. investment while strengthening local infrastructure.

LUZON CORRIDOR

The Luzon Economic Corridor, a U.S.-Japan-Philippines initiative, offers a strategic counterweight to China's footprint in the Indo-Pacific. Anchored in the Philippines' Luzon Island, the Corridor integrates transport, energy, and digital infrastructure to expand secure supply chains and support U.S. and allied investment. Investing in supply chains through Luzon offers significant opportunities not only for potential critical minerals, but for a growing [semiconductor](#) industry, which will drive regional growth.

- The U.S. Trade & Development Agency recently [announced](#) funding for development of the Subic-Clark-Manila-Batangas (SCMB) Railway, which will connect three of the Philippines' most critical ports. The SCMB Railway will generate significant export opportunities for U.S. companies and ease the movement of essential goods.
- The Luzon Corridor has the potential to meet growing demand for critical minerals. The Philippines [holds](#) the world's fourth-largest copper reserves, fifth-largest nickel deposits, and a surplus of cobalt. The Corridor can provide more efficient access to these resources while offering U.S. manufacturing firms better access to critical minerals.

WHERE ELSE COULD WE INVEST?

Additional investments in secure supply chains can advance American interests to ensure the U.S. can meet growing global demand for critical minerals. Beyond Lobito and Luzon, there are other opportunities where strategic development and investment could boost the U.S. economic position while strengthening our partnerships, as illustrated here:

BOLIVIA

Bolivia is a landlocked country whose southern edge forms part of the "Lithium Triangle," along with Argentina and Chile. The Lithium Triangle is estimated to contain half of global reserves of lithium, a key mineral for batteries and electrical components. In December 2025, the Millennium Challenge Corporation announced Bolivia had been [selected](#) to develop a threshold program that will make it eligible for a larger compact to advance its governance institutions and investment climate.

MOZAMBIQUE

Mozambique has vast reserves of graphite—a mineral the U.S. heavily depends on China for in the use of lithium-ion batteries and steelmaking—as well as heavy mineral sands containing ilmenite and zircon. Strategic cooperation with Mozambique presents an opportunity to enhance critical mineral supply chains and advance long-term stability. Leveraging tools from the Development Finance Corporation and the Export-Import Bank can help de-risk private investment for U.S. companies while addressing the security challenges within the country.