Hawker Britton

# United States-Australia Framework for Securing of Supply in the Mining and Processing of Critical Minerals and Rare Earths

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On Monday 20 October 2025, Prime Minister Anthony Albanese and President Donald Trump signed the *United States-Australia Framework for Securing of Supply in the Mining and Processing of Critical Minerals and Rare Earths*, a significant bilateral framework on critical minerals and rare earths at the White House, in a much anticipated first time meeting between the two leaders.

The framework is designed to accelerate the pipeline of priority projects to assist both nations in building resilience and security in critical minerals and rare earths supply chains, including mining, separation and processing. These resources are essential for defence, energy security and advanced technologies. The US and Australia will both invest upwards of US $1 billion over the next six months in order to unlock US $8.5 billion pipeline of critical mineral projects to supply both commercial and defence industries.

The framework and investments are intended to produce a pipeline of critical minerals and rare earths that is independent of China's supply chain. China through decades of investment has developed a near complete monopoly on the refining and production capacity for critical minerals and rare earths, controlling globally close to 90 per cent of these processes. In early October China tightened export controls on critical mineral technologies and products, placing significant amount of pressure on Australia and other foreign facilities.

## Critical Minerals Strategic Reserve Plan

Critical minerals and rare earths have been a significant priority of the Albanese Government. With recent global supply chain constraints and Australia's natural abundance of these resources, it has become a focus of the Government's investment. The joint framework with the US aligns with Australia's Critical Minerals Strategy (2023-2030), which sets out the Government's vision to grow Australia's critical minerals sector, by diversifying supply chains, establishing sovereign capability in processing and utilising these resources for developing renewable energy. As part of this broader strategy, in April 2025, Prime Minister Albanese committed to establishing a Critical Minerals Strategic Reserve, introducing a mechanism to bring stability to the market of rare earths and critical minerals. The plan is due next year, and it is expected to be operational by the second half of 2026. Additionally, in the 2025-26 Federal Budget the Government allocated $1.2 billion to establish the reserve by investing in critical minerals through national offtake agreements and selective stockpiling, mechanisms which have been outlined in the joint framework.

## The United States-Australia Framework

The US and Australia have outlined in the framework a policy and programmatic plan for the mining and processing of critical minerals and rare earths, designed to be achieved through the use of economic policy mechanisms and coordinated investment.

Australia and the US have agreed to secure the supply of critical minerals and rare earths necessary to support manufacturing for defence and advanced technologies, utilising the US's stockpiling infrastructure, industrial demand, and Australia's Critical Mineral Strategic Reserve. Both countries will provide at least $1 billion in financing to projects both in the US and Australia. There is a strong focus on investment, aimed at mobilising government and the private sector to invest in mining and processing through capital guarantees, loans, equity or offtake arrangements. Investment will be aimed at jointly identified projects of interest that will address gaps in the supply chain. Within 6 months, measures are set to be taken to provide at least $1 billion in financing to projects located in both the US and Australia. Both countries have agreed to promote investment in mining by arranging a Mining, Minerals and Metals Investment Ministerial within 180 days.

The framework outlines an understanding to take measures that assist in deregulating or streamlining the processes for obtaining permits for mining, separation, and processing. Further, that the critical minerals and rare earths markets will be protected from unfair trade practices, both countries will work with international partners to develop a global framework for international pricing, possibly to include a price floor. The framework additionally outlines sovereign capability protections, requiring both nations work to strengthen existing authorities and mechanisms to review and deter critical minerals and rare earths asset sales on national security grounds.

Additionally, there is a commitment to invest in minerals recycling technology and to ensure that scrap from critical minerals and rare earths is managed to support supply chain diversification. To ensure supply chain security, the framework outlines that participants will work with third parties where appropriate to ensure this, as well as geologically mapping mineral resources to support the diversification of critical mineral supply chains.  Under the leadership of the Australian Minister for Resources and the US Secretary of Energy, a US-Australia Critical Minerals Supply Security Response Group will be established to identify priority minerals and vulnerabilities in supply and develop a coordinated plan to accelerate delivery of processed minerals under the framework.

## Priority Projects

The Australian Government announced on 21 October 2025 that the first two priority projects in Australia would be the Alcoa-Sojitz Gallium Recovery Project, a plant in Wagerup Western Australia that produces gallium, a strategic mineral vital for advanced technologies. This is a trilateral project with Japan, Australia and the US to provide up to 10 per cent of global gallium.

The second is the Arafura Nolans project in the Northern Territory, mining rare earth oxides of neodymium and praseodymium, critical to the production of magnets used in wind turbines, electric motors and medical devices. There are further planned investments in projects in Victoria and New South Wales that produce titanium and zircon, and in Queensland for the mining of graphite.

The Governments media release on the framework can be found here.

## Further Information

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