



The Women's Mining Coalition's 33 Year History Has Witnessed the Development of the Current Minerals Emergency

by:

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Introduction

Since its inception in 1993, the Women's Mining Coalition has been part of the national mining policy dialogue. Our annual Washington, DC Fly-Ins have consistently emphasized the importance of maintaining a strong domestic mining industry. Unfortunately, during WMC's 33-year history, mining in the U.S. has steadily declined as policymakers decided to reduce domestic mining and outsource mining and mineral processing to foreign countries – many of which produce minerals without much regard to protecting the environment or worker health and safety.

Consequently, over the past three decades, the U.S. has gradually shifted away from being self-sufficient for many key minerals to being dangerously reliant on mineral imports from other nations, including from adversaries like China. Our current national minerals emergency is the direct result of decades of failing to understand that the country must have reliable sources of domestic minerals and numerous shortsighted policies seeking to reduce U.S. mining.

For many years, WMC's fly-in materials have included charts that the U.S. Geological Survey (USGS) publishes in its annual *Mineral Commodity Summaries*. For example, the charts on Page 4 compare the modest level of U.S. mineral imports in 1995 with our significant mineral import reliance in 2023. U.S. mineral import dependency continues to increase. According to the USGS' *2026 Mineral Commodity Summaries*², the U.S. imported 100% of 16 minerals and depended on foreign countries for over 50% of 54 minerals.

Recognizing that the steady increase in U.S. mineral dependency – especially minerals and mineral products imported from China – is dangerous and unsustainable, President Trump declared a national energy and minerals emergency on inauguration day of his second term. On that day, he defined energy to include minerals, established that energy and minerals security are the foundation for national security, and signed two Executive Orders (EOs), [*Unleashing American Energy*](#) and [*Declaring a National Energy Emergency*](#) to put the U.S. back on a path of energy and minerals security. Since then, he has issued additional EOs seeking to reduce our risky minerals import reliance and to increase domestic mining and mineral processing.

Three Decades of Bad Policy are Responsible for Today's Minerals Emergency

Finding solutions to the current energy and minerals emergency requires understanding how three decades of bad U.S. policies hollowed out the U.S. mining industry and created a perfect 30-year storm for minerals and mining. WMC witnessed each step of this perfect storm unfold as policymakers:

- Ignored that minerals are the building blocks of our military, manufacturing, infrastructure, technology, and economy;

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² <https://pubs.usgs.gov/publication/mcs2026#main-content>

- Forgot that minerals are essential in maintaining military superiority;
- Pursued policies to denigrate and discourage domestic mining, preferring instead to obtain minerals from other countries – some of which are not our allies;
- Sought to impose confiscatory royalties and taxes to make mining on public lands uneconomic;
- Enacted regulations that forced the closure of the country’s smelters and mineral processing facilities and outsourced mineral processing to other countries;
- Put large areas of public lands off-limits to mining;
- Proposed land use plans to restrict mining on available public lands and rules to impose unrealistic and unachievable environmental standards;
- Let our permitting process devolve into a costly and time-consuming labyrinth fraught with litigation that adds intolerable risk and uncertainty and sends mineral investment to countries with faster and more predictable permitting;
- Neglected the importance of educating mining professionals and allowed the number of U.S. mining schools to shrink from 25 in 1982 to just 14 accredited schools today.
- Decided that federal expertise in mining and mineral processing was unimportant when Congress stopped funding the U.S. Bureau of Mines in 1996;
- Dismissed the wisdom of maintaining strategic mineral stockpiles and treated previously accumulated mineral stockpiles as piggybanks rather than as safeguards;
- Became over reliant on just-in-time mineral supply chains from across the globe and dismissed the importance of maintaining just-in-case supplies of domestic minerals for our military and economy;
- Failed to understand how critical minerals shortages of the rare earths needed to manufacture advanced magnets, the gallium and germanium used to produce semiconductors, or the antimony needed to build munitions – can halt industrial production, send seismic shock waves throughout our economy, and severely threaten national security; and
- Sat idly by while China sailed strategically through this perfect storm, building a mining and mineral processing empire and becoming today’s global minerals superpower that uses export restrictions to put a worldwide stranglehold on essential mineral inputs.

During its 33-year history, WMC has tried to help lawmakers navigate away from this Perfect Storm. Starting in 1993, we have:

- Defended the 1872 Mining Law against draconian legislation to gut this essential land tenure statute that leverages private-sector investment to discover the minerals that have built this Nation;
- Focused on how federal environmental laws and regulations comprehensively and effectively govern mining to minimize the environmental impacts from mining and explained that mineral projects on federal lands have financial assurance to guarantee these projects will be fully reclaimed;
- Told lawmakers that the federal government needs mining and mineral processing expertise – like the U.S. Bureau of Mines used to provide; and
- Supported bills to increase funding to the Nation’s dwindling mining schools and the need to educate and expand the next generation of mining professionals.

New Policies to Address the Minerals Emergency

The current administration recognizes that minerals can no longer be managed as commodities because China has spent decades building its minerals empire to achieve geopolitical leverage by holding the world hostage to the availability of Chinese minerals and mineral products. In response to this currently untenable and dangerous situation, the administration has taken bold moves to address the minerals emergency by issuing numerous minerals EOs and Secretarial Orders, and taking steps to streamline permitting and support ongoing legislative dialogues about how to improve the NEPA process.

To counteract China's critical minerals export controls and manipulative pricing strategies, the administration has entered into public-private partnerships to invest in critical minerals projects and companies. These transactions include pricing guarantees and off-take agreements that assure there will be a buyer that will pay an established price for the minerals produced, and loans, grants, and other financial support. These arrangements give mining, mineral processing, and mineral products manufacturing companies confidence that their investment in developing a critical minerals project won't be undermined by China suddenly flooding the market or taking other predatory actions to render U.S. projects uneconomic.

The administration is also engaging allies to stem China's minerals hegemony. In February, Secretary of State Rubio invited 54 countries to a Critical Minerals Ministerial to encourage bilateral minerals agreements and frameworks. In another move, the administration created the Minerals Vault, which is a public-private partnership to create reserves and stockpiles of minerals and mineral products.

Current U.S. mineral policies correctly recognize that many minerals cannot be managed as normal commodities because the costs of not having the necessary mineral inputs pose too great a threat to our economy and national security. Shortages of key minerals – some of which are small-volume specialty minerals like the gallium and germanium needed for semiconductor chips, or the rare earths used to manufacture high-tech magnets – can undermine entire industries, technologies, and defense systems that must have these minerals.

It's also important to understand that different minerals require custom-tailored policies because they have widely divergent demand profiles and economics. For example, according to S&P Global's recent copper report³, the current global copper demand is 28 million metric tons per year, which is expected to increase to 42 million metric tons by 2040. In contrast, the annual global demand for terbium, a heavy rare earth element that is essential in rare earth permanent magnets, is estimated at 340 tons and is projected to increase to 581 tons in 2030.⁴ Obviously, there is no one-size-fits-all mineral policy appropriate for a mega-mineral like copper compared to a micro-mineral like terbium.

WMC's Important Mission During the 2026 Fly-In

WMC's 2026 Fly-In represents an unparalleled opportunity to discuss the importance of minerals with Congressional lawmakers and their staff. Our mission today is just as important as when WMC embarked upon our first trip to Washington, DC in March 1993 to defend the 1872 Mining Law.

But today, in contrast to 1993, there is a much broader awareness of the critical role that minerals play in our economy and national security, and the danger in relying on foreign adversaries for the mineral inputs that are the foundation for everything. Thus, this is the perfect time to advocate for immediate policies to solve the current minerals emergency and long-term policies that will ensure the U.S. develops and maintains strong domestic mining and mineral processing capabilities into the foreseeable future. The durability of our mining policies is of paramount importance as the world's future mineral consumption is projected to skyrocket.

The U.S. must secure its future by having ready access to the minerals we need for artificial intelligence data centers, our national defense, our economy, and for new technologies. This means we must have enduring policies to support and increase domestic mining and mineral processing.

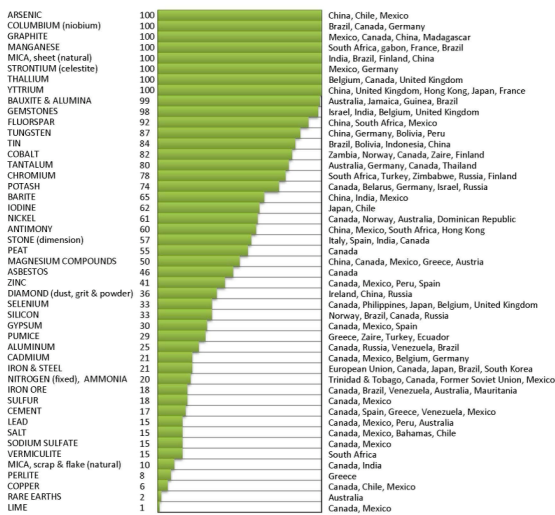
³ <https://www.spglobal.com/en/research-insights/special-reports/copper-in-the-age-of-ai>

⁴ <https://www.sciencedirect.com/science/article/abs/pii/S0301420722004603#:~:text=This%20study%20aims%20to%20investigate,terbium%20supply%20can%20be%20achieved.>

The U.S. is blessed with an abundant mineral endowment that can produce many – and perhaps most of – the minerals we need for the future. Although partnering with allies for some minerals that we may lack will always be a part of the solution, it should be minimized because we are seeing first-hand and in real time how shipping blockades can radically interfere with global supply chains. Our primary long-term strategy must thus be to obtain the minerals we need from domestic mines, mineral processing facilities, and mineral manufacturers.

USGS' Minerals Import Reliance Charts Document the Nation's Mineral Import Reliance Has Skyrocketed in the Last 30 Years Which Has Created the Current Minerals Emergency

1995 U.S. NET IMPORT RELIANCE FOR SELECTED NONFUEL MINERAL MATERIALS

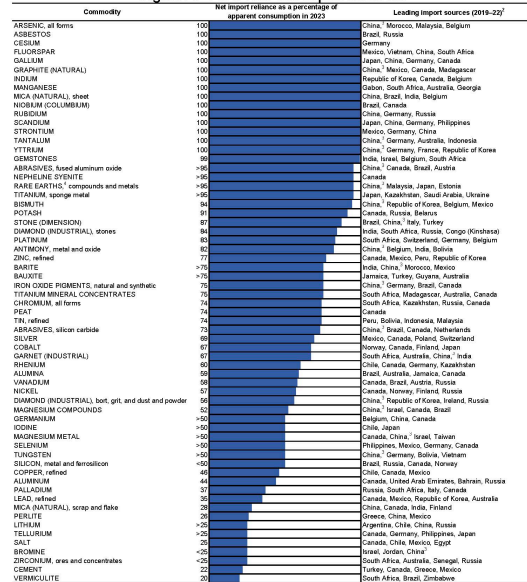


Additional commodities for which there is some import dependency include:

Bismuth	Mexico, Belgium, China, Peru
Gallium	France, Germany, Russia, United Kingdom, Hungary
Ilmenite	South Africa, Australia, Canada
Indium	Canada, France, Italy, Belgium, Russia
Iron & steel slag	Canada, Japan
Kyanite	South Africa, France
Mercury	Canada, Russia, Germany
Platinum	South Africa, United Kingdom, Belgium, Germany
Rhenium	Chile, Germany, United Kingdom, Russia, Kazakhstan
Rutile	Australia, Sierra Leone, South Africa
Silver	Mexico, Canada, Peru, Chile
Thorium	Australia
Titanium (sponge)	Australia, Japan, China
Vanadium	Russia, South Africa, Canada, Mexico
Zirconium	Australia, South Africa

Data from U.S. Geological Survey, 1996, Mineral commodity summaries 1995: <https://minerals.usgs.gov/minerals/pubs/mcs/1996/mcs.pdf>

Figure 2.—2023 U.S. Net Import Reliance¹



¹Not all mineral commodities covered in this publication are listed here. Those not shown include mineral commodities for which the United States is a net exporter (abrasives, metallic beryllium, boron, cadmium, clay, diborane, gold, helium, iron and steel scrap, iron ore, kyanite, lime, malgoborite, raw earths, mineral concentrates, sand and gravel, industrial soda ash, titanium dioxide pigment, wolframite, zirconite, and zinc, ores and concentrates) or less than 20% net import reliant (feldspar, gypsum, iron and steel, iron and steel slag, nitrogen (feed)—ammonia, phosphate rock, potash, sand and gravel, construction stone, crushed, scoria, acid slag and pyrolysis). For some mineral commodities (barium, mercury, quartz, high-purity and industrial cultured crystal, thallium, and thorium), not enough information is available to calculate the exact percentage of import reliance.

²Listed in descending order of import share.

³Includes Hong Kong

⁴Includes leucite/adularite, diopside, urbitum, europium, gadolinium, holmium, lanthanum, lutetium, neodymium, praseodymium, samarium, terbium, thulium, and ytterbium.