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America's Answer to China's Mineral Weapon Is Made of Carbon

Beijing spent two years mapping every critical material it controls that can stop U.S. defense production. The answer is not digging faster. It is building smarter — with the one material China cannot control.

By Dr. Gregory S. Carmichael · Lt. Col. USAF (Ret.) · DPA Title III Advisor, Pearl Harbor (2024) · Founder, Advanced Nano-Materials Manufacturing LLC (ANMM)

March 23, 2026 · ≈ 1,750 words · 8 minute read

China just handed the United States the most useful intelligence briefing in industrial history — and most people missed it.

Between August 2023 and April 2025, Beijing methodically imposed export controls on gallium, germanium, graphite, antimony, tungsten, tellurium, bismuth, molybdenum, indium, and seven categories of rare earth elements. In November 2025, following the Trump–Xi summit, they suspended some of those controls — with great fanfare and diplomatic credit — until late 2026. The financial press declared a truce.

Here is what actually happened: China revealed, in precise detail, exactly which materials it believes can hold the United States hostage. It *named* them. It *sequenced* them. It tested the leverage of each one, measured the reaction, and then — crucially — did not dismantle a single piece of the control architecture it had built.

The military-end-use prohibition — which bars any Chinese-origin dual-use material from reaching U.S. defense users or applications — has never been suspended. Not for a single day. While civilian trade was temporarily eased, the kill switch for American defense production remained firmly in Beijing's hands. The truce expires in late 2026.

This is not a trade dispute. It is a map.

What's Actually on the List

The 2025 U.S. Geological Survey Critical Minerals List names 60 materials essential to American economic and national security. The Silverado Policy Accelerator, using a defense-specific risk lens, condensed that to 12 that pose the most acute immediate threat: **antimony, arsenic, bismuth, gallium, germanium, indium, natural graphite, rare earth elements, scandium, tantalum, tungsten, and yttrium.**

Metric	Number
Total minerals on 2025 USGS Critical List	60
Strategic defense-critical minerals (Silverado)	12
Of those 12: U.S. is fully/near-fully import-dependent	9
Of those 12: China dominates production or processing	10
Minerals under active Chinese export controls (2025)	20+
Days the military-end-use ban has been suspended	0

The materials that go into F-35 radar systems, night-vision goggles, armor-piercing ammunition, missile actuator fins, submarine batteries, and satellite communications — nine out of twelve of the most critical are ones we cannot reliably produce ourselves, and most of them flow through China before they reach us.

When European rare earth prices hit six times their Chinese equivalent following the April 2025 export controls, some automotive factories reduced output within weeks. An F-35 carries 435 kilograms of rare earth materials. A next-generation destroyer needs 4.5 metric tons. A nuclear submarine needs 1.5 metric tons. As one veteran mining executive put it at the U.S. Capital Access Forum in Singapore this month: *"It's a bit unbelievable that it's taken so long for everyone to realize that maybe we should have some of these things in house."*

China effectively holds a kill switch over Western defense production.

So what does America actually do about this?

> *The answer is not digging faster. It is building smarter — with the one material whose supply chain Beijing does not and cannot control.*

The Answer Is Carbon

Not mining more tungsten. Not buying more gallium from allied nations — though we should do both of those things immediately. The structural answer, the one that changes the geometry of the problem rather than just managing it, is **graphene**.

Graphene is a single atomic layer of carbon atoms arranged in a hexagonal lattice. It is the strongest material ever measured — roughly 300 times the tensile strength of steel at a fraction of the weight. It conducts heat better than any known material. Its electron mobility is 143 times faster than silicon. It is chemically inert across the full pH range. And its precursor — carbon — is available in virtually unlimited quantities from domestic coal, natural gas, biomass, and plastic waste.

China does not control carbon.

The strategic proposition: across at least 21 of the 60 minerals on the critical list, graphene-based materials offer a viable pathway to reduce, offset, or in some cases fully replace American dependency on Chinese-controlled supply chains. Not all at once, and not without investment — but the technical foundation is there, and in several cases the technology is ready to deploy *today*.

Where It Works Right Now

Indium. China controls more than 55% of global indium production, and export controls now apply. Indium tin oxide (ITO) is the transparent conducting material in virtually every military heads-up display, cockpit instrumentation panel, and ruggedized touch interface in the U.S. inventory. It is also brittle — ITO-coated glass cracks under battle-damage vibration in ways that graphene-coated polymer simply does not.

Four-layer CVD graphene films already match ITO's optical transmittance while outperforming it on flexibility and every metric that matters in a combat environment. This is not a laboratory curiosity. It is a Technology Readiness Level 6–7 material waiting for a procurement decision. A targeted policy change in DoD display contracting could eliminate indium as a supply chain vulnerability within 24 months.

Cobalt. The Democratic Republic of Congo supplies roughly 70% of global cobalt; China controls roughly 80% of cobalt refining. Graphene-wrapped silicon anode technology achieves three times the lithium storage capacity of conventional graphite anodes. A battery that stores three times as much energy per unit of anode mass needs proportionally less cobalt in the cathode to match the same cell performance. The math is direct and calculable, and silicon-graphene cells are already at Technology Readiness Level 5–6 for military-grade applications.

Platinum group metals. South Africa and Russia control the majority of global platinum and palladium production respectively. Nitrogen-doped graphene catalyst supports reduce platinum loading in hydrogen fuel cells by 70–80% while maintaining equivalent electrochemical performance. This is already being deployed commercially. The Navy's submarine air-independent propulsion systems represent an immediate application target.

Where It Takes Longer — And Why We Must Start Now

The tungsten case is instructive precisely because graphene *cannot* directly substitute for tungsten carbide powder in copper-brazed bearing applications at 1,093°C brazing temperatures. The thermodynamics are unambiguous: graphene oxidizes at that temperature before the braze cycle is complete, and the wetting physics of copper on graphene basal planes is fundamentally unfavorable. Anyone claiming a simple one-for-one swap here is wrong, and the integrity of this analysis requires saying so directly.

What graphene *can* do is reduce tungsten demand per application by 15–25% through composite reinforcement of WC-Co powders, and extend service intervals by 200–300% through surface coatings — producing an effective 60–70% reduction in aggregate tungsten procurement over equipment lifecycle. For a customer consuming 38,000 pounds of tungsten carbide per month, that is a strategically significant reduction even if it is not a complete substitution.

The **gallium and germanium** pathways are more technically ambitious but ultimately more strategically decisive. GaN-on-Graphene substrate technology, where a thin gallium nitride active layer is grown on graphene rather than silicon carbide, reduces gallium consumption per radar device by 55–65% while enabling new form factors — flexible, conformal radar arrays and wearable electronic warfare countermeasures — that are impossible with current technology. This is at Technology Readiness Level 4–5 and reachable at TRL 7 within 36 months with focused investment.

Rare earth permanent magnets — the neodymium-iron-boron systems in F-35 lift fans, UAV propulsion motors, and missile actuators — cannot be fully replaced by graphene in the near term. But graphene nanoplatelets incorporated at the grain boundaries of NdFeB magnets at 0.1–0.5% by weight reduce dysprosium content requirements by 20–30% while maintaining high-temperature coercivity. Given that China's military-end-use prohibition already bars Chinese dysprosium from reaching U.S. defense contractors, any reduction in required dysprosium content per magnet is not an efficiency improvement — it is operational continuity.

The Production Problem

The honest limitation of everything above is scale. Current global graphene production across all forms is estimated at roughly 1,000 metric tons per year. Full deployment of the defense applications described here would require 5,000 to 50,000 metric tons per year. That gap does not close through laboratory research. It closes through industrial investment, and it will not attract sufficient private capital at the speed the national security timeline demands without government catalysis.

The Defense Production Act Title III was written exactly for this moment. It authorizes the government to fund domestic industrial capabilities that the private market cannot build fast enough when national security requires it. A focused DPA Title III program targeting domestic graphene production is the right instrument at the right moment.

The precursor is carbon. Carbon comes from coal, from natural gas, from the plastic waste accumulating on Caribbean beaches and in American landfills. A circular economy graphene production platform that converts domestic and near-shore waste streams into defense-critical advanced materials is not a green energy story. It is a **national security story wearing green clothing.**

Mineral	Substitution Rating	TRL Today	Timeline
Indium (ITO replacement)	5/5 ★★★★★	6–7	1–2 years
Cobalt (Li-ion batteries)	5/5 ★★★★★	5–6	3–5 years
PGMs (fuel cell catalysts)	4/5 ★★★★	6	2–4 years
Chromium (corrosion coatings)	4/5 ★★★★	6–7	1–3 years
Gallium (GaN radar substrates)	4/5 ★★★★	4–5	5–7 years
Germanium (IR optics)	4/5 ★★★★	4–5	5–7 years
Tungsten (demand reduction)	3/5 ★★★	3–5	2–4 years
Rare earths (NdFeB magnets)	3/5 ★★★	4–5	5–10 years

Rating: 5 = near-full substitution or demand elimination; 3 = significant demand reduction

The Clock

China did not accidentally reveal which minerals it controls. It did so deliberately, strategically, and with careful calibration — testing leverage, measuring response, and preserving the architecture for future use. The suspension offers temporary relief but should not be mistaken for deregulation. The kill switch is still there.

The United States has roughly eighteen months before Beijing can reinstate the full export control regime with a single ministerial announcement — and this time, with the diplomatic justification of having already demonstrated good faith through the suspension.

Eighteen months is enough time to qualify graphene transparent conductors for military displays. It is enough time to begin GaN-on-Graphene substrate development programs. It is enough time to establish the first domestic graphene production facility at meaningful scale.

It is *not* enough time to build a tungsten mine, a gallium refinery, or a rare earth processing facility from scratch.

The answer to China's mineral weapon is not digging faster. It is building smarter — with the one material whose supply chain Beijing does not and cannot control. America has plenty of carbon. The question is whether it will invest in turning that carbon into strategic independence before the truce runs out.

The three actions that matter right now:

1. **DPA Title III investment** in domestic graphene production capacity — 50+ metric tons per year, onshore, today.
2. **DoD procurement policy** update to qualify graphene transparent conductors for military displays (this requires no new technology — only a decision).
3. **DARPA/SBIR programs** targeting GaN-on-Graphene radar substrates and graphene-silicon battery cells with TRL 7 milestones within 36 months.

The truce expires late 2026. The clock is running.

Dr. Gregory S. Carmichael is a retired USAF Lieutenant Colonel, former U.S. Representative to the G20 Summit India (2023), and DPA Title III Advisor at Pearl Harbor (2024). He is the Founder and CTO of Advanced Nano-Materials Manufacturing LLC (ANMM), a Puerto Rico-based advanced materials company developing graphene-based solutions for defense and infrastructure applications. The full technical paper — "Graphene as a Strategic Substitute for U.S. Critical Minerals and Materials" — is available on request at `greg@anmm-usa.com`.
