

NEWS RELEASE

Future-Facing Raw Materials: Why the Investment Case Has Never Been More Compelling

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Legislature & Geopolitics

In a week where **U.S. firms moved decisively to secure rare-earth supplies** - one theme cuts through the noise with unmistakable clarity: the investment proposition for future-facing raw materials including helium has never been stronger.

We are entering an era in which technology is becoming the benchmark of national status, as access to advanced healthcare, next-generation computing, and integrated defence platforms narrows to a select group of nations. These “must-have” capabilities rely on scarce, enabling raw materials, and it is secure, uninterrupted access to those inputs, beyond straightforward jurisdictional ownership, that now looks set to define, and potentially redefine -the world’s dominant superpowers in the decades ahead.

Increasingly, across today’s geopolitical landscape, the winners are not those who simply host resources within their borders, but those with the institutional, financial, geopolitical, and increasingly military, capability to secure and defend uninterrupted access to them. As a result, “ownership” in the traditional sense is becoming ever more fragile, with territorial sovereignty growing markedly more fluid, a potential indication of what may lie ahead.

Raw Materials as a Bellwether of Future Economic Strength



If technology can be framed as the currency of power, then the raw materials that enable it become the collateral backing that currency. A nation’s ability to secure these critical inputs is fast becoming a bellwether for its growth potential and its standing on the global stage. That growth is increasingly tethered to supply chains capable of reliably and consistently delivering strategic raw materials, including rare earths, battery metals, and industrial gases like helium, which are critical to semiconductor manufacturing and advanced medical imaging, and are increasingly important for emerging data-centre cooling technologies and next-generation nuclear innovation.

This raises an uncomfortable but unavoidable question: as strategic materials become increasingly central to

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technological and economic power, will nations adopt more assertive, even expansionist, strategies to secure them? The global scramble for rare earths, the race to lock-in battery metals, the reshoring of semiconductor supply chains, and the intensifying competition for helium and other strategic commodities all point in the same direction. Access is power.

Ultimately, nations that secure stable helium supply will gain structural advantages across technological capability, indirectly via semiconductor manufacturing, high-performance computing and advanced medical systems that underpin AI expansion, automation and next-generation healthcare.

The proposition is clear - and the strategic case even clearer. In the decades ahead, it may not be the nations that simply possess raw materials that rise, but those that can consistently and reliably secure them, a geopolitical distinction poised to define the next era of global power.

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