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This does seem somewhat absurd, given that whilst AVL have a rare earth deposit, it is nowhere near being ready to produce anything, even if the Canadian government immediately provided the financing!

Rainbow Rare Earths in the UK are at least producing, and their share price has justifiably risen , as they would be an immediate beneficiary of higher prices, should they occur, and they may well not.

Even if China imposes a ban on REE exports to the USA, they will not be able to control intermediaries and even other countries circumventing this via indirect trading. For this reason I do not foresee a high rise in REE prices, although selective ones may rise if the Chinese impose a total ban due to that particular element being in high demand for, say, the US military.