

**Congress of the United States**  
**Washington, DC 20515**

November 10, 2025

Mr. David Copley  
National Security Council  
The White House  
1600 Pennsylvania Ave., NW  
Washington, DC 20500

Dear Mr. David Copley:

Thank you for your leadership in carrying out the administration's agenda to secure U.S. critical minerals and materials by reducing reliance on adversarial sources of supply and refining. Ensuring a resilient industrial base requires first sustaining existing producers while building new capacity in the production of materials lost to subsidized foreign competitors. Congress empowered the Industrial Base Analysis and Sustainment (IBAS) program to act decisively to ensure critical minerals and materials manufacturers within the defense industrial base (DIB) remain viable so that the U.S. does not fall victim to market manipulation, subsidized foreign producers, foreign overcapacity and dumping, and export restrictions imposed by the People's Republic of China (PRC).

As such, we are deeply concerned about the viability of our nation's last domestic alumina refinery, Atlantic Alumina Company (ATALCO).<sup>1</sup> Without IBAS program support and debt financing through the Office of Strategic Capital, ATALCO will likely be forced into bankruptcy as early as this week. The closure of this facility would directly threaten 550 jobs in Gramercy, Louisiana. This community would be deeply affected by the loss of one of its largest employers and economic anchors. If left unaddressed, the survival of U.S. alumina—and our last access to a reliable domestic supply—will be in jeopardy. This outcome would be a strategic win for China and Brazil, detrimental to U.S. national security, Louisiana, and the regional economy, and leave the U.S. wholly dependent on foreign sources of supply for critical materials like gallium for years to come.

As you well know, China has aggressively consolidated the world's global productive capacity of Gallium, which is critical to U.S. economic and national security. The U.S. is 100% reliant on the PRC for primary low-purity gallium production.<sup>2</sup> Used to manufacture semiconductor wafers, laser diodes, photodetectors, and light-emitting diodes, gallium is an extremely low production volume mineral. Notably, the PRC imposed export controls on gallium in 2023, which raised concerns about supply chain resilience. The U.S. maintains no reserves of gallium

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<sup>1</sup> Alexandra Byrne & Travers Mackel, *At America's last alumina refinery, a trade war spells trade-offs*, NBC NEWS, (April 6, 2025), available at: <https://www.nbcnews.com/business/economy/americas-last-alumina-refinery-trade-war-spells-trade-offs-rcna196539>

<sup>2</sup> *Mineral Commodity Summaries 2025*, UNITED STATES GEOLOGIC SERVICE, (Feb, 2025), available at: <https://pubs.usgs.gov/periodicals/mcs2025/mcs2025.pdf>

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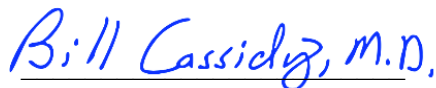
in its government stockpile and has limited economically viable domestic sources.<sup>3</sup> ATALCO provides the most realistic opportunity to reverse our sole-source reliance on China for this critical mineral.

We urge you to work closely with the IBAS program to urgently identify equitable terms with ATALCO that allow a financially sustainable path forward for both the U.S. taxpayer and private industry partners. ATALCO and its investors (primarily firefighter and police pension funds) are eager to support the industrial base and safeguard U.S. national security and are willing to agree to terms giving the U.S. Government better returns than private investors. However, any deal must provide a viable path for the company to seek modest returns on the sizable investments already made and those being requested under the most recent terms.

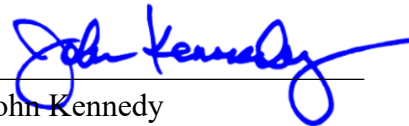
Congress designed IBAS to protect vital national security industrial interests while returning the taxpayers' investment, not to be a money-making opportunity. We must ensure any future deals reflect this commitment to reduce dependency on foreign sources, ensuring resiliency, and supporting a robust critical minerals and materials ecosystem.

Thank you for your leadership and continued commitment to safeguarding our national security and ensuring the sovereignty of our critical minerals and materials.

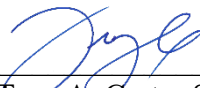
Respectfully,



Bill Cassidy, M.D.  
U.S. Senator



John Kennedy  
U.S. Senator



Troy A. Carter Sr.  
Member of Congress

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<sup>3</sup> Institute for Energy Research, *China Has Banned Exports of Some Rare Minerals to the United States* (Dec. 12, 2024) available at [www.instituteforenergyresearch.org/international-issues/china-has-banned-exports-of-some-rare-minerals-to-the-united-states/](http://www.instituteforenergyresearch.org/international-issues/china-has-banned-exports-of-some-rare-minerals-to-the-united-states/).