

Can Monazite Fuel the AI Chip Revolution?

A radioactive ore may hold the key to secure, high-performance semiconductors.

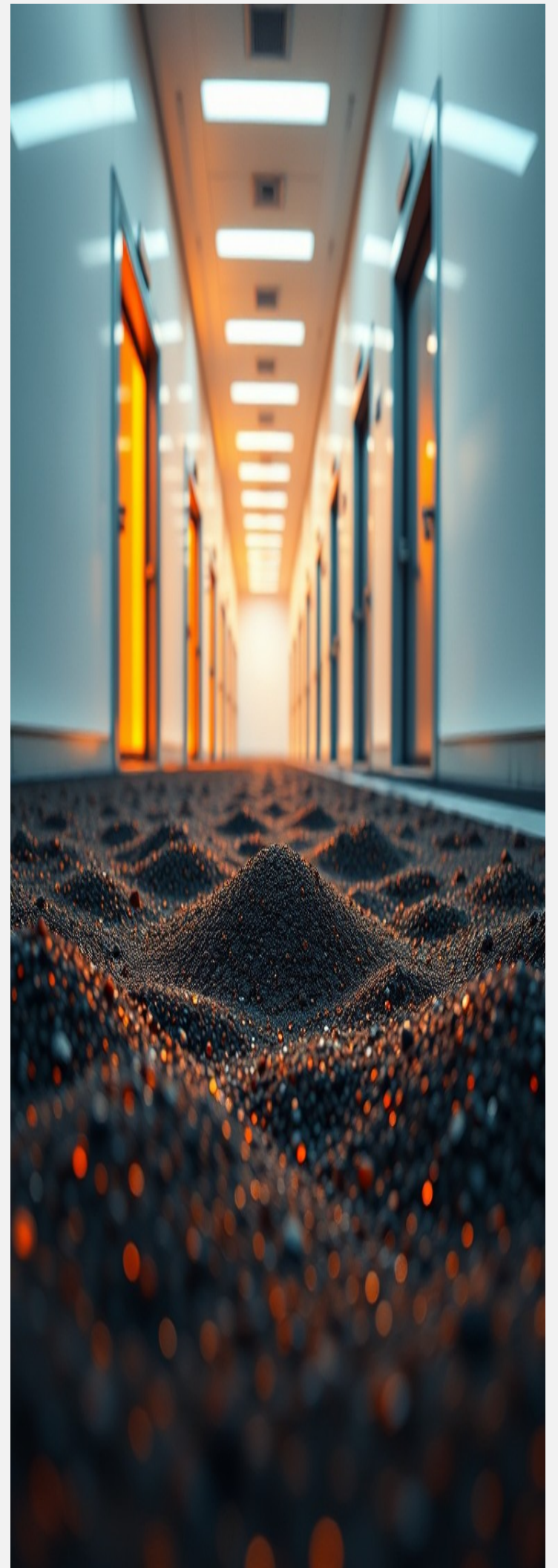
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40 tonnes per month

Planned rare-earth output

The Saskatchewan Research Council's monazite processing plant was expected to produce this much rare earths monthly by end of 2024.

This target, never met, underscores the immense technical and logistical hurdles in scaling monazite processing. Despite six years of construction and \$72 million in investment, the facility remains far from operational, highlighting the fragility of rare-earth supply chain ambitions.



01

Monazite: The AI Supply Chain's Hidden Lever

This self-contained mineral profile reduces the need for complex, geopolitically risky processing chains, making monazite a strategic asset for sovereign chip manufacturing. Its presence in heavy mineral sands also enables lower-energy extraction methods compared to hard-rock mining.

02

Radioactive Risk, Strategic Reward

The real bottleneck isn't the ore — it's the political and technical will to manage its hazards at scale.

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