

Australia

AA-rated jurisdiction. The default non-China bet for IRA-aligned buyers.

Australia is the lowest-friction non-Chinese supplier base for the IRA-aligned procurement universe. AUD\$4bn Critical Minerals Strategy, free-trade alignment with the US, Japan and Korea, and a mature ASX-listed operator ecosystem make it the entry point for any diversification programme.

Australia

Strong rule-of-law, mature mining code, free-trade alignment with US/JP/KR. ESG bar high. Permitting timelines lengthening on heritage and water grounds. Tianqi/Ganfeng/CMOC stakes in several producers introduce FEOC residual risk.

Regulatory regime

Mining titles administered at state level (WA, NSW, QLD dominant). Federal foreign-investment review (FIRB) increasingly active on Chinese investors in critical minerals.

Authorities & actors

DISR (federal)

Critical Minerals Strategy & Critical Minerals Office

FIRB

Foreign-investment screening

Geoscience Australia

Geological data, cadastre integration

ASIC / ASX

Public-company disclosures

Key policies

<p>Critical Minerals Strategy 2023</p> <p>AUD\$4bn fund deployed via NAIF, EFA and ARENA</p>	Active
<p>Future Made in Australia Act</p> <p>Production tax credit for downstream processing</p>	Active (2024)
<p>FIRB foreign-buyer scrutiny</p> <p>Chinese majority stakes in CM producers blocked</p>	Tightened (2023)

Mining cadastre & data sources

States operate independent cadastres (Tengraph WA, Titles QLD, MinView NSW). STRATEGIA reconciles into a federated supplier table updated daily; FIRB approvals tracked via gazette ingestion.

ESG regime

Federal Modern Slavery Act + state-level Indigenous heritage protection (post-Juukan Gorge reforms). IRMA and TSM (Towards Sustainable Mining) common among Tier-1 operators.

Top materials produced

Lithium (spodumene)

#1 globally by output

Greenbushes, Pilgangoora, Mt Marion, Kathleen Valley

Rare earths (NdPr, Dy, Tb)

#2 globally outside China

Lynas Mt Weld + Iluka Eneabba

Nickel (sulfide)

Tier 1, declining ore grade

Kambalda district + BHP Nickel West (idle)

Copper

Top 10 globally

Olympic Dam, Cadia, Carrapateena

Top operators

Lynas Rare Earths	Operating
Mt Weld + Kalgoorlie heavy circuit 2026	
Pilbara Minerals	Operating
Spodumene with POSCO conversion JV	
Iluka Resources	Ramping
Eneabba REE refinery — first commercial Dy/Tb ex-China	
Albemarle / IGO	Operating
Greenbushes lithium	

In the STRATEGIA Atlas

Lynas Rare Earths — Mt Weld / Kalgoorlie	ESG 84 · Operating
Albemarle / IGO / Tianqi — Greenbushes	ESG 78 · Operating
Pilbara Minerals — Pilgangoora	ESG 76 · Operating
Iluka Resources — Eneabba	ESG 80 · Ramping

12-month outlook

FIRB enforcement against Chinese-linked offtakes likely to intensify. Iluka Eneabba qualification window 2026-Q4. Permitting reform under federal review may shorten timelines for strategic projects.

Watchlist

- FIRB decisions on Lynas / Iluka secondary placements
- Tianqi exit pressure at Greenbushes
- WA Aboriginal Cultural Heritage Act amendment
- Iluka Eneabba first commercial Dy delivery

SUBSCRIBER-ONLY FOLLOW-ON

The full 24-page diligence file covers corporate-level data, beneficial-ownership tracing, FEOC scoring per operator, and quarterly updated supplier lists. Contact desk@strategia.ai.