

United States Senate

WASHINGTON, DC 20510

May 12, 2026

Mr. David Lorch
Director, Office of Strategic Capital
United States Department of War
3030 Defense Pentagon
Washington, DC, 20301

Dear Director Lorch,

We write seeking clarity about the Department's prioritization and support of domestic critical mineral supply chains, particularly lithium resources. Lithium is foundational to the precision munitions and advanced weapons systems that underpin American military superiority. Critical systems and platforms such as Tomahawk Land Attack Missiles, Patriot Batteries/PAC-3 missiles, Hellfire missiles, and Terminal High Altitude Area Defense systems, among many others, rely on lithium-based battery technologies for guidance, power, and reliability.

The Smackover Formation is a brine-rich geological stratum stretching across Arkansas, Louisiana, and Texas. Recent assessments indicate the Formation may represent one of the most significant lithium brine deposits in the Western Hemisphere. Domestic production from this region could materially reduce American dependence on foreign-controlled lithium sources and provide a reliable upstream supply for domestic defense manufacturers.

We know you share our conviction that allowing strategic vulnerabilities in our mineral supply chains is not an option that the United States can afford. We urge the Department to treat Smackover lithium development as a priority investment target worthy of OSC engagement, Title III Defense Production Act authorities, and other available financing mechanisms. We respectfully request answers to the below questions by May 25, 2026.

- What criteria and process does OSC employ to evaluate and rank critical minerals for prioritized investment or industrial base support? What protections are in place to ensure a long-term strategic commitment that withstands short term shifts?
- Is lithium designated as a high-priority material in the Department's critical minerals framework? If so, how is that prioritization reflected in OSC's project pipeline? If not, what is the rationale?
- What is the Department's coordination process to ensure critical mineral supply chains efforts are synchronized? What mechanisms exist to ensure OSC's financing activities are aligned with the requirements of the military services and combatant commands?
- Has OSC (or other offices within the Department) coordinated with other agencies, to include the Department of Energy, United States Geological Survey, and Department of Commerce, on domestic critical mineral development? If so, how is that coordination structured? How are investment signals and strategic priorities communicated? What legislative provisions or resources would materially enhance OSC's ability to support lithium projects such as those in the Smackover Formation?

The urgency of this issue demands we move with speed. We are confident that the Department shares this urgency. We look forward to working with you on this issue of critical importance.

Sincerely,



Tom Cotton
United States Senator



John Boozman
United States Senator



Ted Cruz
United States Senator