Welcome to our November Critical Minerals Association monthly newsletter & updates on the critical minerals space.

Read on for:

- UK Prime Minister Mentions Critical Minerals at PMQs
- Breakfast Chat Highlights - ESG: Track, Trace & Provenance Breakfast Chat
- TechMet Invests £18M in Cornish Lithium
- Webinar Highlights: Building Responsible & Secure UK - AUS Supply Chains
- Critical Minerals & UK's Green Industrial Revolution Event
- Welcoming Less Common Metals to CMA
- Welcoming Giyani Metals to CMA
- Alexander Stafford MP on China's Dominance of Critical Minerals
- Mkango Renews Thambani Uranium Licences
- E-Tech Resources Diamond Drilling Result
- The Role of Critical minerals in the Energy Transition: A Canadian Perspective
- COP26 – What Does it Mean for Geoscience?
- BGS Data Review 2021/2022
- Visual Capitalist: Rare Earth Elements - Where in the World are They?
- Circulor, A Start-up Tackling 'Greenwashing'
- Critical Mineral News
- An Exploration of Cultural Change in Mining
- Degree Apprenticeship at Camborne School of Mines
- SRK Consulting: What if Mining was Cool?
- Call for Evidence - Diversity in STEM

This month's newsletter has been put together by Olimpia Pilch, CMA's Business Development & Communications Associate!

Kirsty & Jeff

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Got a suggestion? Want to feature in next month's newsletter? Contact olimpia@criticalmineral.org

Want to learn more? Check out our website: https://www.criticalmineral.org/ & follow us on twitter @CMA_Minerals
Andrew Murrison:
"Mr Speaker Net Zero, levelling up and building back better can’t happen unless we have a massive increase in the supply of critical minerals like silicon, copper and lithium. But Beijing controls most of them. Noting China’s recent tech minerals leverage on Japan does he agree with me that the success of our green industrial revolution hinges on advancing our indigenous Silicon Valley and, free of the EU, what fiscal incentives can he now provide to make it happen at pace."

Prime Minister:
"I thank my hon friend for that and as he knows there are some very interesting and potentially lucrative sources of minerals such as lithium in this country, whose exploration, discovery and reuse we are encouraging. But secondly on the tax point that he rightly raises, we’re going to use freeports to ensure that we support them as hubs for the processing of those critical minerals here in the UK."
The Critical Minerals Association collaborated with Austrade and the State Governments of Western Australia, Queensland, and South Australia to deliver a webinar and parallel workshops as part of the Australia Takeover on the 24th of November 2021.

The virtual event, which began with an overview of the Australian opportunity, brought together insights of what is happening in Australia, and provided an opportunity for earnest discussion on how the UK and Australia can collaborate to build secure and responsible critical mineral supply chains.

READ ON HERE

Australia Takeover Website Here
The Critical Minerals Association teamed up with The Geological Society Business Forum and IOM3 to deliver a three part hybrid event, including a breakfast in parliament, a conference livestreamed from The Geological Society and, a drinks reception.

We welcome the Minister of Industry, Lee Rowley’s speech outlining support for the domestic critical minerals sector. We are also grateful to Alexander Stafford MP and Baroness Northover for their ongoing championing of critical minerals.

Thank you to all of those that attended in person and online!
We were delighted to host a breakfast chat on 'ESG: Track, Trace & Provenance', with Douglas Johnson-Poensgen of Circulor, Nathan Dubrich, Source Certain International, Jamie Strauss of Digbee.

The discussion centred around the importance of track, trace and provenance of critical minerals in ensuring that the benefits of ESG compliance are kept throughout the supply chain.

READ ON HERE

Interested in insights from Mining Magazine focusing on how ESG-friendly supply chains will 'open up' capital?

READ ON HERE

ESG: TRACK, TRACE & PROVENANCE

- Douglas Johnson-Poensgen, Co-founder of Circulor
- Jamiee Strauss, Founder of Digbee
- Nathan Dubrich, Head of Sales, Source Certain International

Moderated by Jeff Townsend, Co-founder of CMA.

MON, 8 NOV @ 9AM BST
Cornish Lithium secures transformational funding package from leading technology metals investor TechMet.

Highlights:

- The funding package will enable Cornish Lithium to significantly accelerate its projects, including:
  
  - The construction of a beneficiation and hydrometallurgical demonstration plant that will enable Cornish Lithium to optimise the low carbon Lepidico processing technology to which Cornish Lithium secured a 15-year royalty free licence in 2020.
  
  - Progress towards feasibility studies for the Trelavour Project, which will enable Cornish Lithium to materially progress construction plans and to seek the necessary finance to build the Trelavour Project and move towards commercial production.
We are delighted to announce that Less Common Metals Ltd has become a member of the Critical Minerals Association.

Less Common Metals (LCM) is a world leader in the manufacture and supply of complex alloy systems and metals and are specialists in those based on rare earth elements.

LCM processes are focussed on vacuum induction melting of alloys. The form of these materials varies from powders, through cast alloy ingots and cast shapes to rapidly cooled flake generated by strip casting. All these materials include rare earth and non-rare earth containing alloys.

“LCM shares the Critical Minerals Association’s view about the highly strategic nature of rare earths and their importance in various modern technologies, particularly for green applications. We look forward to working with the CMA to help establish viable, ethical, stable and secure supplies of rare earths to support new and growing industries.” - Ian Higgins, Managing Director, Less Common Metals

Welcome to the association!
We are delighted to announce that Giyani Metals Corp has become a member of the Critical Minerals Association.

Giyani Metals is a mineral resource company focused on the advancement of its manganese assets within the Kanye Basin in south-eastern Botswana, Africa. Giyani Metals is focusing on building a low-cost, low-carbon, high-purity manganese project in Botswana to supply the growing electric vehicle battery market.

"Like many companies in the battery metals sector and as a prospective supplier of critical raw materials to the UK EV market, at Giyani we are keenly aware of the challenges that global decarbonisation presents to governments and industries as they transition to clean and sustainable sources of energy. The work that the CMA is doing on engaging with policy-makers and OEMs is vital to ensure that the role of the mining sector is properly represented and we are delighted to be part of this hugely important initiative." - George Donne, VP Business Development

Welcome to the association!
"With the Glasgow agreement reached and the UK’s Net Zero Strategy published, we must now turn our attention to delivery. The market is already speeding towards new net-zero industries, encouraged by government policy but mostly spurred by the constant demand for better technology, like renewable energy and electric vehicles.

However, many of the new net zero industries rely on what has been termed “critical minerals”. Lithium, cobalt, and rare earth metals, for example, are found in wind turbines and battery-powered cars, as they are in other modern technologies like smartphones and televisions.

They are called “critical” minerals because they are irreplaceable ingredients which are at high risk of supply chain disruption. Today, the risk comes from China’s dominance of international supply chains. Though lithium and rare earths can actually be found in plentiful supply all over the world, China has built up a dominant grip on their supply chains since the 1980s, particularly in refining." - Alexander Stafford MP
Mkango Resources announced that the Government of Malawi has renewed the Thambani uranium, tantalum and niobium exploration licence and issued four retention licences RTL0015/16/17/18/21 granted for five years from 20th October 2021 to 19th October 2026, covering a total of 98.4 square km.

Highlights:

• Potential for uranium-tantalum-niobium mineralisation along a strike length of >3 km
• Assay results from 128 rock samples collected during the 2019/2020 exploration programme returned uranium, tantalum and niobium values ranging up to 0.74% U3O8, 0.41% Ta2O5 and 3.24% Nb2O5. Uranium and associated U-Ta-Nb mineralisation occurs in nepheline syenite gneiss and associated veins
• Targeting potential shallow drill targets on the down-dip extension of surface prospects. Property also has Zircon, columbite and corundum exploration potential
• Evaluating strategic options including opportunities for joint ventures and other potential avenues to create value
E-Tech Resources recently announced the assay results for the first step-out diamond drill holes completed at the Eureka REE Project, located in central Namibia. The drill holes are part of the Phase 1 resource expansion program across Zones 1, 2 and 3 which was completed in late September 2021 totaling 5,761 meters of diamond drilling (DD) in 20 holes.

Elbert Loois, CEO of E-Tech, commented, “The assay results received to date reveal an extension of the mineralization outside of the current resource estimate in several monazite bearing carbonatitic dykes. These results confirm the presence of these dykes up to 160 meters vertical depth, while remaining open at depth and along strike.”

READ ON HERE

WATCH MINES & MONEY INTERVIEW HERE
Will we have enough of the critical minerals in time for all the electric vehicles, wind turbines and solar panels that are the backbone of the energy transition? This is the challenge that governments will face as they look to adhere to the goal of the Paris Agreement.

And this is the question Fasken modestly attempts to answer in this series, from a Canadian perspective – a country with a relatively small population, but vast regions with enormous mineral resources.

In this series we review what the Canadian government and provincial and territorial governments have done and plan to do to ensure that Canada can produce enough of these critical minerals to help power the energy transition. What is clear is that as a country we do a lot to encourage the demand for electric vehicles, but there is far less clarity when it comes to the government policies necessary to spur the supply of the critical minerals that are necessary to power those electric vehicles.

READ PART 1 HERE
READ PART 2 HERE
The Geological Society's Flo Bullough and Megan O’Donnell share their reflections on the second week of international negotiations at the 26th UN Conference of the Parties (COP26) in Glasgow.

The second week of the long-awaited 2021 UN climate conference has culminated in the announcement of the Glasgow Climate Pact. This international agreement strengthens global ambitions to mitigate the effects and impacts of climate change.

Perhaps most importantly, and for the first time in three decades of UN climate summits, a global commitment to ‘phase down’ the use of unabated coal for power was agreed. Alongside formally agreeing to the cessation of ‘inefficient’ fossil fuel subsidies, this marks an important and historical step-change, with the potential to significantly reduce greenhouse gas emissions from the fossil fuel industry.

READ ON HERE
BGS is conducting a comprehensive digital data review to help them understand the data ecosystem in which they operate and assess options for their target operating model over the next 10 years.

The digital data review will help BGS prioritise investment and identify and assess different options around future operating models for their data business. To do this effectively, they would like to understand stakeholder requirements of BGS data so would appreciate you taking some time to review and complete this survey.

BGS produces a wide range of data that helps to improve understanding and communication of the effects of geoenvironmental properties and hazards in Great Britain, thereby improving society’s resilience and enabling people, businesses and Government to make better-informed decisions.

BGS are keen to hear from a representative cross-section of the data and science community, including those who are familiar with BGS and, importantly, those that are not. The survey should take approximately 10 minutes to complete. It will be open until Friday 17 December 2021.
Rare earth elements are a group of metals that are critical ingredients for a greener economy, and the location of the reserves for mining are increasingly important and valuable. This infographic features data from the United States Geological Society (USGS) which reveals the countries with the largest known reserves of rare earth elements (REEs).

<table>
<thead>
<tr>
<th>Country</th>
<th>Mine Production 2020</th>
<th>Reserves</th>
<th>% of Total Reserves</th>
</tr>
</thead>
<tbody>
<tr>
<td>China</td>
<td>140,000</td>
<td>44,000,000</td>
<td>38.0%</td>
</tr>
<tr>
<td>Vietnam</td>
<td>1,000</td>
<td>22,000,000</td>
<td>19.0%</td>
</tr>
<tr>
<td>Brazil</td>
<td>1,000</td>
<td>21,000,000</td>
<td>18.1%</td>
</tr>
<tr>
<td>Russia</td>
<td>2,700</td>
<td>12,000,000</td>
<td>10.4%</td>
</tr>
<tr>
<td>India</td>
<td>3,000</td>
<td>6,900,000</td>
<td>6.0%</td>
</tr>
<tr>
<td>Australia</td>
<td>17,000</td>
<td>4,100,000</td>
<td>3.5%</td>
</tr>
<tr>
<td>United States</td>
<td>38,000</td>
<td>1,500,000</td>
<td>1.3%</td>
</tr>
<tr>
<td>Greenland</td>
<td>-</td>
<td>1,500,000</td>
<td>1.3%</td>
</tr>
<tr>
<td>Tanzania</td>
<td>-</td>
<td>890,000</td>
<td>0.8%</td>
</tr>
<tr>
<td>Canada</td>
<td>-</td>
<td>830,000</td>
<td>0.7%</td>
</tr>
<tr>
<td>South Africa</td>
<td>-</td>
<td>790,000</td>
<td>0.7%</td>
</tr>
<tr>
<td>Other Countries</td>
<td>100</td>
<td>310,000</td>
<td>0.3%</td>
</tr>
<tr>
<td>Burma</td>
<td>30,000</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Madagascar</td>
<td>8,000</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Thailand</td>
<td>2,000</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Burundi</td>
<td>500</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td><strong>World Total</strong></td>
<td><strong>243,300</strong></td>
<td><strong>115,820,000</strong></td>
<td><strong>100%</strong></td>
</tr>
</tbody>
</table>
COP26 is a time for big pledges, with everyone from governments to banks promising to do their bit for the planet. How will we know these promises are being kept and it’s not all just “greenwashing”?

Enter Hammersmith-headquartered start-up Circulor. Founded in 2018, the firm uses blockchain technology to help companies trace products through complex supply chains.

Circulor’s software lets clients do things like track CO2 emissions through manufacturing and shipping, monitor if recycling is being carried out responsibly, or make sure the cobalt inside a battery is not the product of child labour. Circulor already does the latter for the batteries in Volvo’s electric vehicles.

The start-up was set up by former consultants and colleagues Douglas Johnson-Poensgen, 52, and Veera Johnson, 56 (the pair aren’t related).

“Five years ago when I was talking to VCs about what we were doing, they were sitting there going ‘is that a thing?’,” CEO Johnson-Poensgen says. “Nobody would now suggest this is not a ‘thing’.”

READ ON HERE
The following November news articles from Argus Media, Mining Weekly, Mining Magazine, and others, provide an overview of critical mineral mining for:

- Cobalt
- Copper
- Graphite
- Lithium
- Manganese
- Nickel
- Tin
- Tungsten
- Rare Earth Elements

*The Critical Minerals Association takes no credit for any articles and makes no endorsement of any of the content.*
Cobalt

• Africa
  ○ Congo [24.11.21]
    ▪ Democratic Republic of Congo’s government said on Wednesday it would push to develop domestic battery manufacturing capacity to add value to its exports of minerals such as cobalt and copper.

• Europe
  ○ Sweden: Northvolt [12.11.21]
    ▪ Northvolt announced that it has produced what it claims is the first battery cell with a cathode built “100% from recycled nickel, manganese, and cobalt.” Northvolt is a battery startup founded by two former Tesla executives who worked on Tesla’s first Gigafactory in Nevada with Panasonic.

• North America
  ○ Canada: Fortune Minerals [7.11.21]
    ▪ New road paves the way for Canada’s first primary cobalt mine. Fortune Minerals's NICO project will greatly benefit from the about-to-be-open Tlicho all-season road, linking the community of Whati to the national highway system.
Copper

• Global [3.11.21]
  ■ Visualizing Copper Demand for Renewables. The above infographic from Teck highlights how global copper demand in both the clean power and the clean transport sectors is expected to double in the next decades.
  ■ [https://www.visualcapitalist.com/visualizing-copper-demand-for-renewables/](https://www.visualcapitalist.com/visualizing-copper-demand-for-renewables/)

• Africa
  ○ Congo: Zijin Mining [23.11.21]
    ■ Zijin approves investment in $769m Congo copper smelter

• Latin America
  ○ Chile [19.11.21]
    ■ Chile elections may impact a third of the world’s copper supply.

• North America
  ○ Canada: Rio Tinto [26.11.21]
    ■ Rio Tinto Exploration Canada is set to become the majority owner of Forum Energy Metals’ 100% owned Janice Lake copper-silver project in Saskatchewan, Canada
Graphite

• Asia
  ○ Korea: POSCO/ EcoGraf [25.11.21]
    ▪ ASX-listed EcoGraf has struck a non-binding memorandum of understanding with Korean major POSCO that would see EcoGraf supporting POSCO’s anode production expansion plans by supplying battery anode material products from its new Australian battery anode material facility and its planned facility in Europe.
  ○ India: Tirupati Graphite [8.11.21]
    ▪ Tirupati Graphite begins trading its shares on the OTCQX amidst demand for graphite in the US.

• Africa
  ○ Mozambique: Triton Minerals [9.11.21]
    ▪ Australian graphite developer Triton Minerals has entered into a binding agreement to supply graphite concentrate from its Ancuabe project in Mozambique to China's Yichang Xinchang Graphite.
Lithium

• Europe
  ○ Serbia: Rio Tinto [17.11.21]
    ▪ Rio Tinto has solidified its agreement with Europe-based battery technology company InoBat Auto, offering an investment in the firm. InoBat is actively pursuing plans to build a number of gigafactories, including one in Serbia.

• Latin America
  ○ Argentina: Lithium Americas [18.11.21]
    ▪ Lithium Americas is buying Argentina-focused Millennial Lithium for $400-million in stock and cash, eclipsing an offer from China's Contemporary Amperex Technology Co Ltd (CATL).
    ▪ https://www.miningweekly.com/article/lithium-americas-beats-catl-to-buy-millennial-for-400m-2021-11-18

• Oceania
  ○ Australia: Eastern Iron [15.11.21]
    ▪ Australia's Eastern Iron Ltd has agreed to develop lithium projects with China lithium chemicals producer Yahua Group, in Australia and other countries.
Manganese

• Africa
  ◦ Botswana: Giyani Metals [8.11.21]
    ■ Giyani Announces Update on Activities at its Manganese Projects, Botswana.

• Europe
  ◦ Czech Republic [11.11.21]
    ■ Euro Manganese, the Vancouver-based battery materials company, is making good progress at its Chvaletice Manganese Project site in the Czech Republic, where it aims to reprocess manganese from historic mine tailings and supply ultra-high-purity manganese products to the lithium-ion battery industry in Europe.
    ■ [https://www.thearmchairtrader.com/euro-manganese-chvaletice-project/](https://www.thearmchairtrader.com/euro-manganese-chvaletice-project/)
Nickel

• Asia
  ○ Indonesia/ China: Weiming [25.11.21]
    ▪ China's Weiming to invest in $400m Indonesia nickel matte project. Weiming said the Indigo tie-up, would also focus on the development of low-grade nickel ore and tailings utilisation technology.
  ○ Indonesia/ Australia: Nickel Mines [17.11.21]
    ▪ First nickel pig iron (NPI) from the Angel nickel project, in Indonesia, is expected in the first quarter of 2022, well ahead of the October 2022 date initially set.

• Latin America
  ○ Brazil: Horizonte [24.11.21]
    ▪ Horizonte Minerals announced a proposed equity and debt funding package of $633-million that would complete the funding required for the construction of the Araguaia nickel project, in Brazil.

• North America
  ○ USA: US Geological Survey [11.11.21]
    ▪ The US Geological Survey (USGS) has added nickel and zinc to its proposed list of 50 ‘critical minerals’ and removed potash
Tin

• Global [9.11.21]
  ■ Column: Tin ticks all the commodity supercycle boxes: Andy Home.
  ■ https://www.reuters.com/business/energy/tin-ticks-all-commodity-supercycle-boxes-andy-home-2021-11-08/

• Asia
  ○ Indonesia [24.11.21]
    ■ Indonesia may stop tin exports in 2024 as part of its ambitions to attract investment into downstream processing and manufacturing in the Asian nation, President Joko Widodo said on Wednesday.

• Europe
  ○ UK: Strategic Minerals [17.11.21]
    ■ Strategic Minerals identifies more high-grade tin to the west of Redmoor deposit in Cornwall.
Tungsten

• Europe
  ○ Spain: Rafaella Resources [23.11.21]
    ▪ ASX-listed explorer Rafaella Resources has struck a binding heads of agreement with PanEx Resources to acquire the Borralha and Vila Verde tungsten projects, in Portugal.

• Oceania
  ○ Australia: Thor Mining [8.11.21]
    ▪ The directors of Thor Mining Plc have announced that diamond drilling has commenced at the Molyhil tungsten-molybdenum Project, in the Northern Territory (NT).

  ○ Tasmania: King Island [9.11.21]
    ▪ Australia’s looming return to meaningful tungsten production – after a near-three decade absence – will be driven by a global dearth of non-Chinese supply for the critical material used by aircraft, mining and car-industries, says Johann Jacobs, whose King Island Scheelite project off Tasmania cleared a key development hurdle this week.
Rare Earth Elements

• Asia
  ○ China: Rare Earths in EVs [31.10.21]
    ▪ A new report by IDTechEx anticipates China continuing to use permanent magnet motors in its EVs, but Europe making efforts to decrease the utilization of magnetic materials and especially heavy rare earths.
      ▪ [https://www.mining.com/while-china-will-continue-to-use-rare-earths-in-evs-europe-may-be-trying-different-options-report/]

• Europe
  ○ UK: Alexander Stafford MP [24.11.21]
    ▪ China’s dominance of rare earth metals has left Britain strategically vulnerable
      ▪ [https://www.politicshome.com/thehouse/article/chinas-dominance-of-rare-earth-metals-has-left-britain-strategically-vulnerable]
  ○ UK: Gov Funded Feasibility Study [4.11.21]
    ▪ The UK gears up to produce rare earth magnets, cut reliance on China
      ▪ [https://www.reuters.com/world/uk/exclusive-uk-gears-up-produce-rare-earth-magnets-cut-reliance-china-2021-11-04/]

• North America
  ○ USA: Pennsylvania State University [24.11.21]
    ▪ In a paper in the Chemical Engineering Journal, Amir Sheikhi, assistant professor of chemical engineering and biomedical engineering details a new nanotechnology to separate neodymium using plant cellulose, which is found in paper, cotton and pulp.
This article explores the renewed focus on culture and values in the mining sector, which challenges traditional perceptions or misconceptions of the industry as it seeks to attract the future workforce.

‘From my school days, I’ve always felt it's better to work within the system than outside it - for example, become a prefect and try to change the school. Now I'm in the mining industry, and if you want something changed, you can either fight against it, or you can get in the middle and try and influence it from the inside. That's my approach,’ divulges Fiona Cessford FIMMM, Corporate Consultant for Environmental, Social and Governance (ESG) at global mining consultancy SRK, with over 20 years’ experience in the sector.

She muses, ‘Historically, mining was seen as a positive career choice. My father moved from the north of England to South Africa to get a job in mining, and I think it was seen positively, as a very strong career. This has changed - with an understandable focus on the green economy, tailings dam failures, blowing up cultural heritage sites and loss of human rights associated with conflict minerals - the reputation of the industry has decreased.’
Throughout this year an Industry Advisory Panel, which includes several CSM Association members, has been working alongside the University to develop a pioneering new Mining Engineering program at CSM.

The Degree Apprenticeship (DA) model represents an innovative new partnership between employers and universities. Apprentices will be employed throughout the programme, spending part of their time studying (through access to online material and attendance at residentials) and the rest working. On successful completion of the program candidates will be awarded a BEng (Hons) degree in Mining Engineering from the University of Exeter. The program will be aimed at both the UK mining sector and the international mining industry through a blended learning offering.

To industry the DA represents both a completely different early talent recruitment model, and a novel opportunity for existing employees to gain a degree-level qualification. A recent industry survey around the DA provided very encouraging results and CSM and University Staff have agreed to develop the course.
The fact is that there's a disconnect between the mining industry's view of itself and the way the public at large sees it. In a thought leadership panel at CMJ's Reimagine Mining Symposium on Oct. 13, mining consultancy SRK asked the question: 'What if mining was cool?

Discussing their personal paths to the mining sector, the panellists talked about the best way to reach young people, diversity and inclusion in the sector, and the stories that could help improve the public perception of mining.
There is evidence to suggest that women, certain ethnic minorities, people with disabilities and those from disadvantaged socioeconomic backgrounds are underrepresented in education, training and employment related to STEM.

While there is significant variation in rates of progression and outcomes across ethnic minority groups, research shows that ethnic minority staff and students have consistently poorer outcomes than white staff and students.

The Committee is therefore seeking written submissions by 23:59 on Friday 14 January 2022 addressing any or all of the following topics:

- the nature or extent to which women, ethnic minorities, people with disabilities and those from disadvantaged socioeconomic backgrounds are underrepresented in STEM in academia and industry;
- the reasons why these groups are underrepresented;
- the implications of these groups being underrepresented in STEM roles in academia and industry.

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Linkedin: Critical Minerals Association
Contact: kirsty@criticalmineral.org

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