CRITICAL MINERALS ASSOCIATION (UK)

OCTOBER 2023

REGISTER FOR CMA (UK) & GBSF 3RD ANNUAL CONFERENCE: THE UK OPPORTUNITY - 27 NOV

CHINA ANNOUNCES EXPORT RESTRICTIONS ON GRAPHITE PRODUCTS

UK AND JAPAN SIGN MOC ON CRITICAL MINERALS
Welcome to our October CMA (UK) monthly newsletter featuring updates on the critical minerals space. Read on for:

- Register for the CMA (UK) & GSBF 3rd Annual Conference
- Speaker Line-Up: CMA (UK) & GSBF 3rd Annual Conference
- CMA (UK) & HM Treasury Tour Northeast Mineral Exploration Sites
- UK and Japan Sign Memorandum on Critical Minerals
- China Announces New Export Restrictions on Graphite Products
- EU Commits €300B to Global Gateway, Rivalling China's BRI
- Australia Commits Additional £2 Billion to Critical Minerals
- CMA (UK) Hosts ESG Networking Event During LME Week
- UK Hosts Principal Meeting of Minerals Security Partnership
- HyProMag Rare Earth Magnet Recycling Selected as MSP Project
- UK Gov Announces Funding through APC for 20 Tech Projects
- CMIC Releases New Methodology Report on Criticality
- Aberdeen Minerals Arthrath Project Awarded Government Grant
- E-Tech Resources Advances Exploration with New Partners
- Minviro & Worley to Support Sustainable Battery Manufacturing
- Time for Geography Seeks Partners for the UK talent pipeline
- Register for Mines and Money: Resourcing Tomorrow 2023
- UK-Canada matchmaking -Critical Minerals R&D Competition
- News Round Up
- Events Calendar

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This month's newsletter has been put together by Eileen Maes, CMA (UK) & Chenhao Wu (Colgate University)

Would you like to feature in a future edition? Contact Eileen at eileen@criticalmineral.org
On 27 November, the Critical Minerals Association (UK) and Geological Society Business Forum’s Annual Conference is returning to Burlington House in London. The year’s theme is ‘The UK Opportunity’, and the event will feature presentations, panel discussions, and roundtables that explore issues across the critical minerals supply chain. Speakers include:

- **Minister Nusrat Ghani**, Minister of State at the Department for Business and Trade, UK Government
- **His Excellency Khalid Al-Mudaifer**, Vice-Minister for Mining Affairs, Ministry of Industry and Mineral Resources, Kingdom of Saudi Arabia
- **The Honourable Ralph Goodale**, High Commissioner for Canada in the United Kingdom of Great Britain and Northern Ireland

Tickets are limited so register your place on Eventbrite today!

**MORE INFO HERE**
CONFIRMED SPEAKERS:
CMA (UK) & GSBF 3RD ANNUAL CONFERENCE

- Madeline R. Young
  University of Northampton of London
- Joseph Mansour
  FCDO-DESNZ
- Suzanne Shaw
  Women in Mining UK
- Stacy Hope
  University of Northampton of London
- Lilia Guittari-Lickovski
  Department for Business & Trade
- Nic Stirk
  Materials Nexus
- Sarah Gordon
  Satarla
- Sheena Hindocha
  Innovate UK KTN
- Christian Peters
  Seloxium
- Julie-Ann Adams
  EERA
- Lilia Guittari-Lickovski
  Department for Business & Trade
- Nic Stirk
  Materials Nexus
- Sarah Gordon
  Satarla
- Sheena Hindocha
  Innovate UK KTN
- Christian Peters
  Seloxium
- Lilia Guittari-Lickovski
  Department for Business & Trade
- Nic Stirk
  Materials Nexus
- Sarah Gordon
  Satarla
- Sheena Hindocha
  Innovate UK KTN
- Christian Peters
  Seloxium

Baroness Northover
House of Lords

Sarah Connelly
Innovate UK

Lucy Smith
Materials Processing Institute

Izzi Monk
Royal Society of Chemistry

Jacqui Murray
NMIS

Eva Marquis
Camborne School of Mines

David Payne
Mineral Products Association

Kathryn Goodenough
British Geological Survey

Luke Hampton
SMMT

Anna Gibbs
Phillips 66

Grant Smith
Less Common Metals

Amanda van Dyke
ARCH

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MORE SPEAKERS TO BE ANNOUNCED SOON
From 4-5 October, the Critical Minerals Association (UK) joined officials from HM Treasury on a tour of mineral exploration and development projects in the Northeast.

The first day comprised of visits to Green Lithium at Teesport, where CMA (UK) and HMT were shown the impressive scale of the freeport’s facilities, as well as where Green Lithium’s merchant refinery would be built. Later on, the team travelled to the Materials Processing Institute in Middlesbrough, an organisation that develops and commercialises materials for industrial processes.

On the second day, the delegation travelled up to the idyllic county of Weardale to visit junior exploration companies Northern Lithium and Weardale Lithium, both of whom are looking to extract lithium from geothermal brines.

This trip comes 2 weeks after the CMA (UK) joined officials from HMT and the Department for Business & Trade (DBT) on a tour of mineral exploration and mine development sites in the Southwest of England.

READ ON HERE
On 28 October, Japan and the United Kingdom (UK) signed a Memorandum of Cooperation (MoC) that established a new bilateral partnership on critical minerals.

The MoC was signed by Kemi Badenoch, Secretary of State for Business and Trade, and Yasutoshi Nishimura, Minister of Economy, Trade and Industry of Japan, at the G7 Trade Ministers’ Meeting in Osaka.

The Memorandum provides a framework for promoting dialogue and deepening cooperation between the two nations on the issue of critical minerals. It covers areas such as research and innovation, data and traceability, industry partnerships, infrastructure projects in developing producer nations, as well as technical and environmental, social and governance (ESG) standards.

READ ON HERE
On 21 October, China announced that it will impose export restrictions on certain graphite products for the purpose of 'national security'.

Graphite is a key component of electric vehicles batteries. As the world’s largest producer, China accounts for two-thirds of global supply. It also refines more than 90% of the world’s graphite into material-ready product for EV battery anodes.

This is China’s latest move in curbing shipments of the critical minerals that are crucial for the manufacturing of renewable technologies and energy sources. On 1 August, China imposed export restrictions on germanium & gallium.

Automakers such as Tesla and Mercedes have been rushing to lock in graphite supply from non-Chinese suppliers. Without security of supply to graphite and other critical minerals, nations will simply not be able to meet any of their decarbonisation targets.

READ ON HERE
As of 25 October, the European Union (EU) has announced a raft of new investment agreements totalling €300 billion, to support projects spanning critical raw minerals, green energy, and transport corridors.

The agreements form part of the EU’s 2-day forum on the ‘Global Gateway’, the bloc’s new infrastructure partnership plan to rival China’s $1 trillion Belt and Road Initiative. President Ursula von der Leyen hosted over 40 world leaders and ministers in Brussels, where she pitched the EU as a better choice for financing & developing clean infrastructure.

The new initiatives include agreements on critical raw materials with the Democratic Republic of Congo and Zambia, green hydrogen with Namibia, and cooperation on clean energy with Bangladesh and Vietnam.

READ ON HERE
On 25 October, Australian Prime Minister Anthony Albanese announced an additional $2 billion funding package for the Australian critical minerals industry, to help attract foreign investment and facilitate the nation’s transition to a decarbonised economy.

"We want to move Australia up the international value chain in critical minerals, energy and manufacturing,” Mr Albanese said in a statement.

In May, Mr Albanese and US President Joe Biden formally agreed to make climate & clean energy the ‘third pillar’ of the Australia-US alliance (alongside defense & security, and trade & investment). The new funding plan was unveiled ahead of the first roundtable meeting of the Australia-United States Taskforce on Critical Minerals, held in Washington as part of Mr Albanese’s 4-day visit to the US.
CMA (UK) HOSTS ESG NETWORKING EVENT DURING LME WEEK

On London Metals Exchange (LME) Week, the UK Government hosted the Principals' meeting of the Minerals Security Partnership, focused on boosting responsible public & private investment in critical mineral supply chains.

To coincide with this meeting, on 10 October the Critical Minerals Association (UK) organised an invite-only ESG Networking event that brought stakeholders from across industry, finance, government, to showcase the UK’s strengths in Environmental, Social and Governance (ESG), and to facilitate discussions on key issues.

The event included presentations from ESG experts:
- Douglas Johnson-Poensgen, Founder & CEO of Circulor;
- Sarah Gordon, Founder & CEO of Satarla
- Jamie Strauss, Founder & CEO of Digbee
- Jane Joughin, Corporate Consultant at SRK Consulting
- Robert Pell, Founder & CEO of Minviro.

READ ON HERE
On 10 October, the UK hosted a Principals' Meeting of the Minerals Security Partnership (MSP) for the first time. The meeting, held at the London Metals Exchange (LME) on LME Week, brought together 14 partner nations (representing over 50 percent of global GD) to focus on boosting responsible public and private sector investment in critical mineral supply chains.

Nusrat Ghani MP, Minister of State at the Department for Business & Trade, co-chaired the historic meeting of the MSP together with US Under-Secretary for Economic Growth, Energy and the Environment, Jose Fernandez.

MSP member nations approved the development of multiple projects at the meeting, including 11 projects in upstream mining and mineral extraction, 4 in midstream processing, and 2 in recycling & recovery-- including a UK-based project by HyProMag, commercialising rare earth magnet recycling.

READ ON HERE
Rare earth magnet recycling technology developed at the University of Birmingham, and commercialised by HyProMag Ltd, has been selected as a Minerals Security Partnership (MSP) project. They are 1 of only 17 projects selected by the MSP, which aims to build secure, responsible mineral supply chains to achieve Net Zero carbon targets.

Professor Allan Walton, Founding Director of Hypromag and Director of the Birmingham Centre for Strategic Elements & Critical Materials, outlines how their patented technology can unlock the supply chain:

“Our Hydrogen Processing of Magnet Scrap technology offers an extremely efficient method to separate rare earth magnets, producing a demagnetised, purified alloy powder which can be fed into multiple parts of the value chain. Without such an efficient separation process it is difficult to see how recycling can be achieved at scale.”

READ ON HERE
The UK Government has awarded £89 million in funding through the Advanced Propulsion Centre (APC) for 20 cutting-edge tech projects in the UK, including a new lithium scale-up plant, reinforcing the nation as “a world leader in zero emissions vehicle technology”.

The new funding package includes 4 collaborative R&D projects, 5 scale-up projects to assess if businesses in the automotive sector are ready for growth, and 7 feasibility studies for large-scale manufacturing facilities in the UK.

Chief Executive of the APC, Ian Constance, said in a statement: “This latest round of funding coincides with the APC’s 10th anniversary. We have seen over £1.4 billion of investment into automotive projects since the APC was set up, and I am proud of the impact that we have made.”

The new funding “will further add to our portfolio of innovative projects and continue to drive the UK to deliver on its net zero ambition.”

READ ON HERE
A new report from the Critical Mineral Intelligence Centre (CMIC) published on 10 October sets out a revised methodology for determining the criticality of minerals.

Informed by international best-practice, the report presents a thorough review of the indicators in the ‘UK Criticality Assessment of Technology Critical Minerals and Metals’ published by the British Geological Survey (BGS) in 2021. It describes which indicators have been modified as a result of the review, which includes new data sets and methodological improvements.

As a result the list of candidate materials to be considered in the next criticality assessment will grow from 26 to 82. The revised methodology will be used as the basis for the next UK criticality assessment carried out by CMIC in 2024.

READ THE REPORT HERE
Aberdeen Minerals has been awarded £294,000 in grant funding by the UK Government through the Automotive Transformation Fund (ATF).

The grant will address 70% of the costs for a Feasibility Study into innovative methods to process minerals at their Arthrath Nickel-Copper-Cobalt Project in Aberdeenshire.

Fraser Gardiner, CEO of Aberdeen Minerals, commented: “We are grateful to receive UK Government backing and endorsement of our project. The support through the ATF enables a very exciting opportunity to advance our vision in North East Scotland for environmentally and socially responsible, local processing of the critical raw materials required for a just energy transition.”

Innovations to be tested include Glycine Leaching Technology (patented by Draslovka), which uses glycine as a sustainable and cost-effective way to produce critical minerals.

READ ON HERE
E-Tech Resources Inc., a rare earth element (REE) exploration & development company which owns the Eureka Project in Namibia, has announced a Memorandum of Understanding (MOU) with Novamera Inc. to evaluate the use of surgical mining for mineral extraction.

The MOU sets out a series of milestones that include a conceptual economic desktop evaluation (commencing immediately), Guidance Tool calibration activities, and a bulk sample. The two partners plan to initiate these activities over the next 12 months.

Novamera’s technology could provide a more efficient and cost-effective path to production, while also radically reducing environmental and social impact.

E-Tech is also now engaging with Gecko Namibia (Pty) Ltd. and Flightec Namibia to support ongoing exploration and development activities at its Eureka project.

READ ON HERE
In today’s fast-paced tech industry, it’s essential to keep sustainability at the forefront. Minviro and Worley have recently partnered to create a leading combination for sustainable battery manufacturers, offering data-driven asset design and engineering solutions.

The collaboration leverages the best of both companies: Worley as engineering and project delivery industry leaders, and Minviro as experts in cradle-to-gate life cycle assessments across the battery materials supply chain. Combined, they aim to help companies future-proof their assets and reduce environmental impacts at every stage of the battery life cycle.

READ ON HERE
Geoscience sectors need a strong talent pipeline to address the biggest challenges facing our world. Net Zero cannot be achieved without a robust, skilled workforce of geologists, mining engineers, and metallurgists in the UK.

Time for Geography is an open-access, dedicated video platform for geography and geoscience education, supporting the education of 2.9 million secondary students in the UK and many more overseas.

Watch Time for Geography’s video below to find out how you can get involved in promoting your sector and career pathways at the national scale, to the next generation of geoscientists.

To express interest in the programme, contact Time for Geography by going to their website (click on Logo) by 10 November.

WATCH VIDEO HERE
This year the Critical Minerals Association (UK) is continuing its partnership with Mines and Money to bring Resourcing Tomorrow 2023 back to London.

Join over 2,000 key players from across the mining and energy industries, including investors, educators, government officials, suppliers, and operators from around the world, to grow relationships and do business at the Business Design Centre in Angel.

Click below to register, and don't forget to use CMA (UK)'s exclusive discount code at checkout.

READ ON HERE
Innovate UK, Innovate UK KTN and National Research Council of Canada Industrial Research Assistance Program (NRC IRAP) are working together to deliver an exciting online event to bring together industry and research from across the two nations.

The UK-Canada Critical Minerals Online Matchmaking Event is one of several activities in a larger programme to build and strengthen UK-Canada relationships around critical minerals and form collaborative partnerships to apply into a forthcoming bilateral competition.

Both the UK and Canada have identified that critical minerals and their associated technologies are vital for the forthcoming energy transition. Important applications include the electrification of road transport, expansion of wind energy production, in addition critical minerals are also used in consumer electronics and defence applications.

**REGISTER HERE**
The following September news articles from Argus Media, Mining Weekly, Mining Magazine, Financial Times, and others, provide an overview of critical mineral mining for:

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

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

• Asia
  ○ China [23.10.23]
    ▪ China plans to boost state cobalt reserves after prices drop.
    ▪ Read the article here.

• North America
  ○ Canada: Fortune Minerals, Rio Tinto [29.09.23]
    ▪ Fortune Minerals and Rio Tinto collaborate to expand North America critical minerals production.
    ▪ Read the article here.

  ○ USA: Eurasian Resources Group [11.10.23]
    ▪ ERG signs deal to sell cobalt to US battery materials producer.
    ▪ Read the article here.

• Oceania
  ○ Australia: Sunrise Energy Metals [05.10.23]
    ▪ Sunrise Energy Metals seeks to install $200 million nickel-cobalt refinery in US.
    ▪ Read the article here.
Copper

• Africa
  ○ Congo: Exxaro [05.10.23]
    ▪ Coal miner Exxaro hunts for copper assets in Congo, Zambia and Botswana, diversifying into critical minerals.
    ▪ Read the article here.
  ○ Zambia: Barrick Gold [04.10.23]
    ▪ Barrick Gold invest nearly $2 bln in Zambia mine to raise copper output.
    ▪ Read the article here

• Oceania
  ○ Australia: Glencore [18.10.23]
    ▪ Glencore said it was set to shut Australia's Mount Isa copper mines in second half of 2025, which is the second-largest copper producer in Australia.
    ▪ Read the article here.

• North America
  ○ Panama: First Quantum Minerals [21.10.23]
    ▪ Panama's president gives final law-authorizing approval to a new long-term copper mine contract.
    ▪ Read the article here.
Graphite

• Asia
  ○ China [20.10.23]
    ▪ China, world's top graphite producer, tightens exports of key battery material.
    ▪ Read the article here.

• Europe
  ○ Sweden: Talga Group [13.10.23]
    ▪ Talga Group is building a factory Sweden to make cleaner anodes, which it plans to complement with a nearby graphite mine.
    ▪ Read the article here.

• Oceania
  ○ Australia: International Graphite Ltd [13.10.23]
    ▪ International Graphite advances second largest graphite deposit in Australia.
    ▪ Read the article here.
Lithium

• Africa
  ○ DRC: Zijin Minig Group [26.10.23]
    ▪ China's Zijin Mining Group Co. announces a venture to develop part of the world’s largest hard-rock lithium deposits in the Democratic Republic of Congo.
    ▪ [Read the article here.]

• Asia
  ○ Saudi Arabia: Ma’aden [25.10.23]
    ▪ Saudi Arabia's Ma'aden working to extract lithium from seawater.
    ▪ [Read the article here.]

• Europe
  ○ France [12.10.23]
    ▪ Lithium-hungry France stroked Mongolian exploration deal.
    ▪ [Read the article here.]

• North America
  ○ USA: Albemarle [16.10.23]
    ▪ Albemarle abandoned Australian lithium deal after billionaire Gina Rinehart builds stake.
    ▪ [Read the article here.]

• South America
  ○ Chile: Tshingshan [16.10.23]
    ▪ Tsingshan plans $233 million lithium-related investment in Chile.
    ▪ [Read the article here.]
Manganese

• Africa
  ○ South Africa: South 32 [23.10.23]
    ▪ South32 reports record quarterly production at South Africa Manganese.
    ▪ Read the article here.

• Asia
  ○ China: Tianyuan Manganese Industry [29.09.23]
    ▪ Ningxia Tianyuan Manganese Industry Group declares insolvency, reorganization citing ‘debt problems, market factors’.
    ▪ Read the article here.

• Oceania
  ○ Australia: Accelerated Resource [05.10.23]
    ▪ Accelerate Resources fields positive phase four drilling results at Woodie Woodie North Manganese Project.
    ▪ Read the article here.
Nickel

• Europe
  ○ UK [16.10.23]
    ▪ London Metal Exchange tries to move on from nickel crisis.
    ▪ Read the article here.

• North America
  ○ USA: Atlas Minerals [29.09.23]
    ▪ Start-up Atlas raises $27 million for new nickel technology for EV batteries.
    ▪ Read the article here.

  ○ Canada: Power Nickel [16.10.23]
    ▪ Power Nickel has announced a proposed private placement of $2.75 million to advance exploration at its flagship Nisk nickel and platinum group metals (PGM) project in Quebec.
    ▪ Read the article here.

• Oceania
  ○ Australia: Galileo Mining [23.10.23]
    ▪ Galileo Mining kicks off new nickel and palladium exploration drilling campaign at Norseman.
    ▪ Read the article here.

  ○ Australia: Dynamic Metals [23.10.23]
    ▪ Dynamic Metals identifies “exciting” nickel drill target at Widgiemooltha.
    ▪ Read the article here.
Rare Earth Elements

- **Asia**
  - **Vietnam [20.10.23]**
    - Police in Vietnam have arrested six people accused of violating mining regulations, including the chairman of a company at the forefront of a drive to create a rare earth industry.
    - [Read the article here.](#)
  - **Malaysia [24.10.23]**
    - Malaysia will allow exports of only processed rare earths and prohibit shipments of rare earth raw material.
    - [Read the article here.](#)
  - **Malaysia: Lynas Rare Earths [20.10.23]**
    - Lynas Rare Earths planned to shut all operations in Malaysia on a temporary basis, except a mixed rare earth carbonate processing plant in the December quarter.
    - [Read the article here.](#)

- **Oceania**
  - **Australia: Shenghe Resources [23.10.23]**
    - China-based Shenghe Resources said on Monday its unit's Singapore firm signed an agreement to acquire new shares in Australia-based rare-earth miner Vital Metals for about $14.8 million.
    - [Read the article here.](#)
Tin

- Europe
  - UK: Cornish Tin [10.19.23]
    - The UK's Crown Estate has granted rights to early-stage mining company Cornish Tin to search for gold and silver across its Cornish land assets.
      - Read the article here.

  - UK [10.16.23]
    - Tin polls second at LME Metals Seminar for upside potential.
      - Read the article here.

Tungsten

- Asia
  - China [12.10.23]
    - China Tungsten Price Remains Stable in the First half of October 2023
      - Read the article here.

- Oceania
  - Australia: EQ Resources [09.10.23]
    - EQ Resources reports increase in quarterly Tungsten concentrate output.
      - Read the article here.
Vanadium

• Africa
  ○ South Africa: Ironveld [26.10.23]
    ▪ Ironveld to raise £1m for working capital; Wardle to take over as chairperson.
    ▪ Read the article here.

• North America
  ○ South Africa: Nevada Vanadium [30.10.23]
    ▪ The Nevada Bureau of Land Management (BLM) has approved the Gibellini vanadium project, what could be the first primary vanadium mine in the US.
    ▪ Read the article here.
NOVEMBER

- IMARC, Beacon Events | **IMARC 2023: International Mining and Resources Conference + Expo** | ICC Sydney, Australia | 31 October - 2 November 2023
  - Register here.

- RINA | **Products in Compliance Conference** | London, UK | 15 - 16 November
  - Register here.

- AusIMM | **Critical Minerals Conference 2023** | Perth Convention & Exhibition Centre, Australia | 21 - 23 November 2023
  - Register here

- ABMEC | **ABMEC Annual Conference & Exhibition** | Marriott Nottingham Belfry, UK | 22 - 23 November 2023
  - Register here

- The Critical Minerals Association (UK) and Geological Society Business Forum (GSBF) | **3rd Annual Conference: The UK Opportunity** | Burlington House, London | 27 November
  - Register here

- Beacon Events & Mines and Money: **Resourcing Tomorrow** | London, UK | 28 - 30 November 2023
  - Register here

Interested in speaking and / or attending?
Contact eileen@criticalmineral.org
OUR MEMBERS

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