

Ontario Emerges as a Hotspot for EV Battery Investment with Volkswagen's First Battery Plant Outside of Europe

written by InvestorNews | March 16, 2023

In fact, Ontario is becoming quite the hot spot for EV battery investment, both downstream and upstream. Along with the above-noted Volkswagen facility and the Stellantis/LGES joint venture, there have been other declarations in Ontario as well. In Eastern Ontario, not far from Kingston, Belgium-based Umicore announced a C\$1.5 billion investment in an EV battery facility last July.

Don Bubar of Avalon Advanced Materials on delivering lithium for batteries and advanced ceramics

written by InvestorNews | March 16, 2023

In this Critical Minerals Institute interview, host Jack Lifton talks to [Avalon Advanced Materials Inc.](#)'s (TSX: AVL | OTCQB: AVLNF) President, CEO and Director Don Bubar about establishing a North American lithium supply chain and Avalon's new [off-take agreement](#) with a major international glass-ceramics manufacturer

for petalite concentrates.

In the interview, which can also be viewed in full on the InvestorIntel YouTube channel ([click here to access InvestorChannel.com](https://www.investorintel.com)), Don talks about the competitive advantages of building Avalon's lithium refinery in Thunder Bay, Ontario. In addition to having recently signed an MOU with LG Energy Solution to supply battery-grade lithium hydroxide starting in 2025, Don tells Jack: "The main reason for establishing it there was also to basically open the door to other producers of lithium mineral concentrates from the many, many lithium pegmatites that occur throughout Northwestern Ontario..." In addition to lithium, Don says that Avalon provides exposure to multiple other minerals like rare earths, tantalum, and cesium.

Don also talks about a recently announced multi-year agreement for Avalon to supply a non-Chinese international glass ceramic manufacturer with petalite concentrates. "High strength glass ceramic products of various types," Don tells Jack, "that's a market you don't hear a whole lot about for lithium. It is growing now too through further innovation in other types of high strength glass products and ceramic products."

To access the full Critical Minerals Institute interview, [click here](#)

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About Avalon Advanced Materials Inc.

Avalon Advanced Materials Inc. is a Canadian mineral development company specializing in sustainably-produced materials for clean technology. The Company now has four advanced stage projects, providing investors with exposure to lithium, tin and indium, as well as rare earth elements, tantalum, cesium and zirconium.

Avalon is currently focusing on developing its Separation Rapids Lithium Project near Kenora, Ontario while continuing to advance other projects, including its 100%-owned Lilypad Cesium-Tantalum-Lithium Project located near Fort Hope, Ontario. Social responsibility and environmental stewardship are corporate cornerstones.

To learn more about Avalon Advanced Materials Inc., [click here](#)

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Don Bubar of Avalon Advanced Materials on signing key new agreements and the high demand for lithium

written by InvestorNews | March 16, 2023

In this InvestorIntel interview, host Tracy Weslosky talks to [Avalon Advanced Materials Inc.](#)'s (TSX: AVL | OTCQB: AVLNF) President, CEO and Director Don Bubar about the growing world demand for lithium for high strength glass ceramics, and its recent announcement that it has secured a firm commitment to purchase petalite concentrates produced at the company's Separation Rapids Lithium Project in Ontario, Canada.

In the interview, which can also be viewed in full on the InvestorIntel YouTube channel ([click here to access InvestorChannel.com](https://www.investorintel.com)), Don tells Tracy that most people are aware of the growing importance of lithium in EV battery technology,

but “one of the main uses from the past has always been in high strength glass ceramic products... It’s actually the mineral that Corning used to invent CorningWare cookware, which was one of the first examples of high strength glass ceramic product.” He goes on to say that there is increasing demand and innovative uses for other types of high strength glass ceramic products that require the high purity lithium aluminum silicate mineral petalite produced by Avalon. Don also discusses the new multi-year off-take agreement recently announced by Avalon for the delivery of petalite to a major non-Chinese international glass ceramic manufacturer.

Don also talks about Avalon being one of the three companies to sign a non-binding memorandum of understanding with LG Energy Solution to supply them with a battery-grade lithium hydroxide starting in 2025. The MOU was signed during the visit of South Korea’s President, Yoon Suk Yeol, to Canada in September. Under the terms of the MOU, Avalon would commit for an initial period of five years to provide LGES with at least 50% of its planned initial lithium hydroxide production. Don adds: “We’ve been getting the message out on our vision for creating the lithium battery materials refinery in Thunder Bay, and that would be an ideal location to serve the needs of companies that are now going to set up manufacturing facilities in Southern Ontario.”

To access the full InvestorIntel interview, [click here](#)

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Avalon Advanced Materials Don Bubar on the Acceleration of the Separation Rapids Lithium Project

written by InvestorNews | March 16, 2023

In this InvestorIntel interview with host Tracy Weslosky, [Avalon Advanced Materials Inc.](https://www.sedar.com)'s (TSX: AVL | OTCQB: AVLNF) President, CEO and Director Don Bubar talks about their lithium extraction technology and about securing a [\\$3M convertible security funding](#) to accelerate Separation Rapids Lithium Project.

In the interview, which can also be viewed in full on the InvestorIntel YouTube channel ([click here to access InvestorChannel.com](https://www.investorintel.com)), Don starts, "We've been in this space for 25 years...while 25 years ago was a bit early for battery materials, we knew it would have a day and that day has finally

come.” Don also provides an update on reactivating Avalon’s East Kemptville Tin Project which “was the only ever primary tin producer in North American history.” Emphasizing how tin has emerged as a very important technology metal due to its growing usage in many technology applications, Don talks about Avalon creating a new supply.

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Rare Earths and the Challenges of Building a Domestic EV Material Supply Chain

written by InvestorNews | March 16, 2023

In this InvestorIntel PDAC 2022 Panel on rare earths and “Building the EV Material Supply Chain”, host Byron W King is joined by [Search Minerals Inc.](#)’s (TSXV: SMY | OTCQB: SHCMF) President, CEO, and Director Greg Andrews, [Appia Rare Earths & Uranium Corp.](#)’s (CSE: API | OTCQX: APAAF) President Frederick Kozak, [Avalon Advanced Materials Inc.](#)’s (TSX: AVL | OTCQB: AVLNF) President, CEO and Director Don Bubar, and [Vital Metals Limited](#)’s (ASX: VML | OTCQB: VTMXF) Managing Director Geoff Atkins.

In the video, which can also be viewed in full on the InvestorIntel YouTube channel ([click here](#)), the panel discusses whether there is enough rare earths supply to meet the future demand for electric vehicles. Vital Minerals’ Geoff Atkins talks about the shift from government pressure to move to electric vehicles to increasing consumer demand for EVs, especially outside the United States, and the different processing requirements for EV batteries and rare earths magnet components which make “just in time” supply chain inventory management impossible.

Avalon President Don Bubar notes that China’s rare earths dominance came from how “they saw before anyone in the West how you have to create the downstream manufacturing and processing capacity in order to justify creating the primary supply, and that’s a foreign concept to the traditional mining industry here in Canada.” Greg Andrews agrees that the challenge is “trying to create rare earths industry in Canada that doesn’t exist,” but

as Appia president Frederick Kozak points out, the new Saskatchewan rare earths processing facility makes domestic processing more attractive “as opposed to having to ship it to China for processing.”

To access the full InvestorIntel interview, [click here](#)

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About Search Minerals Inc.

Led by a proven management team and board of directors, Search is focused on finding and developing Critical Rare Earths Elements (CREE), Zirconium (Zr) and Hafnium (Hf) resources within the emerging Port Hope Simpson – St. Lewis CREE District of southeast Labrador. The Company controls a belt 63 km long and 2 km wide and is road accessible, on tidewater, and located within 3 local communities. Search has completed a preliminary economic assessment report for **FOXTROT**, and a resource estimate for **DEEP FOX**. Search is also working on three exploration prospects along the belt which include: **FOX MEADOW**, **SILVER FOX** and **AWESOME FOX**.

Search has continued to optimize our patented Direct Extraction Process technology with support from the Department of Industry, Energy and Technology, Government of Newfoundland and Labrador, and from the Atlantic Canada Opportunity Agency. We have completed two pilot plant operations and produced highly purified mixed rare earth carbonate concentrate and mixed rare earth concentrate for separation and refining. We also recognize the continued support by the Government of Newfoundland and Labrador for its Junior Exploration Program.

Search Minerals was selected to participate in the Government of Canada Accelerated Growth Service (“AGS”) initiative, which

supports high growth companies. AGS, as a 'one-stop shop' model, provides Search with coordinated access to Government of Canada resources as Search continues to move quickly to production and contribute to the establishment of a stable and secure rare earth element North American and European supply chain.

To learn more about Search Minerals Inc., [click here](#)

About Appia Rare Earths & Uranium Corp.

Appia is a Canadian publicly-listed company in the rare earth element and uranium sectors. The Company is currently focusing on delineating high-grade critical rare earth elements and gallium on the Alces Lake property, as well as exploring for high-grade uranium in the prolific Athabasca Basin on its Otherside, Loranger, North Wollaston, and Eastside properties. The Company holds the surface rights to exploration for 105,026 hectares (259,525 acres) in Saskatchewan. The Company also has a 100% interest in 12,545 hectares (31,000 acres), with rare earth element and uranium deposits over five mineralized zones in the Elliot Lake Camp, Ontario.

To learn more about Appia Rare Earths & Uranium Corp., [click here](#)

About Avalon Advanced Materials Inc.

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responsibility and environmental stewardship are corporate cornerstones.

To learn more about Avalon Advanced Materials Inc., [click here](#)

About Vital Metals Limited

Vital Metals Limited (ASX: VML) is Canada's first rare earths producer following commencement of production at its Nechalacho rare earths project in Canada in June 2021. It holds a portfolio of rare earths, technology metals and gold projects located in Canada, Africa and Germany.

To know more about Vital Metals Limited, [click here](#)

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Market applauds Avalon Advanced Materials' lithium battery materials refinery news

written by InvestorNews | March 16, 2023

Governments around the world are starting to figure out what China realized 20 (or more) years ago, if you want to be at the leading edge of a technology you need to secure and support the resources that facilitate it. Unfortunately, it took a global pandemic followed by a war on European soil to disrupt supply

chains and impact resource availability, for developed nations to begin to figure this out. But perhaps the light switch has been turned on and the politicians of the world have finally recognized that simply saying something repeatedly doesn't necessarily make it happen. I will spare readers from another rant from me, even though it's like shooting fish in a barrel, but let's just hope that rumblings out of Ottawa, with respect to the next Canadian budget are accurate. It's anticipated that Canada's federal budget will include [an investment of at least \\$2 billion](#) for a strategy to accelerate the production and processing of critical minerals needed for the electric vehicle battery supply chain. Specifically, the investment would be focused on critical minerals including nickel, lithium, cobalt and magnesium.

What a novel concept. I wonder how they managed to come up with such a creative idea? (I really need to find an emoticon or something that expresses when I am being sarcastic). Nevertheless, it's progress so we should all be happy that an encouraging step is being made by politicians. This progress follows on the heels of another supportive announcement, this time from the provincial government of Ontario, where they defined their own first-ever [Critical Minerals Strategy](#). Premier Doug Ford is quoted as saying "The Critical Minerals Strategy is our government's blueprint to connect industries, resources and workers in our province's north to the future of manufacturing in the south as we build up home-grown supply chains."

The timing of these announcements couldn't dovetail any better with news from [Avalon Advanced Materials Inc.](#) (TSX: AVL | OTCQB: AVLNF) on Monday that it has signed a binding [letter of intent](#) to establish Ontario's first regional lithium battery materials refinery in Thunder Bay, Ontario. I can state with confidence that their timing was excellent because the market rewarded Avalon shareholders handsomely, rallying the stock by 48% on the

day. So let's have a little closer look at why investors got so excited about this particular press release.



Avalon is a Canadian mineral development company specializing in sustainably-produced materials for clean technology. The Company now has four advanced stage projects, providing investors with exposure to lithium, tin and indium, as well as rare earth elements, tantalum, cesium and zirconium. Avalon is currently focusing on developing its [Separation Rapids Lithium Project](#) near Kenora, Ontario while continuing to advance other projects, including its 100%-owned [Lilypad Cesium-Tantalum-Lithium Project](#) located near Fort Hope, Ontario. Social responsibility and environmental stewardship are corporate cornerstones as witnessed by the fact that the Company recently reported its tenth (yes, they have been doing this for 10 years) annual comprehensive [sustainability report](#). In a nutshell, Avalon Advanced Materials is an ESG focused company at the forefront of sustainable best practices in cleantech mineral development. Find me a box that doesn't tick.

Timing of all this coming together is somewhat fortuitous for the Company, given they weren't waiting around for any government support. They recognized a long time ago what their roadmap to success would include. Simply finding critical materials wasn't going to be enough, Avalon identified that to control their destiny, they had to control their destiny. To get production started another key step is to have a centrally located lithium refinery that could purchase concentrates produced locally to make the battery material products. Avalon had a much bigger vision whereby a lithium refiner would be designed to accept lithium minerals concentrates, not only from Avalon's Separation Rapids Lithium Project, but also from other aspiring new producers from the many lithium pegmatite resources

that occur in northwestern Ontario. Monday's announcement states this refinery will operate as a separate private business, called Avalon Lithium Inc., a newly established Avalon subsidiary.

Avalon's do-it-yourself (sustainably and responsibly) mantra has resulted in fantastic timing as both Provincial and Federal governments have only just realized what needs to be done at the same time as Avalon is actually doing it. Combine that with an exemplary ESG track record and you have yourself a pretty exciting investment opportunity. Even after the recent run-up, Avalon's market cap is sitting at roughly C\$77.5 million. Is that a fair price for a company doing the right things, in the right way, at the right time?

Avalon Advanced Materials Separation Rapids Lithium Project progresses, EV investors look north for critical materials

written by InvestorNews | March 16, 2023

It is not very often that an investor can buy a company with exposure to both lithium and key magnetic rare earths. One company that offers exposure to both is [Avalon Advanced Materials Inc.](#) (TSX: AVL | OTCQB: AVLNF) ('Avalon'). Avalon has five critical materials projects across Canada, providing

investors with exposure to **lithium, rare earths (neodymium, dysprosium)**, cesium, tantalum, feldspars, tin and indium.

With the electric vehicle (EV) boom set to take off, companies such as Tesla are planning to grow EV production by 50%pa reaching 20 million new EVs pa by 2030. At [Tesla Battery Day](#) Tesla suggested an aggressive industry wide target of 10TWh of Li-ion batteries pa by 2030 to meet EV demand (assumes a switch to 100% EVs).

Tesla says that's a 100 fold increase on 2019 levels. This suggests demand for EV metals (such as lithium and the magnetic rare earths) looks likely to surge this decade and create a super-cycle for the EV metal miners.

100% electric transportation requires 100x growth in EV battery production this decade



[Source](#): Tesla Battery Day video

Avalon's focus projects for lithium (Separation Rapids, Lilypad) and rare earths (Nechalacho)



[Source](#)

Avalon's Separation Rapids Lithium Project is located 70 km by road north of Kenora, Ontario, Canada. It holds one of the largest "complex-type" lithium-cesium-tantalum pegmatite deposits in the world. A [PEA](#) was completed in 2018 resulting in a pre-tax NPV8% of [\\$156m](#), post tax IRR of 22.7%, CapEx C\$77.7m with a 20 year mine life. In a [recent news](#) Avalon has been doing metallurgical test work with the overall objectives of reducing costs, improving recoveries and optimizing lithium product

quality. Avalon has previously developed a proprietary process flowsheet to produce a high purity lithium hydroxide product from petalite. The process limits waste by recycling of the sulphuric acid solvent. Avalon and partners are now optimizing the final stages of the process, which involves the use of electrolysis to produce lithium hydroxide. The results will enable finalizing equipment selection and design. A further 2,500 tonne bulk sample extraction program is set to commence next. With Ontario Premier Doug Ford [recently announcing](#) Ontario's interest in establishing new battery materials supply chains in the province, Avalon is investigating collaborative opportunities to establish a lithium processing facility in Northwestern Ontario.

Avalon's Lilypad Cesium Property, located 150 km northeast of Pickle Lake, Ontario, is an exploration stage project with cesium-lithium-tantalum mineralization. It has the potential to be a secondary lithium supply source for Avalon. Avalon has [recently re-activated the Project](#) due to increasing demand for cesium. Planned follow-up work will initially involve mineralogical and analytical testwork, which will be followed by metallurgical process testwork to identify the most efficient methods for concentrating the pollucite ore and recovering by-product tantalum and lithium.

Avalon's flagship Nechalacho Rare Earth Elements Property is located at Thor Lake, Northwest Territories, Canada. Avalon's main focus is the deeper HREE Basal Zone at the property. The Basal Zone retained by Avalon contains a rich polymetallic rare metals resource, with potential for economic recovery of several rare earth elements. A [Feasibility Study](#) was completed in 2013 on the Basal Zone resulting in a pre-tax NPV10% of \$1.35 billion (post-tax NPV10% of \$900m). The post-tax IRR was 19.6%. CapEx was \$1.575b. Sales of the five critical REO (neodymium, europium, terbium, dysprosium and yttrium) account for over 82%

of the separated REO revenues. Avalon has also retained a 3% NSR on the near surface T-Zone and Tardiff Zone at the Nechalacho Rare Earth Elements Property, [bought by](#) Cheetah Resources back in 2019. Avalon could also potentially collaborate with the newly planned SRC Rare Earths Processing Facility to be established in Saskatchewan with plans to be operational by late 2022.

EVs are coming in all shapes and sizes and they will require huge amounts of EV metals such as lithium and rare earths

Avalon Advanced Materials Inc. stock is [up 87.5%](#) over the past year and trades on a market cap of C\$26m.

Don Bubar on Avalon's 20 years in rare earths and their diversified asset base of critical materials

written by InvestorNews | March 16, 2023

"We have been in rare earths business for over 20 years now," Don Bubar, President, CEO and Director of [Avalon Advanced Materials Inc.](#) (TSX: AVL | OTCQB: AVLNF), tells InvestorIntel's Tracy Weslosky [in an interview](#). "And we are very well known among investors in the US for our lead role in the rare earths bubble 10 years ago. Whenever there is new development and news headline related to the risk on security of supply, then you will see speculative trading activity in Avalon."

“Our strategy has been to have a diversified asset base,” Bubar continued. “That gives us exposure to broad range of these new emerging critical materials. We are basically positioned to react to when there is a new demand in the marketplace.”

Bubar went on to say that Avalon is working with a partner on its Nechalacho rare earth elements property and has maintained its main resource for any future upside. “We continue to look at other possibilities to create new rare earths supplies, by looking at how we can use new technology to recover rare earths from non-traditional sources such as historic mine wastes,” he said.

Bubar also commented on Avalon’s Separation Rapids Lithium Project: “Our focus now is on taking advantage of the opportunity in lithium markets. We are permitted now to recover a bulk sample to finalize our process flowsheet, do a pilot plant run and produce some product samples for customers who have expressed interest in the product in the glass industry as well as start to revisit serving the battery materials market going forward.”

To access the complete interview, [click here.](#)

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As Chinese rare earths’ stock

prices rally, pressure rises for the rest of the world...

written by InvestorNews | March 16, 2023

Rising [US-China tension](#) has resulted in some rare earths' stock prices rising sharply, particularly those in China. Given the recent US moves to introduce [critical materials legislation](#) it seems likely that the non-Chinese rare earth stocks will also rally strongly this year, particularly if the new bills and financial support are passed.

Let's start with a recap of the recent US support highlights for rare earths:

- May 18, 2018 – The US declared a [list of 35 critical materials](#). A large part of the list includes rare earths.
- May 2, 2019 – U.S. Sen. Lisa Murkowski and others submitted the [American Mineral Security Act](#)
- In mid May, 2020, Senator Ted Cruz submitted the [Onshoring Rare Earths Act – the 'ORE Act'](#)
- On May 28, 2020 US Representative Michael Waltz submitted the [American Critical Mineral Exploration and Innovation Act of 2020](#)

The ORE Act focuses on six critical materials – **Rare earths**, scandium, lithium, cobalt, graphite, and manganese. The Critical Mineral Exploration and Innovation Act directs the U.S.G.S. to complete updated resource assessments for each critical mineral. It has been reported that there will be a focus on **rare earths** and other so-called strategic minerals.

Then just last week rare earths expert and [Technology Metals Show](#) host Jack Lifton [stated exclusively to InvestorIntel](#): “The US Defense Department has announced last week that it will seek

\$1.7 billion for rare earths purchases in the 2021 National Defense Authorization Act that means the budget for fiscal 2021. In addition they will ask for another \$300 million (**a total of \$2 billion**), for rare earths for specialized weapons which they name as hypersonic missiles...”

Given all of the above proposed support to the rare earths sector, it is abundantly clear that the US is now finally moving rapidly to secure critical rare earths supply, particularly from US deposits, where possible. Current rare earths producers and listed rare earths stocks stand to be beneficiaries. Especially if they have US rare earths projects, but quite likely any non-Chinese rare earth juniors that can achieve funding and production should find very strong western demand for their products. Most of the western world is now looking to diversify their supply chains especially after the trade war and COVID-19 problems of the past 2 years.

Some rare earth miners with US projects include:

- MP Materials (private)
- Rare Element Resources Ltd. (OTCQB: REEMF)
- Texas Mineral Resources Corp. (OTCQB: TMRC)
- Ucore Rare Metals Inc. (TSXV: UCU | OTCQX: UURAF)

Some miners with US rare earth processing potential include:

- [Energy Fuels Inc.](#) (NYSE: UUUU | TSX: EFR) recently [stated](#) their White Mesa Mill in the USA could be used in future for rare earths processing.
- Lynas Corporation (ASX: LYC) has received US support for a planned US rare earths processing facility.
- Peak Resources (ASX: PEK) plan to have a US rare earths processing facility.

Some rare earth miners with Canadian projects include:

- [Avalon Advanced Materials Inc.](#) (TSX: AVL | OTCQB: AVLNF)
- [Appia Energy Corp.](#) (CSE: API | OTCQB: APAAF)
- [Search Minerals Inc.](#) (TSXV: SMY)

Some rare earth miners with Australian projects include:

- [Alkane Resources Ltd.](#) (ASX: ALK | OTCQX: ALKEF)
- [Scandium International Mining Corp.](#) (TSX: SCY)

Rare earths are vital ingredients for modern technology



Closing remarks

The massive recent news of two new rare earth/critical materials related Acts and a proposed “US\$2 billion towards rare earths in 2021”, appears to have been somewhat missed by the market. The Chinese rare earths stocks have already bounced leaving the potential rest of the world rare earth miners to play catch up.

News flow in future months should continue to be extremely promising for the rare earths sector following on from the tremendous news from the last few weeks.

Investors should not wait too long as any further increased US-China tensions, threats of China supply loss, or passing of rare earths related Bills, will likely send non-Chinese rare earth miners stock prices higher.

Don Bubar on the ORE Act and Avalon's lithium and rare earths projects

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"The ORE Act is a great start. There is no doubt that if we are going to see these rare earths supply chain established in North America government has to help by providing incentives to businesses and entrepreneurs to make that whole supply chain happen. It is not as simple as just starting a new mining operation and everything will happen easily after that. I think it is encouraging that they recognize that now that they do need to provide these incentives and maybe we will actually start to see them." States Don Bubar, President, CEO and Director of [Avalon Advanced Materials Inc.](#) (TSX: AVL | OTCQB: AVLNF), in an interview with InvestorIntel's Tracy Weslosky.

Don went on to say that the whole COVID-19 pandemic has raised awareness in the public about the vulnerability of supply chain in North America by relying on a sole source of supply, especially when it comes from a country like China. He added, "There is increasing trade tension between China and the US. If that continues to grow then for sure there is real risk of China weaponizing their control on the supply chain of rare earths and other critical minerals."

Don also provided an update on Avalon's Separation Rapids Lithium Project. He said that the company is increasingly seeing real opportunities with their Separation Rapids Lithium Project. There is a lot of innovation happening in the glass ceramics space that prefers a form of lithium that is in the high purity mineral petalite at Separation Rapids. The demand from the battery sector is also continuing to grow.

To access the complete interview, [click here](#)

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