

# U.S. Department of State Minerals Security Partnership (MSP) Aims to Support Biden Policies on Critical Minerals

written by Melissa (Mel) Sanderson | April 15, 2024

*MSP's emphasis on ESG principles reflects a global commitment to transforming and "greening" economic activity and fighting climate change, despite political anti-ESG backlash in the U.S.*

To support and advance President Biden's policies on critical minerals and secure supply chains the U.S. Department of State has created the [Minerals Security Partnership](#) (MSP). The program, under the aegis of Under Secretary of State for Economic Growth, Energy and the Environment [Jose Fernandez](#), the MSP "aims to accelerate the development of diverse and sustainable critical energy minerals supply chains through working with host governments and industry to facilitate targeted financial and diplomatic support for strategic projects along the supply chain."

MSP partner States include Australia, Canada, Finland, France, Germany, India, Italy, Japan, Norway, South Korea, Sweden, the United Kingdom, the United States, the European Union (represented by the European Commission) and Estonia (the most

recent country to join the MSP, officially welcomed into the fold at the March 2024 PDAC meetings). The member States will coordinate their work through the MSP Forum, established March 3 at PDAC in Toronto. The Forum will promote diverse and resilient supply chains, local value-addition, and beneficiation.

The MSP is focused on addressing four major critical minerals challenges:

1. Diversifying and stabilizing global supply chains;
2. Investment in those supply chains;
3. Promoting high environmental, social, and governance (ESG) standards in the mining, processing, and recycling sectors; and
4. Increasing recycling of critical materials

The MSP operates on the basis of several Principles under which member States strive to elevate environmental, social, and governance (ESG) standards across the global minerals sector. The MSP only will support projects that meet high, internationally recognized ESG standards throughout the life of the project.

Companies interested in participating in the MSP program and funding opportunities must:

- Demonstrate responsible stewardship of the natural environment;
- Engage in consultative and participatory processes regarding land access and acquisition;
- Commit to meaningful, ongoing consultation with communities;
- Ensure safe, fair, inclusive, and ethical conditions in the community and the workplace;

- Provide economic benefits for workers and local communities; and
- Ensure transparent, ethical business operations

These principles strongly suggest that adherence to programs such as Prior Informed Consent (PIC) (governing consultations between companies, governments, and indigenous populations), the Extractive Industries Transparency Initiative (EITI), and human rights laws prohibiting child labor and protecting the rights of artisanal miners will be required for companies taking part in the MSP. (Note that not every country is fully implementing PIC or EITI and therefore presumably there could be exceptions on a case-by-case basis while maintaining a focus on fulfilling the intention of those programs.)

A large potential complication for the MSP could be the current absence of an internationally agreed standard on ESG implementation and reporting. The EU is considered to have the most rigorous framework, while currently the US does not have an overarching legal standard (the SEC recently postponed announcing its framework, although it is still expected to do so by the end of 2024 after almost 3 years delay). In the absence of a cohesive standard, it is possible that national law will prevail, meaning that companies will have to be fully compliant with whatever ESG laws are in place where their project will be located. Companies applying for MSP funding/participation may find it useful to follow the standards of organizations such as the Global Reporting Initiative (GRI), the IFRS Sustainability Reporting Standards developed by the International Sustainability Standards Board (ISSB) or to become members of ESG-related organizations such as the Institute for Responsible Mining Assurance (IRMA). Likewise, depending on the mineral in question, there are agreed industry standards such as Copper Mark or the International Council on Mining and Metals Principal

on ESG. As the MSP grapples with the question of a universal ESG standard they no doubt will be considering the existing principles already developed by institutions and organizations such as those mentioned above.

There currently are 23 projects in the MSP, 16 of which involve mining and mineral extraction, 7 in processing, and 7 in recycling and secondary recovery. These projects involve cobalt, copper, gallium, germanium, graphite, lithium, manganese, nickel and rare earth elements. Six projects are sited in the Americas, 5 in Europe, 13 in Africa and 3 in the Asia-Pacific region.

The State Department and officials in other participating government agencies are actively looking for additional projects meeting the above standards for production of the identified critical minerals. US Embassies overseas can be a useful resource for companies interested in learning if their projects might qualify for the MSP.

The MSP's emphasis on ESG principles is an important reminder that despite some political anti-ESG backlash in the U.S., the world – and the USG – remains committed to transforming and “greening” global economic activity and fighting to slow climate change, and is increasingly working together to mobilize resources and capabilities to achieve these vitally important goals.

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# Technology      Metals      Report

# **(03.28.2024): China Challenges US EV Plans and the DoE Invests \$6B to Decarbonize Economy**

written by Tracy Weslosky | April 15, 2024

Welcome to the latest issue of the Technology Metals Report (TMR), brought to you by the [Critical Minerals Institute](#) (CMI). In this edition, we compile the most impactful stories shared by our CMI Directors over the past week, reflecting the dynamic and evolving nature of the critical minerals and technology metals industry. Among the key stories featured in this report are Chile's attempts to spur lithium sector investments amidst regulatory and environmental concerns, France's Orano exploring the possibility of a uranium enrichment plant in the U.S., and China's challenge to U.S. electric vehicle subsidy policies at the WTO. Additionally, we delve into the EU's potential adjustments to its 2035 EV mandate, President Biden's electric vehicle policies influencing American election outcomes, and Kazakhstan's push to increase uranium exports to the U.S.

This week's TMR Report also highlights U.S. Critical Materials' efforts to publicize its Bitterroot gallium deposits, significant for semiconductors and defense technologies; the Department of Energy's largest-ever investment to decarbonize industry; Brazilian Rare Earths Limited's new rare earth discovery in the Pele Project; challenges in America's lithium laws slowing down the pace of domestic production; and collaborative efforts between Australia's Pilbara Minerals and China's Ganfeng to study a new lithium chemical plant. Additionally, we explore CATL's discussions with Tesla and other

automakers for U.S. licensing of its battery technology, aiming to navigate the tightening U.S. regulations on the battery sector. Through these stories, the TMR provides a comprehensive overview of the latest developments affecting the critical minerals sector, highlighting the challenges and opportunities ahead. To become a CMI member and stay informed on these and other topics, [click here](#)

**Chile needs to finalize more lithium plan details to spur investment, miners say:** (March 27, 2024, [Source](#)) – Chile's attempt to draw private investment into its lithium sector is met with apprehension due to unresolved details and potential regulatory hurdles. The government plans to open 26 salt flats for private mining, excluding some reserved for state control, as part of President Gabriel Boric's strategy to double lithium production by decade's end. However, concerns over how contracts will be allocated, opposition from Indigenous communities, and environmental considerations could deter investors. Industry voices also caution against possible legal conflicts over mining rights and the negative impact of heavy state involvement on Chile's investment appeal. With lithium prices and electric vehicle sales currently in a slump, the attractiveness of new projects is further challenged, making neighboring countries more appealing for lithium investment.

**Chile opens lithium salt flats for investment, saves two for state control:** (March 27, 2024, [Source](#)) – Chile has inaugurated a significant move to open more than two dozen lithium salt flats to private investment, while strategically keeping the prolific Atacama and Maricunga deposits under state majority control. This decision is part of President Gabriel Boric's vision to increase state involvement in the nation's lithium sector, which is the second-largest globally. The initiative could potentially double Chile's lithium output within ten years, crucial for electric vehicle batteries, according to

Finance Minister Mario Marcel. The tender process for 26 salt flats will start in April, aiming for completion in July. State-run enterprises are initiating projects in five other flats, seeking partners. Currently, only Sociedad Química y Minera de Chile S.A. ("SQM") (NYSE: SQM) and U.S.-based Albemarle Corporation (NYSE: ALB) operate in Chile, specifically in the lithium-rich Atacama salt flat. The government, signaling further interest in lithium ventures beyond Atacama and Maricunga, is also contemplating the establishment of a national lithium company and emphasizes environmental protection and indigenous community involvement in new projects.

**China to challenge Biden's electric vehicle plans at the WTO:** (March 27, 2024, [Source](#)) – China has filed a complaint with the World Trade Organization (WTO) against the United States, alleging that U.S. electric vehicle (EV) subsidy policies unfairly discriminate against Chinese products. This action comes in response to the U.S. Inflation Reduction Act, which, from January 1, disqualifies EVs from receiving tax credits if their critical minerals or battery components are sourced from Chinese, Russian, North Korean, or Iranian companies. China argues that these policies distort fair competition and disrupt the global EV supply chain by excluding Chinese products. The outcome of this dispute is uncertain, particularly if the U.S. appeals a ruling against it, due to the current dysfunction of the WTO's Appellate Body. This complaint underscores the growing tensions in the global EV market, where China is a dominant player in battery technology and aims to expand its auto industry globally.

**France's Orano studying plan to build U.S. uranium enrichment plant:** (March 27, 2024, [Source](#)) – French nuclear fuel company Orano, previously known as Areva, is exploring the possibility of constructing a uranium enrichment plant in the United States, as part of efforts to decrease U.S. dependency on Russian

uranium imports. The plan, which had been shelved following the Fukushima disaster due to a surplus in enrichment capacity, is being revisited amidst growing demand and geopolitical tensions. Orano, which is state-owned, aims to support the U.S., the world's largest nuclear power producer, in bolstering its domestic fuel production capabilities. This initiative aligns with recent U.S. legislative moves, including President Biden's approval of significant funding for domestic uranium production. Orano also plans to expand its existing uranium enrichment capacity in France to meet U.S. demand and reduce reliance on Russian supplies.

**EU May Water Down Harsh 2035 EV Mandate And Reprieve Hybrids:** (March 27, 2024, [Source](#)) – The European Union and Britain's ambitious plans to phase out combustion engine vehicles by 2035 in favor of electric vehicles (EVs) are facing scrutiny and potential adjustments. Experts suggest that hybrids may be given more leeway to ensure a smoother transition. The automotive industry is at risk of being dominated by more cost-effective Chinese EVs, prompting concerns over the financial viability of European carmakers in the shift to electric. Stricter CO2 emissions targets are also causing unease among manufacturers. Reports indicate that EV sales growth is slowing, and the current market offerings are deemed too expensive for widespread adoption, with technology and infrastructure not fully meeting consumer needs yet. There's lobbying for regulatory review and more flexible approaches, including a broader acceptance of hybrid models and other technologies to reduce emissions. The upcoming review by the EU, along with potential geopolitical shifts and industry collaborations, could influence the pace and nature of Europe's transition to electric mobility.

**Electric cars will decide the outcome of the American election:** (March 26, 2024, [Source](#)) – President Biden's



aggressive promotion of electric vehicles (EVs) may jeopardize his political standing, particularly in critical Midwestern swing states. His administration's focus on EVs, marked by substantial price differences and practicality issues compared to traditional vehicles, risks alienating a significant voter base. This strategy, characterized by stringent mileage requirements and incentives for EV adoption, could undermine the traditional auto industry, a cornerstone of states like Michigan and Wisconsin. Furthermore, the policy may inadvertently bolster China's position in the global EV market, while threatening job losses across America's automotive sector, including sales, maintenance, and after-market services.

**World's Top Uranium Miner Seeks to Boost Exports to US:** (March 26, 2024, [Source](#)) – Kazakhstan, the leading uranium producer globally, is intensifying efforts to increase its uranium exports to the United States. This initiative follows discussions on energy cooperation with U.S. Senator Steve Daines. Kazakhstan already holds contracts for uranium product supply until 2032 with key U.S. energy companies. The push for expanded uranium exports comes at a time when the demand for this critical metal is rising, driven by a global shift towards nuclear power to combat climate change. Furthermore, the U.S. is contemplating a ban on imports of enriched Russian uranium, used in both nuclear reactors and weapons, highlighting the strategic importance of identifying alternative uranium sources.

**Mining company touts Bitterroot gallium deposits:** (March 26, 2024, [Source](#)) – U.S. Critical Materials is stepping up its public outreach concerning its mining claims in the Bitterroot's headwaters, with a focus on valuable gallium deposits over 6,700 acres, essential for semiconductors, 5G, smartphones, satellite systems, and defense technologies. The U.S. government, recognizing the strategic importance of gallium—especially amidst a Chinese export embargo—is heavily involved in funding

and driving the production of REE and other critical minerals, with significant contributions from federal agencies. Preliminary exploration at Sheep Creek has seen support from the DOD and collaboration with academic and geological institutions, utilizing advanced survey techniques. Amidst concerns over national security due to dependency on imported gallium, U.S. Critical Materials boasts high-grade gallium deposits and is exploring environmentally sustainable separation processes. The company's partnership with Idaho National Laboratories aims to develop new processing methods to establish a domestic supply chain, a crucial step given the current lack of processing facilities in North America and the environmental and commercial challenges of existing separation technologies.

**Department of Energy announces largest-ever investment to decarbonize industry:** (March 25, 2024, [Source](#)) – The Department of Energy has announced a substantial \$6 billion funding for 33 projects across the U.S. to reduce emissions in energy-intensive industries. This effort, part of the largest-ever investment to decarbonize industry, leverages the Bipartisan Infrastructure Law and Inflation Reduction Act, aiming for a combined investment of \$20 billion including company contributions. Targeting major sectors like steel, aluminum, cement, and food production, the initiative is expected to cut down 14 million metric tons of CO<sub>2</sub> annually, equivalent to removing 3 million gas-powered cars from the roads. Highlighted projects include Constellium's zero-carbon aluminum plant in West Virginia, with potential federal funding up to \$75 million, and Kraft Heinz's \$170.9 million investment to electrify and decarbonize food production at 10 facilities. Additionally, nearly 80% of the projects are located in disadvantaged communities, emphasizing the investment's broader social and environmental benefits.

**Brazilian Rare Earths Limited (ASX:BRE) Announces New Rare Earth Discovery – the Pele Project:** (March 25, 2024, [Source](#)) –

Brazilian Rare Earths Limited (ASX:BRE) has unveiled the Pele Project, a significant new rare earth discovery in Bahia, Brazil, positioned 60km southwest of their Monte Alto Project. This district-scale endeavor is set to explore ultra-high grade REE-Nb-Sc mineralization across a target area vastly exceeding that of Monte Alto. Key findings include extensive geophysical anomalies, the largest known hard rock monazite outcrop extending over 30m, and promising high-grade monazite sand intercepts. Initial results suggest a substantial rare earth mineralization potential, mirroring the successful exploration techniques employed at Monte Alto. With comprehensive surveys and an imminent diamond drilling program, CEO Bernardo da Veiga anticipates accelerating exploration to uncover this area's full potential, marking another stride in expanding their rare earth province footprint.

**America's lithium laws fail to keep pace with rapid development:** (March 25, 2024, [Source](#)) – Efforts to make the United States a leading global lithium producer are hindered by a tangled set of state regulations, creating a significant barrier against reducing dependence on foreign lithium supplies, particularly from China. Confusion over ownership, valuation, and processing of lithium resources across states like Texas and Louisiana, combined with fluctuating commodity prices and technical challenges, are major obstacles. This situation complicates the Biden administration's ambitions for electrification and increasing domestic lithium production. Despite the urgent need for regulatory clarity to attract investment and advance projects, states vary widely in their approaches to lithium extraction and regulation. The uncertainty around regulatory frameworks is delaying the development of lithium projects, thus affecting the U.S.'s ability to meet its lithium production and electrification goals.

**Pilbara Minerals and China's Ganfeng agree to study for lithium**

**chemical plant:** (March 24, 2024, [Source](#)) – Australia's Pilbara Minerals and China's Ganfeng Lithium have agreed to study the feasibility of building a lithium chemical plant capable of producing 32,000 metric tons of lithium carbonate or hydroxide annually, at an undecided location. The study, set to complete by March 2025, explores potential sites, including Australia, aiming for greater supply chain diversification. Pilbara Minerals, which has partnerships in other lithium projects, seeks to reduce transportation volumes and carbon footprint through midstream lithium chemicals production. Preliminary discussions have shown strong international interest in the venture, with incentives such as economic benefits and support for permitting. The venture would be a 50:50 partnership, with Ganfeng considering a stake sale based on U.S. Inflation Reduction Act benefits. Pilbara is increasing spodumene production to 1 million tons annually and may expand further, committing 300,000 tons annually to this project if it proceeds.

**CATL in talks with Tesla, global automakers for US licensing, WSJ reports:** (March 25, 2024, [Source](#)) – Contemporary Amperex Technology Co. Ltd. (CATL), a leading Chinese electric-vehicle battery maker, is currently in discussions with Tesla Inc. (NASDAQ: TSLA) and other automakers to license its battery technology in the U.S. This approach comes as an alternative to establishing its own manufacturing facility in the country. These negotiations, still in the early stages, revolve around the extent of the collaboration and the specifics of the technology Tesla would license, influenced by the EV giant's financial health. CATL's existing partnership with Ford, which recently adjusted its investment strategy for a Michigan battery plant to use CATL's licensed technology amid legislative pushback, serves as a blueprint for potential agreements with other U.S. car manufacturers. This development is amidst a global downturn in EV demand and tighter U.S. regulations on the

battery sector to curb Chinese influence, with CATL also focusing on innovations like faster charging batteries for Tesla.

**CATL Working With Tesla on Fast-Charging Cells, Supplying Nevada:** (March 25, 2024, [Source](#)) – CATL is enhancing fast-charging batteries for Tesla, targeting an electric car under \$25,000. Emphasizing cost-efficiency and longevity, CATL's collaboration extends to supplying Tesla's Nevada factory and innovating in battery technology. Despite global EV market challenges, CATL sustains growth through a diversified clientele including BMW and Mercedes-Benz, and is adapting to U.S. market restrictions by licensing its technology, notably to Ford. With geopolitical tensions affecting trade, CATL values client trust and plans to expand production in Europe and Southeast Asia. The company's strong financial standing allows it to delay further funding rounds, focusing instead on technological advancement and strategic partnerships to navigate the evolving electric vehicle landscape.

## **Investor.News Critical Minerals Videos:**

- March 25, 2024 – Western Uranium & Vanadium's George Glasier on Gearing up for SMC to Commence Production in Colorado <https://bit.ly/3ITmUVA>

## **Critical Minerals IN8.Pro Member News Releases:**

- March 28, 2024 – American Clean Resources Group

Establishes Environmental Sustainability Board  
<https://bit.ly/43JkN0o>

- March 28, 2024 – Scandium Canada Forms a Strategic Advisory Committee and Confirms its Initial 3 Members  
<https://bit.ly/3ISuHTM>
  - March 28, 2024 – Nano One Reports Q4 2023 Results and Provides Progress Update <https://bit.ly/3IXI2Km>
  - March 26, 2024 – Voyageur Pharmaceuticals Files Audited Annual Financial Statements and Grants Stock Options  
<https://bit.ly/4a0gTFV>
  - March 26, 2024 – First Phosphate Reports Published Research Studies for its Lac à l'Original, Mirepoix and Bégin-Lamarche Properties in the Saguenay-Lac-St-Jean region of Quebec, Canada <https://bit.ly/3T0TEWq>
  - March 26, 2024 – Kraken Energy Confirms Elevated Radioactivity in Both Initial Drill Holes at Harts Point Property, Utah <https://bit.ly/3VskYem>
  - March 25, 2024 – Bechtel contract to support ASM with engineering at the Dubbo Project <https://bit.ly/3Vsx8E3>
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**Technology Metals Report  
(03.08.2024) : Chinese  
Investment in Asia rose 37% in  
2023, and the BYD Push in**

# Australia is Underway

written by Tracy Weslosky | April 15, 2024

Welcome to the latest Technology Metals Report (TMR) where we highlight the top news stories that members of the [Critical Minerals Institute](#) (CMI) have forwarded to us in the last week. Key highlights in this Technology Metals Report include the announcement of Australia and Vietnam upgrading their relations to begin talks on critical minerals, focusing on diversifying supply chains away from China. This significant move aims to enhance cooperation in several sectors, particularly in the energy and resources sector, emphasizing the critical minerals supply chain. Both countries, known for their substantial roles in the production and reserves of critical minerals, are looking to strengthen their global supply chain positions amid rising geopolitical tensions and efforts to reduce dependency on China. Additionally, this edition features updates on Chinese investments in Asia, notably in Indonesia, which have surged by 37% in 2023 despite global economic challenges. This growth, largely concentrated in Belt and Road Initiative (BRI) countries, underscores China's strategic shift towards green energy and mining investments, especially in Southeast Asia.

Moreover, this edition of the TMR delves into several crucial developments in the critical minerals and technology metals landscape. The United States outlined its critical minerals strategy for the clean energy transition, emphasizing the need to secure and diversify supply chains for essential minerals such as nickel, manganese, cobalt, and lithium. The EU's move to register Chinese electric vehicle (EV) imports for potential retroactive tariffs reflects growing concerns over fair trade practices. Kazakhstan's emergence as a potential major supplier of lithium, along with investments aimed at expanding lithium operations by companies like Albemarle, highlights the global



race to secure essential components for green and digital technologies. Furthermore, the report covers strategic shifts in the supply chain, such as Posco's agreement with Syrah Resources for graphite supply from Mozambique and Toyota's multi-pathway approach to CO2 emissions reduction. These stories collectively point to a dynamic and rapidly evolving global landscape for critical minerals and technology metals, underlining the strategic importance of diversification, cooperation, and sustainable development in securing the materials essential for the future of technology and clean energy.

**Australia and Vietnam upgrade relations, to begin talks on critical minerals (March 7, 2024, [Source](#))** – Australia and Vietnam have elevated their relations to a comprehensive strategic partnership, announced by Australian Prime Minister Anthony Albanese. This upgrade includes an annual dialogue on minerals, focusing on diversifying supply chains away from China. The partnership aims to enhance cooperation on climate, environment and energy, defense and security, and economic engagement and education. Additionally, it will foster collaboration in the energy and resources sectors, especially in critical minerals supply chains. Both countries, significant in the production and reserves of critical minerals, seek to strengthen their positions in global supply chains amid rising tensions and efforts to reduce dependency on China. This move also signifies Vietnam's success in "bamboo diplomacy," enhancing its relations with major global powers. The partnership reflects a deep mutual political trust and commits to expanded cooperation across various sectors, marking a milestone in the bilateral relationship between Australia and Vietnam.

**Chinese investment in Asia rose 37% in 2023, led by Indonesia (March 7, 2024, [Source](#))** – In 2023, Chinese investment in the Asia-Pacific region surged by 37% to nearly \$20 billion,



outperforming global trends amid economic challenges. Construction contracts also grew by 14% to about \$17 billion, supported by Chinese loans. This contrasts with a 12% decrease in foreign direct investment into Asia's emerging economies. The investment was predominantly in Belt and Road Initiative (BRI) countries, focusing on infrastructure that connects Asia to Europe. Non-BRI country investment plummeted by 90% to a mere \$120 million. Notably, investment strategies shifted towards green energy and mining, with 50% of China's regional investment directed towards Southeast Asia, and Indonesia receiving the largest share at \$7.3 billion. However, certain countries like the Philippines and Pakistan saw significant drops in Chinese engagement due to political and economic risks. The report anticipates a further increase in Chinese investment and construction, especially in green transition initiatives and strategic infrastructure projects, despite China's own economic challenges.

**Under Secretary Jose Fernandez Discusses U.S. Critical Minerals Strategy for Clean Energy Transition (March 6, 2024, [Source](#)) –**

Under Secretary Jose W. Fernandez discussed the U.S.'s strategy for securing and diversifying the supply chain of critical minerals crucial for the clean energy transition in a conversation with InvestorNews' Tracy Weslosky. Highlighting minerals like nickel, manganese, cobalt, and lithium, Fernandez underscored efforts to expand their supply and engage with countries possessing these resources through concrete projects, investment, and financing. He emphasized the challenge of reducing dependency on China, which currently controls a significant share of these minerals, pointing out the strategic vulnerability this poses. Fernandez stressed the importance of adhering to values such as environmental respect, community collaboration, and transparency in these endeavors. Despite slow progress, the U.S. aims to not only secure but also ethically

source these minerals to support the global shift towards clean energy.

**EU set to allow possible retroactive tariffs for Chinese EVs (March 6, 2024, [Source](#))** – The European Commission will start registering Chinese electric vehicle (EV) imports for potential retroactive tariffs, in response to an anti-subsidy investigation. This investigation aims to determine if Chinese EVs benefit from unfair subsidies, potentially harming EU producers. If found guilty, tariffs could be imposed, with provisional duties possible by July and a final decision expected by November. The Commission has found preliminary evidence of subsidy and a significant 14% year-on-year increase in imports since the investigation began in October, suggesting potential harm to EU producers. The China Chamber of Commerce expressed disappointment, attributing the import surge to growing European demand for EVs.

**Kazakhstan positions itself for lithium windfall (March 6, 2024, [Source](#))** – Kazakhstan is emerging as a significant potential supplier of lithium, crucial for power-storage technology, with reserves estimated at around 75,600 tons. Research by the Korea Institute of Geoscience and Mineral Resources highlighted substantial reserves in eastern Kazakhstan, potentially worth up to \$15.7 billion. This discovery, along with European interest in Kazakhstan's critical raw materials, underscores the country's growing importance in the global lithium market. The European Commission and European Bank for Reconstruction and Development have allocated funds for lithium exploration, highlighting the strategic value of Kazakhstan's resources amidst increasing global demand. With investments from various countries, including China and potentially European entities, Kazakhstan is set to play a crucial role in the lithium supply chain, essential for green and digital technologies.

**BYD spearheads Chinese electric car push in Australia, a friendlier market (March 5, 2024, [Source](#))** – BYD and other Chinese automakers are making significant inroads into the Australian electric vehicle (EV) market, leveraging the friendly trade environment and benefiting from the government's aggressive EV adoption policies under Prime Minister Anthony Albanese since 2022. With no trade barriers, EV subsidies, and tax benefits, EV sales in Australia have soared, with EVs making up 7.2% of new car sales in 2023. BYD, supported by Warren Buffett, has quickly captured 14% of Australia's EV market since its entry in 2022, trailing only behind Tesla. The company plans to expand its product lineup and dealership network in Australia, aiming for mainstream market penetration. Similarly, SAIC Motor under its MG brand is set to launch new models. Incumbent automakers like Ford and Toyota are also adapting, introducing electrified vehicles to compete. Despite being a relatively small market, Australia's lack of local car manufacturing and openness to international trade make it an attractive destination for Chinese EV manufacturers, especially given the geopolitical tensions in other key markets.

**Canada and Australia boost collaboration on critical minerals (March 4, 2024, [Source](#))** – Canada and Australia have committed to enhancing their cooperation on critical minerals, vital for battery production and clean energy transition, according to a joint statement released on the margins of the PDAC conference in Toronto. Both countries, rich in these essential minerals, aim to bolster their partnership through R&D collaboration, trade, and investment in the mining sector based on a non-legally binding agreement. This collaboration seeks to ensure supply chain transparency and promote high Environmental, Social, and Governance (ESG) standards globally. The initiative will be spearheaded by Canada's Natural Resources Ministry and Australia's Critical Minerals Office, focusing on policy and

investment coordination to support the burgeoning demand for these minerals in the upcoming decades.

**Albemarle (ALB) Accelerates Lithium Growth With \$1.75B Offering (March 4, 2024, [Source](#))** – Albemarle Corporation (NYSE: ALB) announced a \$1.75 billion offering in depositary shares, each representing a 1/20th interest in Series A Mandatory Convertible Preferred Stock, with a potential additional offering of \$262.5 million under certain conditions. The proceeds are intended for general corporate uses, notably to fund growth capital expenditures for expanding lithium operations in Australia and China, as well as repaying outstanding commercial paper. The depositary shares will carry rights and preferences similar to the Preferred Stock, including conversion into common stock on or around March 1, 2027. Despite a 52.1% decrease in Albemarle's share price over the past year, the company forecasts a 10-20% increase in Energy Storage volumes for 2024, with expected net sales in its Specialties and Ketjen segments ranging from \$1.3 to \$1.5 billion and \$1 to \$1.2 billion, respectively.

**Posco to source 60,000 tons of graphite from Africa in pull away from China (March 3, 2024, [Source](#))** – Posco Future M, a subsidiary of Posco Group, is shifting its supply chain for natural graphite, a crucial battery material, away from China towards Africa. This move is highlighted by a new deal with Australian mining firm Syrah Resources Limited (ASX: SYR), which will provide Posco Future M with up to 60,000 tons of natural graphite annually for six years from its Mozambique Balama operation, starting no later than 2025. This supply is expected to cover 40% of Posco Future M's anode production, translating to about 30,000 tons of anodes. The agreement comes amid concerns over China's control over graphite exports, potentially as leverage against international policies such as the U.S.'s Inflation Reduction Act. Posco's decision reflects a broader strategy to diversify supply sources and reduce dependency on

China, amid rising geopolitical tensions and supply chain vulnerabilities.

**Total EV Adoption Is Not The Way Forward, Says Toyota Chairman (March 3, 2024, [Source](#))** – Akio Toyoda, Toyota's Chairman, expresses skepticism towards full adoption of battery electric vehicles (BEVs), arguing they will not dominate the market beyond a 30% share despite other markets already exceeding this percentage. In a presentation in Tokyo, he emphasized a multi-pathway approach to combating CO2 emissions, suggesting that consumer choice should drive the future of automotive powertrains rather than regulations. Toyota plans to focus on a diverse range of technologies including internal combustion engines, hybrids, and hydrogen vehicles, alongside BEVs. Despite the global push towards electric vehicles, with countries like Norway showing an 80% market share for EVs, Toyoda's stance reflects a broader strategy to embrace multiple solutions for emission reduction. This perspective aligns with Toyota's goal to comply with future regulations and its commitment to sell 1.5 million EVs by 2026, while also investing in alternative technologies like e-fuels.

**Kazakhstan plans to export aluminum, gallium and scandium to the US (March 1, 2024, [Source](#))** – Kazakhstan is aiming to strengthen its trade ties with the United States by proposing to export aluminum, gallium, and scandium. This initiative was unveiled during Minister of Industry and Construction Kanat Sharlapayev's official visit to the U.S., focusing on promoting Kazakhstani interests globally and expanding cooperation in critical materials. In addition to these exports, Kazakhstan is offering tolling services and exploring the production of other precious minerals like wolfram, cobalt, lithium, and titan, aiming to discuss long-term contracts and investment support. The country, which processes 17 of the 50 minerals critical to the U.S. economy, already exports several strategic minerals to American

companies. Sharlapayev's visit also involved meetings with leading American companies to discuss opportunities in industrial production and geological exploration. The talks highlighted the potential for joint projects in various sectors, including infrastructure development and technology, with the U.S. International Development Finance Corporation expressing interest in deepening cooperation with Kazakhstan.

**Chinese money still chasing Canadian critical mining deals despite Ottawa's scrutiny (February 27, 2024, [Source](#))** – A year after Canada tightened its foreign investment rules for the critical minerals sector to enhance national security, Chinese investments continue to flow into Toronto-listed mining companies, as per research by the University of Alberta. Despite Canada forcing three Chinese investors to divest their stakes in 2022 and increasing scrutiny on foreign deals, especially in critical minerals, investments from China and Hong Kong surged to C\$2.2 billion in 2023, a significant leap from C\$62 million in 2022. This influx is buoyed by the perception that Canada remains open to Chinese investments, with junior miners finding it easier to secure funding. The critical minerals sector, vital for Canada's national security, has seen Chinese entities actively investing, notably in copper assets. For instance, MMG Africa Ventures acquired a copper mine for C\$1.7 billion, and Jiangxi Copper Co increased its stake in First Quantum Minerals Ltd. (TSX: FM). Some Canadian miners are lobbying for more Chinese investments due to difficulties in raising capital elsewhere, despite the government's stringent stance on safeguarding critical resources.

**Investor.News      Critical      Minerals**

## Videos:

- March 08, 2024 – Mark Chalmers on Energy Fuels as a Profitable Uranium Producer in the U.S. <https://bit.ly/3P9nl1J>
- March 07, 2024 – Critical Metals Russell Fryer on Copper and Cobalt Plans for Production in 2024 <https://bit.ly/43bGYvJ>
- March 06, 2024 – Under Secretary Jose Fernandez Discusses U.S. Critical Minerals Strategy for Clean Energy Transition <https://bit.ly/433yBSZ>

## Critical Minerals IN8.Pro Member News Releases:

- March 8, 2024 – F3 and Traction Begin Drilling to Locate Source of Radioactive Boulders <https://bit.ly/436k09t>
- March 7, 2024 – American Clean Resources Group Commits to Transfer Federal Tax Credits to Investors to Accelerate the Development of Its Renewable Energy Assets <https://bit.ly/3wCIjzu>
- March 6, 2024 – Halleck Creek Project Update <https://bit.ly/3InYYJV>
- March 6, 2024 – Karbon-X Announces Appointment of Brett Hull and Justin Bourque to its Board of Directors <https://bit.ly/3TpdYxt>
- March 5, 2024 – Panther Metals PLC – Australia: Coggia Nickel-Cobalt Mineral Resource Exceeds 100Mt <https://bit.ly/3IptcMI>
- March 5, 2024 – Panther Metals PLC – Obonga: Extension of Purchase Agreement <https://bit.ly/3TmYLge>
- March 4, 2024 – Ucore Progresses Through Heavy Rare Earth

Processing as It Completes Second Milestone of Strategic US DoD Contract <https://bit.ly/3uSunkx>

- March 4, 2024 – First Phosphate Corp. Receives Mining Research and Innovation Grant from Quebec Ministry of Natural Resources <https://bit.ly/3Iny84z>
  - March 4, 2024 – Voyageur Pharmaceuticals and API Forge Alliance for Carbon-Based Imaging Drug Advancement <https://bit.ly/3wBuem6>
  - March 4, 2024 – Defense Metals Ships Mixed Rare Earth Carbonate Samples to two major REE companies <https://bit.ly/43iwmlT>
  - March 4, 2024 – Power Nickel Defines Initial Volume on its High-Grade Cu-Pt-Pd-Au-Ag Zone 5km Northeast of its Main Nisk Deposit <https://bit.ly/3TiZNde>
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# Australia's Precarious Position: Navigating a Critical Minerals Market Meltdown

written by InvestorNews | April 15, 2024

Australia, often celebrated as the world's quarry, finds itself at a critical juncture as the prices of iron ore, nickel, and lithium, three of its most significant exports, have plummeted. This decline has not only exposed the inherent vulnerabilities of relying heavily on these commodities but has also highlighted the country's dependence on China, its largest buyer. This



situation is further compounded by the realization that the wider global implications of such a downturn are largely overlooked by many in the field.

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# Attention set on rare earths in Canada and Brazil, Appia hits 2024 running

written by InvestorNews | April 15, 2024

[Appia Rare Earths & Uranium Corp.](#) (CSE: API | OTCQX: APAAF) (“Appia”) has several projects located across Canada and Brazil with rare earths and uranium potential, as well as some other valuable metals. The current focus for Appia is on advancing their two key rare earths projects Alces Lake Project in Canada and the PCH Ionic Clay Project in Brazil.

Today we give an update on Appia’s latest activity at these two projects.

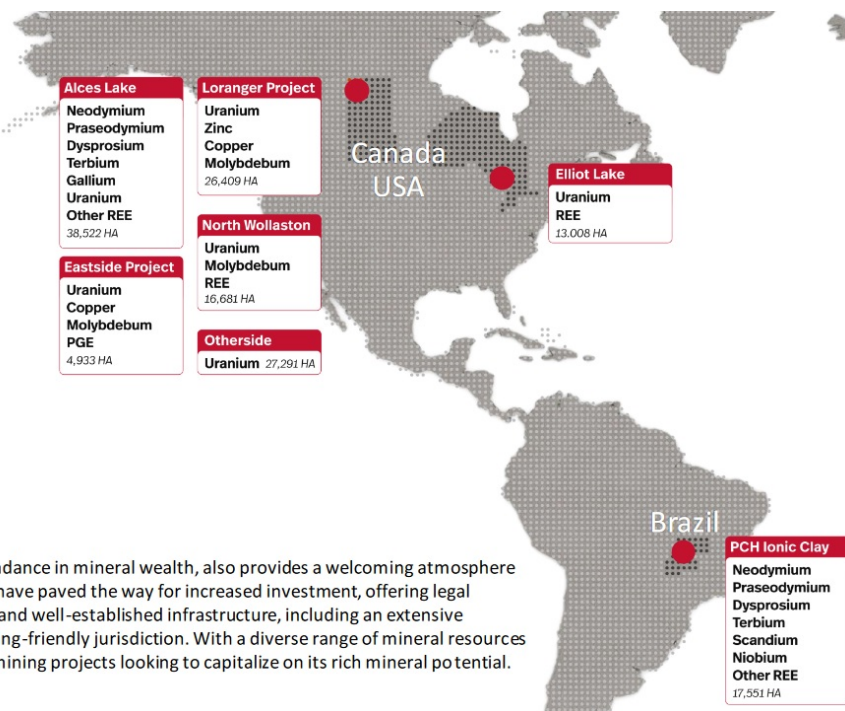
**Appia’s projects are located in Canada and Brazil with a focus on rare earths and uranium**

## Our Projects

Appia is strategically positioned with mining projects in two of the world's most mining-friendly jurisdictions, Canada and Brazil. These locations offer an array of compelling reasons for our choice.

Canada, renowned for its political stability and robust legal framework, stands as a beacon of security for mining investments. With a rich endowment of mineral resources and a well-established mining industry, Canada provides a secure environment where investor interests are safeguarded. The nation's geological diversity opens up vast opportunities for resource exploration, and its experienced mining workforce ensures efficient project execution. Additionally, Canada's developed infrastructure and skilled labour force create an environment where mining operations can thrive with ease. **The Company holds a large uranium ground position in Elliot Lake and four highly prospective uranium exploration projects in the prolific Athabasca Basin area: Loranger, North Wollaston, Eastside and Otherside.**

In the southern hemisphere, Brazil, while boasting similar abundance in mineral wealth, also provides a welcoming atmosphere for mining endeavors. The country's regulatory improvements have paved the way for increased investment, offering legal certainty for mining operations. Brazil's geological accessibility and well-established infrastructure, including an extensive transportation network, further underscore its appeal as a mining-friendly jurisdiction. With a diverse range of mineral resources and a skilled workforce, Brazil represents an ideal location for mining projects looking to capitalize on its rich mineral potential.



Source: [Appia company presentation](#)

## Alces Lake Project in Canada (100% owned)

The Alces Lake Project is located in Northern Saskatchewan and is known for having exceptionally high rare earths grades and gallium in favorable monazite ore. Appia [state](#): "Alces Lake Project in Saskatchewan's Athabasca Basin is the highest-grade critical rare earths prospect in North America and one of the highest-grade rare earths prospects in the world."

Appia is now starting to release their latest results from the 2023 drill campaign from the Magnet Ridge Zone at Alces Lake.

Appia [announced](#) on January 15, 2024: "Assays of **up to 1.57 wt.% (15,700 ppm) Total Rare Earth Oxides (TREO)** were returned, with thickness and grades increasing to the south-southeast...**Mineralization intervals occur from near surface to < 85 metres depth.**"

Appia also [announced](#) in January 2024 that they have signed a new Cooperation Agreement with the Ya'thi Néné Lands and Resources Office.

Near term catalysts from Alces Lake include further assay results from the 40 diamond drill hole summer 2023 exploration program.

## The PCH Project in Brazil (option to acquire [up to 70% interest](#))

The PCH Project is potentially a very significant ionic clay rare earths project located in Goiás, Brazil. Ionic clay projects are favored as the extraction process for rare earths is a relatively simple and less expensive process, already widely practiced in China. Furthermore, Appia's PCH Project has all the key rare earths needed for the powerful magnets used in electric motors in most EVs. Most other projects don't have this complete spectrum as discussed by leading rare earths expert Jack Lifton [here](#).

Drill results [announced](#) in October 2023 from the PCH Project have been very encouraging, including Hole RC-063 that reported 24 metres of mineralization from surface **with a total weighted average of 27,188 ppm or 2.72% of Total Rare Earth Oxides (TREO)**. The hole remains open at depth and has extended the known area of Target IV.

Appia Geology Manager, Carlos Bastos, [stated](#): *"The assay results from PCH-RC-063 are highly promising, revealing sustained mineralization of essential elements including **Terbium (Tb), Dysprosium (Dy), Neodymium (Nd), and Praseodymium (Pr)**. Notably, several elements surpassed the upper detection limit of the assay method being used, and updated results will be reported*

*once received."*

*Note: Bold emphasis by the author.*

On January 16, 2024, Appia announced [reanalysis](#) of Hole RC-063 resulting in even higher grades of a **Total Weighted Average of 38,655 ppm or 3.87% TREO**.

From the first 10 holes drilled at the PCH Project the total weighted average grade is 7,578 ppm or [0.76% Total Rare Earth Oxide](#).

The January 11, 2024 Appia [announcement](#) highlights the excitement that the Appia team has towards the PCH Project. They announced an extension of their existing mining claims at the Project from 17,551.07 hectares to an expansive 40,963.18 hectares across a total of 22 claim blocks. The substantial 133% increase in the current land package includes 12 new claims independently staked by the Company and incurred minimal costs.

The PCH Project is situated in a jurisdiction supportive of mining activities with many major mining corporations actively exploring and mining located just ~30 km from the city of Iporá. Access is good using well-developed regional roads with [optimal infrastructure](#) including water and power to the Project. Appia [says](#) that "the Project has the support of both local and state governments".

Appia is targeting a Maiden Resource for the PCH Project Target IV in [Q1, 2024](#).

**Typical differences between ionic clay and hard rock rare earth projects**

	IONIC CLAY	HARD ROCK
Location	Mainly China, Brazil, Africa	China, USA, Australia Canada
Type of REE	Contain both Heavy and Light REE	Mainly Light REE
CAPEX and OPEX	Low CAPEX & OPEX	Same as other hard rock mining deposits – higher costs for drilling and blasting
Exploration and Mining	Quick, inexpensive, simple, shallow drilling in weathered granites; mainly found in top 10-30 metres. Easy mining without drilling or blasting. Environmentally friendly and therefore easier to permit.	More expensive exploration: Deeper, diamond core drilling, blasting, open-pit or underground mining; tailings
Processing	Simple leaching and very little radioactivity	High temperature cracking; tailings; often containing higher radioactivity

Source: [Appia company presentation](#)

## Closing remarks

Appia is making steady progress on multiple projects with the key focus currently on the Alces Lake Project in Canada and the PCH Project in Brazil. Both Projects have strong potential with good grades and amenable ore, but will take time to develop. Appia also has their various uranium projects, but that's for next time.

Appia trades on a market cap of [C\\$27 million](#). 2024 could potentially be a very big year for Appia. Stay tuned.

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## First Shots in the New Cold War

written by Christopher Ecclestone | April 15, 2024

When we were recently writing our review of the takeover battle between Teck Resources Limited (TSX: TECK.A | TSX: TECK.B |

NYSE: TECK) and Glencore PLC (LSE: GLEN) a colleague said, “don’t forget to mention the Germanium” and we nearly did. It proved to be an important reminder as Germanium (Gallium) became eminently newsworthy only a few weeks later when China decided to turn off the spigots of both metals as part of the tit-for-tat over Chinese access to Western semiconductor output. The Chinese ban spurred a surge in Wikipedia and Google traffic as pundits and journalists scurried to get au fait with the metals. For us, it was lucky we had been so recently hot off the press with our thoughts. As for Gallium, we happened to be one of the few that also knew where a primary Gallium deposit was hiding in full sight.... Though we were not telling.

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## Let the Cold War Begin

written by InvestorNews | April 15, 2024

In a recent InvestorIntel interview, Tracy Weslosky spoke with Christopher Ecclestone, Principal and mining strategist at [Hallgarten & Company](#), regarding China’s new export ban on critical minerals germanium and gallium. The ban, enacted on August 1st, is seen as a strategic retaliation against Western restrictions on key semiconductor supplies to China.

Ecclestone explained this as an extension of the modern “Cold War,” where conflict is expressed through trade embargos, rather than on battlefields. The aim, seemingly, is to disrupt Western semiconductor production by limiting access to essential materials like gallium arsenide, which is critical in chip manufacturing.

Despite China’s dominance in gallium and germanium production

(98% and 66% respectively), the U.S. government has been reticent to admit this 'stranglehold.' Companies in the West, Ecclestone highlighted, have failed to stockpile these critical metals, leaving them exposed to the current 'rainy day' scenario.

However, this new restriction has sounded an alarm for Western companies to reevaluate their dependencies and take necessary actions. Companies like [Trafigura Beheer B.V.](#) are already looking at byproduct production of germanium in their zinc refineries. Over time, this could eventually lead to Western self-sufficiency in these metals, negating Chinese leverage.

As Ecclestone concluded, the Cold War may have indeed restarted in the realm of trade. To read Ecclestone's latest report, "[Let the Cold War \(re\)Begin](#)," visit the [Hallgarten & Company](#) website.

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

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Any projections given are principally intended for use as objectives and are not intended, and should not be taken, as assurances that the projected results will be obtained by the Company. The assumptions used may not prove to be accurate and a potential decline in the Company's financial condition or results of operations may negatively impact the value of its securities. Prospective investors are urged to review the Company's profile on [Sedar.com](https://www.Sedar.com) and to carry out independent investigations in order to determine their interest in investing in the Company.

If you have any questions surrounding the content of this interview, please contact us at +1 416 792 8228 and/or email us direct at [info@investorintel.com](mailto:info@investorintel.com).

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## **Incompetent Experts: For Critical Minerals, this is not an Oxymoron.**

written by Jack Lifton | April 15, 2024

I am often asked to introduce technology metals based ventures to the sourcing/purchasing activities of the OEM automotive industry, based in Detroit, where I have lived for most of my 83 years, and for which I was a supplier of production parts and



engineered materials for more than 30 years.

I find an almost complete lack of understanding of marketing and sales to the OEM automotive industry to be common among technology metals miners and refiners, who are of course the anchor companies of any and all production parts' supply chains.

In the past this has been of little interest to the OEM automotive industry due to its standard operating procedures of choosing preferred vendors, known in the industry as Tier One Vendors, who then became responsible for choosing their own vendors of parts and services, subject to the acceptance of the Tier One product by the end-use customer's internal Production Part Acceptance Protocol (PPAP), and even then, subject to on-time delivery, in the agreed quantities, to the customer's specification at the agreed pricing. Failure in any one of these required categories could, at the discretion of the OEM, result in the "desourcing" of the (approved otherwise) vendor. To ensure security and continuity of supply, the end-user normally would have a primary Tier One vendor and at least two alternates, each of which would normally get a small percentage of the total "buy" to keep it in the game. The alternates would be required to have the capability and the capacity to supplement or even replace the primary in the event of partial, or even total, non-performance by the primary.

Such Tier One Vendors are of course operating companies with an existing output or capability to produce the parts in question. They will have positive cash flow and, typically, are public companies with a listing on a major exchange and a substantial market cap. The core competency of each and every company in the total supply for the part chain would be required and it is understood to be guaranteed to the OEM by the Tier One.

Nowhere is the decay of proven, verifiable, competence as the

sine qua non “standard” more apparent than in the, most likely to be, disastrous exemption of the PPAP standard in the OEM automotive industry for lithium-ion battery manufacturing. Rare earth permanent magnet motor manufacturing may soon be compromised by the same decay of standards.

The pathetic and jejune industry “experts” who not only analyze but, even worse, advise the OEMs on the sourcing of production parts based on critical metals are unified by their almost complete lack of practical experience, education and knowledge of the origin, processing, fabricating and manufacturing engineering at commercial scale of the **total** supply chains for the critical metals enabled devices upon which the motive power, “engine” management, and supply of information for the drivers of EVs depend.

Last week we were told by this “expert” class of journalists and advisors that both [germanium and gallium](#) were “rare earths” and that they were used in batteries. Both “expert” statements were completely wrong and misleading.

Earlier this year we were told and continue to be told by an “expert” firm that the economy needs “only 300” more lithium mines to meet the needs of a zero-carbon economy. Apparently, these fools think that there is not only a standard size lithium mine, but also a standard predictable demand for lithium. Mining engineers and mining company CFOs will be delighted to find out about this development.

I’m going to try from now on to list the Erroneous Critical Minerals Supply and Demand statement of the Week each Friday.

Attention manufacturing executives and policy makers: You need to do a due diligence review of your “experts,” before you act on their advice.

Hint: Make sure that their jobs don't depend on always agreeing with you.

A final comment: Germanium and gallium are critical to chip manufacturing, LEDs, and military optics. The "CHIPS" act and the "IRA" pledged more than \$50 billion in subsidies for domestic chip manufacturing and battery manufacturing, but not ONE CENT for domestic gallium or germanium production.

Is this how policy experts in Washington think we can become independent of Chinese dominance in critical minerals production and processing?

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# Critical Minerals Export Ban is China Tit-for-Tat with the United States

written by Jack Lifton | April 15, 2024

**"The issue here is one of understanding.** The Chinese didn't stop exporting the materials. What the Chinese said, and what they are going to do is to restrict the exports, not prohibit them. This means that they have adopted a policy of tit-for-tat with the United States. We recently have restricted the export to China of very high-tech machinery to make the latest and greatest chips. Simultaneously, we have prohibited our own companies from buying Chinese-manufactured chips for use in their products without permission from our State or Commerce Department in the form of a ruling that such importation and/or use does not impact "national security."

The Chinese are saying, OK, so if those are the rules of the game then, now, we're playing also by those rules. We're going to start playing by picking two materials that you don't have available domestically in end-user form, the metalloid germanium, and the metal gallium. These two materials, are in fact, critical to the manufacturing of the chips, access to which you wish to prohibit China from getting.

Now the interesting thing is here the journalists have got this all wrong – they all call these metals, “rare earths”, and they couldn't be more wrong, It's frightening to think that they don't understand what rare earths are, considering how important rare earths are to us in a different industrial context of use.

Germanium is a member of the silicon family. Gallium is chemically related to aluminum. Neither one of these are rare earths, and if I were teaching a course in general chemistry, I would fail anyone who said something like that. Alright, here's the point. The United States Department of Defense actually has stockpiled germanium. That should tell you something. It's really critical. It's what I call a critical-critical mineral. OK, but not, for some reason that I don't understand, gallium. Both of those, as I recall from my misspent youth, were produced in the United States and we were self-sufficient.

We have domestic American sources of both of these materials that come actually as byproducts of more common materials. Germanium is a byproduct of zinc and silver mining, and can also be obtained from coal. Gallium is a byproduct of aluminum production. Both of those were once produced and in abundance in the United States. I've talked about germanium and gallium, because we used to produce so much of the metals of which they're a byproduct, that we supplied our gallium needs and our germanium needs out of processing those materials. America stopped producing end-user forms of both germanium and gallium,

because the Chinese got into the processing of these materials in a big way and pretty soon it became obvious that it was much cheaper to buy them from China.

Now keep in mind that when the Chinese were setting up to produce both of these metals, they actually had little or no use for them. They were strictly a service operation 25 years ago. I doubt that the Chinese had ever produced a computer chip 25 years ago. There is one other use they might have had back then for gallium. It, gallium, is used in making atomic bombs, so perhaps they were doing it for that, but we simply stopped producing fine gallium chemical forms here, because, we didn't have to. You could get cheaper from China.

Now, "all of a sudden," The Chinese, who are very aware of critical materials and have been organizing themselves to be self-sufficient and secure in their supplies of all of these materials that underlie our modern technological society, are supposed to be "weaponizing" them for use against us. This is saying that we're so stupid and lazy that we didn't notice the dependence of our technological society on certain critical materials and take action to secure sufficient supplies of them for our domestic industries. Of course, this is exactly what happened.

I'm sure, once we started with the arguments about computer chips, that the Chinese could be using them to spy on us, and when we started saying this publicly and embarrassing the Chinese and insulting them, they decided that they had no recourse but to take aggressive action in the marketplace. They may, in fact, be doing these things. I'm not saying that they're innocent. I'm just saying that somehow or other. Our government doesn't seem to understand that cultures outside of the American ethos may be different from those on the American ethos. For example, you keep telling the second largest economy in the

world and, perhaps, the proudest people in the world of their multi 1000 year old heritage of "civilization" that you're liars and you're cheats. You're trying to screw us, blah blah, blah. Pretty soon they get annoyed.

Fast forward to today. The U.S. Secretary of the Treasury, Mrs. Yellen, is in Beijing today. OK. And all the reporters, the same ones who think germanium and gallium are rare earths, they're saying, well, she's going to straighten things out with the Chinese. Do you know what I think? I'll bet that when she landed and went to see the first Chinese officials, they started telling her, Hey, what the hell does your country think they're doing now? You want to discuss economics with us while you're insulting us. You call us pariahs, you call our great leader a dictator.

OK. This problem with germanium and gallium is not going to go away anytime soon until American diplomats get diplomatic and so-called American experts in Washington figure out that we should have never gotten out of the germanium and gallium "processing" business in the United States. We can go back to secure self-sufficiency.

I have been asked frequently in the last few days how long it would take for the USA to regain self-sufficiency in the production of ultra-high-purity end-user forms of germanium and gallium. Would it take decades, the youthful reporters ask breathlessly? I'll make you a bet we could be back into producing gallium and germanium in the United States in a useful form for electronics in six months to a year. I mean, this is not, excuse the expression, rocket science. We developed these technologies. This is among the very first things I ever did in my working life, the ultra-purification of metals for electronics. I knew how to process gallium and germanium 60 years ago(!), and there's been a lot of work to improve and

commercialize processes since then. We have to stop saying “Oh my God. The sky is falling,” and just start doing what we should have been doing all this time. That is my commentary on this subject...” – *Excerpt from an interview with the Critical Minerals Institute’s Co-Chairman, Jack Lifton*

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# Tom Drivas of Appia Rare Earths & Uranium Discusses Alces Lake and “Exciting” Brazilian Acquisition

written by InvestorNews | April 15, 2024

In this InvestorIntel interview, Tracy Weslosky talks to [Appia Rare Earths & Uranium Corp.](#)’s (CSE: API | OTCQX: APAAF) CEO and Director Tom Drivas about signing a [letter agreement](#) to acquire up to 70% interest in a prospective rare earths ionic clay project in Brazil. Currently doing its due diligence, Tom discusses how the new Brazilian project, if finalized, would not interfere with their main focus on the Alces Lake project. Tom goes on to say that the Brazilian project will have a new team with direct ionic clay expertise.

With an extensive exploration program planned for this year at the Alces Lake project in northern Saskatchewan, Tom discusses the company’s focus on delineating high-grade critical rare earth elements and gallium. Tom also provides an update on Appia’s ongoing relationship with the Saskatchewan Research Council (“SRC”) which is developing a rare earths processing

facility in Saskatoon and the plans for the SRC to process monazite from the Alces Lake project as early as next year.

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

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## About Appia Rare Earths & Uranium Corp.

Appia is a publicly traded Canadian 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 Loranger, North Wollaston, Eastside, and Otherside properties. The Company holds the surface rights to exploration for 113,837.15 hectares (281,297.72 acres) in Saskatchewan. The Company also has a 100% interest in approximately 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](#).

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Any projections given are principally intended for use as objectives and are not intended, and should not be taken, as assurances that the projected results will be obtained by the Company. The assumptions used may not prove to be accurate and a potential decline in the Company’s financial condition or results of operations may negatively impact the value of its securities. Prospective investors are urged to review the Company’s profile on [Sedar.com](https://www.sedar.com) and to carry out independent investigations in order to determine their interest in investing in the Company.

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