

Demand Driving Silver Prices: The Top 5 Silver Producers Trading on the TSX

written by InvestorNews | April 9, 2024

The recent surge in silver prices has sparked renewed interest in the precious metal as an investment avenue, particularly amidst a backdrop of economic uncertainty and geopolitical tensions. Despite its traditional correlation with gold, silver has demonstrated an independent trajectory in recent months, outperforming its counterpart and attracting attention from investors seeking diversification and hedging opportunities.

Christopher Ecclestone, an analyst at [Hallgarten & Company](#), sheds light on the dynamics shaping the silver market in a [short note](#) he released earlier this morning on [Aya Gold & Silver Inc.](#) (TSX: AYA | OTCQX: AYASF). He notes the intriguing divergence between gold and silver prices, emphasizing the impact of global events such as inflationary pressures and geopolitical conflicts on precious metal markets. Ecclestone's insights underscore the complexity of factors influencing silver's price movements and its potential as an investment asset.

One notable aspect of silver's recent performance is its resilience amid challenging economic conditions. While gold has historically been viewed as the ultimate safe haven asset, silver's versatility and industrial applications have contributed to its appeal as an alternative investment. Ecclestone highlights the role of industrial demand in driving silver prices, suggesting that silver's utility extends beyond its function as a store of value.

Moreover, the [Critical Minerals Institute](#) (CMI) Co-Chair Jack

Lifton always tells us that silver is the #1 technology metal, he often references a notable supply-demand imbalance in the silver market. The forecasted increase in global silver supply, coupled with strong demand projections, suggests a potentially favorable environment for silver investors. Ecclestone's observations underscore the significance of supply dynamics in shaping silver's price trajectory and investment outlook. And we are counting down to having John Carter from [Silver Bullet Mines Corp.](#) (TSXV: SBMI | OTCQB: SBMCF) at 9 AM EST, tomorrow – Wednesday, April 10, 2024, from 9-920 AM ([click here to join](#)).

In preparation – we have done our research on the Top 5 silver producers listed on the Canadian markets. Here are the top 5 silver companies listed on the TSX by market capitalization:

#1: [Pan American Silver Corp.](#) (TSX: PAAS | NYSE: PAAS)

Market Cap: C\$ 9.357 billion

Latest News Release: April 8, 2024 – Pan American Silver reports additional high-grade drill results from the La Colorada Skarn project [[Read more](#)]

About: Pan American is a leading producer of silver and gold in the Americas, with operations in Canada, Mexico, Peru, Brazil, Bolivia, Chile, and Argentina. They have a strong reputation for sustainability, operational excellence, and financial management. Headquartered in Vancouver, B.C., their shares trade on the NYSE and TSX under “PAAS.”

#2: [First Majestic Silver Corp.](#) (TSX: FR | NYSE: AG)

Market Cap: C\$ 3.167 billion

Latest News Release: April 1, 2024 – First Majestic Announces 2023 Mineral Reserve and Mineral Resource Estimates [[Read more](#)]

About: First Majestic is a publicly traded mining company focused on silver and gold production in Mexico and the United States. They own and operate several mines, including San Dimas, Santa Elena, and La Encantada, along with development and

exploration assets.

#3: [Fortuna Silver Mines Inc.](#) (TSX: FVI | NYSE: FSM)

Market Cap: C\$ 1.993 billion

Latest News Release: April 8, 2024 – Fortuna reports strong gold equivalent production of 112,543 ounces in the first quarter of 2024 [[Read more](#)]

About: Fortuna Silver Mines Inc. is a Canadian precious metals mining company with five operating mines in Argentina, Burkina Faso, Côte d'Ivoire, Mexico, and Peru. They emphasize sustainability, efficient production, environmental protection, and social responsibility.

#4: [MAG Silver Corp.](#) (TSX: MAG | NYSE American: MAG)

Market Cap: C\$ 1.751 billion

Latest News Release: March 27, 2024 – MAG Silver Announces Robust Updated Technical Report for Juanicipio [[Read more](#)]

About: MAG Silver Corp. is a Canadian exploration company focused on advancing high-grade precious metals projects in the Americas. Their joint venture interest in the Juanicipio Mine in Mexico positions them as a top-tier primary silver mining company.

#5: [SilverCrest Metals Inc.](#) (TSX: SIL | NYSE American: SILV)

Market Cap: C\$ 1.497 billion

Latest News Release: March 11, 2024 – SilverCrest Reports Fourth Quarter and 2023 Annual Financial Results [[Read more](#)]

About: SilverCrest is a Canadian precious metals producer headquartered in Vancouver, BC. Their principal focus is the Las Chispas Operation in Sonora, Mexico, with ongoing initiatives to expand their asset base and operate multiple silver-gold mines in the Americas.

In summary, the recent surge in silver prices highlights the metal's potential as a valuable component of a diversified

investment portfolio. Whether through physical ownership, ETFs, mining stocks, or futures contracts, investors have various avenues to participate in the silver market and potentially benefit from its upward trajectory.



[Note from the Published: In this headline photo (L-R): Peter Clausi and John Carter from Silver Bullet Mines Corp. (TSXV: SBMI | OTCQB: SBMCF), with Stephen Burega from Romios Gold Resources Inc. (TSXV: RG | OTCQB: RMI0F). The 15-oz bar was drawn during PDAC, and the winner was Mathieu Stephens from NeoTerrex Minerals Inc. (TSXV: NTX)]

Albemarle Lithium Auction offers a bold move forward in

pricing transparency in the critical minerals market

written by InvestorNews | April 9, 2024

In a notable development within the lithium industry, [Albemarle Corporation](#) (NYSE: ALB), the world's largest producer of lithium, has announced its plan to host an auction for a significant quantity of lithium on March 26. This move marks a strategic attempt to address the persistent issue of price discovery in a market characterized by its lack of transparency and high volatility. Jack Lifton, Co-founder of the [Critical Minerals Institute](#) (CMI), offers insightful commentary on the implications of this event, tying it to the broader challenges facing the lithium market today.

The auction by Albemarle, according to a [news story](#) published on Reuters yesterday is a response to the dramatic shifts witnessed in the lithium sector, propelled by the electric vehicle (EV) revolution. Since 2007, lithium production has surged from less than 4,000 tons to 186,000 tons, underscoring the metal's critical role in the transition towards electrification. Despite this growth, the industry has struggled with establishing a clear and stable pricing mechanism, a challenge that Lifton identifies as a major impediment to investment and development within the sector.

Historically, the pricing of lithium has been opaque, often negotiated privately between producers and buyers. This lack of clarity has been further complicated by the introduction of lithium contracts on Chinese exchanges, which, despite their potential, have failed to provide a global benchmark due to issues of transparency and accessibility for international market participants. Western attempts to establish futures

trading for lithium, such as those by the London Metal Exchange (LME) and the Chicago Mercantile Exchange (CME), have also seen limited success, highlighting the disconnect between traditional commodity trading mechanisms and the unique dynamics of the lithium market.

Albemarle's upcoming auction represents an innovative approach to tackling these pricing challenges. By opening up the sale of a substantial quantity of lithium to competitive bidding, the company aims to foster greater transparency and provide a more accurate reflection of current market valuations. This initiative not only seeks to bridge the gap in price discovery but also serves as a potential model for future transactions in the industry.

Lifton emphasizes the importance of this auction in the context of the lithium market's evolution. The shift towards digital auctions and the potential for establishing more transparent pricing indices reflect the industry's adaptability and its search for solutions that align with the realities of global lithium supply and demand. However, he also cautions that while this auction may offer valuable insights, it is not a definitive solution to the market's overarching issues of volatility and unpredictability.

In conclusion, Albemarle's decision to host an auction for its lithium products is a significant step towards addressing the critical challenge of price discovery in the lithium market. As Lifton notes, this approach represents a move away from traditional pricing mechanisms and towards a more transparent and dynamic model. While the long-term impact of this and similar initiatives remains to be seen, they underscore the lithium industry's ongoing efforts to adapt to the complexities of a rapidly evolving global market.

Jack Lifton Sits Down with ‘Bobby’ Stewart, the Driving Force Behind Geophysx Jamaica’s Charge into the Global Arena with Critical Minerals

written by InvestorNews | April 9, 2024

During a revealing interview at PDAC 2024 with Jack Lifton of InvestorNews, Robert “Bobby” Stewart, the driving force behind [Geophysx Jamaica Ltd.](#), shared insights into the company’s pioneering exploration efforts and strategic partnerships in Jamaica. Over the past five to six years, Geophysx Jamaica has conducted a comprehensive exploration campaign across the island, identifying significant copper and gold targets and recently announcing a [joint venture](#) with C3 Metals to further develop these findings. This collaboration aims to leverage both entities’ resources and expertise, particularly spotlighting the integration of the past-producing Pennants Gold Mine with the Main Ridge Project to establish the Super Block Project. Stewart highlighted the venture’s potential to unlock untapped mineral wealth, emphasizing the strategic importance of copper and gold in technological advancements and space exploration.

Stewart’s revelation of a substantial rare earths discovery in Jamaica underscores a significant leap forward in the nation’s mineral exploration landscape. Covering about 100 square

kilometers, this area exhibits unusually high concentrations of rare earth elements, diverging from the typical geological signatures found in Jamaica's bauxite-rich regions. This finding positions Jamaica as a potential key player in the global critical minerals supply chain, with Stewart remarking on the indispensable role of copper in electricity transmission and the protective qualities of gold in space exploration technologies. The interview delves into the technical and logistical facets of Geophysx Jamaica's exploration strategy, including extensive geochemical and geophysical surveys. Stewart also discusses the company's future plans, hinting at the possibility of public offering and the exploration of downstream processing opportunities in Jamaica to enhance the value of its mineral projects. This conversation with Lifton not only sheds light on Geophysx Jamaica's ambitious exploration endeavors but also highlights the broader implications for Jamaica's role in the global mining industry.

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

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Rowena Smith sits down with Jack Lifton on ASM's 'Mines to Metal' Advantage in Supplying Rare Earths

written by InvestorNews | April 9, 2024

During an interview at PDAC 2024 in Toronto, Jack Lifton of InvestorNews sat down with Rowena Smith, the Managing Director of [Australian Strategic Materials Ltd.](#) (ASX: ASM), to delve into the company's position and strategic initiatives within the rare earths and permanent magnet supply chain. Smith elucidated ASM's comprehensive strategy, spanning from "mine to metal," highlighting their advanced development project in Dubbo, New South Wales, and their operational metals plant in South Korea. The company has successfully commenced production of neodymium praseodymium (NdPr) metal and neodymium iron boron (NdFeB) strip alloy, which are essential components for sintered magnets used across various technological applications. Smith proudly noted ASM's pioneering role as the first Australian entity and one of the few globally to achieve such depth in the supply chain outside of China, emphasizing the critical nature of their work in diversifying the global supply chain and reducing dependence on single-source suppliers.

Smith also detailed the Dubbo Project's progress, underlining

its pivotal role in ASM's mine-to-metals business model for supplying rare earths and critical minerals. Funding and securing off-take agreements are current priorities, with the project's engineering, exploration, and permitting stages already completed. Smith's participation in a U.S. trade delegation and discussions with U.S. government departments reflect a strong international interest in funding the project. These interactions highlight the alignment between Australian and U.S. interests in establishing a sustainable and transparent critical minerals supply chain. ASM's engagement with various U.S. government agencies and the passage of legislation recognizing Australia as a 'domestic source' for U.S. Department of Defense procurement showcases the international efforts to bolster critical mineral supply chains outside of China. The company's ongoing discussions for offtake agreements and advancements in metallization capability at the Korean Metals Plant further underscore ASM's commitment to securing a robust position within the global supply chain of rare earth metals and alloys.

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About Australian Strategic Materials Ltd.

Australian Strategic Materials (ASX: ASM) is a vertically integrated 'mine to metals' producer of critical metals for new growth industries, high technologies and sustainable energy solutions. ASM operates a metals plant in Ochang, South Korea which is currently producing critical metals and alloys to customer specifications. The initial production focus is on

neodymium praseodymium (NdPr) and neodymium iron boron (NdFeB). Currently, ASM sources the rare earth oxides for the production of the critical metals at its Korean Metals Plant (KMP) from a third party located in Vietnam. The company's Dubbo Project, is a long-term resource of rare earth elements, zirconium, niobium and hafnium, located in New South Wales, Australia. ASM intends to develop the Dubbo Project to produce metal oxides which will be used for refining into critical metals at ASM's KMP and subsequent plants that may be established in other jurisdictions.

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Pat Ryan on Ucore's Engineering Advantage in the Production of Heavy Rare Earths for Permanent Magnets

written by InvestorNews | April 9, 2024

At PDAC Toronto 2024, [Critical Minerals Institute](#) (CMI) Co-Chairman Jack Lifton interviewed Pat Ryan, the Chairman and CEO of [Ucore Rare Metals Inc.](#) (TSXV: UCU | OTCQX: UURAF), discussing Ucore's advancements in the rare earths' permanent magnet supply chain. Ryan highlighted the company's focus on mid-market separation technologies, particularly their RapidSX technology, which significantly improves throughput rates for extracting rare earths essential for high-temperature applications like electric vehicles. With a commercial demo plant in Kingston, Ucore is engineering a full-scale system capable of producing heavy rare earths, including dysprosium, at purities above 99%. Ryan emphasized the strategic importance of heavy rare earths, noting, "The one critical thing we're really focused on is that heavy rare earth element...the permanent magnets really only work because the heavy rare earth allows it to operate at very high temperature."

Ucore's approach to securing feedstock for these valuable minerals is noteworthy, as Ryan mentioned sourcing from the Asian market outside of China. This strategic sourcing is part of Ucore's broader vision to disrupt China's control over the North American rare earth supply chain. With plans to operationalize a full-scale plant in Louisiana by 2025, Ucore is poised to become a significant player in the rare earths market. The company's engagement in joint ventures rather than

traditional buy-sell agreements reflects a collaborative strategy aimed at strengthening the western rare earths supply chain. This initiative is further supported by Ucore's recent announcement of successfully separating a range of heavy rare earth elements using its RapidSX technology, marking a critical step towards establishing a domestic rare earth processing capability.

Ucore's commitment to innovation and strategic partnerships underscores its potential to influence the North American rare earths market significantly. By focusing on the production of heavy rare earths and employing advanced separation technologies, Ucore aims to reduce dependence on foreign rare earths and contribute to the resilience of critical supply chains. With a seasoned executive like Ryan, who has extensive experience in manufacturing and supply chain management, Ucore is well-positioned to navigate the complexities of rare earth processing and meet the growing demand for these essential components in various high-tech applications.

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About Ucore Rare Metals Inc.

Ucore is focused on rare- and critical-metal resources, extraction, beneficiation, and separation technologies with the potential for production, growth, and scalability. Ucore's vision and plan is to become a leading advanced technology company, providing best-in-class metal separation products and services to the mining and mineral extraction industry.

Through strategic partnerships, this plan includes disrupting

the People's Republic of China's control of the North American REE supply chain through the near-term establishment of a heavy and light rare-earth processing facility in the US State of Louisiana, subsequent Strategic Metal Complexes in Canada and Alaska and the longer-term development of Ucore's 100% controlled Bokan-Dotson Ridge Rare Heavy REE Project on Prince of Wales Island in Southeast Alaska, USA.

To learn more about Ucore Rare Metals Inc., [click here](#)

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**Defense Metals' Dr. Luisa
Moreno on the Wicheeda Project**

as a Critical Future Source of Rare Earths in North America

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During the Prospectors & Developers Association of Canada (PDAC) 2024 event, Jack Lifton of the [Critical Minerals Institute](#) (CMI) conducted an insightful interview with Dr. Luisa Moreno, President and Director of [Defense Metals Corp.](#) (TSXV: DEFN | OTCQB: DFMTF). Dr. Moreno elaborated on the company's Wicheeda Rare Earth Element (REE) Project, describing it as a significant carbonatite deposit located in British Columbia, Canada. At the pre-feasibility stage, the project boasts a resource of approximately 30 million tons at an average grade of 2%, with initial years of mining expected to yield even higher grades of 2.5 to 3%. The company's vision includes concentrating the material and establishing a hydrometallurgical plant to produce a chemical concentrate, with a target production timeline spanning about five years. Dr. Moreno highlighted the success of the pilot plant and the potential for another pilot plant focusing on flotation and hydrometallurgy, underscoring the project's viability and its role in supporting the burgeoning EV and hybrid vehicle markets, which are heavily reliant on rare earth permanent magnets.

Defense Metals Corp., under the leadership of Dr. Moreno and CEO Craig Taylor, aims to establish the Wicheeda Project as a critical future source of rare earths in North America. The project's strategic advantages include its location, superior logistics, favorable mineralogy and metallurgy, proven capability to produce rare earth products through pilot plant operations, significant potential mine life, and the support of the McLeod Lake Indian Band. In line with this vision, the company has taken significant steps by shipping mixed rare earth

carbonate samples to major rare earth companies worldwide, validating the high-quality REE product from the Wicheeda deposit. This initiative further positions Defense Metals as a pivotal player in establishing North American rare earth supply chains, emphasizing the importance of diversified supply chains and the need for increased REE production outside China. The company's commitment to contributing to North American rare earth independence is evident through its active participation in industry conventions, such as PDAC 2024, and its ongoing efforts to progress the Wicheeda Project.

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About Defense Metals Corp.

Defense Metals Corp. is a mineral exploration and development company focused on the development of its 100% owned, 8,301-hectare (~20,534-acre) Wicheeda REE Project that is located on the traditional territory of the McLeod Lake Indian Band in British Columbia, Canada.

The Wicheeda REE Project, approximately 80 kilometres (~50 miles) northeast of the city of Prince George, is readily accessible by a paved highway and all-weather gravel roads and is close to infrastructure, including hydro power transmission lines and gas pipelines. The nearby Canadian National Railway and major highways allow easy access to the port facilities at Prince Rupert, the closest major North American port to Asia.

Defense Metals is a proud member of Discovery Group.

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Neo Performance's Rahim Suleman on being 'the most vertically integrated rare earth magnetics company in the world.'

written by InvestorNews | April 9, 2024

During an engaging interview at PDAC 2024 with [Critical Minerals Institute](#) (CMI) Co-Chairman Jack Lifton, Rahim Suleman, President, CEO, and Director of [Neo Performance Materials Inc.](#) (TSX: NEO), shed light on the company's strategic endeavors and its unique positioning in the rare earth materials sector.

Suleman emphasized Neo's role as a pivotal player in the rare earth magnetics market, underlining the critical importance of these materials in driving the energy transition and their explosive demand growth. He highlighted Neo's existing vertical integration in the rare earth magnet sector and its innovative dual supply chain strategy that provides a robust solution to the market's over-reliance on China, which dominates the extraction, processing, and magnet production of rare earth materials. "We are the most vertically integrated rare earth magnetics company in the world," Suleman remarked, illustrating Neo's commitment to mitigating concentration risks and fostering resilience in the supply chain.

Suleman further detailed Neo's significant investments in expanding its operational footprint, particularly mentioning the development of a sintered magnet facility in Estonia, which is poised to serve both the North American and European markets starting in 2025. This ambitious project, heralded as a landmark move to diversify the global rare earth magnet production landscape, underscores Neo's proactive approach to addressing the critical shortage of rare earth permanent magnet manufacturing capacity outside China. With plans to extend its manufacturing capabilities to North America and ongoing support from the European Union, Neo is strategically positioning itself to meet the burgeoning demand for rare earth magnets essential for electric vehicles and other green technologies. "We're in the process of investing in phase one... but we would immediately follow it with phase two and then immediately follow that and probably even concurrent to that do a large phase in North America as well," Suleman shared, highlighting Neo's comprehensive strategy to fulfill European and American EV Motor OEMs' demand for domestic sourcing of rare earth magnets.

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About Neo Performance Materials Inc.

Neo manufactures the building blocks of many modern technologies that enhance efficiency and sustainability. Neo's advanced industrial materials – magnetic powders and magnets, specialty chemicals, metals, and alloys – are critical to the performance of many everyday products and emerging technologies. Neo's products help to deliver the technologies of tomorrow to consumers today. The business of Neo is organized along three segments: Magnequench, Chemicals & Oxides and Rare Metals. Neo is headquartered in Toronto, Ontario, Canada; with corporate offices in Greenwood Village, Colorado, United States; Singapore; and Beijing, China. Neo has a global platform that includes ten manufacturing facilities located in Canada, China, Estonia, Germany, Thailand, the United Kingdom, and the United States, as well as one dedicated research and development centre in Singapore.

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Tom Drivas Explores the Initial Rare Earth Mineral Resource Estimate from Appia's PCH Ionic Adsorption Clay Project in Brazil

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In this interview with Tracy Weslosky during PDAC 2024, Tom Drivas, CEO and Director of [Appia Rare Earths & Uranium Corp.](#) (CSE: API | OTCQX: APAAF) discussed the results from the maiden [Mineral Resource Estimate](#) for Appia's PCH Ionic Adsorption Clay Project in Brazil. Announcing a significant 52.8 million tonnes of resource, Tom highlighted the presence of extremely high-grades of rare earths within this resource, showcasing some of the highest TREO (total rare earth oxide) grades globally.

Tom emphasized the project's potential, stating, "We have only explored 1% of the total area... We have 40,000 hectares." Tom also highlighted the project's richness in magnet rare earths like neodymium and praseodymium, essential for producing permanent magnets in high demand. The addition of industry experts like Constantine Karayannopoulos, Jack Lifton and Don

Hains, P. Geo to Appia's Advisory Board underscores the project's significance and potential.

Besides the project in Brazil, Appia is also advancing uranium exploration properties around the Athabasca Basin in Saskatchewan and has a significant uranium resource in Ontario at Elliot Lake. Notably, the company is also advancing its Alces Lake project in Saskatchewan, renowned for its high-grade critical rare earths in monazite.

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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 Otherside, Loranger, North Wollaston, and Eastside properties. The Company holds the surface rights to exploration for 94,982.39 hectares (234,706.59 acres) in Saskatchewan. The Company also has a 100% interest in 13,008 hectares (32,143 acres), with rare earth elements and uranium deposits over five mineralized zones in the Elliot Lake Camp, Ontario. Lastly, the Company holds the right to acquire up to a 70% interest in the PCH Project (See June 9th, 2023 Press Release – Click [HERE](#)) which is 40,963.18 ha. in size and located within the Goiás State of Brazil. (See January 11th, 2024 Press Release – [Click HERE](#))

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

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Technology Metals Report (02.23.2024): Yellen to Visit Chile for Critical Minerals and Biden's EV Dreams Are a Nightmare for Tesla

written by Tracy Weslosky | April 9, 2024

Welcome to the latest issue of the Technology Metals Report (TMR), brought to you by the [Critical Minerals Institute](https://criticalmineralsinstitute.com) (CMI). In this edition, we compile the most impactful stories shared by

our members over the past week, reflecting the dynamic and evolving nature of the critical minerals and technology metals industry. From the Inflation Reduction Act's challenges for the American EV industry to China's lithium market developments and Treasury Secretary Janet Yellen's strategic visit to Chile, our report covers a wide array of developments crucial for stakeholders. The unveiling of Tesla Inc.'s (NASDAQ: TSLA) lithium refinery in Texas, alongside CATL's confirmation of its lithium mine's normal operations, paints a picture of the industry's efforts to navigate through pricing volatilities, supply chain complexities, and geopolitical tensions. Moreover, the significant moves by major financial institutions in the uranium market and Gecamines' strategic overhaul in the DRC underline the shifting paradigms in the mining and investment landscapes of technology metals.

This TMR report also highlights the broader implications of these developments on the global stage, including efforts to diminish reliance on China for essential metals, the impact of Tesla's pricing strategies on the used EV market, and the strategic dialogues around rare earths markets. The visit by US Treasury Secretary Janet Yellen to Chile is spotlighted as a key initiative to bolster ties around critical minerals, emphasizing the urgency of diversifying supply chains amid growing demands for green transition materials. Additionally, the narrative around the challenges posed by the Inflation Reduction Act for Tesla and the US car industry, coupled with BHP's cautionary stance on the Australian nickel sector, illustrates the complex interplay between policy, market dynamics, and strategic resource management. As we delve into these stories, our aim is to provide a comprehensive overview that informs and stimulates discussion among policymakers, industry leaders, and stakeholders, navigating the intricate pathways towards a sustainable and competitive future for critical minerals and

technology metals.

MP Materials swings to quarterly loss on falling rare earths prices (February 22, 2024, [Source](#)) – MP Materials Corp. (NYSE: MP) reported a fourth-quarter loss, attributed to declining rare earths prices and increased production costs, despite expectations of a larger deficit. Amidst unsuccessful merger discussions with Lynas Rare Earths Ltd. (ASX: LYC) and competition from Chinese firms, CEO Jim Litinsky emphasized the potential for mutual learning and cost reduction among companies. Despite a 2.7% drop in shares on Thursday, a slight recovery was observed in after-hours trading. The company experienced a significant shift from previous year's profit to a \$16.3 million loss. Sales of rare earths concentrate to China decreased by 34% due to lower production at its Mountain Pass mine, exacerbated by facility issues. However, MP is advancing in refining rare earths domestically, with ongoing projects in California and Texas, and has initiated production in a new facility in Vietnam.

Stalling the American EV Industry: The Unintended Consequences of the Inflation Reduction Act's Attempt to Bypass China for Critical Minerals (February 22, 2024, [Source](#)) – The Inflation Reduction Act (IRA), integral to President Joe Biden's environmental strategy, seeks to transition the American automotive industry towards a US-centric electric vehicle (EV) supply chain, reducing reliance on Chinese materials. This shift, exemplified by initiatives like Tesla Inc.'s (NASDAQ: TSLA) lithium refinery in Texas, aims to enhance the competitiveness of American-made EVs. However, the IRA's stringent requirements for sourcing materials domestically or from approved countries by 2024 pose significant challenges, complicating efforts by major manufacturers to maintain affordability and quality. Jack Lifton, an expert in the field, highlights the complexity of creating a new EV supply

infrastructure and the strategic challenges of overtaking China's advanced position in the EV sector. The article emphasizes that realizing the IRA's vision demands innovation, strategic foresight, and time, presenting both obstacles and opportunities for the U.S. automotive industry in its quest for sustainability and energy independence.

Battery factories: Europe's mechanical engineering companies are lagging behind (February 22, 2024, [Source](#)) – The report “Battery Manufacturing 2030: Collaborating at Warp Speed” by Porsche Consulting and the German Engineering Federation (VDMA) highlights the expansion of battery factories, with around 200 set to be constructed worldwide in the next decade, predominantly in Europe. Despite this growth, European mechanical engineering firms are trailing behind their Asian counterparts, particularly in supplying high-tech equipment for these factories, with only 8% of such technology currently coming from Europe. This low market share limits Europe's influence on technical development in the battery sector. The study suggests that to avoid technological dependency and enhance their market position, European companies must aim for at least a 20% market share, requiring significant growth and collaboration to offer integrated factory solutions competitive with turnkey plants from China. The study emphasizes the potential for growth and the critical need for European firms to innovate and collaborate to secure a substantial stake in the rapidly expanding battery production technology market, estimated at 300 billion euros by 2030.

“This is a very important article, because it illustrates that the EV battery manufacturing industry has become technologically dependent upon Chinese manufacturing technology for efficient and economical production. Is this the beginning of the end for any attempt by the non-Chinese world to catch up? No, we've already reached that point, and what other

manufacturing industries in the West are circling the drain?" – Jack Lifton, CMI Co-Chair & Co-Founder

China's CATL says its lithium mine operating normally (February 22, 2024, [Source](#)) – Chinese battery giant Contemporary Amperex Technology Co. (CATL) has confirmed that its lithium mine in Jiangxi province is operating normally, amidst market speculation of a halt due to falling lithium prices. The Jianxiawo mine, rich in hard rock lepidolite and a subsidiary of CATL, faced rumors of reduced or stopped production due to economic challenges. However, CATL asserts production is ongoing as planned, despite market rumors suggesting otherwise. After the Lunar New Year holiday, it was noted that only one of two production lines resumed operation. The mine, which began phase-one production recently, aims for a 200,000 tons capacity of lithium carbonate equivalent (LCE) upon completion of all phases. Despite high production costs compared to current market prices, analysts predict significantly lower output this year than initially expected, with potential delays in future expansion due to these costs. The speculation had earlier boosted Australian lithium stocks.

China's lithium carbonate futures jump on talk of environmental crackdown (February 21, 2024, [Source](#)) – On Wednesday, China's lithium carbonate futures prices experienced a significant rally, driven by market speculation regarding potential environmental inspections in a key production area. This speculation raised concerns about possible output restrictions, leading to a 6.35% increase in the most-active July contract on the Guangzhou Futures Exchange, reaching 99,600 yuan per metric ton. Speculation centered around Yichun, a major lithium production city in Jiangxi province, facing environmental checks that could limit operations for producers failing to properly manage lithium slag. Despite these rumors, major producers in Jiangxi continued their operations as planned, with some

undergoing scheduled maintenance. The price surge, reflecting concerns over supply constraints, followed a rally in Australian lithium stocks prompted by rumors that Chinese battery maker CATL had closed its Jianxiawo mine.

Yellen to Visit Chile in Push to Boost Ties on Critical Minerals (February 21, 2024, [Source](#)) – US Treasury Secretary Janet Yellen is scheduled to visit Chile next week as part of an effort to strengthen the United States' ties with Chile, focusing on the South American nation's significant role in the green transition through its contribution to renewable energy policies and as a supplier of critical minerals. This visit is a strategic move by the US to diversify its critical minerals supply chain and reduce its dependence on China, which currently leads the market for essential metals necessary for energy transition technologies. Chile, possessing one of the world's largest lithium reserves, is seeking foreign investment to expand its capacity within the global battery supply chain. The visit, which follows Yellen's attendance at a G20 finance ministers' meeting in Sao Paulo, aims to deepen bilateral economic relations, particularly in the context of Chile's potential to benefit from President Biden's green stimulus program due to a free-trade agreement with the US, thereby supporting North American electric vehicle production.

Tesla's price cuts are driving down car values so much that EV makers are sending checks to leasing firms to compensate them (February 21, 2024, [Source](#)) – Tesla's price reductions have significantly lowered the resale value of used electric vehicles (EVs), prompting automakers to issue compensation to leasing companies like Ayvens to cover these losses. This adjustment comes as the industry is pushed to sell more EVs to avoid fines, with leasing firms seeking protections against further depreciation in the \$1.2 trillion second-hand car market. The demand for used EVs fell due to Tesla's price cuts, affecting

companies that play a vital role in the corporate car market. To mitigate risks of depreciation, negotiations for buyback agreements and re-leasing options are underway. Regulatory pressures for lower fleet emissions compound the issue, as unstable used-EV pricing challenges the transition to electric mobility by 2035. Corporate shifts, like SAP SE discontinuing Teslas for employees, underscore the broader impacts of volatile EV pricing on the industry.

Biden's EV Dreams Are a Nightmare for Tesla and the US Car Industry (February 20, 2024, [Source](#)) – The Inflation Reduction Act (IRA), initiated by President Joe Biden to foster a US-centric electric vehicle (EV) supply chain and reduce reliance on Chinese components, poses significant challenges for Tesla and other American car manufacturers. Despite Tesla's initial steps towards compliance, including sourcing batteries from within the US and building a lithium refinery in Texas, the company's substantial procurement of Chinese lithium-ion batteries underscores the complexity of shifting away from China's supply network. The IRA mandates stringent sourcing requirements for battery components and raw materials, aiming to cut China's dominance in the EV sector. However, these measures have compelled carmakers to navigate a difficult transition, risking the affordability and competitiveness of EVs. As Tesla, GM, Ford, and others strive to adapt to these evolving standards and develop alternative supply chains, they face the daunting task of balancing economic, environmental, and strategic objectives in a rapidly changing global market dominated by geopolitical tensions and the strategic distribution of critical minerals.

Goldman, hedge funds step up activity in physical uranium as prices spike (February 20, 2024, [Source](#)) – Investment banks Goldman Sachs and Macquarie, along with some hedge funds, are increasingly engaging in the uranium market, driven by a spike

in uranium prices to 16-year highs. While many banks remain cautious, these institutions are actively trading physical uranium and, in Goldman's case, its options. This shift is fueled by utilities' need for new supplies amid shortages. The interest in uranium is also growing among hedge funds and financial institutions, a notable change after the sector's stagnation post-Fukushima disaster. Uranium prices have doubled over the past year, reaching \$102 a pound, prompted by production cuts from top producers and a renewed interest in nuclear energy as a means to reduce carbon emissions. Goldman Sachs has also introduced options on physical uranium for hedge funds, marking a significant development in the market. This increased activity reflects a broader appeal of uranium to financial investors, with notable investments in physical uranium as well as equities related to the sector.

Gecamines plans overhaul of mining JVs in world's top cobalt supplier (February 20, 2024, [Source](#)) – Gecamines, the state miner of the Democratic Republic of Congo, is seeking to renegotiate terms of its copper and cobalt joint ventures to increase its stakes and gain more control. Aiming to leverage global demand for minerals essential for the green energy transition, Gecamines plans to secure better off-take contracts and ensure local representation on venture boards for improved asset management. The strategy addresses past oversights, focusing on rectifying prolonged indebtedness and insufficient investment by some partners. Recent deals, like the one with China's CMOC Group, exemplify Gecamines' efforts towards securing equitable terms, demonstrating a push for enhanced returns, community benefits, and transparency in the world's top cobalt supplier and a leading copper producer.

Industry Leaders Lifton and Karayannopoulos China's Influence on Rare Earth Prices and Markets Today (February 19, 2024, [Source](#)) – In an insightful interview, Jack Lifton and Constantine

Karayannopoulos delve into the complexities of the rare earths market. Karayannopoulos, wary of current market trends, notes a decline in prices for key elements like neodymium and praseodymium and maintains a cautious outlook due to the industry's cyclical nature. Lifton points out the impact of China's economic struggles on low rare earth prices, advocating for strategic investments in mining and processing at this juncture. Both experts discuss the discrepancy between market expectations and reality, particularly in the context of China's economic growth and the slower-than-anticipated expansion of its magnet industry, vital for electric vehicle production. They emphasize the significance of investing in raw materials and processing to navigate and leverage China's market dominance effectively, offering a comprehensive view on economic trends, geopolitical strategies, and investment opportunities in the rare earths sector.

BHP says Australian support for nickel miners 'may not be enough' to save industry (February 19, 2024, [Source](#)) – BHP Group (ASX: BHP | NYSE: BHP) warned that Australian government efforts to support the nickel industry might not suffice amid challenges, as a write-off in its nickel operations led to a nearly 90% drop in first-half net profit. The crisis in Australia's nickel industry is due to a price collapse from a supply glut in Indonesia. Despite government measures like production tax credits and royalty relief, BHP's CEO, Mike Henry, suggested these might be inadequate due to structural market changes. BHP, facing a \$3.5 billion pre-tax impairment charge on its Nickel West operation, is contemplating suspending its activities there, despite healthy nickel demand from the electric vehicle sector. However, Henry highlighted copper, potash, and iron ore as stronger growth areas for BHP. The company announced a higher-than-expected interim dividend, reflecting robust copper and iron ore performance, and

anticipates stability in commodity demand from China and India.

US Bid to Loosen China's Grip on Key Metals for EVs Is Stalling (February 19, 2024, [Source](#)) – The U.S. is striving to diminish its reliance on China for crucial metals like gallium and germanium, vital for electric vehicles and military technology. Efforts have been hampered by the diminished efficacy of the U.S. National Defense Stockpile and budget cuts, revealing vulnerabilities to supply shocks. Despite the Biden administration's initiatives to diversify metal sources through international deals and domestic projects, China's control over the global metal supply remains strong. Recent legislative reforms aim to enhance strategic stockpiling and procurement flexibility, but challenges in establishing a coherent strategy and securing stable mineral supplies continue. The situation underscores the complex dynamics of global supply chains and the critical nature of these metals for technological and defense applications.

JPMorgan, State Street quit climate group, BlackRock steps back (February 15, 2024, [Source](#)) – JPMorgan Chase and State Street's investment arms exited the Climate Action 100+ coalition, a global investor group advocating for reduced emissions, withdrawing nearly \$14 trillion in assets from climate change initiatives. BlackRock scaled back its participation by shifting its membership to its international arm. These moves follow the coalition's request for members to intensify actions against companies lagging in emission reductions. Despite political pressure from Republican politicians accusing financial firms of antitrust and fiduciary duty breaches, none cited politics as a reason for their departure. State Street cited conflicts with the coalition's new priorities, which include engaging policymakers and public emission reduction commitments, as misaligned with its independent approach. BlackRock aims to maintain independence while prioritizing climate goals for its

clients.

Investor.News Critical Minerals Media Coverage:

- February 22, 2024 – Stalling the American EV Industry: The Unintended Consequences of the Inflation Reduction Act's Attempt to Bypass China for Critical Minerals <https://bit.ly/3T8IpYE>
- February 22, 2024 – Revolutionizing Energy Storage with NEO Battery Materials' Strategic Advances in Silicon Anode Technology <https://bit.ly/3T5r080>

Investor.News Critical Minerals Videos:

- Industry Leaders Lifton and Karayannopoulos China's Influence on Rare Earth Prices and Markets Today <https://bit.ly/3SNSuZk>

Critical Minerals IN8.Pro Member News Releases:

- February 22, 2024 – American Rare Earths Announces A\$13.5m Placement to advance Halleck Creek Project <https://bit.ly/3wuU1fB>
- February 22, 2024 – First Phosphate Project Receives Letter of Support from Mario Simard, Canadian Parliamentary Deputy for the Riding of Jonquière, Québec

<https://bit.ly/3S0AP3i>

- February 21, 2024 – Nano One Adds 4 More Lithium Battery Manufacturing Patents in Asia – Boosts Total to 40
<https://bit.ly/3I6EmFL>
- February 21, 2024 – Power Nickel Expands on High Grade Cu-Pd-Pt-Au-Ag Zone 5km northeast of its Main Nisk Deposit
<https://bit.ly/433eJj3>
- February 20, 2024 – American Clean Resources Group Acquires SWIS Community, LLC, an Environmental Water Technology Company <https://bit.ly/3T6iSis>
- February 20, 2024 – First Phosphate Provides Update on Plans for a Purified Phosphoric Acid Plant at Port Saguenay, Quebec <https://bit.ly/4bINV4s>
- February 20, 2024 – Western Uranium & Vanadium Receives over \$4.6M from Warrant Exercises <https://bit.ly/3UI3DxH>
- February 20, 2024 – Appia Unveils Significant REE, Cobalt and Scandium Assay Results From 47 RC Drill Holes at the Buriti Target Within Its PCH IAC REE Project, Brazil
<https://bit.ly/3ST4GIG>
- February 20, 2024 – Fathom Nickel Announces the Closing of Its Second and Final Tranche of Private Placement
<https://bit.ly/3wjSSr7>
- February 20, 2024 – Canadian GoldCamps to Earn 50% of Murphy Lake for \$10M Exploration Spend
<https://bit.ly/4bBbtz0>

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Industry Leaders Lifton and Karayannopoulos China's Influence on Rare Earth Prices and Markets Today

written by InvestorNews | April 9, 2024

In a thought-provoking InvestorNews interview hosted by the [Critical Minerals Institute](#) founder [Tracy Weslosky](#), [Jack Lifton](#) and [Constantine Karayannopoulos](#), two renowned figures in the rare earths market, share their insights on the sector's current trends and future prospects. Constantine Karayannopoulos, reflecting on the state of the market, observes, "There is never a dull moment in the rare earths industry," highlighting the ongoing slide in prices for critical rare earth elements like neodymium and praseodymium. He expresses a cautious outlook, noting, "I'm a little pessimistic about the near term... it's a cyclical industry."

[Critical Minerals Institute](#) (CMI) Co-Chair Jack Lifton adds: "The low prices may be here for a while because the principal producer in the world is China, and China's having a very bad time economically right now." He emphasizes the opportunities presented by the current market conditions for strategic investments, advising, "This is the ideal time for real mining and real processing companies to get into the game."

Karayannopoulos also touches on the disconnection between market interest and actual market trends, suggesting, "There's always a disconnect between reality versus expectation." He elaborates on the nuanced dynamics within China, mentioning, "The Chinese consumer has not stopped buying, China grew at 5% last year.. However, the main consumer of rare earths today, the magnet

industry that feeds the electric vehicle production in China, it's not growing as fast as people thought it was going to grow."

Lifton further discusses the broader implications of supply and demand, cautioning, "As long as the supply is in excess, the prices are not going to go up." He also highlights the strategic importance of investments in raw material sources and processing capabilities, particularly in light of China's dominance in the market.

Through their conversation, Lifton and Karayannopoulos provide a nuanced analysis of the rare earths market, blending perspectives on economic trends, geopolitical strategies, and investment opportunities. To access the complete interview, [click here](#)