

Nouveau Monde CEO on the significant demand for graphite from the battery material market

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March 29, 2018 – “Battery material is becoming a significant market for graphite. It used to be 9% of the market a few years ago. Now it is 25% of the market and it is getting higher and higher.” – states Eric DeSaulniers, President, CEO and Director of [Nouveau Monde Graphite Inc.](#) (TSXV: NOU | OTCQB: NMGRF), in an interview with InvestorIntel’s Andy Gaudry.

Andy Gaudry: How is PDAC 2018 treating you this year?

Eric Desaulniers: Pretty busy. I guess that is why we are coming, but busy. I am sure I will not have time to meet everyone I want to meet, but I am doing my best.

Andy Gaudry: What is new and exciting with Nouveau Monde?

Eric Desaulniers: A lot of good is going on actually at the moment. You saw we just announced drill results. In the next few weeks we will have an update of our resource estimate for the South Zone. Then we will start our feasibility study, bankable feasibility study of the commercial project. At the same time we are building a Phase 1 capacity that will be up and running in June. We just finished stripping the whole mining area for the next 2 years. Then we will start to blast in the spring and we will start mine that in our plant in June. Phase 1 will be able to produce 2,000 tons of flake concentrate in the next 2 years to start qualifying our product. A lot of stuff is going on, on

all different fronts.

Andy Gaudry: That is fantastic news. How is the graphite market in Canada these days?

Eric Desaulniers: It is a very interesting year for the graphite market. On the demand side the demand is picking up significantly with the steelmakers in China resuming operations significantly. At the same time, battery material is becoming a significant market for graphite. It used to be 9% of the market a few years ago. Now it is 25% of the market and it is getting higher and higher. There is one big guy in the room. It is Syrah Resource. Everyone is looking at Syrah who started production in January. They have a lot of different problems, like I think one of their circuits caught fire and it is now shut down for a few months. All the market is looking at this new capacity that is coming online. Will it be enough to fill the growth in the demand? It is a very interesting year. On top of it there are 23 big factories, battery factories, being built on the planet. By 2021-2022 they will require an extra 450,000 tons more of graphite. With this demand there will be a supply squeeze at some point in the next 5 years. We want to be there right on time with our project to fill part of this supply...to access the complete interview, [click here](#)

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U308 CEO on the gradual strengthening of the uranium market

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March 28, 2018 – “I think that what happened in December last year with both Kazakhstan and Cameco taking supply off the market that was just huge. I do not think people understand quite the extent of that cutback.” States Dr. Richard Spencer, CEO, President and Director of [U308 Corp.](#) (TSX: UWE | OTCQB: UWEFF), in an interview with InvestorIntel’s Andy Gaudry.

Andy Gaudry: What is the chat about the uranium market at PDAC this year?

Richard Spencer: I think the chat is that we are through the bottom of the market. I think that what happened in December last year with both Kazakhstan and Cameco taking supply off the market that was just huge. I do not think people understand quite the extent of that cutback. If we apply it to the zinc market, when the zinc in 2015 had been in the doldrums, a declining market for a long time, one of the big producing companies, Glencore, took 3½% of world supply off the market. It did not have a dramatic impact on the zinc market at the time. It was just a gradual rise, but looking back at the zinc market that was the bottom of the market. I think that we are going to look back on the 2017 in the uranium market and see that those cuts by those two big producers they did define the bottom of the market. I think that we are through it. People are talking about the amount of uranium inventory that there is above ground. The old adage is that a bull market climbs all of worry and I think that we are going to see a gradual strengthening of the uranium market from December 2017.

Andy Gaudry: How is the market going to be affected now with Mr. Trump and Mr. Putin going head-to-head?

Richard Spencer: That is a real interesting question. I think that it is bizarre that we have Russia that controls or is very friendly with two-thirds of the suppliers or the suppliers of two-thirds of the world's uranium. We have got the uranium market just trundling along ignoring this escalation of discussion between Russia and the U.S. If I were a U.S. utility knowing that my President instead of going toe-to-toe with someone who supplies or controls or is very friendly with the suppliers of two-thirds of the world's production of X, I would start taking action. I would start building my own inventory to keep my reactor running. I think that is exactly what we will see happen in the uranium industry, but at the moment no one seems to care that the U.S. is upping the ante with the Russians or vice versa between the two of them. The ante is rising and the uranium market is doing absolutely nothing. It is absolutely bizarre. I think we are going to look back at this and say, why were not people reacting to this? I think they need to be reacting to it, which is good for the uranium suppliers.

Andy Gaudry: Your company is operating in Argentina. How is that affecting the world markets?

Richard Spencer: The Argentinians have a strong nuclear program. They have got 3 reactors, bit reactors that are operating. They are building another 2 and they are talking about building a sixth reactor as well. These are the big reactors. Their aim is to produce about 20% of their electricity from nuclear by 2025...to access the complete interview, [click here](#)

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