

OFFICIAL

AUSTRALIA MINERALS

REALISE THE OPPORTUNITY

Australian Government support for critical minerals

Alix Collins

Director, Project Finance

Critical Minerals Securities Branch

Department of Industry, Science & Resources



Australian Government

Geoscience Australia

Japan—Australia Mineral Resources Investment Seminar | Sep '25 | #AustraliaMinerals

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The Future Made in Australia

\$22.7 billion over 10 years



*Net zero
transition
stream*

Renewable
hydrogen

Green metals

Low carbon
liquid fuels

*Economic
resilience &
security
stream*

Critical minerals
processing

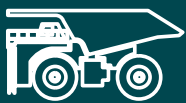
Clean energy
manufacturing

Critical Minerals Office (CMO)

CMO is the Australian Government's **central coordination point for critical minerals**. The CMO:

- Provides national policy and strategic advice
- Facilitates international partnerships
- Facilitates services to develop the sector

CMO oversees the **Critical Minerals Strategy 2023–2030**, which sets out government priorities across six focus areas, which aim to:



Develop
strategically
important projects



Attract investment
and build international
partnerships



Support
First Nations
engagement and
benefit sharing



Promote Australia
as a world leader
in ESG performance



Unlock investment
in enabling
infrastructure
and services



Grow a skilled
workforce

Unprecedented Australian Government support for critical minerals

- **\$7b Critical Minerals Production Tax Incentive**
- **\$7b Northern Australian Infrastructure Facility**
- **\$15b National Reconstruction Fund**
 - \$3b Renewables and low-emissions technologies
 - \$1b Advanced manufacturing
 - \$1b Value-adding in resources
- **\$4b Critical Minerals Facility**
 - +\$1b Strategic Reserve
- **\$50m Critical Minerals Development Program**
- **\$40m International Partnerships in Critical Minerals**
- **\$50m Critical Minerals R&D Hub**
- **\$3.4b Resourcing Australia's Prosperity initiative** over 35 years
 - \$566.1m over first 10 years



Australian Government



**Investor
Front Door**



Department of Foreign Affairs and Trade (DFAT)



Australian Government

Department of Foreign Affairs and Trade

DFAT promotes and protects Australia's international interests to support our security and prosperity.

DFAT government-to-government engagement advances the goals of the Critical Minerals Strategy to create **diverse and secure global supply chains** for critical minerals and attracts international investment.

DFAT works closely with the CMO and Austrade to build **bilateral and multilateral partnerships** that enable commercial linkages.

Australia's diplomatic missions are working to **showcase Australia's critical mineral industry** to international partners.



Export Finance Australia



Commercial Account

Loans, bonds, guarantees and insurance.

Approvals in place for high purity alumina, lithium and rare earths.

Decisions under the Commercial Account are the responsibility of the EFA Board and Management.

Critical Minerals Facility

Export Finance Australia (EFA) administers the Australian Government's \$4 billion Critical Minerals Facility (CMF). The Government has announced they will increase this to \$5 billion. Loans, bonds, guarantees, insurance and equity.

Decisions to provide finance under the CMF are made by the Australian Government.

Approvals in place for high purity alumina, graphite, rare earths.

When assessing a critical minerals project, EFA considers:

- Alignment with Australia's Critical Minerals Strategy.
- A comprehensive feasibility study must be completed.
- Buyer commitment to purchase the projects production.
- Use of proven processing technology.
- Proponents with financial, technical and commercial capacity.

National Reconstruction Fund

- The National Reconstruction Fund (NRF) is a \$15 billion fund established by the government to diversify and transform Australia's industry and economy.
- The NRF can provide finance in the form of debt, equity and guarantees.
- NRF invests across **7 priority sectors** of the Australian economy including **Value-add in Resources**.
- This sector includes the processing and refining of critical and strategic minerals, as well as mining technology and equipment.
- NRF is focused on investing in globally competitive projects to maintain and grow Australia's role as a reliable and sustainable source of critical minerals.

NRF's Investments – Critical Minerals



Arafura Rare Earths

\$200m Convertible Note

Nolans Rare Earths Project, Northern Territory

Supply chain resilience for critical minerals in the net zero transition



Liontown Resources

\$50m Equity

Kathleen Valley Lithium Project, Western Australia

Sovereign capability in the battery materials value chain

Northern Australia Infrastructure Fund



Investing for impact
in **northern Australia**



The leading financier for
northern Australia

\$7B

Available funds for
infrastructure projects



Focus on economic
impact: jobs, procurement,
public benefit & Indigenous
outcomes



Higher risk appetite for
risks related to northern

2016

Commonwealth
Government Special
Investment Vehicle



Invest in the development or
enhancement of
infrastructure projects



Can invest in
any sector or industry



Provide concessional
finance

Australian Trade and Investment Commission (Austrade)

Austrade accelerates the growth of exporters, attracts foreign investors and stimulates the visitor economy.

The **Australian Critical Minerals Prospectus** showcases 55+ investment-ready projects across Australia.

Japan Office
Australian Embassy, Marketing Office
2-1-14 Minato-ku, Mita Tokyo Japan
+81 3 5232 3930
enquiry.japan@austrade.gov.au



Australian Government
Australian Trade and Investment Commission

Australian Critical Minerals Prospectus

Welcome to the Australian Critical Minerals Prospectus.
This interactive tool showcases 57 investment-ready critical minerals projects around Australia.
To get started, select a project from the table, chose a pin on the map or follow the steps below to refine your search.

Reset selection ↻

First, select a critical mineral:

Critical Mineral

All ▾

→

If desired, select a project status:

Project Status

All ▾

→

If desired, select an Australian state or territory:

State

All ▾

→

Finally, select a project from the table or from the map and click on "View Project Information":

View Project Information ↻



Project Name	Company(ies)	Critical Mineral(s)	Project Status	State
Balranald	Iluka Resources Ltd	Rare Earth Elements, Titanium, Zirconium	Construction	NSW
Barrambie	Neometals Ltd	Titanium, Vanadium	Pre Feasibility Study	WA
Beharra Silica Sand	Perpetual Resources Ltd	Silicon	Pre Feasibility Study	WA
Blue Spec	Calidus Resources Ltd	Antimony	Feasibility Study	WA
Bold Head	Group 6 Metals Ltd	Tungsten	Pre Feasibility Study	TAS
Broken Hill Cobalt Project & Kwinana Cobalt Refinery	Cobalt Blue Holdings Ltd	Cobalt, Nickel	Pre Feasibility Study	NSW
Browns Range Heavy Rare Earths	Northern Minerals Ltd	Rare Earth Elements	Feasibility Study	WA
Butcherbird High Purity Manganese	Element 25 Ltd	Manganese, Silicon	Feasibility Study	WA
Cape Flattery Silica Sand	Metallica Minerals Ltd	Silicon	Feasibility Study	QLD
Caravel Copper Project	Caravel Minerals Ltd	Molybdenum	Pre Feasibility Study	WA
Collie Graphite Processing Hub	International Graphite Ltd	Graphite	Feasibility Study	WA
Copi	RZ Resources Ltd	Rare Earth Elements, Titanium, Zirconium	Feasibility Study	NSW
Cyclone	Diatreme Resources Ltd	Titanium, Zirconium, Hafnium	Feasibility Study	WA
Donald Rare Earth and Mineral Sands	Astron Corporation Ltd	Rare Earth Elements, Titanium, Zirconium	Feasibility Study	VIC
Dubbo Project	Australian Strategic Materials Ltd	Rare Earth Elements	Feasibility Study	NSW
Eneabba Refinery	Iluka Resources Ltd	Rare Earth Elements, Titanium, Zirconium	Pre Construction	WA

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Thank you

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Australian Government
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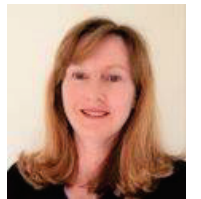
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Australian Government action to secure and grow critical mineral supply chains

Allison Britt
Director, Minerals Resources Advice and Promotion
Geoscience Australia



Australian Government
Geoscience Australia

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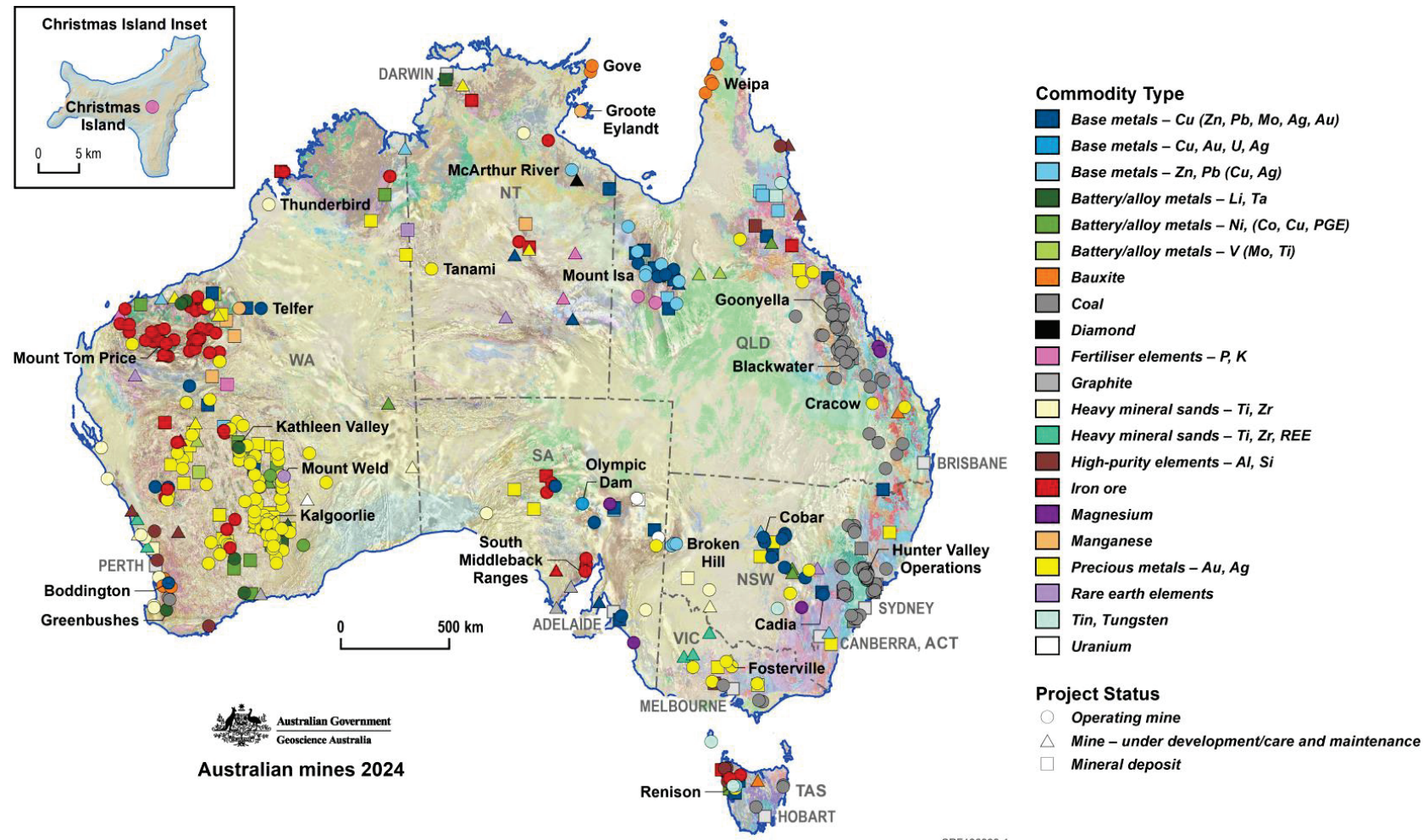
Australia Minerals



- Australia's eight geological surveys working together to attract investment into Australia's minerals sector
- Trade, investment and technical specialists who can connect you with the right people and projects
- Building on Australia's reputation for successful mineral discovery and mining

www.australiaminerals.gov.au

Australia's mining industry 2024



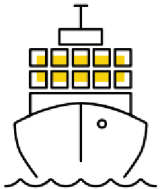
>300 operating mines



14.5% GDP



300k direct employment,
1.1m indirect

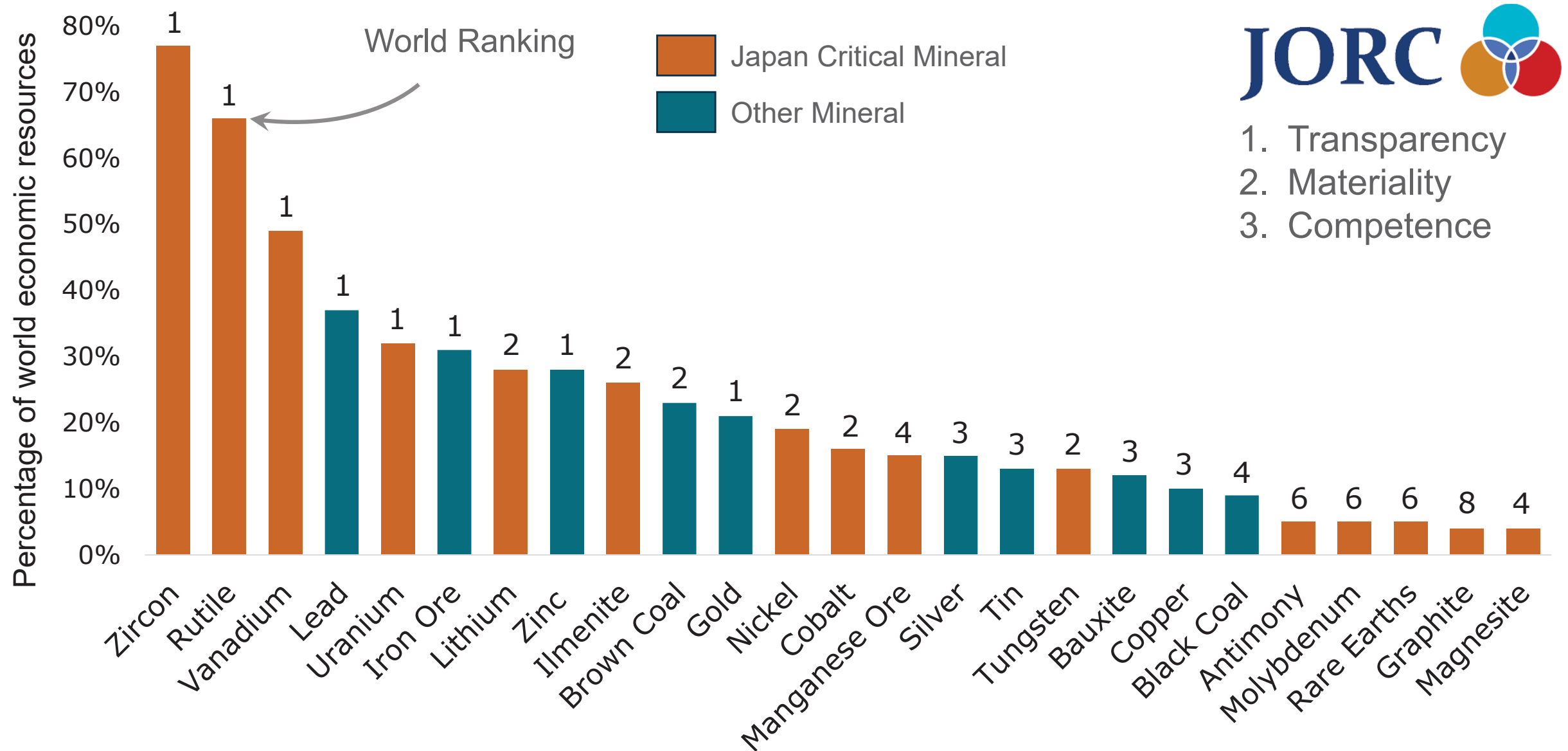


\$395b exports
(61% of total)

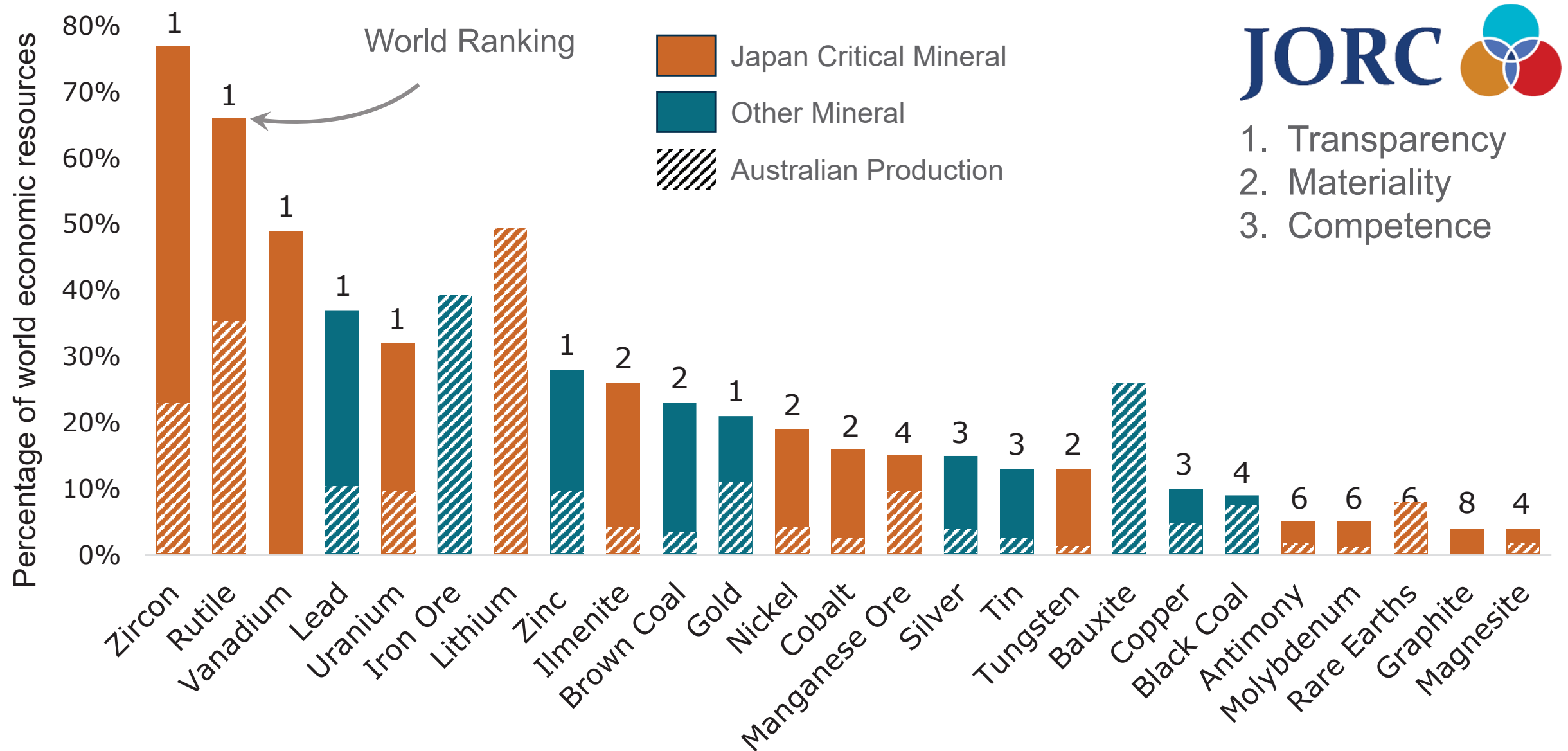
Japan's Critical Minerals List: what Australia can supply

High potential	Moderate potential	Low potential	Current production	Potential production
Antimony	Gallium	Nickel	Strontium	
Barium	Germanium	Niobium	Tantalum	
Beryllium	Graphite	Phosphorus	Tellurium	
Bismuth	Hafnium	Platinum Group Elements	Thallium	
Boron	Indium	Rare Earths	Titanium	
Caesium	Lithium	Rhenium	Tungsten	
Chromium	Magnesium	Rubidium	Uranium	
Cobalt	Manganese	Selenium	Vanadium	
Fluorine	Molybdenum	Silicon	Zirconium	

Australia's mineral resources wealth



Australia's mineral resources wealth



Australia Minerals – strong government support for resources



Australian Government
Geoscience Australia

- Resourcing Australia's Prosperity
- Critical Minerals Research & Development Hub



- New Frontiers Exploration Program
- Critical Minerals and High-Tech Metals Activation Fund



- Resourcing the Territory
- Exploration Grants



Queensland Government
Australia

- Collaborative Exploration Initiative
- Collaborative Development Program
- Queensland Resources Industry Development Plan
 - Critical Minerals Strategy
- Critical Minerals Queensland Office



- MinEx CRC National Drilling Initiative
- Sedimentary Copper Mineral Systems



Tasmanian Government

- Supporting Tasmania's Mining, Exploration and Quarrying Sector
- Exploration Drilling Grant Initiative
- Geoscience Initiative



- State of Discovery—minerals strategy
- Victorian initiatives & projects
- Developing Victoria's Critical Minerals Program



Department of Mines, Petroleum and Exploration

- Exploration Incentive Scheme
- Geoscience Data Transformation Program
- WA Array

The Future Made in Australia

\$22.7 billion over 10 years



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transition
stream*

Renewable
hydrogen

Green metals

Low carbon
liquid fuels

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Critical minerals
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Clean energy
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Australian Government



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Resourcing Australia's Prosperity



Mapping
Australia's
resources for
a sustainable
future

Delivery through 4 interrelated components:

1. Australia-wide geoscience
2. National Resource Assessments
3. Deep Dives
4. Data and Engagement

10 Year Roadmap providing
key deliverables under each
component was released.

**\$3.4
billion**

**35
years**

Some examples of the things we are doing



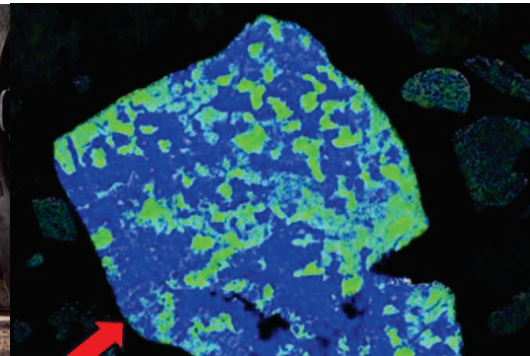
Airborne electromagnetics



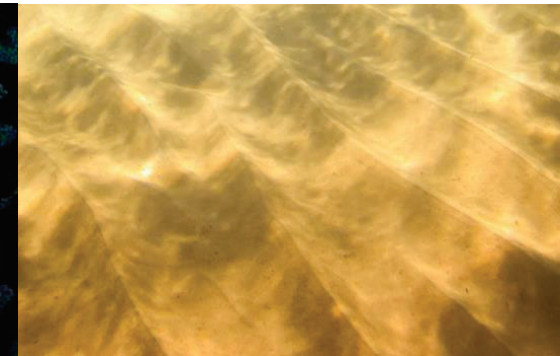
Seismometer installation



Reflection seismic trucks



**Geochemical
characterization**



Seabed mapping



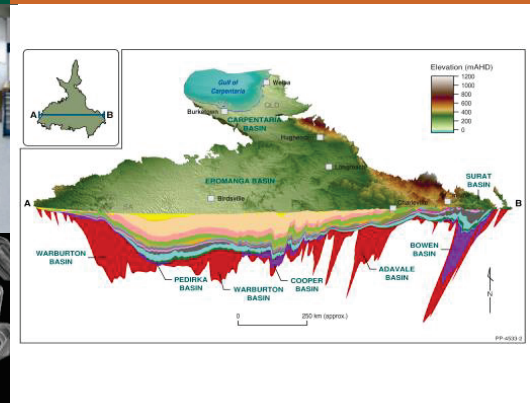
**High performance
computing**



Coil tube drilling rig



Mineral dating



3D Geological mapping



**Techno-economic
modelling**

Australia-wide geoscience data

World-first layered geology of a continent

- 7,600 individual geological units mapped
- Layer thickness maps to support development of new national 3D geology model

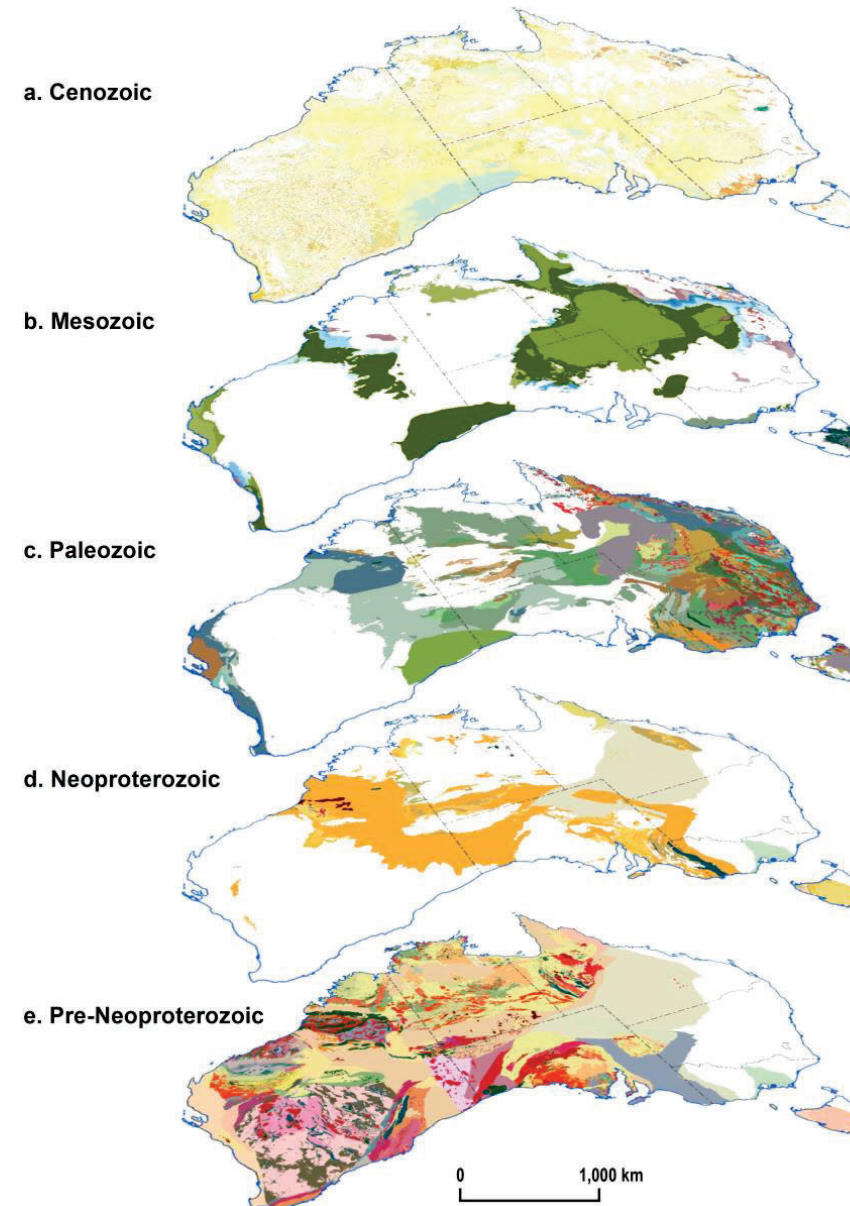
Sanchez et al., 2024

[dx.doi.org/10.26186/149391](https://doi.org/10.26186/149391)

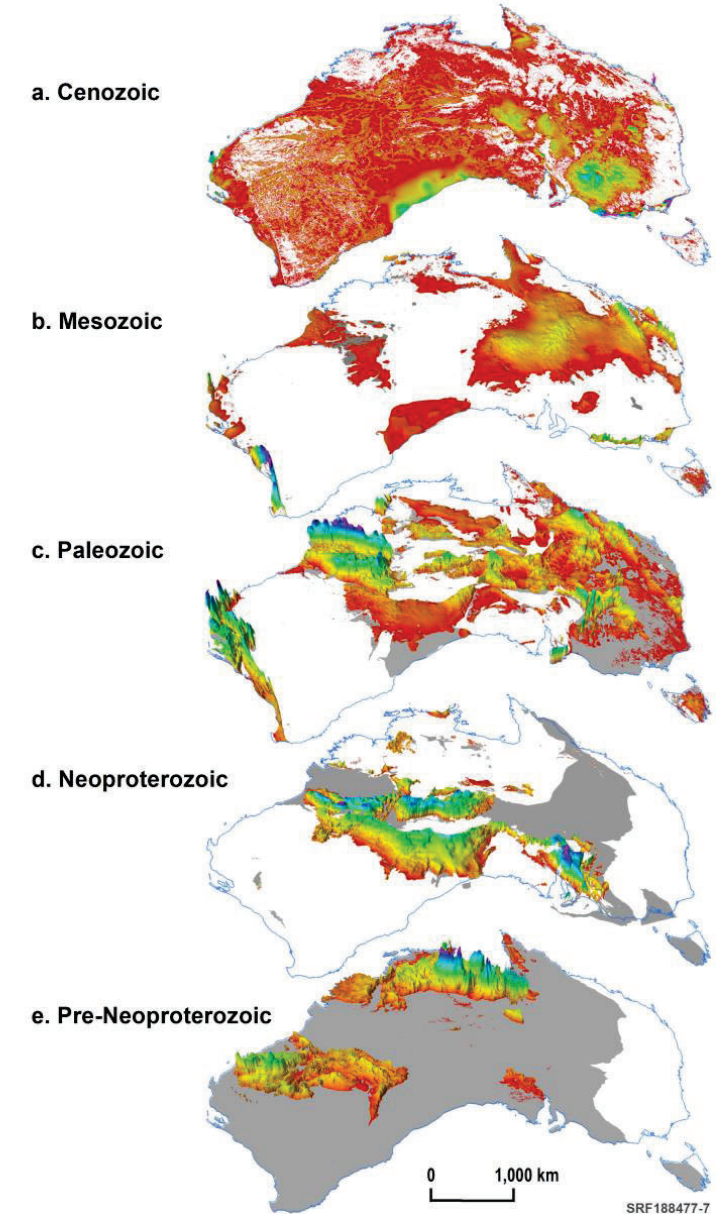
Rollet et al., 2024

[dx.doi.org/10.26186/149418](https://doi.org/10.26186/149418)

Layered geology maps



Layer thickness maps



A world leading mining destination



Further information



Data Discovery Portal
portal.ga.gov.au



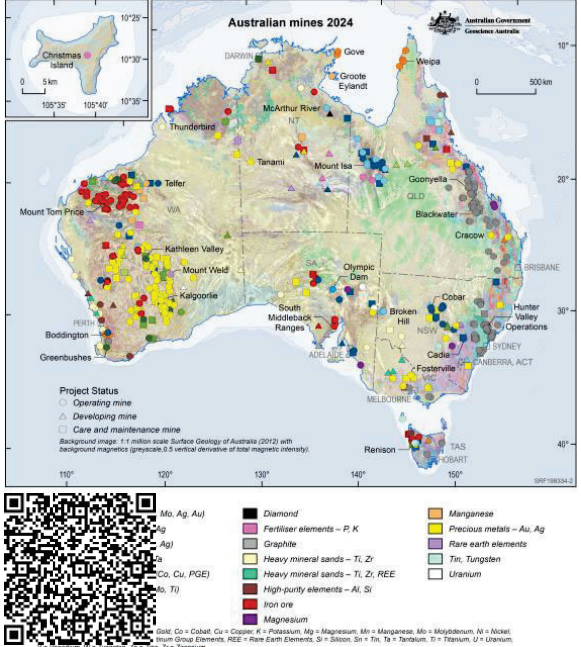
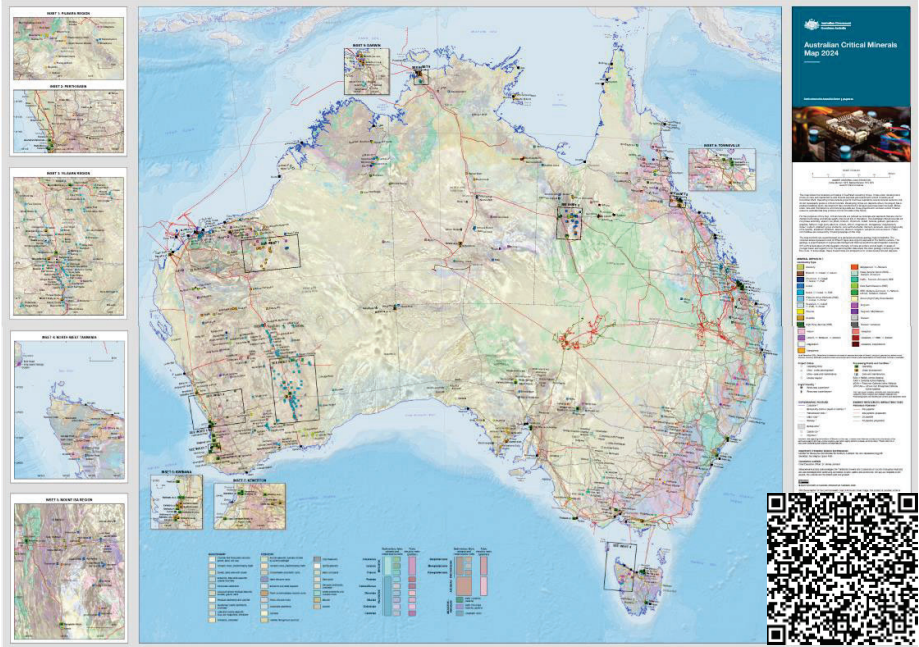
Websites

australiaminerals.gov.au
ga.gov.au/prosperity
research.csiro.au/critical-minerals-hub



Contacts

mineral.promotions@ga.gov.au
RAP@ga.gov.au



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Thank you

Allison Britt
Director, Minerals Resources Advice and Promotion
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AUSTRALIA MINERALS

REALISE THE OPPORTUNITY

New South Wales Mining investment opportunities

Tomohito Tanase
Associate Director
Investment NSW – North Asia



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NSW outline

State capital: Sydney

Population: 8.5 million

Land: 800,000 km²

GST: approx. A\$700 billion*

*More than 30% of AUS GDP

Main industry: energy, mining, banking, etc.

Annual export: A\$96 billion

Annual import: A\$164 billion*

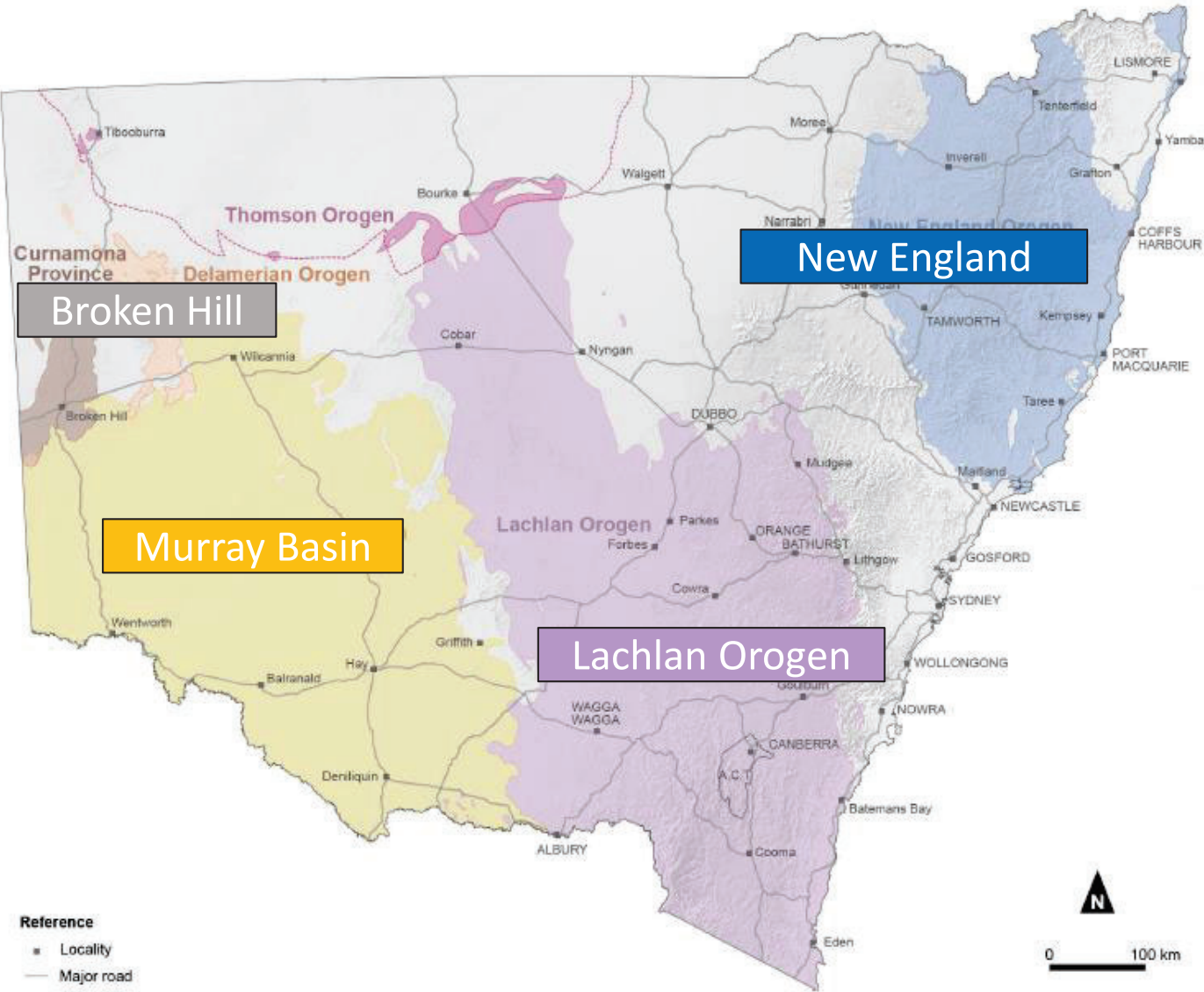
*Japan is the largest trading partner for NSW

The state's credit rating: AAA (Moody's)



***Biggest population & economy
in Australia***

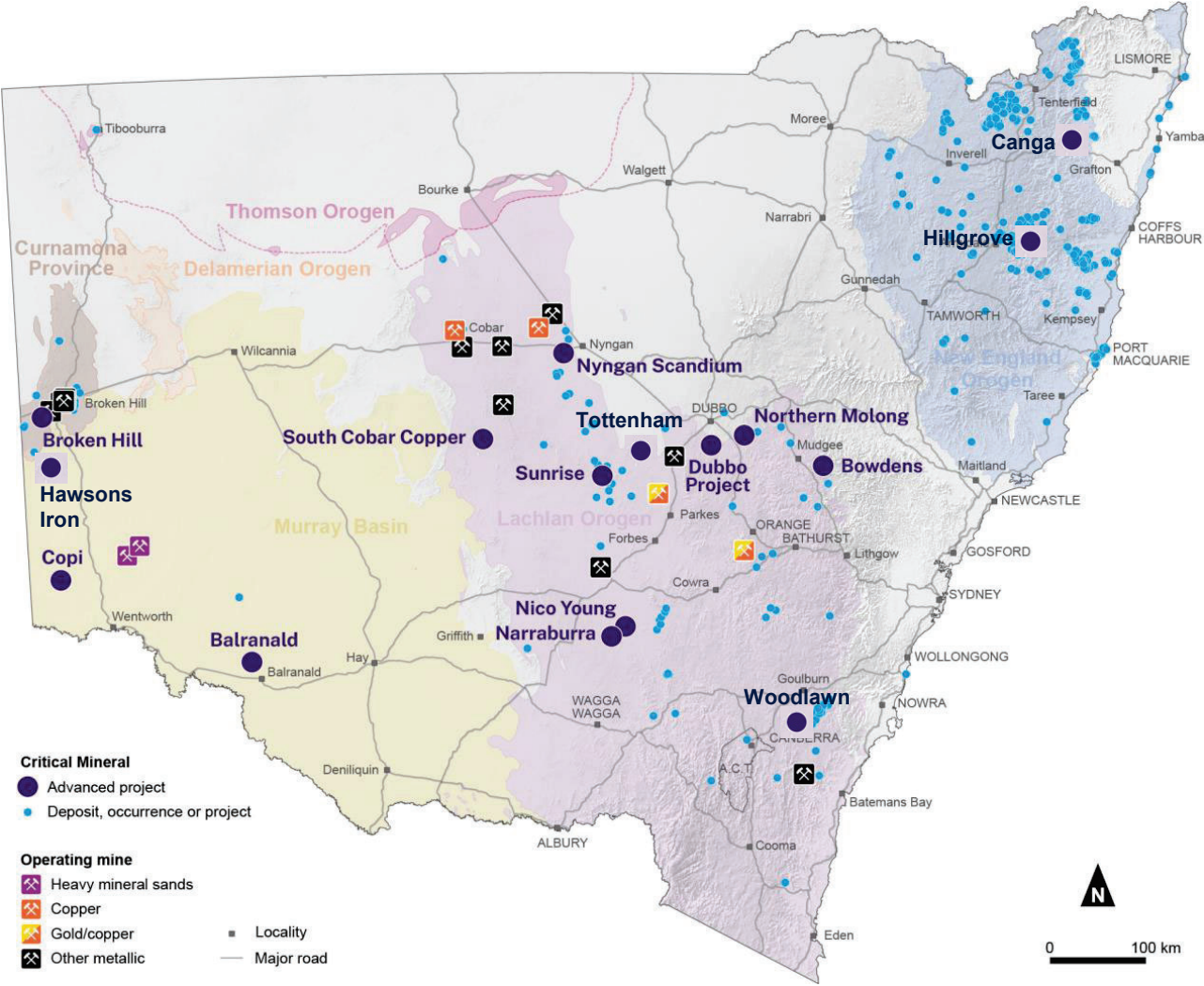
Mining regions in NSW



New England	Lachlan Orogen	Murray Basin	Broken Hill
<u>Cobalt</u> <u>Antimony</u> Scandium Tungsten Indium PGE High-purity Alumina Coal	<u>Nickel</u> <u>Cobalt</u> <u>Rare earth</u> <u>Copper</u> Gold Silver Lead Zinc Molybdenum Niobium Hafnium Indium Bismuth Magnesium PGE Scandium Tantalum Tungsten Zirconium Alumina	<u>Rare earth</u> Titanium Zirconium	<u>Cobalt</u> Tungsten PGE Silver Lead Zinc

Critical minerals/high-tech metals projects

Project	Company	Stage	Minerals
Dubbo	Australian Strategic Materials	Development approved	<u>REE</u> , Zr, Nb, Hf, Ta
Copi	RZ Resources	FS	<u>REE</u> , Ti, Zr
Narraburra	Godolphin Resources	Advanced exploration	<u>REE</u>
Balranald	Iluka Resources	Development approved	<u>REE</u> , Ti, Zr
Sunrise Battery Materials	Sunrise Energy Metals	Development approved	<u>Ni, Co</u> , Sc
Broken Hill Cobalt	Cobalt Blue	FS	<u>Co</u> , S
NiCo Young	Legacy Minerals	Advanced exploration	<u>Ni, Co</u>
South Cobar Copper	Peel Mining	FS	<u>Cu</u> , Au, Zn, Pb, Ag
Tottenham Copper-Gold	Locksley Resources	Advanced exploration	<u>Cu</u> , Au, Ag
Cangai Copper	Infinity Mining	Advanced exploration	<u>Cu</u> , Au, Zn, Ag
Hillgrove	Larvotto Resources	Commence production (Q2 2026)	<u>Sb</u> , Au
Hawsons Iron	Hawsons Iron	FS	<u>Magnetite</u>



Mine starts / re-starts

Endeavor Mine

Company: Polymetals Resources
Location: Cobar
Commodities: Ag, Zn, Pb
Status: Operational (H1 2025)

Federation Mine

Company: Aurelia Metals
Location: Nymagee
Commodities: Zn, Pb, Au, Cu, Ag
Status: Operational (H2 2024)

Mineral Hill Mine

Company: Kingston Resources
Location: Condobolin
Commodities: Au, Cu
Status: Operational (H2 2024)

Challenger Gold Mine

Company: Great Divide Mining / Adelong Gold (JV)
Location: Adelong
Commodities: Au
Status: Operational (H1 2025)

Hillgrove Gold-Antimony Mine

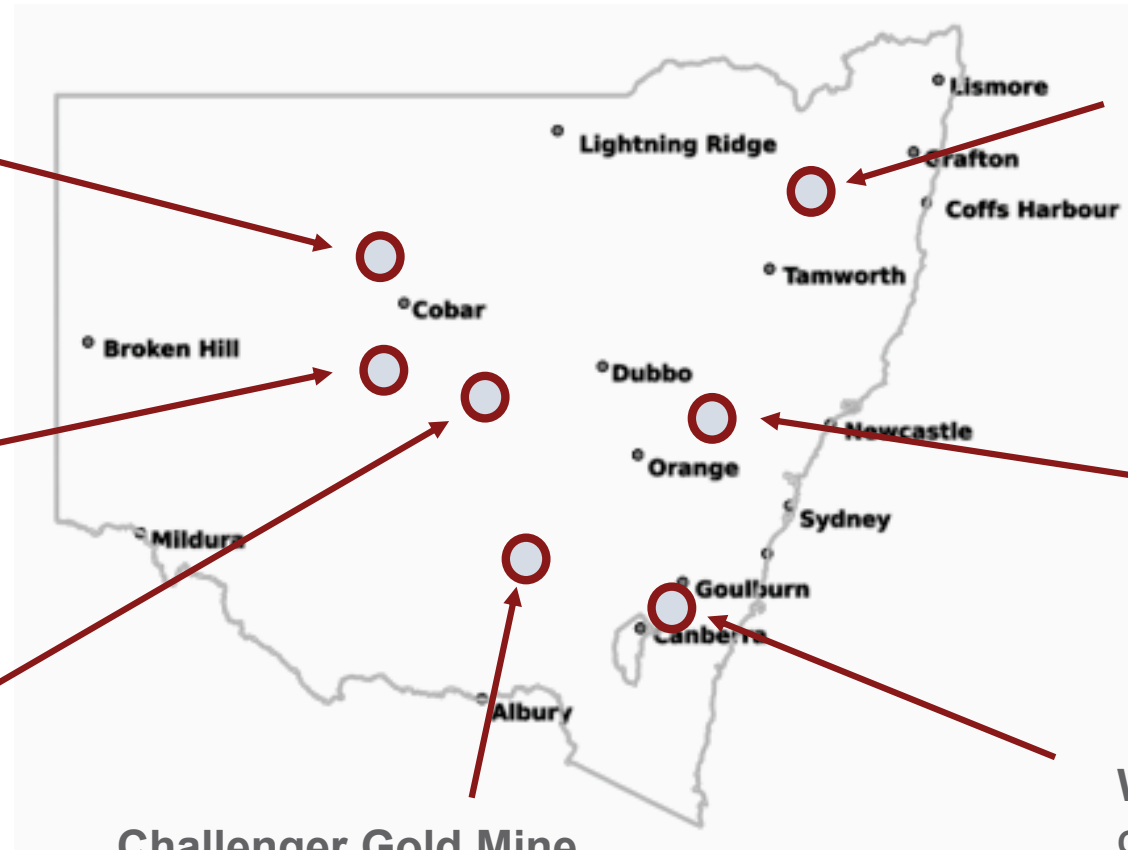
Company: Larvotto Resources
Location: Armidale
Commodities: Sb, Au
Status: C&M,
 First ore production expected Q2 2026

Reward Gold Mine

Company: Vertex Minerals
Location: Mudgee
Commodities: Au
Status: operational (H1 2025)

Woodlawn Zinc-Copper Mine

Company: DEVELOP Global
Location: Goulburn
Commodities: Zn, Cu
Status: Operational (H1 2025)



Project list – 1

- Latest status of each project should be confirmed.
- Please contact us if you are interested in any projects. We will confirm project details and investment/offtake opportunities.

[illegible]

Project list – 2

- Latest status of each project should be confirmed.
- Please contact us if you are interested in any projects. We will confirm project details and investment/offtake opportunities.



Project	Company	Listed	Project Status	Project Category	Au	Cu	Ni	Co	REE	Ag	Zn	Pb	Zr	Mineral Sands	Others	Resources
NiCo Young	Legacy Minerals	LGM	FS	Advanced exploration			Ⓢ 0.59%	○ 0.06%								167.8Mt
South Cobar Copper: - Mallee Bull - Wirlong	Peel Mining	PEX	FS Seeking finance & offtake	Advanced exploration	○ 0.22g/t	Ⓢ 1.85%				○ 18g/t	○ 0.10%	○ 0.12%				10.64Mt
Tottenham Copper-Gold	Locksley Resources Limited	LKY	Reserves development	Advanced exploration	Ⓢ 0.22g/t	Ⓢ 0.72%				○ 2g/t						9.86Mt
Cangai Copper	Infinity Mining	IMI	FS	Advanced exploration		Ⓢ 2.45%										4.6Mt
Hillgrove Gold-Antimony	Larvotto Resourced	LRV	Resume operation Q2 2026 Under C&M	Development operation resume	Ⓢ 4.4g/t										Ⓢ Sb 1.3%	7.264Mt
Hawsons Iron	Hawsons Iron	HIO	FS	New project											Ⓢ Fe (Magnetite) DTR 11.4% Fe Conc 68.4%	4,415Mt

NSW Critical Minerals Strategy

The 5 pillars below support the NSW critical minerals industry



<https://www.nsw.gov.au/sites/default/files/noindex/2024-10/nsw-critical-minerals-and-high-tech-metals-strategy-2024-35.pdf>



Encourage exploration

- Co-invest in exploration
- Deliver pre-exploration data acquisition programs



Incentivise production

- A\$250 million royalty deferral scheme for critical minerals projects that start production between July 2025 and June 2030 (First 5 years)
- Approval support, maintain Rapid Assessment Framework (RAF)



Supply chain development

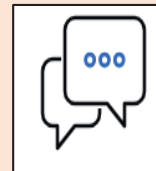
- Collaborate with ANSTO to investigate the potential for processing rare earth elements in NSW
- Promote reuse of mine tailings

Develop skilled workforce



- Encourage young people to consider future careers in critical minerals
- Develop a skills plan for the critical minerals sector

Engage communities



- Increase awareness of mining to foster stronger community engagement
- Ensure regional plans are aligned with the mining strategy

NSW Government support

- Mine development proposals must obtain approval under NSW legislation* before a mining lease can be granted to mine for mineral and coal resources in NSW
- All mine-related impacts need to be considered – economic, environmental, social, cultural
- Community consultation, including engagement with relevant Aboriginal/Indigenous groups is essential during the assessment process

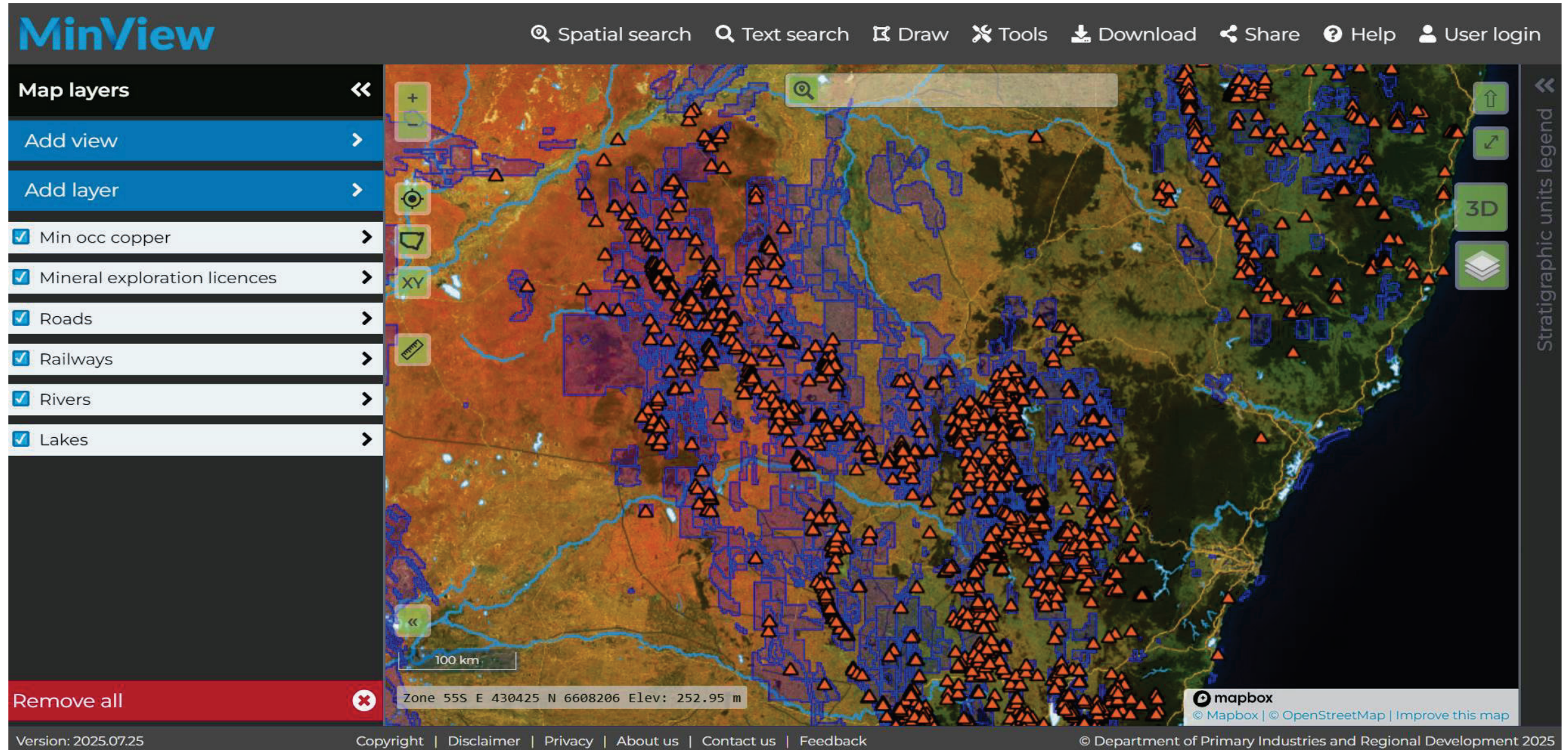
NSW Government support to mine development proponents (includes, but not limited to)	
Dept. Planning, Housing & Infrastructure	NSW Resources (mines department)
Coordinates a whole-of-government (State, Commonwealth, Local) assessment of the impacts of mining projects Provides comprehensive and clear guidelines for proponents to improve their environmental assessments: • Engagement Guidelines • Cumulative Impact Assessment Guidelines • Social Impact Assessment Guidelines • How to engage with Indigenous/Aboriginal community groups and landowners' guidelines	NSW Mining Concierge • Inform exploration and mining companies of the various project approvals requirements and processes in NSW • Facilitate connections with NSW Government agencies, and between all tiers of government in Australia to address water, transport, biodiversity, Native Title claims
	Assessment and Titles • Assesses applications for exploration and mining permits – advising proponents on requirements • Specialised Native Title team – advises on land ownership and Right to Negotiate process

* Mine proposals may also require Commonwealth Government or Local Government approvals (subject to project size, value, significance/importance)

MinView (Geoscientific data)

(<https://minview.geoscience.nsw.gov.au/#/?lon=148.5&lat=-32.5&z=7&l=>)

Open data source for geological and infrastructure data in NSW



DIGS (Geological data archive)



Advanced mineral projects and exploration highlights in New South Wales

July 2025

REFERENCE

- Operating mine
 - Exploration highlight previously reported
 - New announcement January-June 2025
- 11 m @ 0.88 g/t Au New data January-June 2025
Fontenoy (LGM) New project January-June 2025
Rock Lodge (CTN) New operator January-June 2025

GLOSSARY

%	percent
ct	carat
DTR	Davis Tube Recovery test
g/t	grams per tonne
koz	million ounces
Mt	million tonnes
ppb	parts per billion
ppm	parts per million
wt%	weight percent
Ag	silver
Al	aluminium
Au	gold
Cu	copper
Co	cobalt
Fe	iron
Hf	hafnium
HM	heavy minerals (zircon, rutile, ilmenite, leucosine)
In	indium
Mo	molybdenum
Nb	niobium
Ni	nickel
O	oxygen
Pb	lead
Pd	palladium
Pl	platinum
Pt	rhodium
REE	rare earth elements
S	sulfur
Si	silicon
Sc	scandium
Sn	tin
Ta	tantalum
TREO	total rare earth oxides
W	tungsten
Y	yttrium
Zn	zinc
Zr	zirconium

OPERATING MINES — RESOURCES & RESERVES

Ardethan (Aus Tin)
Underground (total resource) 5.5 Mt @ 0.45% Sn
Tailings (total resource) 10.7 Mt @ 0.2% Sn
Waste stockpiles (total resource) 21.3 Mt @ 0.09% Sn

Broken Hill Operations (PEM)
Southern Operations: (total reserves) 11.7 Mt @ 6.2% Zn, 4.8% Pb, 50 g/t Ag
Southern Operations: (total resources) 11.7 Mt @ 9.3% Zn, 6.8% Pb, 72 g/t Ag
North Mine Upper: (total resources) 1 Mt @ 7% Zn, 9% Pb, 140 g/t Ag
North Mine Deep: (measured & indicated) 3.7 Mt @ 11.3% Zn, 13.5% Pb, 219 g/t Ag
Potosi: (inferred) 1.6 Mt @ 13% Zn, 3.1% Pb, 43.1 g/t Ag
Silver Peak: (inferred) 0.4 Mt @ 5% Zn, 9% Pb, 77 g/t Ag

Cadia Valley Operations (NEM)
Cadia: (probable) 1,051.5 Mt @ 0.42 g/t Au, 0.29% Cu, 0.67 g/t Ag, 0.01% Mo
Cadia Underground: (indicated) 1,242.1 Mt @ 0.39 g/t Au, 0.25% Cu, 0.65 g/t Ag
Cadia Underground: (indicated) 1,173.9 Mt @ 0.01% Mo
Cadia Stockpiles and Open Pit: (measured) 30.8 Mt @ 0.3 g/t Au, 0.13% Cu
Cadia Stockpiles and Open Pit: (inferred) 11 Mt @ 0.7 g/t Au, 0.5% Cu

Challenger (ADG)
(total resources) 1.92 Mt @ 3.21 g/t Au

Cowal (EVN)
(total reserves) 140 Mt @ 1.01 g/t Au
(total resources) 280 Mt @ 0.96 g/t Au

CSA (MAC)
(total reserves) 15.9 Mt @ 3.4% Cu, 13.3 g/t Ag
(total resources) 20.3 Mt @ 5% Cu, 19.5 g/t Ag

Endeavor (POL)
(total reserves) 6.6 Mt @ 4.32% Zn, 2.04% Pb, 73 g/t Ag
(total resources) 16.3 Mt @ 8% Zn, 4.5% Pb, 84 g/t Ag

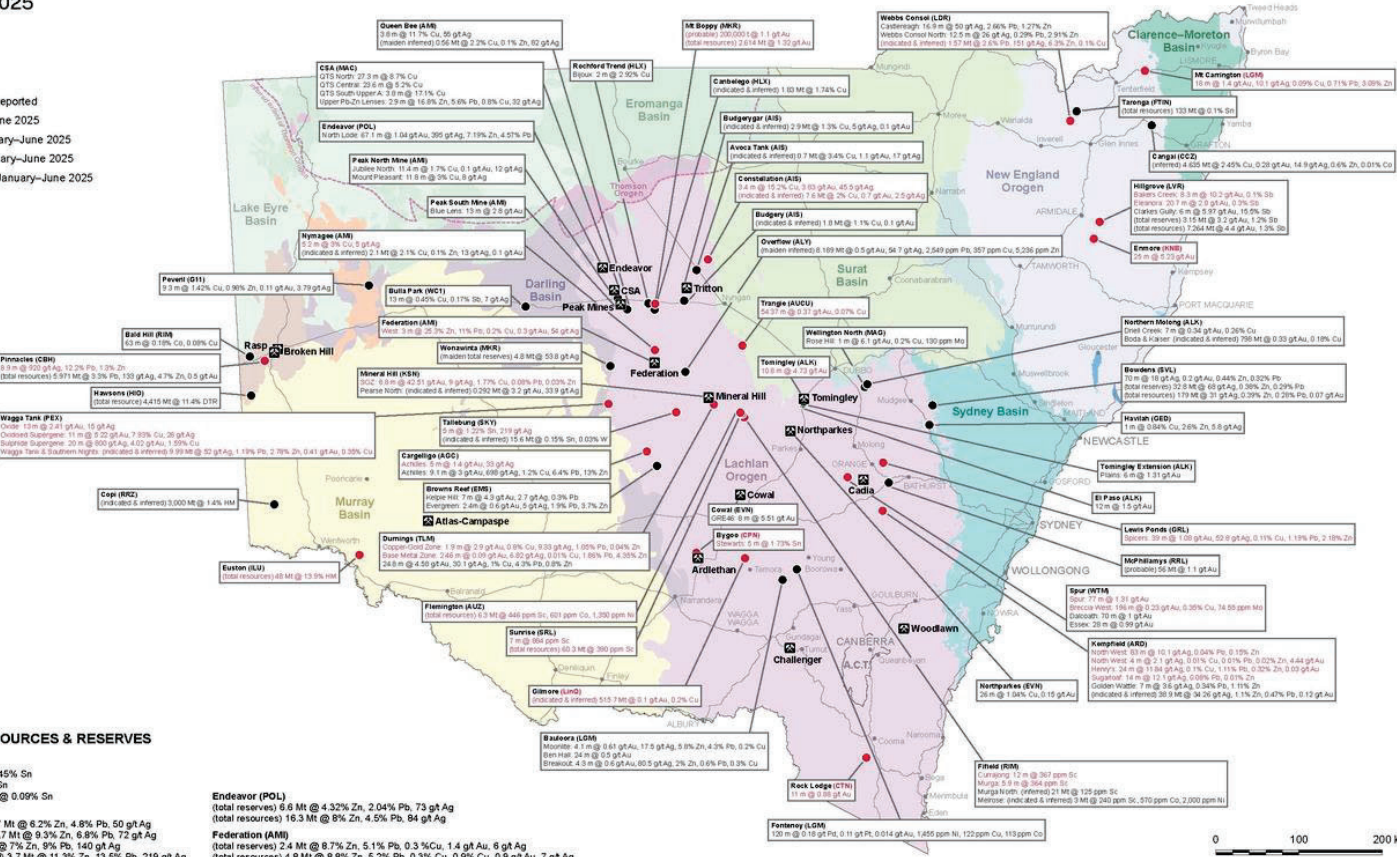
Federation (AMM)
(total reserves) 2.4 Mt @ 8.7% Zn, 5.1% Pb, 0.3% Cu, 1.4 g/t Au, 6 g/t Ag
(total resources) 4.9 Mt @ 8.8% Zn, 5.2% Pb, 0.3% Cu, 0.9% Cu, 0.8 g/t Au, 7 g/t Ag

Mineral Hill (KSN)
Underground (total reserves) 0.7 Mt @ 0.8% Cu, 1.4 g/t Au, 20 g/t Ag, 1.9% Pb, 1.6% Zn
Open pit (total reserves) 0.37 Mt @ 3.6 g/t Au, 52 g/t Ag
Underground (total resources) 1.7 Mt @ 2 g/t Au, 12 g/t Ag, 0.9% Cu, 1.2% Pb, 0.9% Zn
Open pit (total resources) 0.4 Mt @ 3.5 g/t Au, 49 g/t Ag

Murray Basin Operations (TROX)
Atlas-Campaspe: (total reserves) 105 Mt @ 5.8% HM
Atlas-Campaspe: (total resources) 110 Mt @ 3.9% HM

Northparkes (EVN)
(total reserves) 91 Mt @ 0.52% Cu, 0.29 g/t Au
(total resources) 480 Mt @ 0.51% Cu, 0.19 g/t Au

Peak Gold Mines (AMM)
Copper: (total reserves) 2 Mt @ 1.7 g/t Au, 1.8% Cu, 5 g/t Ag
Copper: (total resources) 16 Mt @ 0.9 g/t Au, 1.8% Cu, 6 g/t Ag
Lead-Zinc: (total reserves) 0.32 Mt @ 5.2% Zn, 4.2% Pb, 0.5% Cu, 3.4 g/t Au, 20 g/t Ag
Lead-Zinc: (total resources) 2.5 Mt @ 1.7 g/t Au, 2.7% Pb, 3.9% Zn, 21 g/t Ag



Updated every 6 months
(minerals, quantity, etc.)

<https://search.geoscience.nsw.gov.au/>

The NSW Government invites investors to Sydney for IMARC week 2025

NSW Critical Minerals Investment Showcase event

- Monday 20 October, 9:30 am – 1:30 pm @ The Mint, Sydney CBD
- NSW Government and industry presentations and networking

IMARC 2025

- Tuesday 21 – Thursday 23 October @ ICC Sydney
- Australia's largest and most influential mining event
- 3 days of networking opportunities, collaboration and deal making

REGISTRATION OF INTEREST

NSW Critical Minerals Investment Showcase (invitation only event)

IMARC (complimentary 3-day investor pass)

Email: tomohito.tanase@investment.nsw.gov.au



IMARC INTERNATIONAL MINING AND RESOURCES CONFERENCE + EXPO

Australia's International Mining Week

21 – 23 OCTOBER 2025 | ICC SYDNEY, AUSTRALIA

COLLABORATING ON TRENDS IN MINING, INVESTMENT AND INNOVATION TOWARDS A SUSTAINABLE FUTURE

FOUNDING PARTNERS

VICTORIA State Government Australia | AUSTMINE | AusImm | mines and money

HOST PARTNER

NSW GOVERNMENT

KEY STATS

10,500+
Attendees

550+
Speakers

500+
Exhibiting companies

120+
Countries

20,000m²
Exhibition Floor

For further information

Tomohito Tanase

Associate Director

Investment NSW – North Asia

9F Kyobashi Trust Tower, 2-1-3 Kyobashi, Chuo-ku, Tokyo, 104-0031 JAPAN

E: tomohito.tanase@investment.nsw.gov.au

W: <https://www.investment.nsw.gov.au/> / www.regional.nsw.gov.au/meg

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Tomohito Tanase
Associate Director
Investment NSW – North Asia



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The NSW Government does not specifically endorse any particular project, rather these are a range of projects located in the State of New South Wales.

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Critical minerals opportunities in Australia's Northern Territory

Ian Scrimgeour
Senior Executive Director
Northern Territory Geological Survey

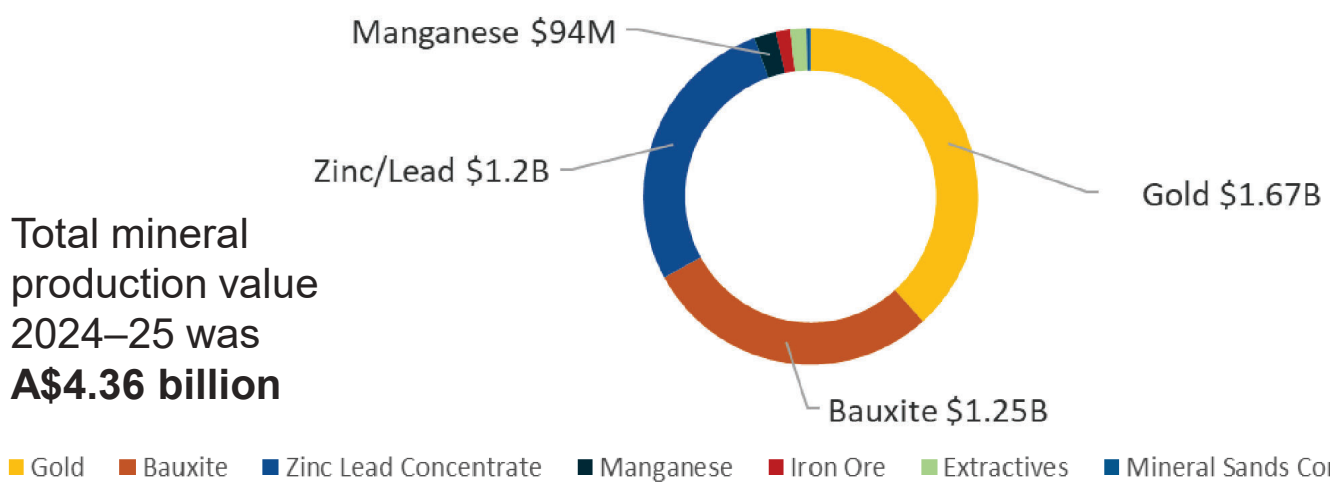


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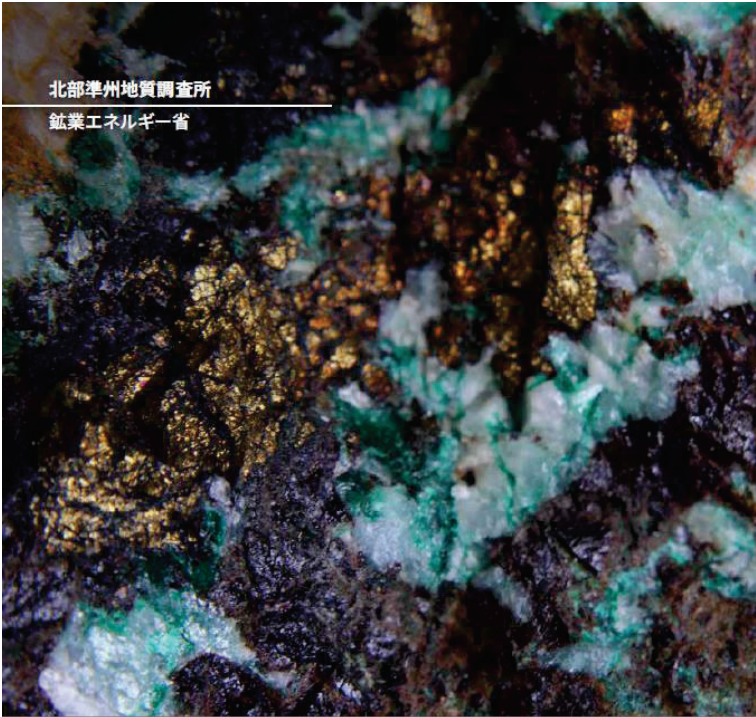
Australia's Northern Territory

- 1.3 million km² in land area, 250,000 people
- Vast and under-explored
- Resources-driven economy
- Closest Australian port to Asian markets
- Major producer of manganese, bauxite, lead-zinc-silver, gold
- Uranium exploration and mining is allowed
- NT mining sector is expanding into critical minerals, 19 projects in development pipeline mainly gold, lithium, REE, graphite, copper, phosphate, cobalt, magnesium – mainly junior ASX-listed companies



Critical Minerals in the NT 2025

北部準州地質調査所
鉱業エネルギー省



2025年北部準州のクリティカル ミネラル(重要鉱物)

resourcingtheterritory.nt.gov.au



AUSTRALIA'S
NORTHERN
TERRITORY



Department of
MINING AND
ENERGY

北部準州のクリティカル ミネラル	
アルミニウム*	ニッケル
コバルト	リン酸塩*
銅*	希土類元素
ガリウム	チタン
黒鉛	タングステン
リチウム	バナジウム
マグネシウム	亜鉛*
マンガン	ジルコニウム
モリブデン	



北部準州内の新興クリティカル ミネラル	
アンチモン	スカンジウム
ベリリウム	シリコン
ビスマス	タンタル
フッ素	テルル
ゲルマニウム	スズ*
高純度アルミナ	
ニオブ	
白金族元素	

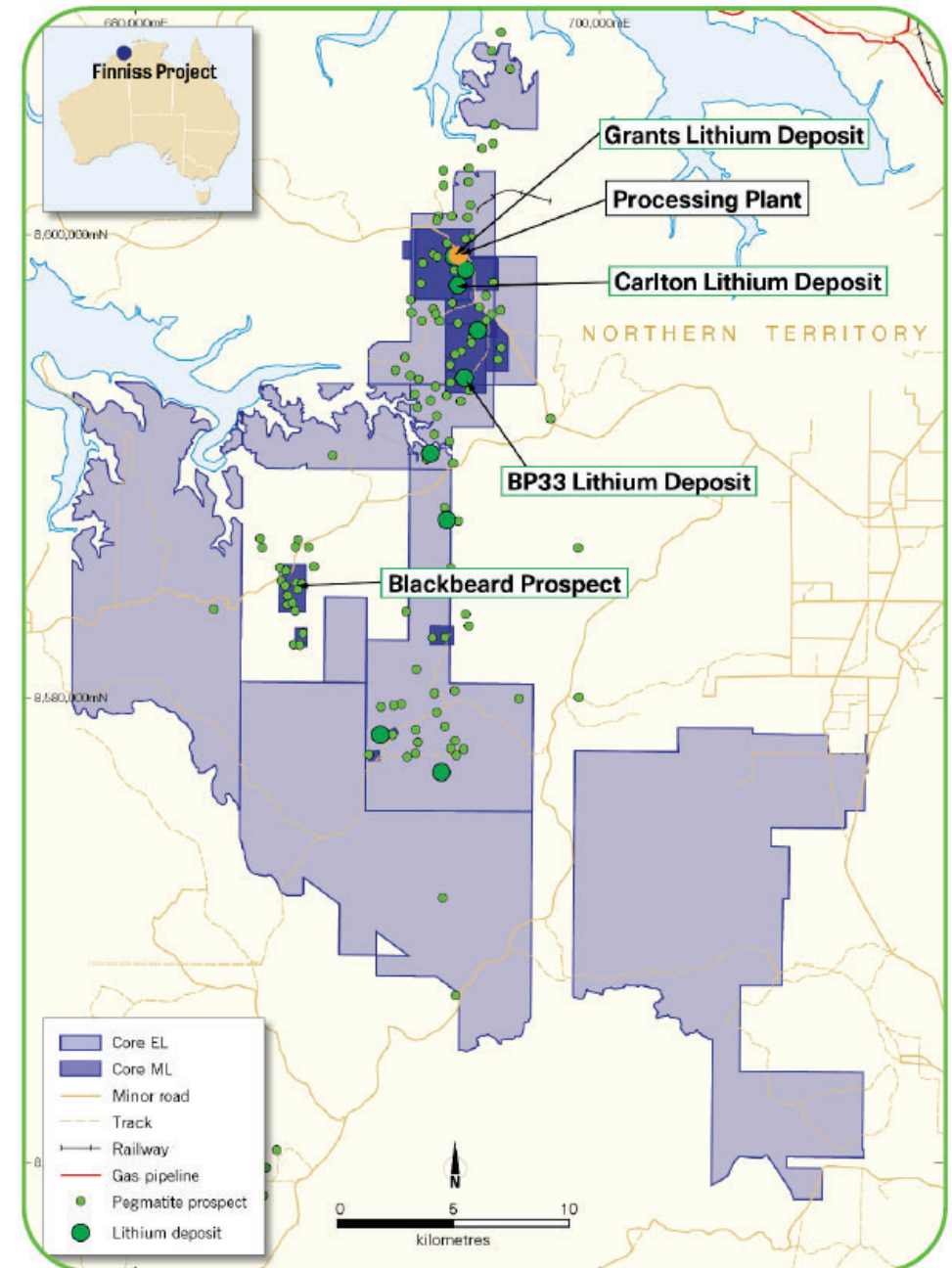
Lithium

Core Lithium - Finniss

- NT's first lithium mine, opened in 2022
- Entered temporary care and maintenance in June 2024
- 250% increase in contained Li since start of 2023
- Mineral Resource upgraded to **48.5 Mt @ 1.26% Li₂O**
- New discovery in 2024 at Blackbeard – 63 m @ 1.67% Li₂O

Updates in May 2025:

- 60% of future offtake now available
- Restart study released showing significant cost reductions for mining and processing; predicted unit operating costs for 6% spodumene concentrate of A\$690–785/t
- Planning up to 205,000 tpa spodumene concentrate production in 10 year mine life, with potential for 20 years



Lithium

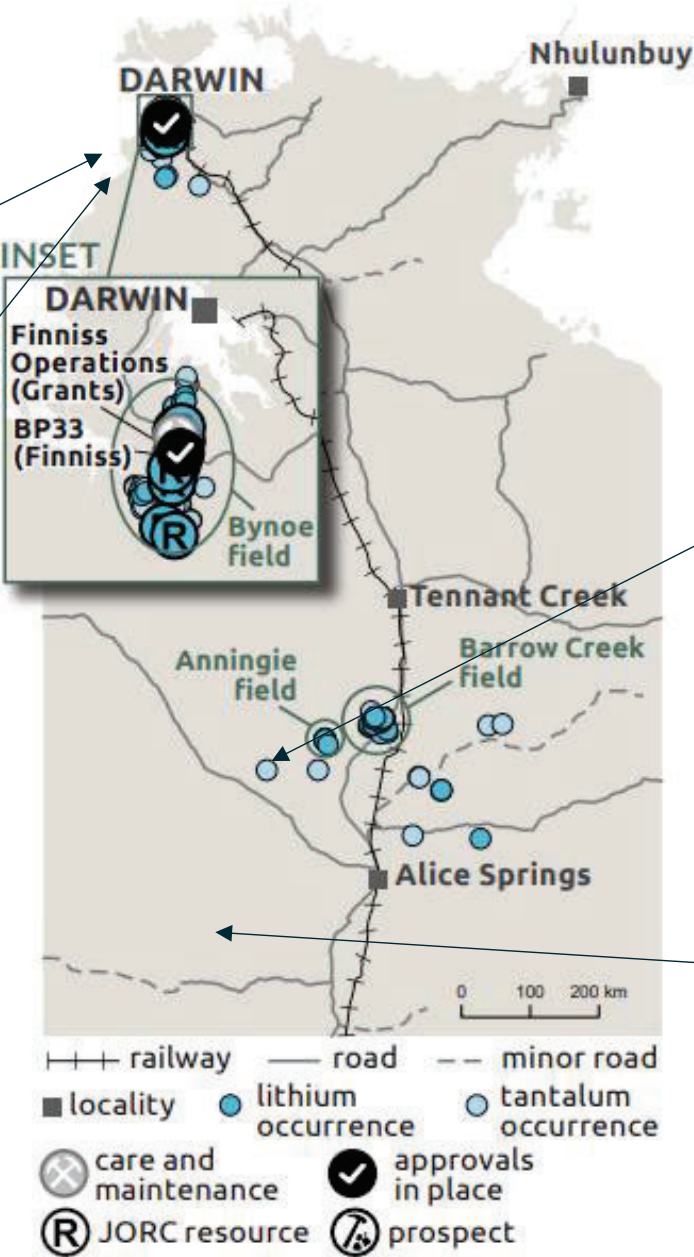


High-grade resource defined at Lei

4.1 Mt @ 1.43% Li₂O



Maiden drilling campaign in 2024 intersected spodumene pegmatites in eastern Bynoe field; assays pending



Spodumene pegmatites discovered at Mt Stafford tin field in 2024. Major Chilean lithium company **SQM** signed exploration farm-in agreement (April 2025).



Investigating potential lithium brine resource in Amadeus Basin

Rare earth elements (NdPr)

Arafura Rare Earths Ltd – Nolans

World-class resource of magnet-feed rare earths (NdPr),
130 km north of Alice Springs near railway

- On-site downstream processing to produce separated rare earths (including NdPr oxide)
- 66% of off-take secured with binding agreements with Hyundai Motor Co and Kia, Siemens Gamesa, Traxys
- Debt funding secured – US\$1.05B debt package including debt facilities from Euler Hermes (Germany), **KEXIM**, Export Development Canada, Northern Australia Infrastructure Facility and Export Finance Australia.
- A\$200 million investment commitment from Australian National Reconstruction Fund Corp. in January 2025
- Approvals in place, targeting FID 2025



Copper

Potential for copper (+ gold, cobalt, bismuth) production from Tennant Creek mineral field

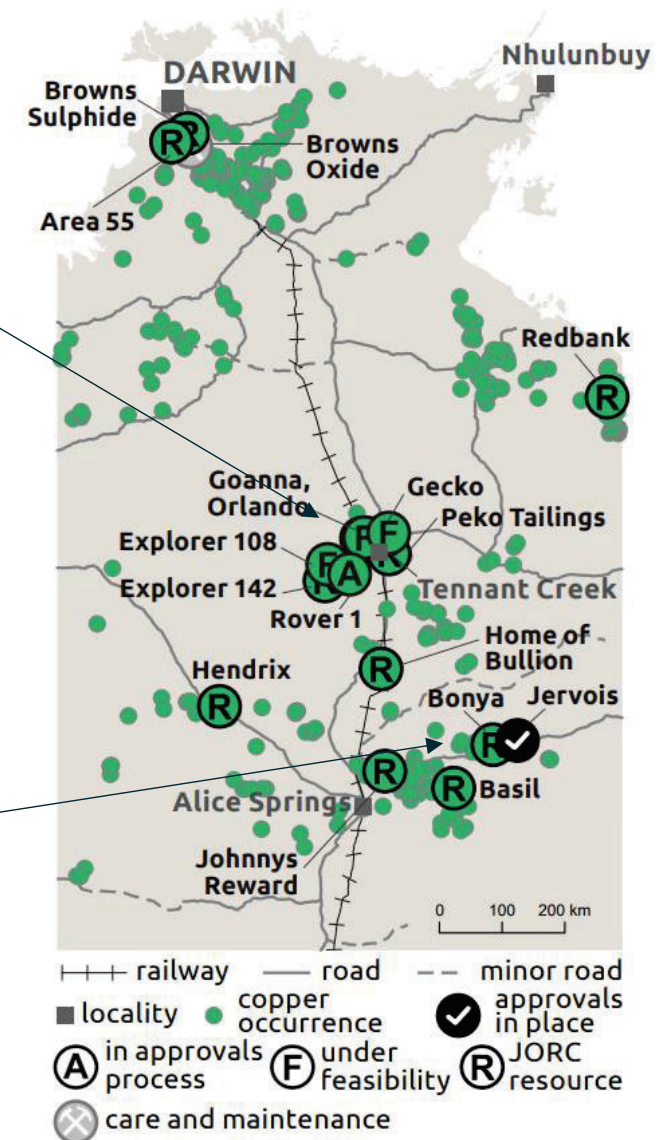
- Multiple companies assessing consolidation and development options including multi-user processing for copper, gold and critical minerals from multiple high-grade deposits (Tennant Mines, Emmerson Resources, CuFe Ltd, Tennant Minerals, Castile Resources)

More than 500 kt of contained copper in recent resource upgrades

- Tennant Mines Pty Ltd – Warrego:** 16.5 Mt @ 1.3% Cu, 1.1g/t Au
- CuFe Ltd – Gecko-Orlando:** 24.3 Mt @ 1.8% Cu, 0.56 g/t Au

KGL Resources Ltd – Jervois

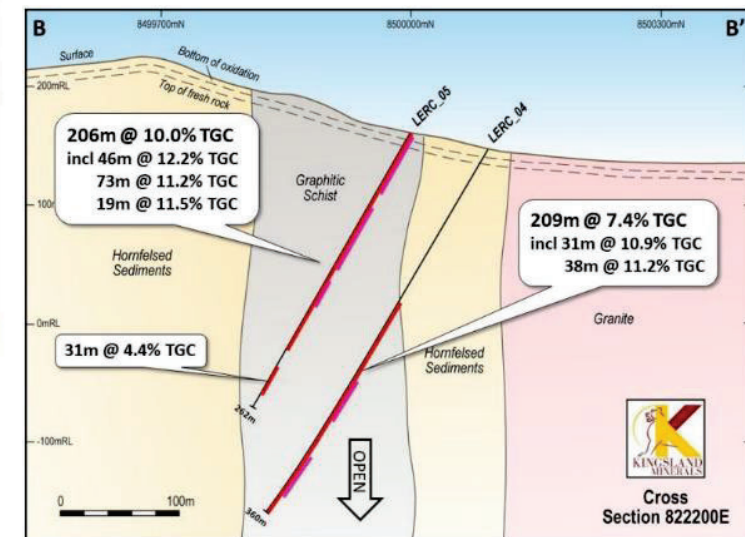
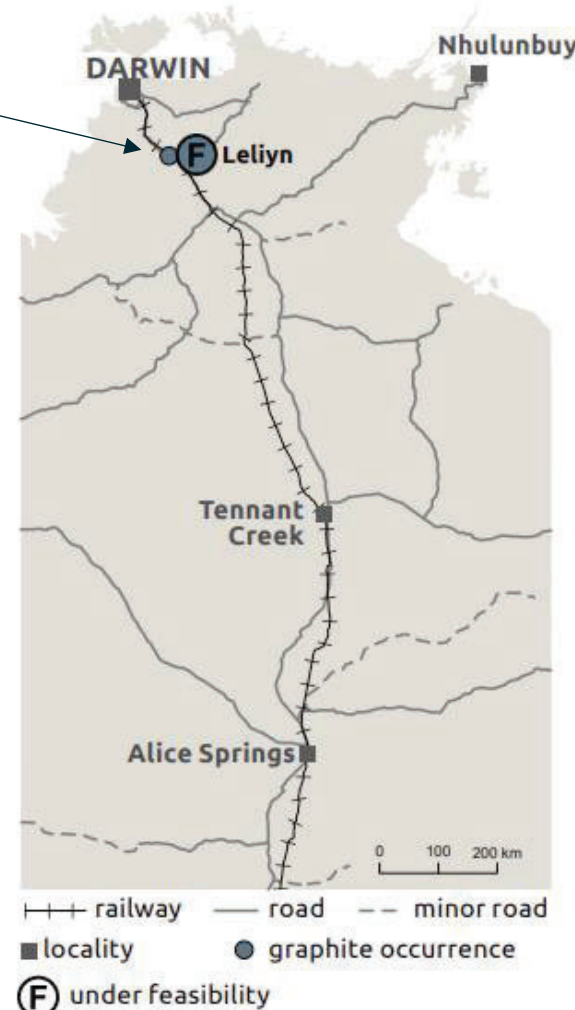
- NT's largest and most advanced copper project
- 27.45 Mt @ 1.87% Cu, 25.3 g/t Ag, 0.24 g/t Au**
- Proposed 10+ year mine, producing 30,000 tpa Cu (in concentrate).
- Revised feasibility study released February 2025
- Fully approved, seeking project finance



Graphite

Kingsland Minerals Ltd – Leliyn

- 200 km from port, close to rail
- Australia's largest graphite resource – discovered in 2023.
- Indicated & Inferred Resource:
192.5 Mt @ 7.3% TGC
- High grade graphite over substantial widths
Exploration Target 700–1100 Mt @ 7–8% TGC
- Metallurgical testwork demonstrates production of 99.97% purified spherical graphite, suitable for anode material
- Scoping study due for release Q3 2025
- Assessing gallium as a by-product
- Strategic partner Quinbrook investigating downstream graphite processing facility near Darwin.



Other opportunities

Magnesium

High-grade magnesite deposits located close to Darwin port (*Thessally Resources Pty Ltd*)

Phosphate

Australia's largest undeveloped phosphate deposits (*Avenira Ltd* and *Verdant Minerals Ltd*)

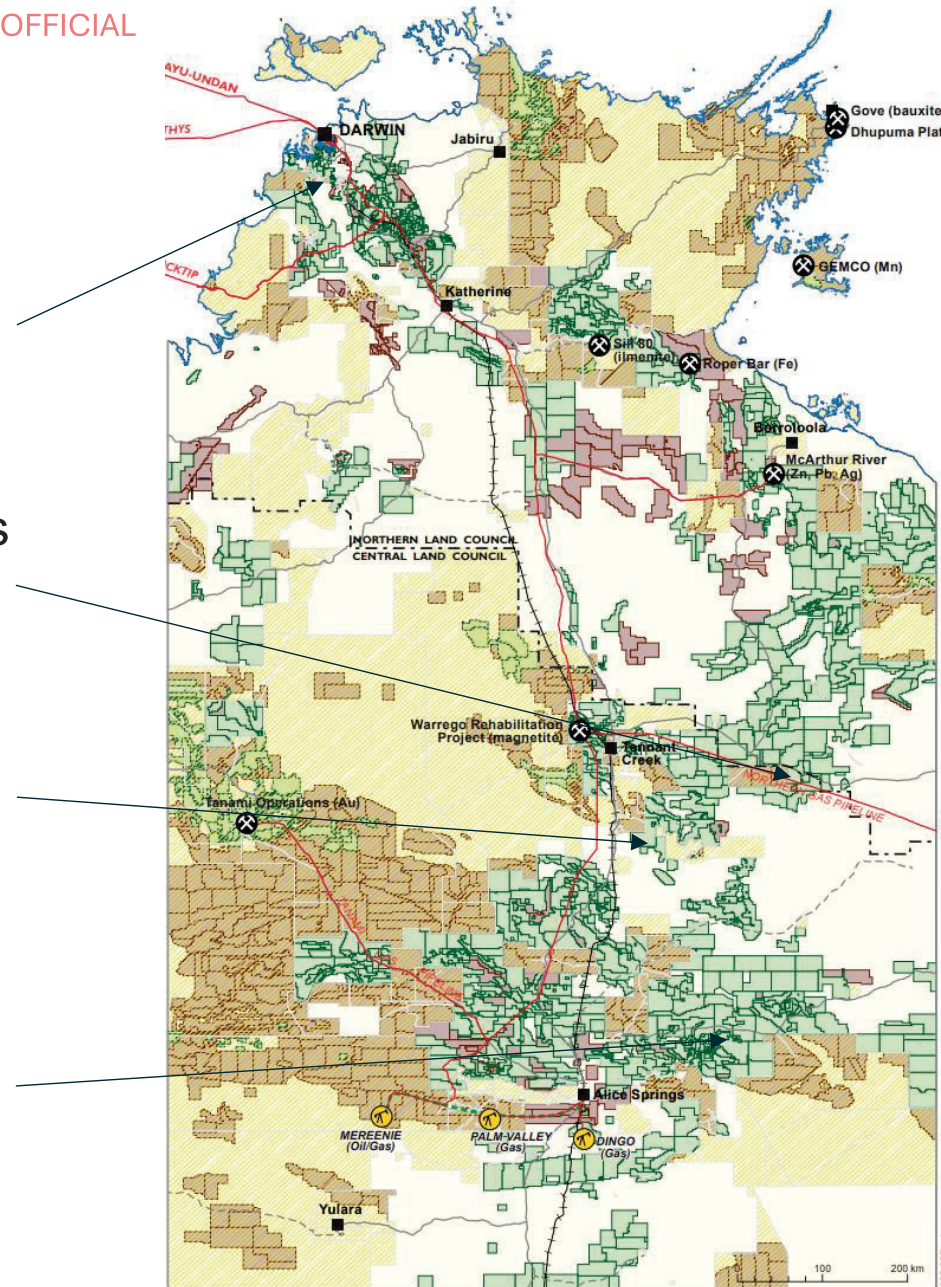
Tungsten

Advanced tungsten and W-Mo projects (*Investigator Resources Ltd* and *Tungsten Mining NL*)

Fluorite

Emerging high-grade fluorite project in central Australia (*Tivan Ltd* – Memorandum of Understanding signed with *Sumitomo Corporation*)

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Exploration
licences in the NT
Green = granted
Red = applications

Northern Territory Government support

Northern Territory Geological Survey

- Undertakes geoscience studies to improve the understanding of critical mineral potential
- Competitive exploration grant scheme available to industry to support and de-risk exploration
- Lead agency in the Northern Territory for progressing critical minerals MOU with JOGMEC (signed 17/07/2024)

Mining development reforms

- New mineral royalty regime (5% for concentrates; 3.5% for processed materials)

NT Government supports downstream processing

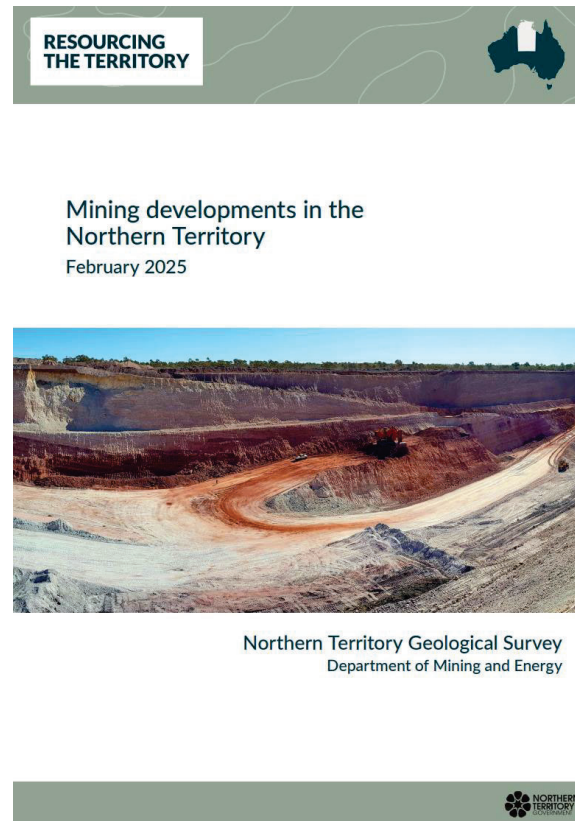
- Evaluating potential for low emission hydrocarbons, hydrogen, advanced manufacturing, CCS and minerals processing



For more information



Critical minerals in the
Northern Territory
(Japanese version)



Mining
developments
in the Northern
Territory



Resourcing the Territory website
www.resourcingtheterritory.nt.gov.au

Geoscience data and products
gemis.nt.gov.au
or email: geoscience.info@nt.gov.au

Geoscience and titles web mapping
strike.nt.gov.au

Contact me directly
Ian Scrimgeour
ian.scrimgeour@nt.gov.au
+61 8999 5377

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Queensland

Unlocking critical minerals for
a sustainable and innovative future

Paul Holden

Lead – Critical Minerals Queensland

Department of Natural Resources and Mines, Manufacturing and Regional
and Rural Development

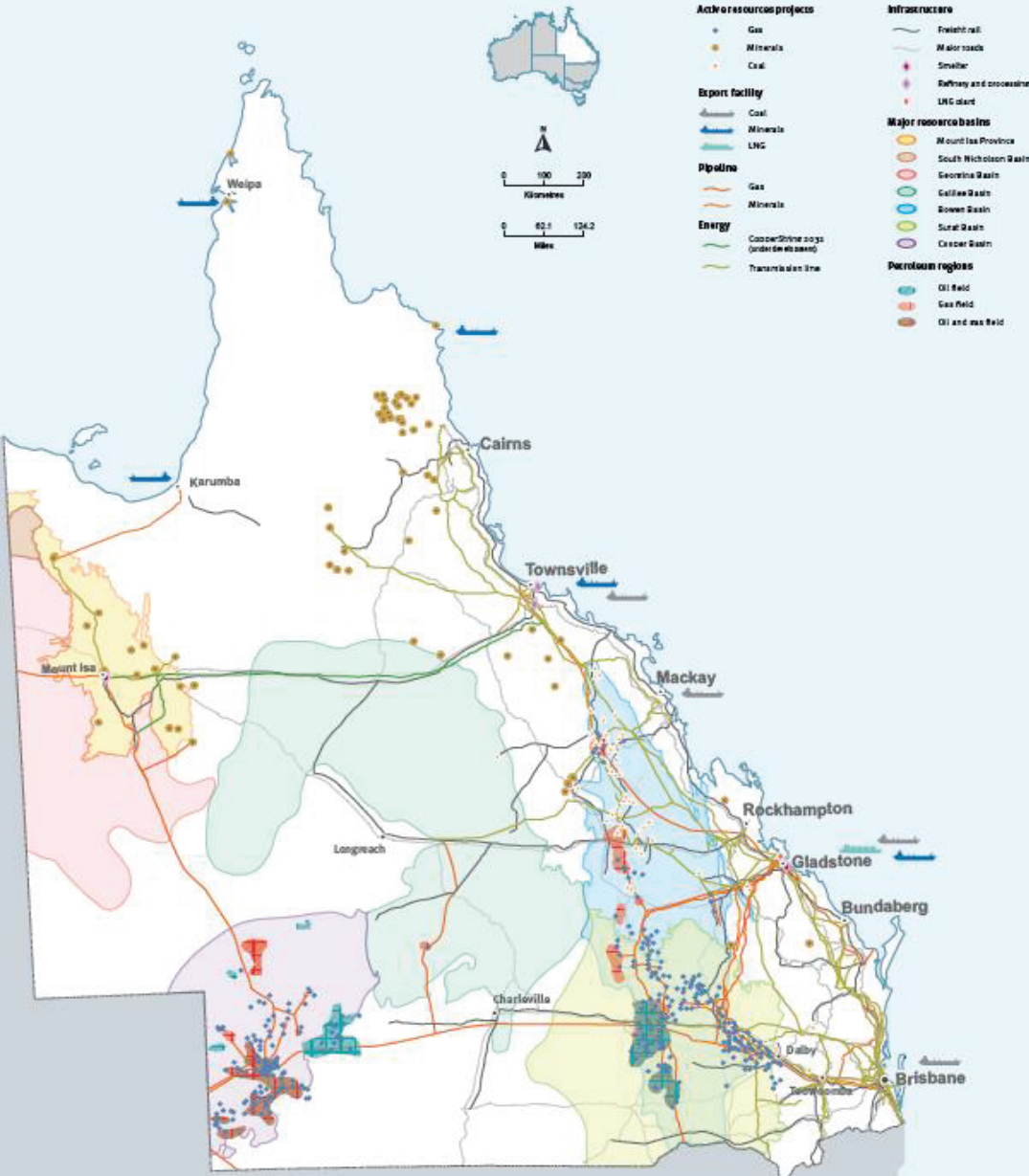


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MAP OF QUEENSLAND'S RESOURCES



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Queensland: a mining powerhouse

Queensland's leading industry

Mining is the state's largest industrial sector and a key economy driver

World-class resources

Home to globally significant mineral, coal and gas basins

Infrastructure advantage

Established network + ongoing investment in power and water

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Why Queensland?

- ✓ Queensland's biggest economic sector
World-class operations in copper, coal, gas
- ✓ Established infrastructure
Well developed transport and logistics networks
- ✓ Globally significant mineral deposits
Recoverable deposits of vanadium, copper, graphite, silica
- ✓ Strong wrap-around support
Comprehensive assistance for proponents AND investors



Queensland's mineral story: Powering the global transition

Strategic leadership

Resources Cabinet Committee (RCC) provides cross-agency coordination to accelerate approvals and bring government focus to resolving issues impacting the industry.

Streamlined approvals

RCC oversight reduces duplication and speeds decision-making, supporting the \$84B/year resources sector (25% of Queensland GDP) while boosting investor confidence and regional development.

Queensland Critical Minerals Strategy

Vision to position Queensland as a global leader in critical minerals, focusing on approval efficiency, investment attraction, value chain development, and ESG leadership. Delivered by Critical Minerals Queensland (CMQ).

Federal alignment

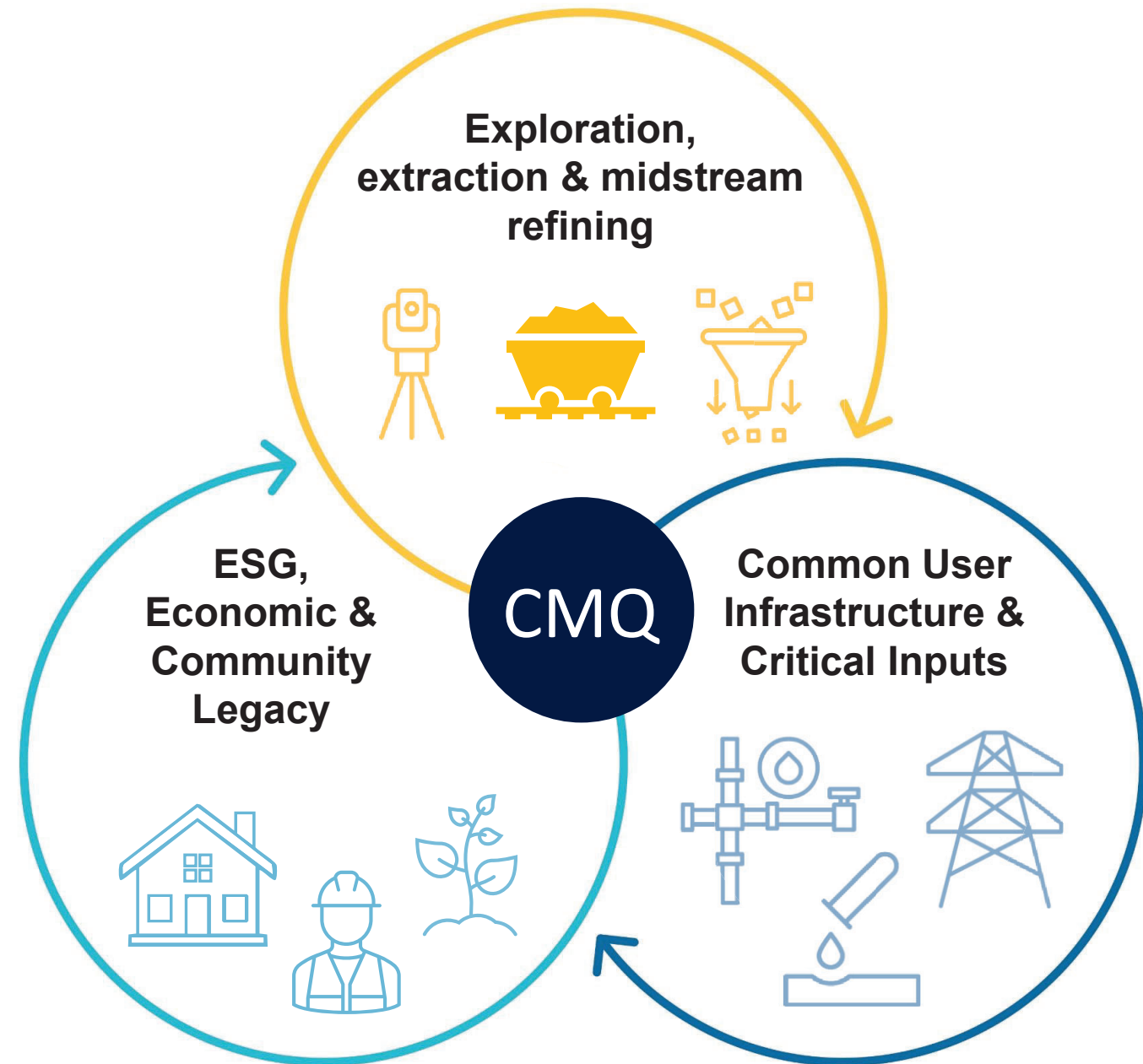
Queensland strategy complements the Australian Critical Minerals Strategy with shared goals of decarbonisation, sovereign capability, and global competitiveness.

World-class mineral assets

- Copper: Mount Isa region (50% of Australia's copper)
- Graphite: Esmeralda and Millennium Projects
- Other: Zinc, Lead, Bauxite, Rare Earths, Vanadium, Cobalt

Critical Minerals Queensland

- ✓ Move faster, smarter
- ✓ Maximise investment
- ✓ Build value chains
- ✓ Foster research and ESG excellence



Invested in success

1. Copperstring 2032
2. Qld Resources Common User Facility
3. Critical Mineral and Battery Tech Fund
4. Qld Critical Mineral Zones
5. Collaborative Exploration Initiative
6. Research and development Alliance
7. Qld Critical Mineral Prospectus





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Japan and Queensland: Valued Partners, New Opportunities

Energy security

Government-backed support
for both regions' energy
security and decarbonisation
journeys

Partnership facilitation

Facilitated partnership and
investment opportunities
between Japan and
Queensland

Industry support

Continued industry support and streamlined investment
approvals to strengthen bilateral relations

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Queensland Critical Mineral Prospectus



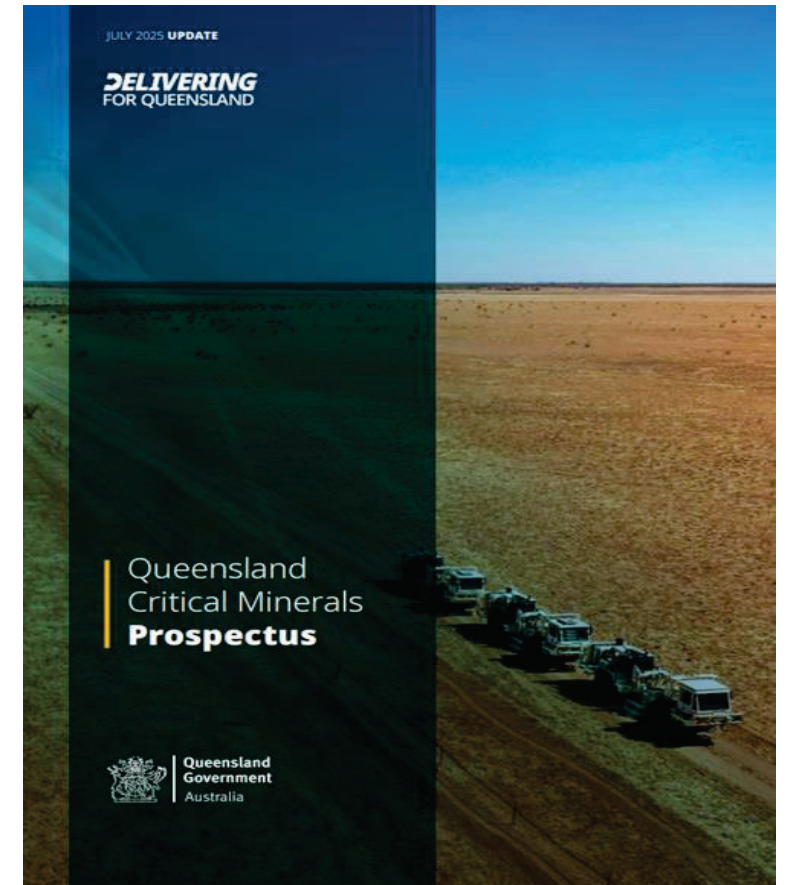
Paul Holden

Lead – Critical Minerals Queensland

P: +61 447 064 975

E: criticalminerals@resources.qld.gov.au

A: L11, 445 Flinders Street, Townsville QLD



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Thank you

Paul Holden
Lead – Critical Minerals Queensland
Department of Natural Resources and Mines, Manufacturing and Regional
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South Australia: The Copper State

Copper, Magnetite, Uranium, Natural Hydrogen

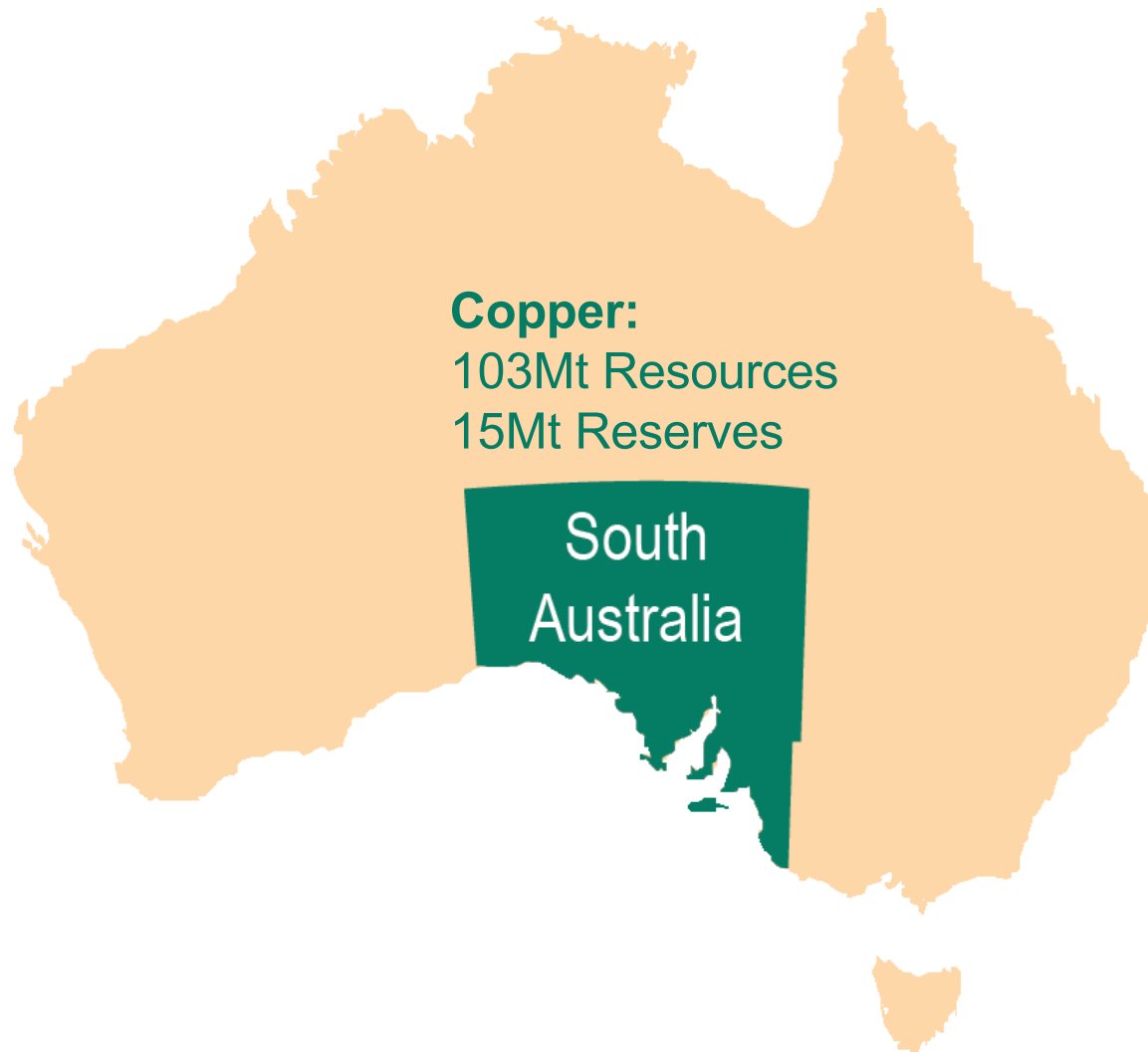
Dr Bronwyn Camac
Department for Energy and Mining
Geological Survey of South Australia



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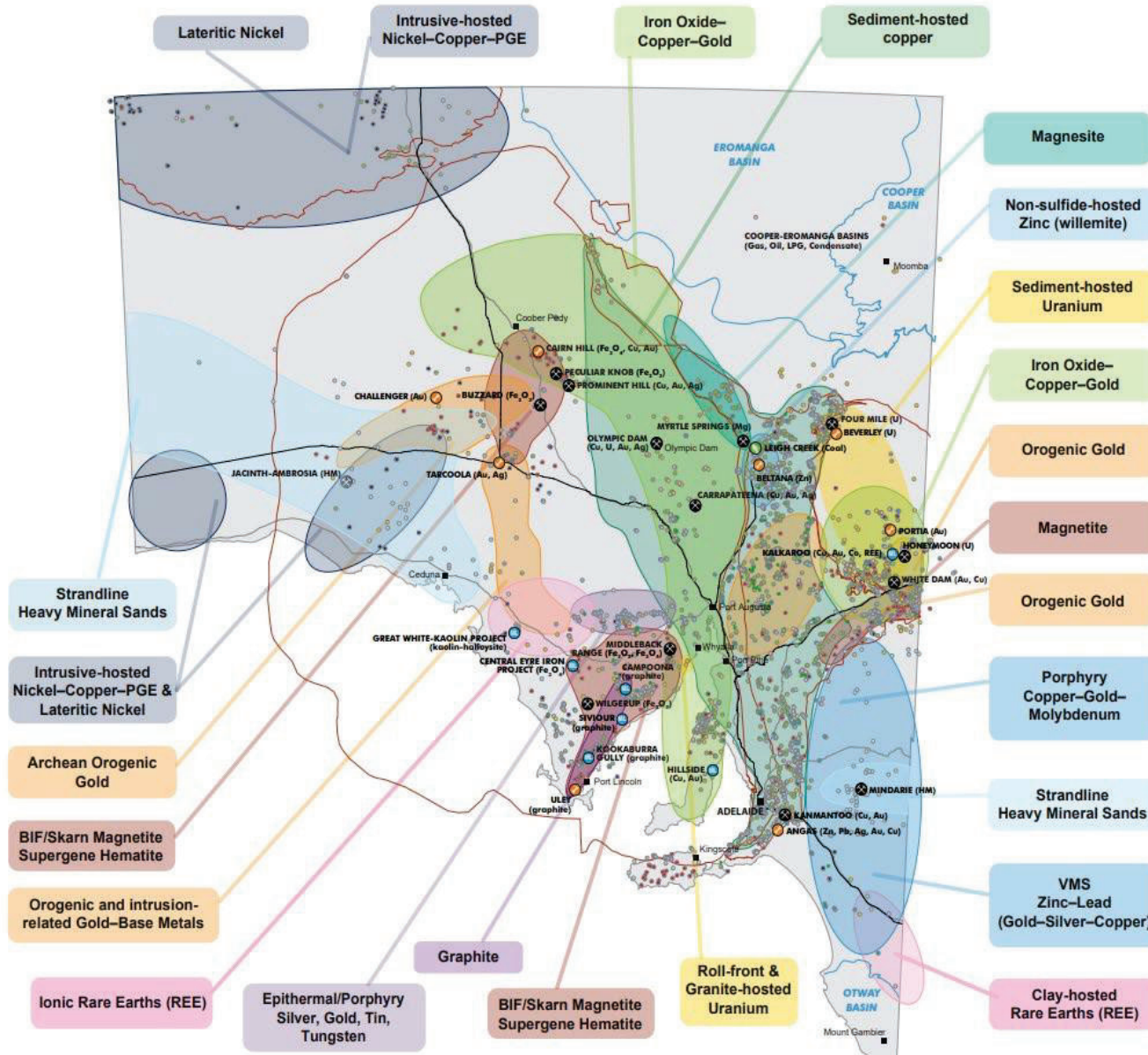
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South Australia: The Copper State



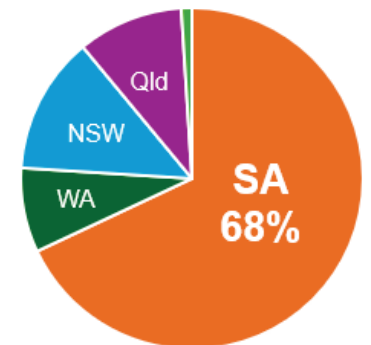
- South Australia has the largest economic demonstrated resource of copper within Australia
- Premier copper provinces include Olympic Dam Cu-Au and Curnamona, and the Adelaide Superbasin
- Commercially significant mineral systems include Iron Oxide-Copper-Gold (IOCG) +/- Uranium and Sedimentary Copper
- There is strong ongoing copper exploration with AUS\$204m spent in 2023–24 and copper production value of A\$4.36 billion in 2024
- South Australia has world-class precompetitive geoscience data and regulatory framework

South Australia: Copper | Graphite | Magnetite | Uranium | Critical Minerals

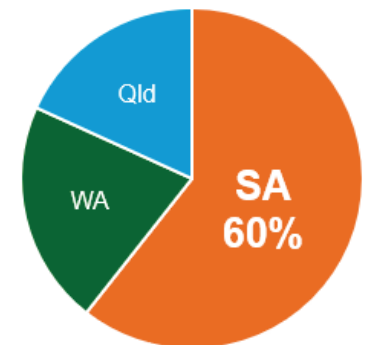


- Overlapping multi-commodity mineral systems
- South Australia hosts 68% of Australia's **copper** and 60% Australia's **graphite** resources*
- High-quality magnetite, feedstock for DRI and Green Iron manufacture
- Largest deposit of uranium in the world, 4th largest producer globally
- Proven resource for critical minerals:
 - Graphite
 - Rare earths
 - Magnesium
 - Mineral sands
 - Titanium
 - High-purity alumina

COPPER in AUSTRALIA



GRAPHITE in AUSTRALIA

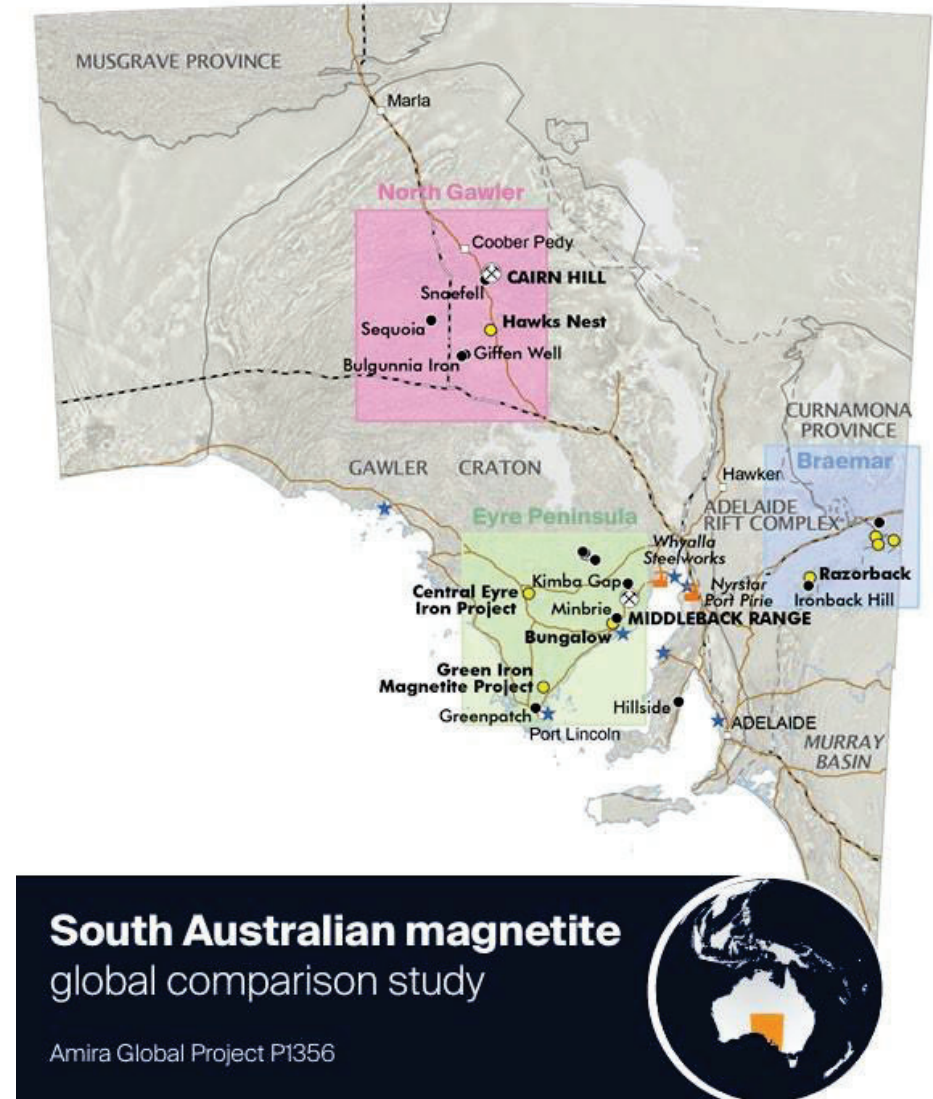


* Australia's Identified Mineral Resources | Geoscience Australia

World-class magnetite

- South Australia has a total of **19.6 billion tonnes** of JORC compliant magnetite ore, including **8.3 billion tonnes of Economic Demonstrated Resources**
- South Australia's magnetite deposits are situated in three regions; the North Gawler, Eyre Peninsula and Braemar iron regions
- BIF-hosted magnetite deposits in South Australia similar in style to some currently exploited deposits in Western Australia, Canada, and in the USA
- South Australia, by magnetite tonnage* **ranks third globally** following Canada and Western Australia
- Based on head and concentrate grades, magnetite recovery rates in South Australian deposits are comparable to those seen in economically viable mines currently operating in Western Australia and Canada
- Grinding size is variable across the deposits with some allowing for coarse grinding ($>100\ \mu\text{m}$), representing a significant advantage compared to many competitors globally
- Bond work demonstrates that some South Australian deposits host less abrasive magnetite ores compared to other regions
- Potential source rock for natural hydrogen accumulations

* from publicly available data



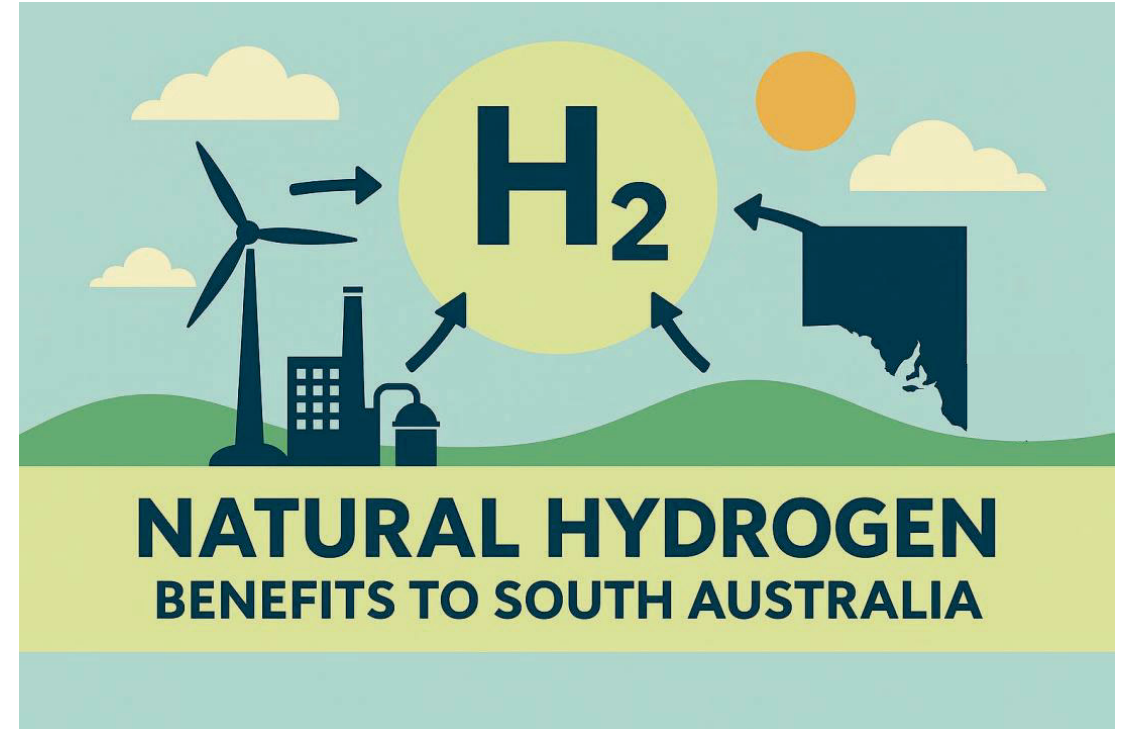
Natural Hydrogen – positioning South Australia as a global leader

Why South Australia?

- **Geological advantage:** Iron-rich and uranium-rich basement rocks, deep faults, and salt lakes
- **Historic evidence:** Drillholes from 1930s showed hydrogen concentrations up to **84%**
- **Regulatory support:** SA amended its **Energy Resource Act and Regulations** to include hydrogen

Key projects

- **Gold Hydrogen – Ramsay Project (Yorke Peninsula)**
 - exploring for natural hydrogen with the acquisition of 600 km of 2D seismic data and the drilling of two wells, Ramsay-1 and Ramsay-2
 - A gravity-magnetic-digital terrain geophysical survey was also acquired 10,529-line km, in 2023, along with soil gas surveys in conjunction with the CSIRO
 - Testing of Ramsay-1 and Ramsay-2 wells recorded hydrogen concentration of 95.8%, along with a new discovery of helium (36.9%)
 - Further drilling planned late 2025
- **H2EX – Eyre Peninsula**
- **2H Resources – Adelaide Fold Belt**



- ✓ Over **35 exploration licence applications** since 2021
- ✓ Active hydrogen systems confirmed
- ✓ SA's regulatory framework supports rapid development and investment

South Australia | Innovation

HyLogger™



5900

metres scanned
since delivery

1681

drillholes
available online

488,827

metres scanned
since 2013

SA Geodata Standardisation

Onsite Core Digitisation

SA Geodata Ready

Virtual Core
Collection

SA Core Library
Digitisation

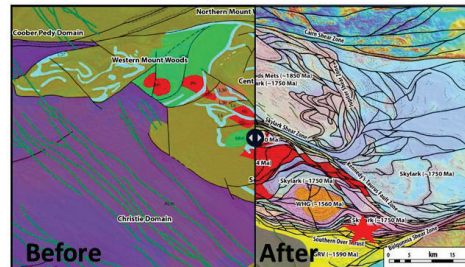
Future Data

**SARIG Core
Intelligence**

South Australian Discovery Mapping

- Increases the accessibility and usability of pre-competitive data delivered to industry.
- Delivered via SARIG and Web Services, which links geological processes across time and location and is future-proofed for new data integration.
- Spatial data integrated with text-based geological intelligence links spatial features with explanatory notes to create a more holistic understanding of the State's geology.

Example of improved mapping in the Mt Woods Domain, surrounding the Prominent Hill Mine



Access to seamless geology via SARIG, in GIS software and AI-ready

- GIS data package includes:
 - ESRI File Geodatabase
 - 45 spatial layers and symbology legend files
 - associated attribution tables with extensive detailed descriptions
- Web Service API includes:
 - IUGS CGI standards – National and International standard
 - Machine readable – future focus for next generation of digital AI/ML exploration



SARIG catalogue

Home Search Records FAQs Vocabularies SARIG map

SOUTH AUSTRALIAN RESOURCES INFORMATION GATEWAY
A place to find, access, share and connect to geoscientific information

Search catalogue

Search 30K records by keyword

BROWSE BY TYPE OF RECORD

Service 14 Model 31 Map 71 Document 29,9k Dataset 871 Application 6

EXPLORE BY CATEGORY

Exploration Energy Geology Geophysics Environment Spatial

EXPLORE BY COLLECTION

Departmental publications Produced by SA's Department for Energy and Mining	Legislation and guidance To regulate and aid in resource exploration and production in SA
Mineral exploration company reports Governed by the Mining Act 1971 and Mining Regulations 2020 of SA	Exploration initiatives Reports that were funded by a SA Government grant in aid of exploration
Mineral mining reports Governed by the Mining Act 1971 and Mining Regulations 2020 of SA	Geoscience reports and publications SA geoscience and resource sector news

Useful Links and Contacts | SOUTH AUSTRALIA



Government
of South Australia

Department for
Energy and Mining

Dr Bronwyn Camac

Director, Geological Survey South Australia, Department for
Energy and Mining

Bronwyn.camac@sa.gov.au

Sally Townsend

Regional Director South Australia – Japan & Korea,
Department of State Development

Sally.Townsend@austrade.gov.au



Government
of South Australia

Department of
State Development

Website links

Department for Energy and Mining [Energy & Mining | Energy & Mining](#)

- Geological Survey South Australia [Geological Survey | Energy & Mining](#)
- Minerals and Mining [Minerals and mining | Energy & Mining](#)
- Green Iron and Steel [Green iron and steel | Energy & Mining](#)
- Regulation [Regulatory services | Energy & Mining](#)
- Energy Resources [Energy resources | Energy & Mining](#)



**GEOLOGICAL
SURVEY OF**
South Australia

Department for State Development [Invest In Prosperity Projects SA](#)

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Thank you

Dr. Bronwyn Camac
Geological Survey South Australia
Department for Energy and Mining



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Minerals investment opportunities in Tasmania

2025 Update

Rebecca Sproule
Chief Government Geologist
Mineral Resources Tasmania



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Lutruwita/Tasmania

The 'Island State'

- 0.9% of Australia's landmass
- Incredibly diverse geology and rich mineral endowment
- Highest critical mineral 'deposit' density in Australia (25 per 100,000 km²)
- Products of mining and mineral processing constitute >65% per cent of mercantile exports



Tasmania – mining-friendly jurisdiction

- **Supportive government:** The government actively promotes mining through policies, legislation and initiatives designed to minimize sovereign risk.
- **Established approvals processes:** Predefined authorisation workflows
- **Sustainable energy:** Net zero in emissions, powered by hydroelectricity and wind farms – sets us apart from the rest of Australia
- **Robust infrastructure:** The region boasts well-developed infrastructure tailored to support mining activities with upgrades to rail and port facilities
- **Geological framework:** High-quality, freely available pre-competitive geoscience datasets to minimize exploration risks
- **Skilled workforce:** With over 100 years of mining history, the region has a highly experienced local workforce

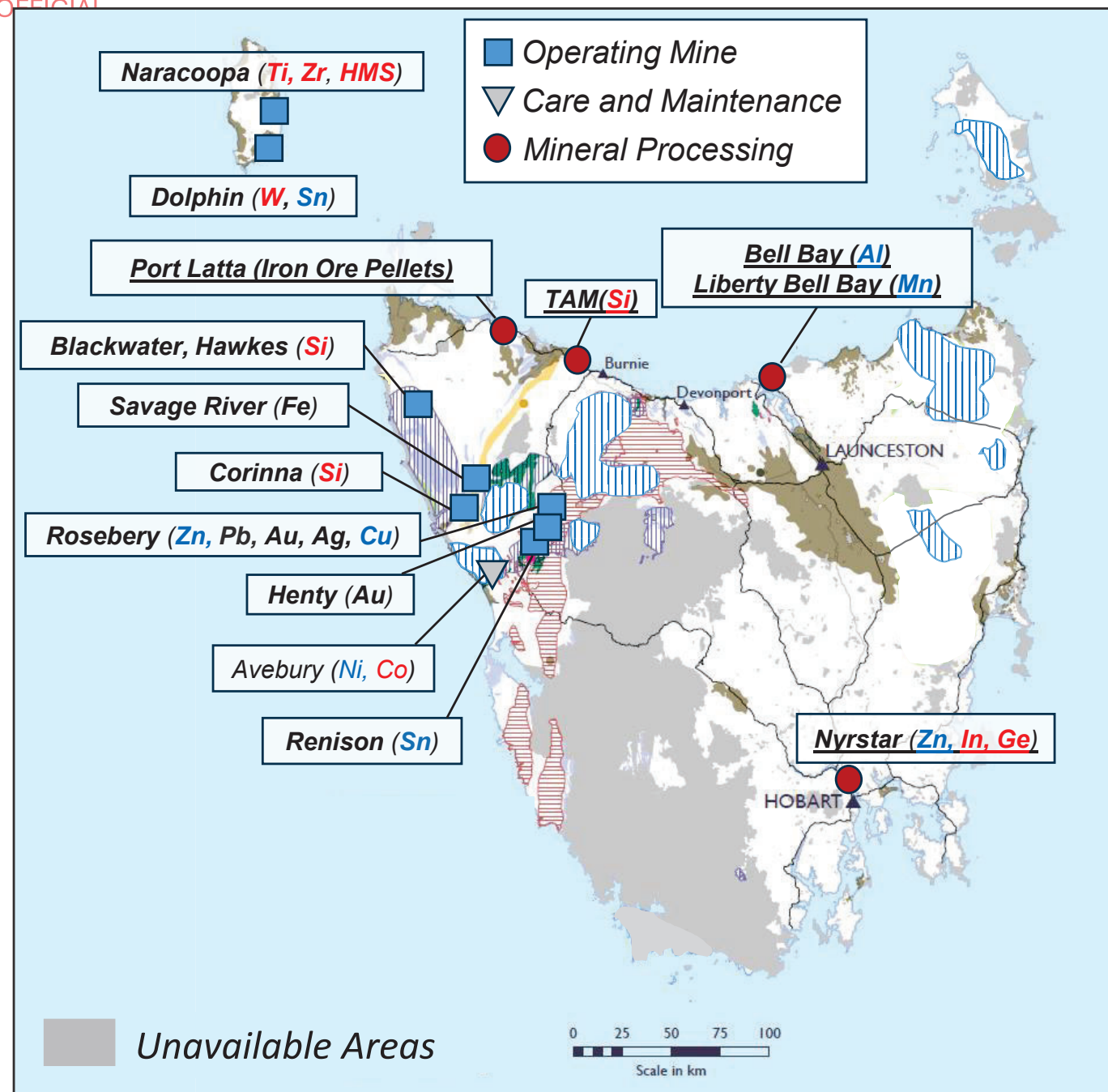


Current production and processing

Primary and by-product **production** and processing in a range of strategic, critical and precious minerals



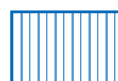
Production in bold
Processing underlined
 Strategic minerals in blue
 Critical minerals in red



A pipeline of opportunities

Exploration pipeline of developing projects in a range of commodities and further potential in prospective belts

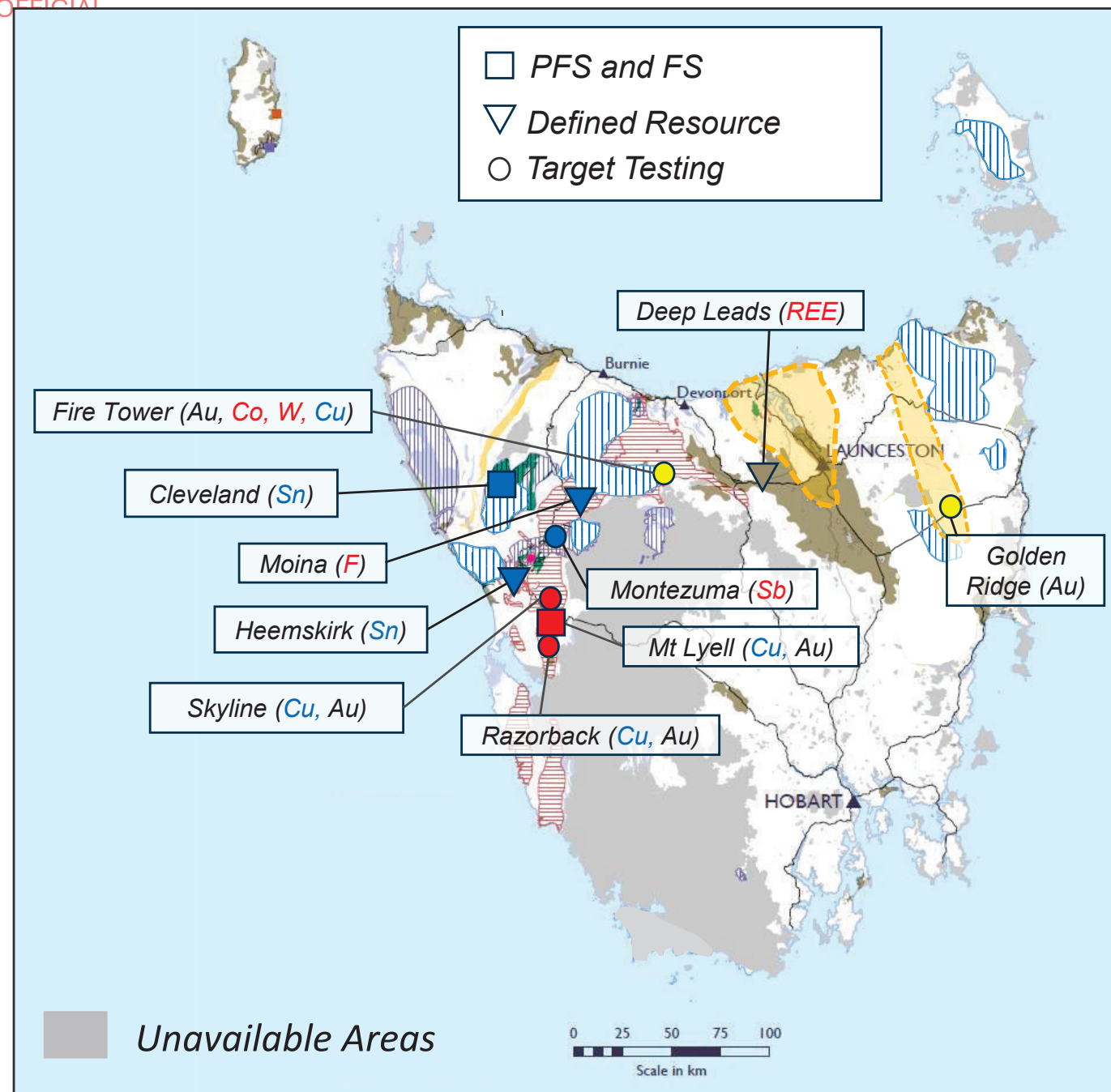
 **Cu, Zn, Pb, Au, In, Ge, Sb**

 **Sn, W, F, Sb, Cu, As**

 **Au, Ag, Sb**

 **REE, Ti, Zr**

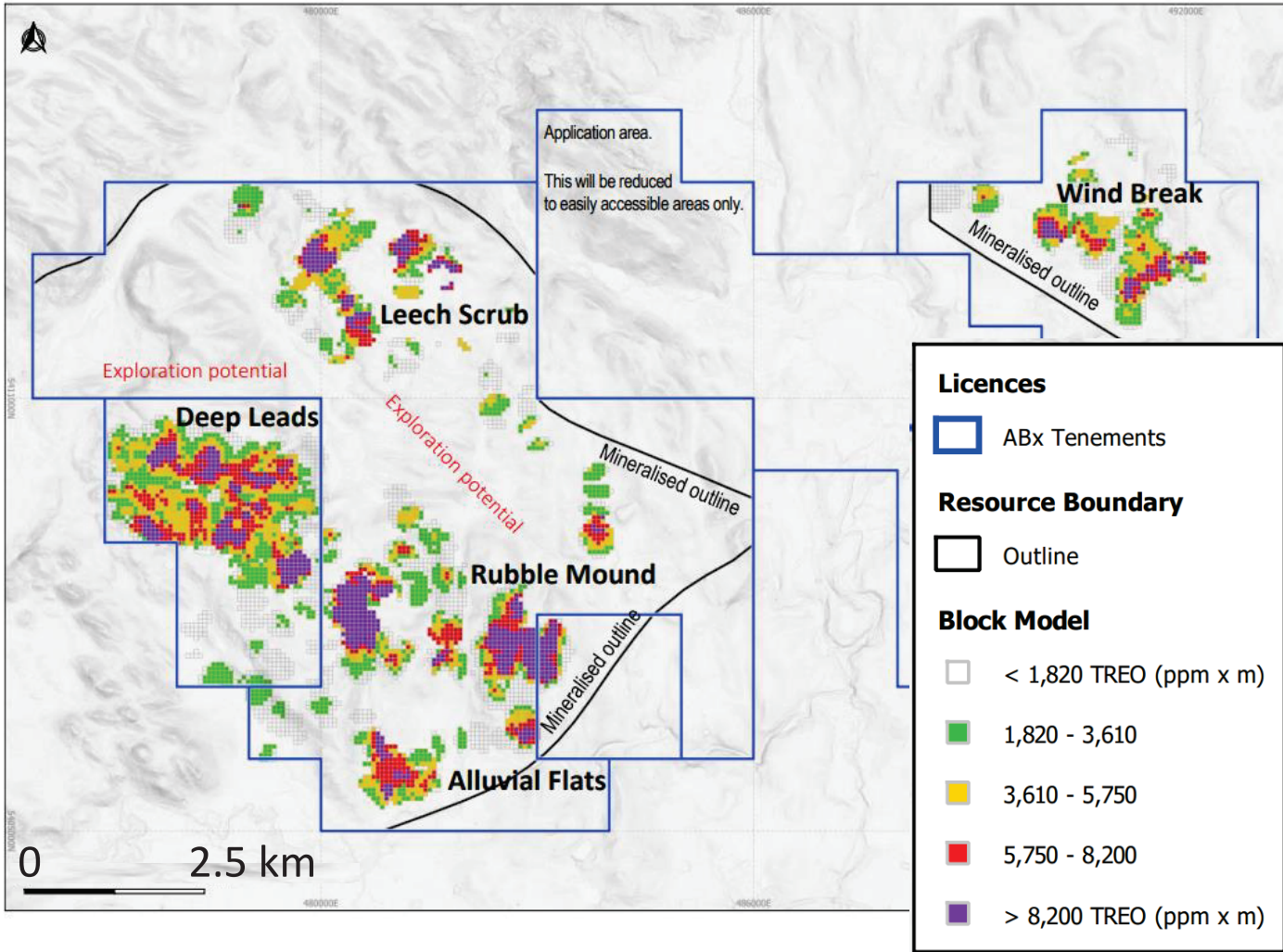
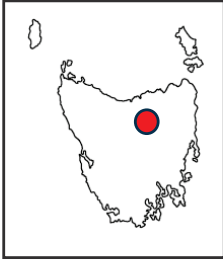
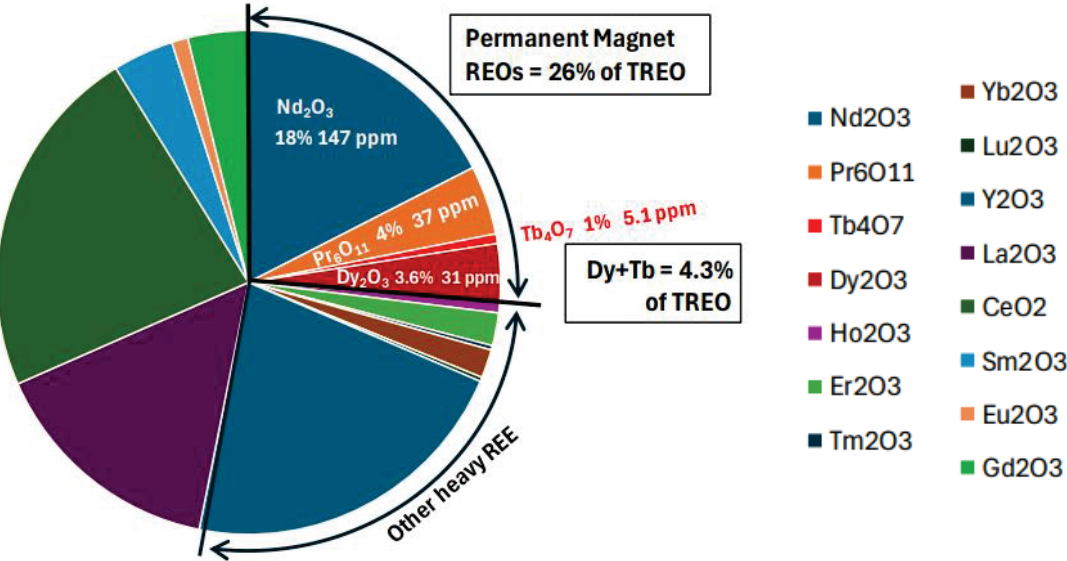
Production in bold
Strategic minerals in blue
Critical minerals in red



Project pipeline – Deep Leads

Rare earth elements

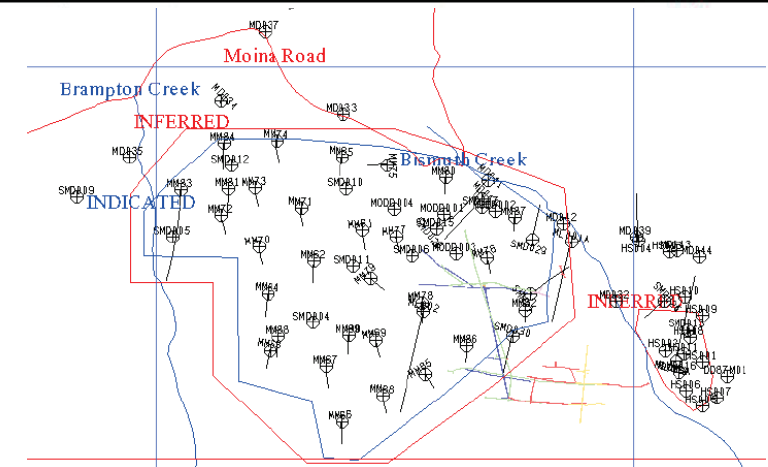
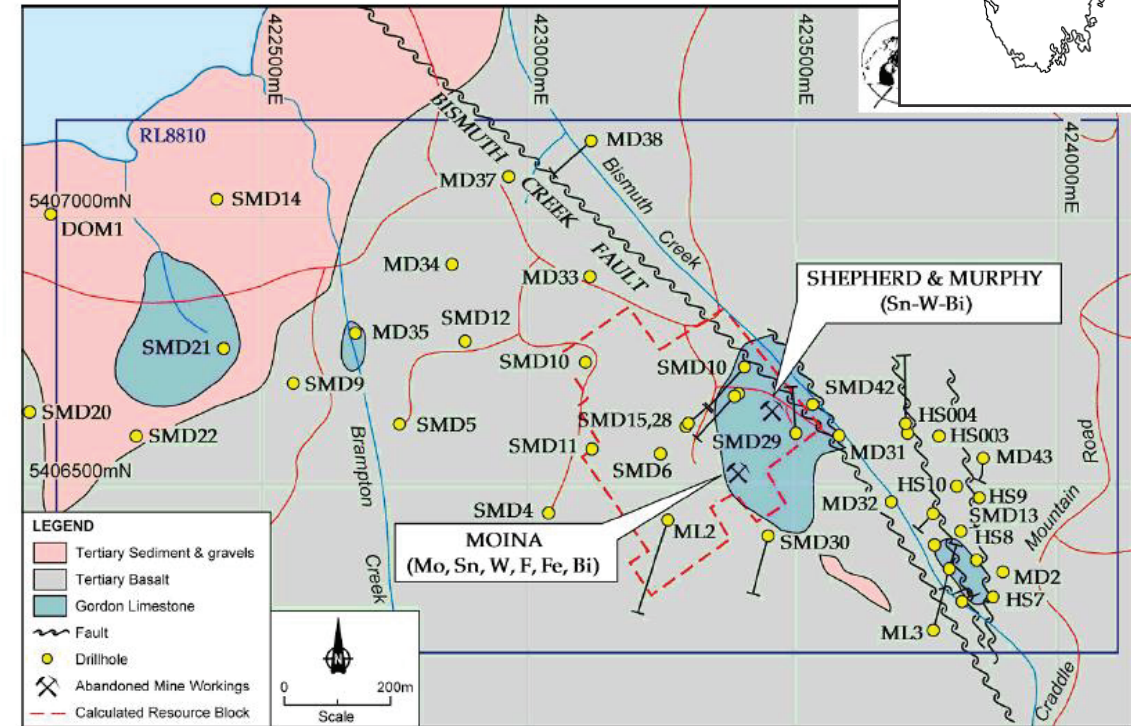
- 89 Mt at 844 ppm TREO (May 2024) based on drill out of only 29% of identified mineralized outline
- Ionic adsorption clay (IAC) type with highest Dy and Tb proportions of any IAC worldwide
- Highly favourable testwork with high rare earth extraction in 30 minutes at pH4 with low acid consumption



Project pipeline – Moina Wrigglite Skarn

Fluorite

- Historic drill recent drilling have been used to define a resource at the Moina Wrigglite Skarn:
 - 59.2 Mt at 6.0% F indicated, with 0.11% Sn and 595 pm W
 - Cited as Australia's largest F resource
- Drilling planned to bring inferred resources to indicated
- Pre-feasibility studies in progress



Project pipeline Stellar Resources – Heemskirk

Tin

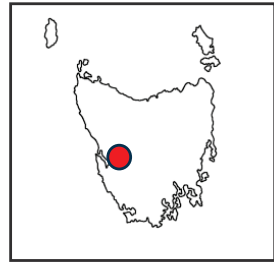
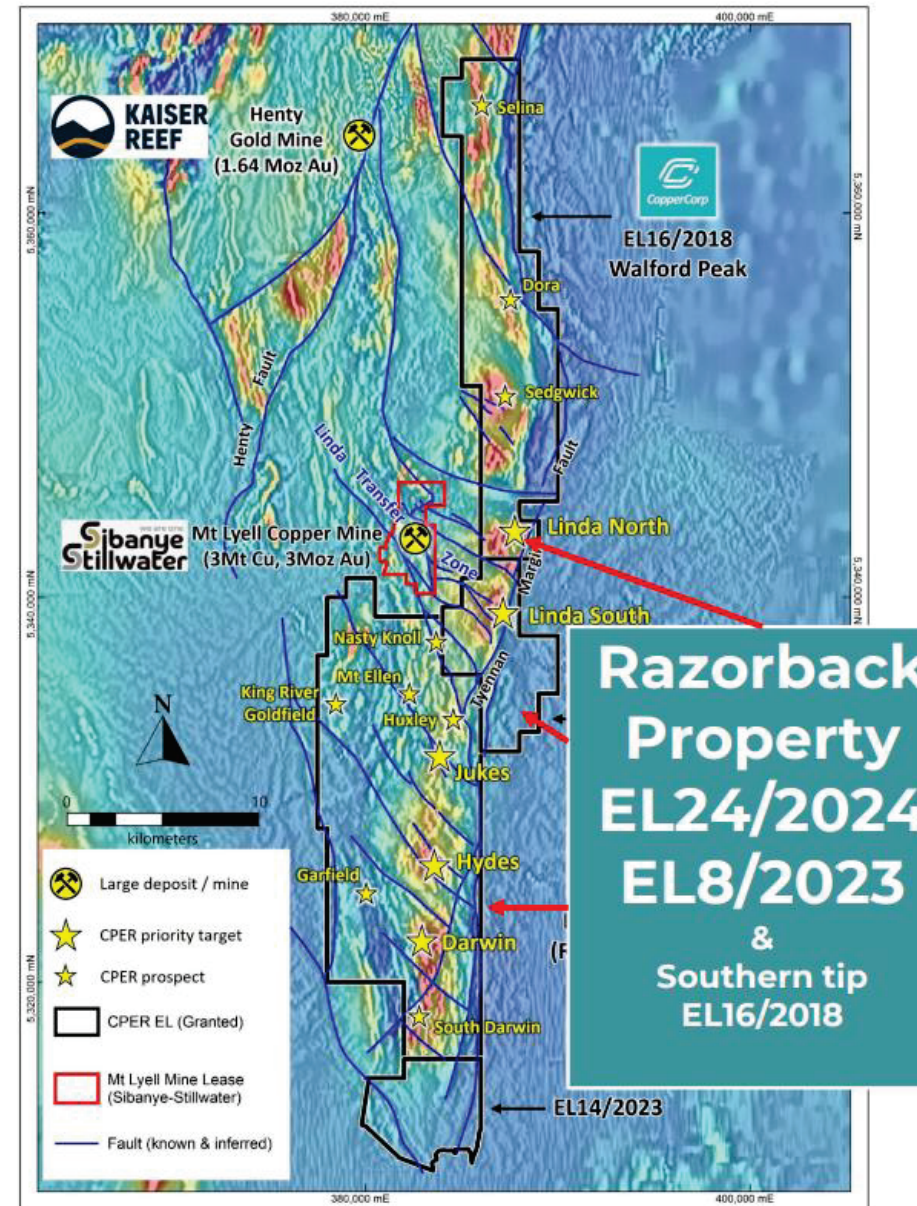
- Total resource of 7.5 Mt @ 1.04% Sn (77.9 kt contained Sn)
- Resource open at depth
- Favourable metallurgy (97% cassiterite) with 69% recovery in 2019, anticipated to increase to 75%
- Pre-feasibility studies in progress
- Off-take unencumbered



Project pipeline – CopperCorp

Copper

- Skyline and Razorback projects along trend of world class Mt Lyell Cu-Au deposits
- 23 km of strike length
- Early exploration stage
- Highest priority targets at Jukes and Hydes
 - Jukes (Dec 2024 drilling)
 - 132 m @ 0.35% Cu & 0.19 g/t Au (from 72.0 m)
 - 50 m @ 0.66% Cu & 0.27 g/t Au (from 498.0 m)
 - Hydes channel sampling
 - 24m @ 0.74% Cu & 0.36 g/t Au, including 14 m @ 0.97% Cu & 0.56 g/t Au

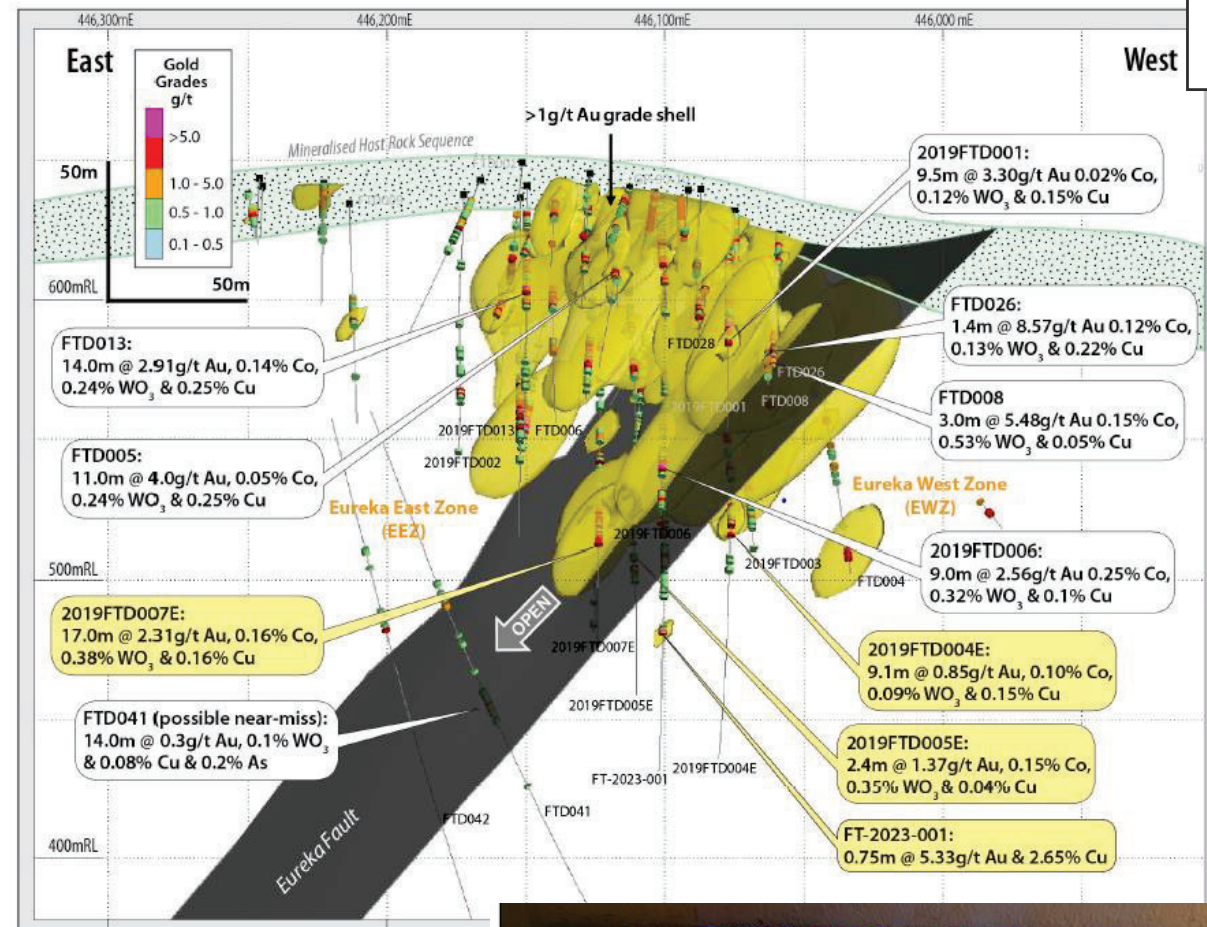


Jukes high grade

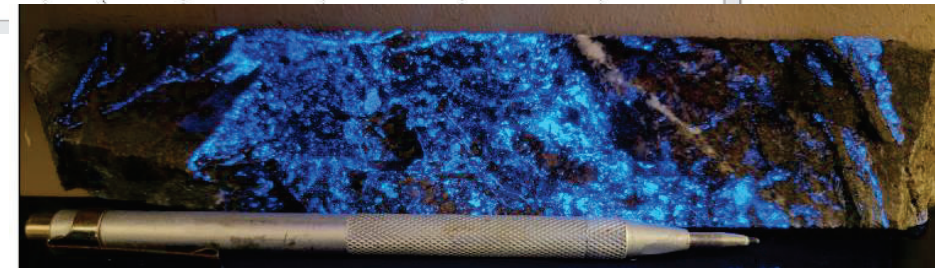
Project pipeline – Firetower Au-Co-W-Cu

Tungsten

- Prior exploration for Au but recent work has identified anomalous W
- New geological interpretation – defined Eureka East Zone
- Best intersection:
17 m @ 5.37 g/t Au and
5.5 m @ 3.27g/t Au, 0.24% Co, 0.53% WO₃ and 0.33% Cu



Section with
preliminary model



For further information



Rebecca Sproule – Chief Geologist

rebecca.sproule@stategrowth.tas.gov.au

+61 439 357 387

Mineral Resources Tasmania team

info@mrt.tas.gov.au

+61 3 6165 4800

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Thank you

Rebecca Sproule
Chief Government Geologist
Mineral Resources Tasmania



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Victoria's Critical Minerals Opportunities: Antimony, mineral sands and more

Shannon.Brown@deeca.vic.gov.au

Acting Manager – Exploration and Development
Resources Victoria



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Victoria: Where in the world?



Victoria: a world-renowned jurisdiction

Capital: Melbourne ([one of world's most livable cities](#))

Population: 6.59 million (75% in Melbourne)

- [Highly skilled](#) residential workforce
- World class research institutions
- Thriving METS sector
- Excellent transport linkages
 - Widespread rail
 - [Melbourne Airport](#)
 - [Port of Melbourne](#)
- World-leading emission reduction targets
- Long gold mining history



Victorian investment support for Japanese companies

Tokyo Office

Victorian Government Trade and Investment
Level 12, Fukoku Seimei Building
2-2-2 Uchisaiwai-cho, Chiyoda-ku
Tokyo 100-0011, Japan



Mr Adam Cunneen
Commissioner for Victoria to North Asia
Location: Tokyo

Email Adam
+81 3 3519 3371
+81 3 3519 3375



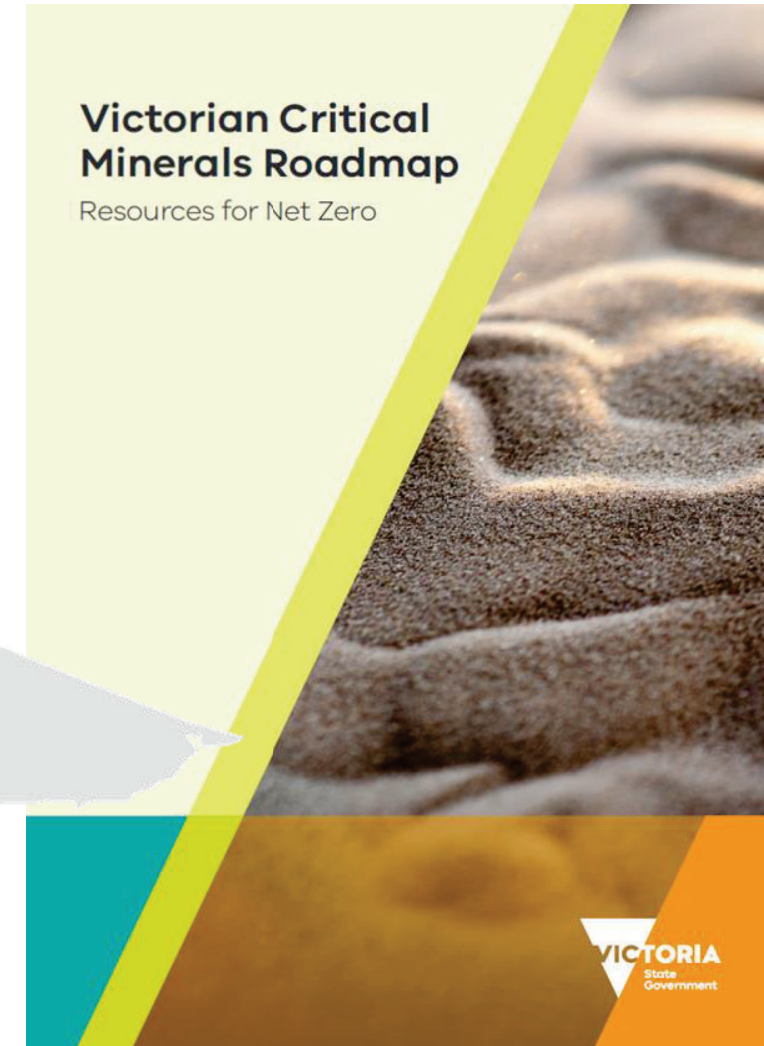
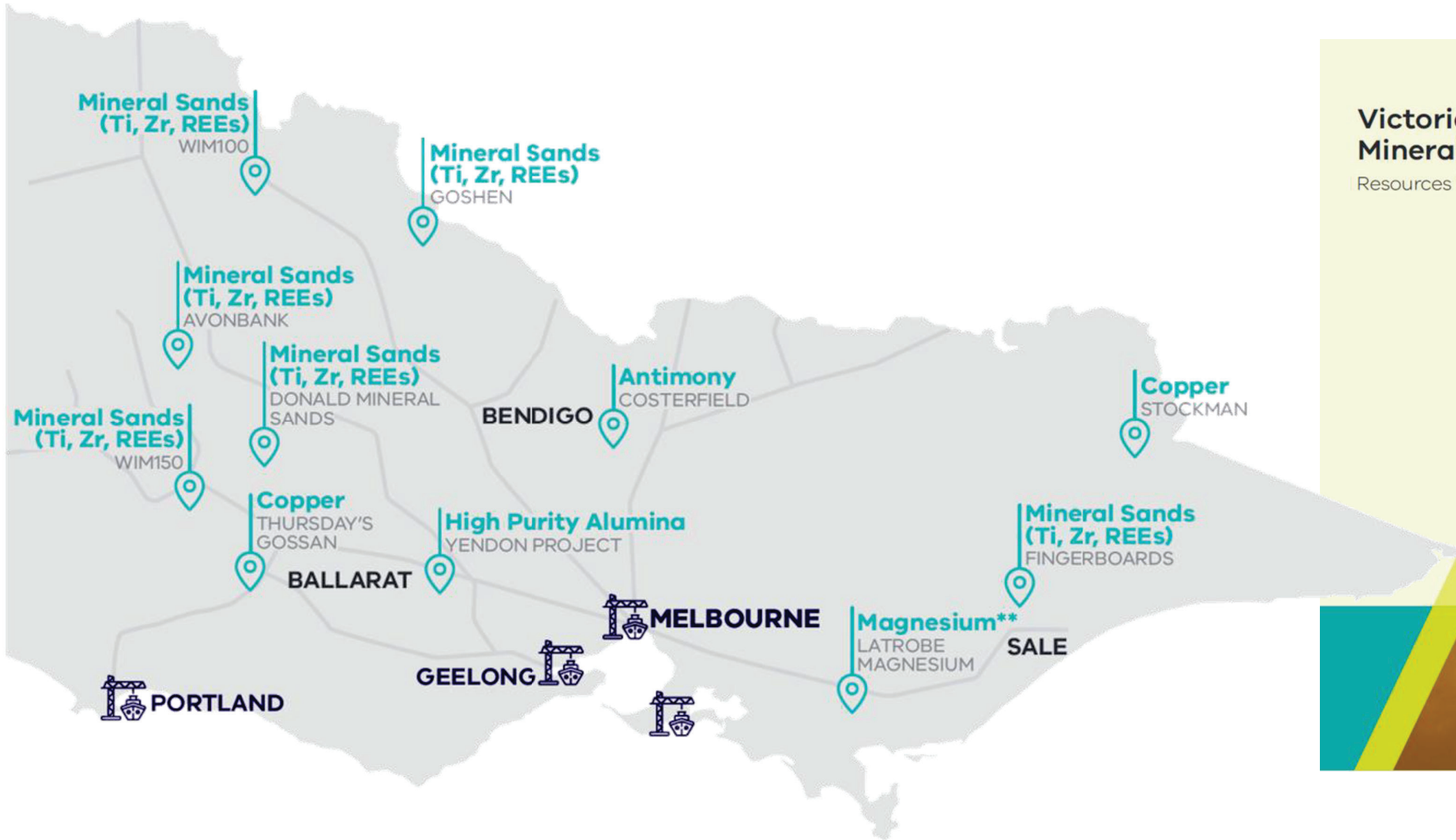
Ms Kiyoko Ozawa
Senior Investment Director_
Location: Melbourne

Email Kiyoko

**INVEST
VICTORIA**

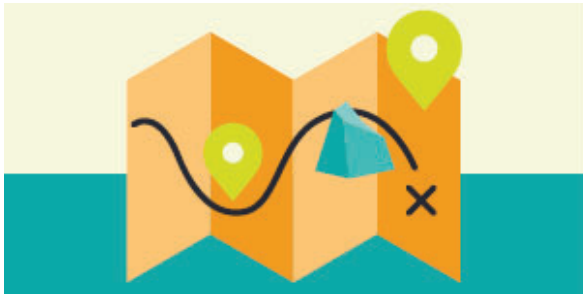
GLOBAL VICTORIA

Demonstrated critical minerals resources



[Download here](#)

The Victorian Critical Minerals Roadmap



Theme 1: Mapping the opportunities

Identify and promote new critical minerals opportunities using modern geoscience data and knowledge.



Theme 2: A modern regulatory regime

Establish a Victorian Critical Minerals Coordination Office to engage industry on processes and standards and reduce approvals timelines.



Theme 3: Critical minerals production and processing

Investigate potential economic and national supply security benefits from downstream processing facilities in Victoria.



Theme 4: Sharing the benefits of Victoria's minerals

Investigate benefit sharing models for local communities and Traditional Owners, balancing the interests of stakeholders to optimise social, environmental and economic outcomes.

Costerfield: Australia's only producing antimony mine

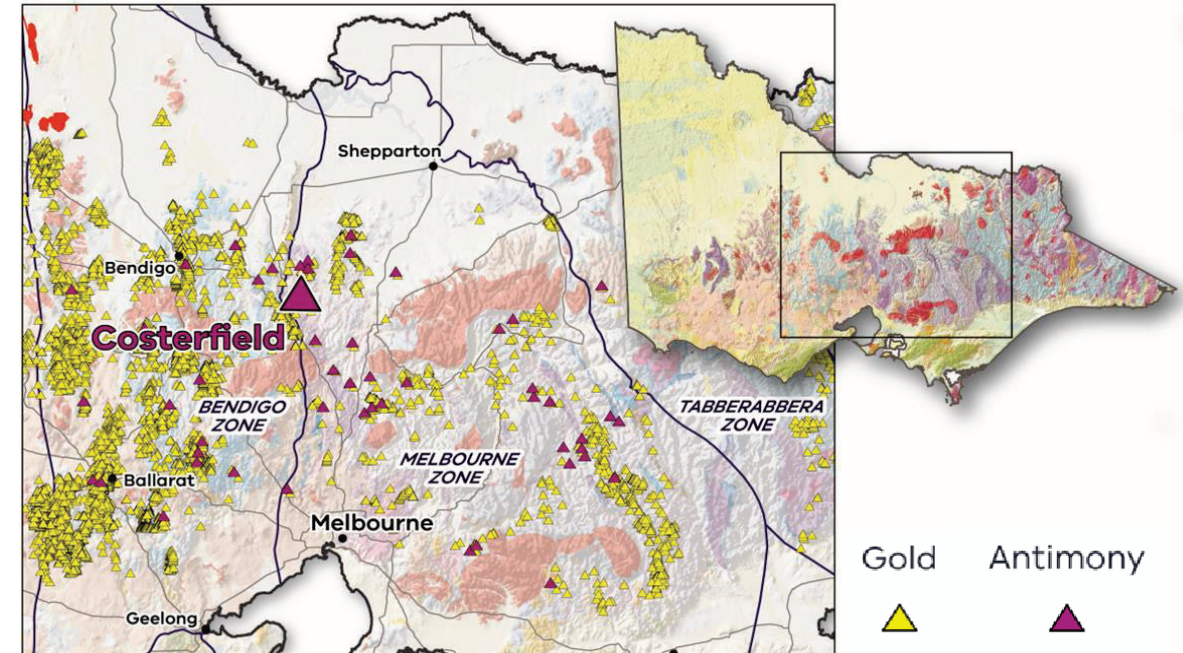
Alkane Resources' Costerfield gold-antimony mine is the largest producer of antimony outside of China, Russia, and Tajikistan.

2024 old production	Gold grade	2024 antimony production	Antimony grade
43,346 ounces	11.05 g/t Au	1,282 tonnes	1.83% Sb

Reserve: 604 kt @ 8.7 g/t Au and 1.8% Sb for 168,000 oz Au and 11,000 tonnes Sb

Critical uses:

- Semiconductors
- Solar panels
- Batteries (liquid metal (Sb-Ca) and Na-ion anode)
- Fire retardants
- Defence



Drilling is uncovering new areas for resource extension and production



[True Blue intercept from TB031](#)

Multiple explorers discovering Victoria's antimony

Southern Cross Gold – Sunday Creek Project

Mineral exploration target:

66.6 – 88.2 kt antimony and 1.7 – 2.6 Moz gold

Exceptional drilling results:

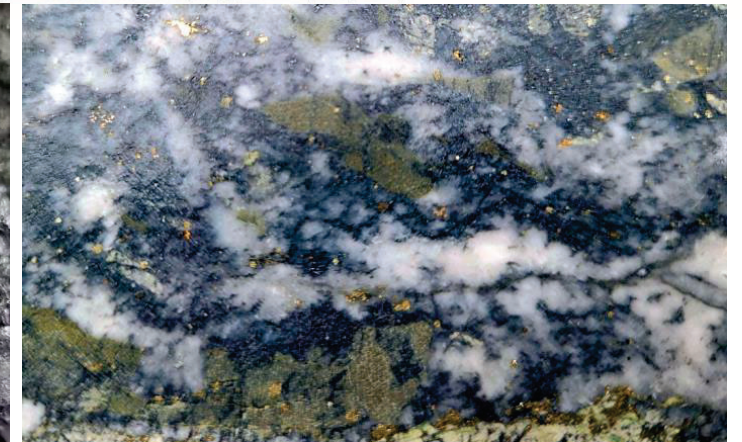
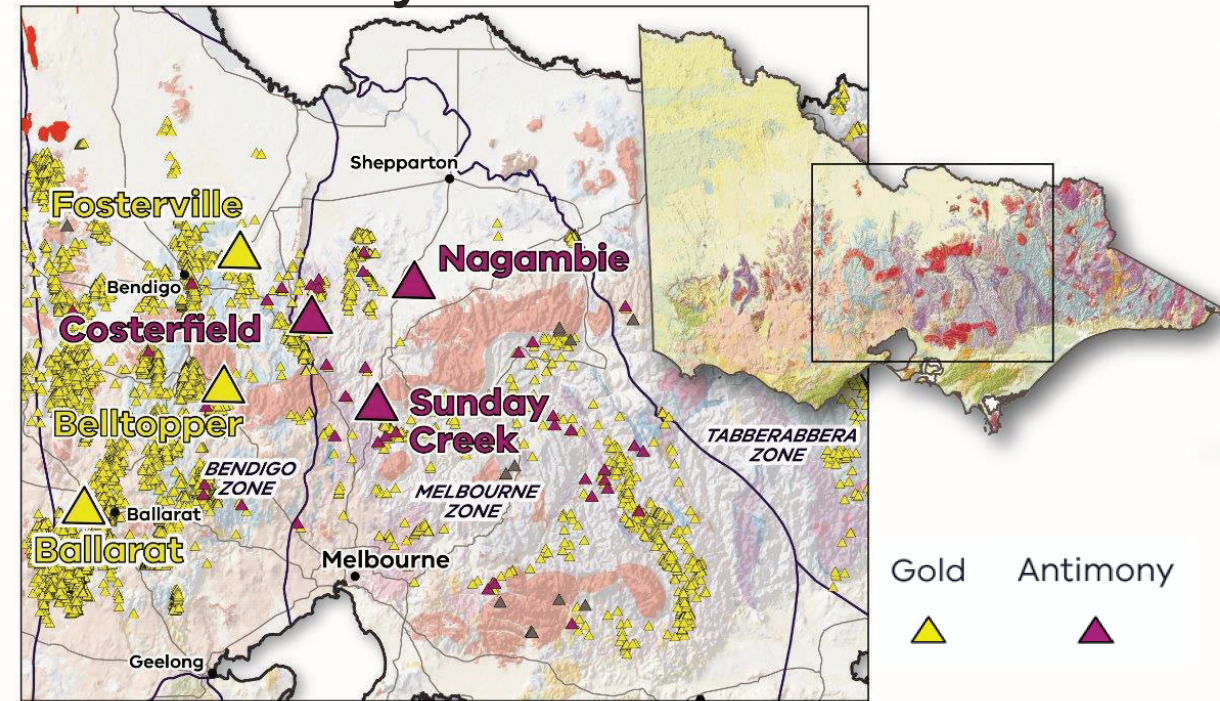
- 54 individual intersections >100 g/t AuEq x m
- SDDSC144: 242.1 m @ 6.0 g/t AuEq (uncut)
 - Incl. 0.16 m @ 3,330.0 Au, 11.7% Sb

Nagambie Resources – Nagambie Mine

Mineral resource: 20.8 kt antimony and 58,013 oz gold

Recent drilling highlights:

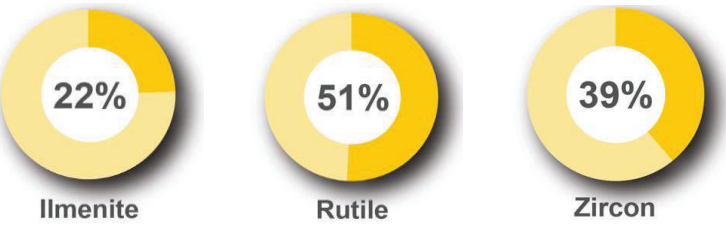
- NAD046: 1.26 m @ 4.7% Sb and 3.1 g/t Au
- NAD048 1.2 m @ 3.3% Sb and 4.5 g/t Au



Mineral sands

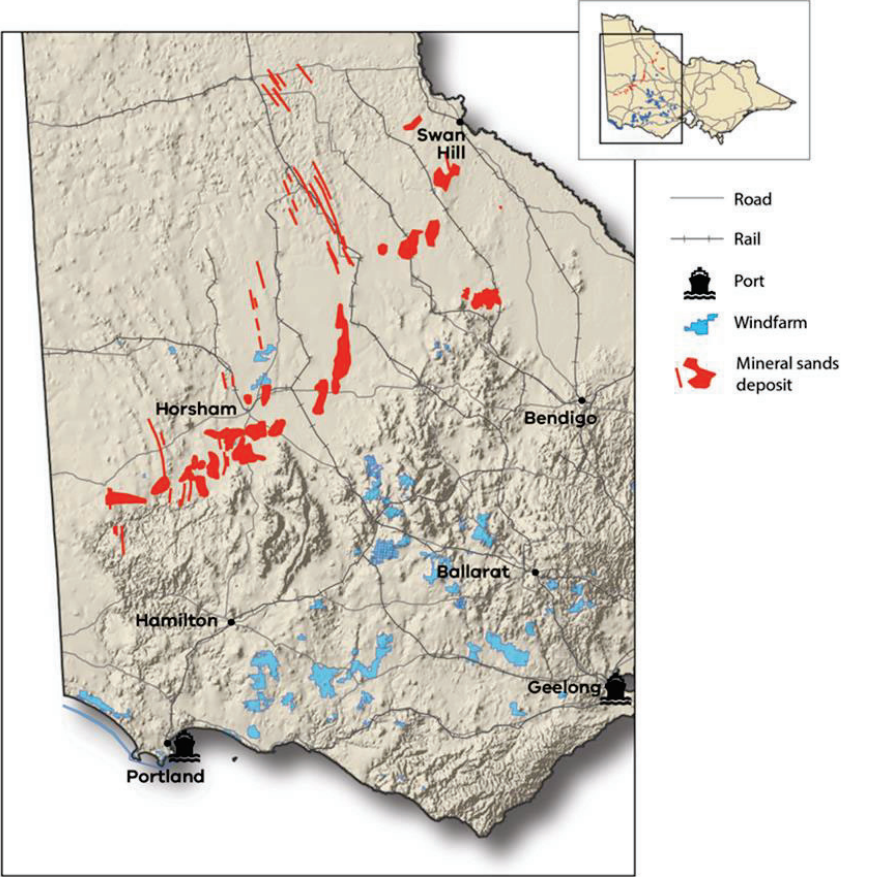
Northwest Victoria is home to the critical minerals required for electrification and decarbonisation.

Victoria’s share of Australia’s mineral sands



Five current projects ranging from advanced exploration to development

- Multiple long-life deposits, billions of tonnes each
 - Heavy Rare Earth Elements (e.g. dysprosium, terbium)
 - Light Rare Earth Elements (e.g. neodymium, praseodymium)



Astron Corporation Donald Mineral Sands Project	VHM Limited Goschen Project	WIM Resource Avonbank	Iluka Resources Wimmera Project	ACDC Metals Goschen Central
5,783 Mt Mineral Resource 185 Mt of total heavy minerals Definitive Feasibility Study 2021 Environmental Effects Statement approved Mining Licence granted Work Plan approved Production expected 2027	629 Mt Mineral Resource 18.3 Mt of total heavy minerals Definitive Feasibility Study 2023 Environmental Effects Statement approved Mining Licence granted Work Plan under assessment Production expected 2027	311.8 Mt Ore reserve 13.4 Mt of total heavy minerals Definitive Feasibility Study 2021 Environmental Effects Statement approved Mining Licence under assessment	1,380 Mt Mineral Resource 69 Mt of total heavy minerals Definitive Feasibility Study underway Environmental Effects Statement underway	620 Mt Mineral Resource 13.6 Mt of total heavy minerals Scoping Study currently underway Drilling planned for 2025 Environmental Effects Statement approved

Downstream processing studies for antimony and rare earth elements

Victoria is well-positioned to host downstream processing due to access to reliable and responsible sources of critical minerals, infrastructure, technology and innovation industries, and strong environmental legislation.

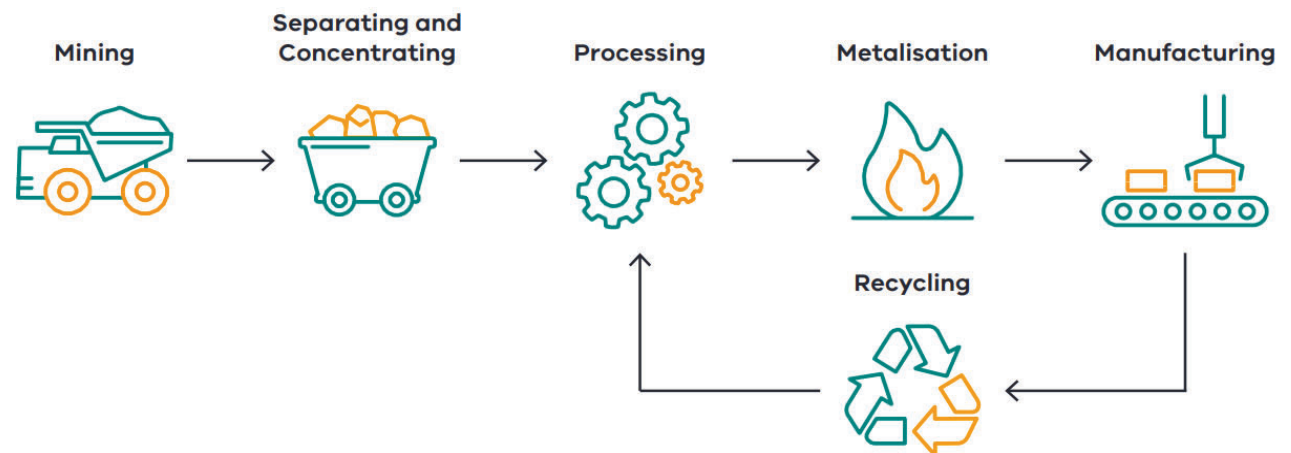
Antimony scoping study

Conducting preliminary economic impact analysis that considers opportunities for Victoria in establishing processing facilities to produce antimony trioxide or ingot

Rare Earth Element metallisation study

Conducting a Pre-Feasibility study that will consider REE metallisation in Victoria to enable a fully integrated REE supply chain in Australia

Theme 3 Critical minerals production and processing in Victoria



Copper

Thursday's Gossan Project

Stavely Minerals

Retention Licence Approved

Resource:

27.3 Mt @ 0.69% Cu, 3.4 g/t Au & 0.1 g/t Ag

Stockman Project

Aeris Resources

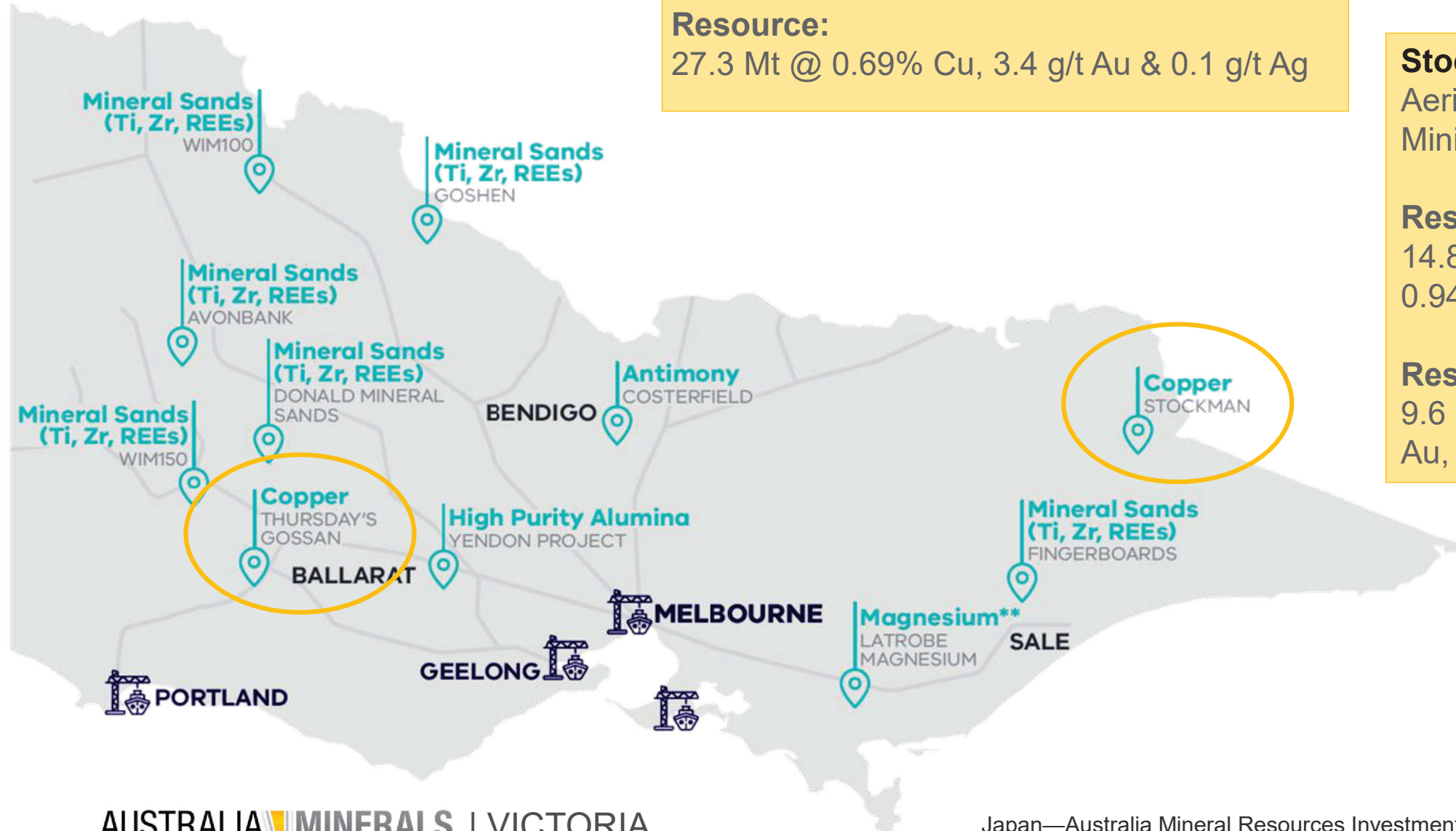
Mining Licence Approved

Resource:

14.8 Mt @ 2.09% Cu, 4.0% Zn,
0.94 g/t, 36 g/t Ag

Reserve:

9.6 Mt @ 1.9% Cu, 4.3% Zn, 1.0 g/t
Au, 36 g/t Ag



New data and knowledge

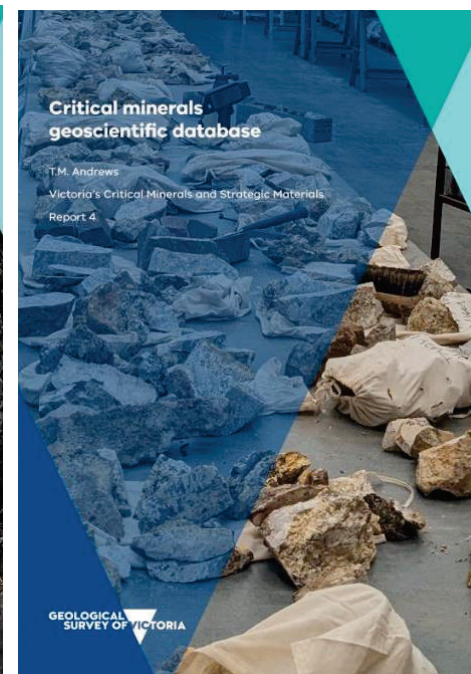
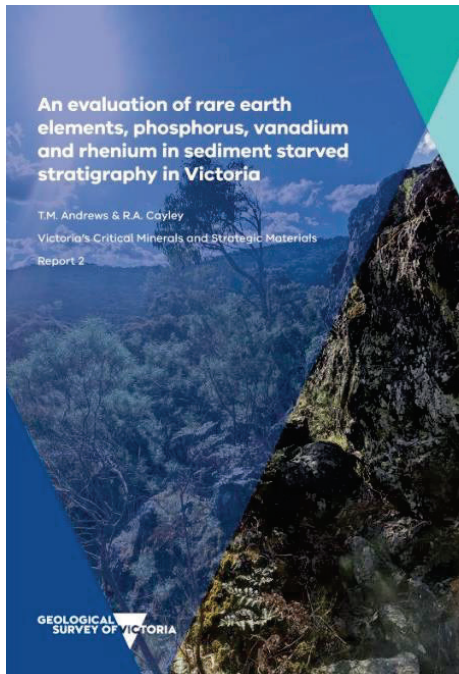
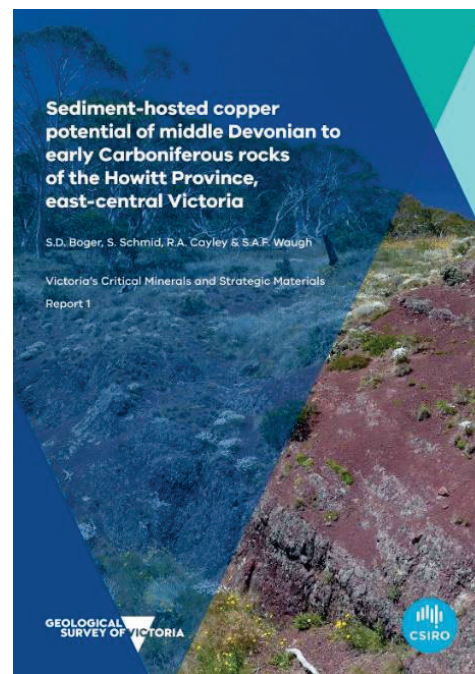
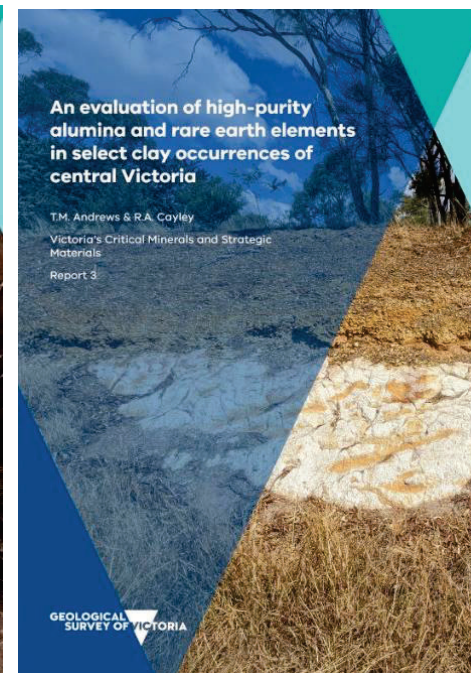
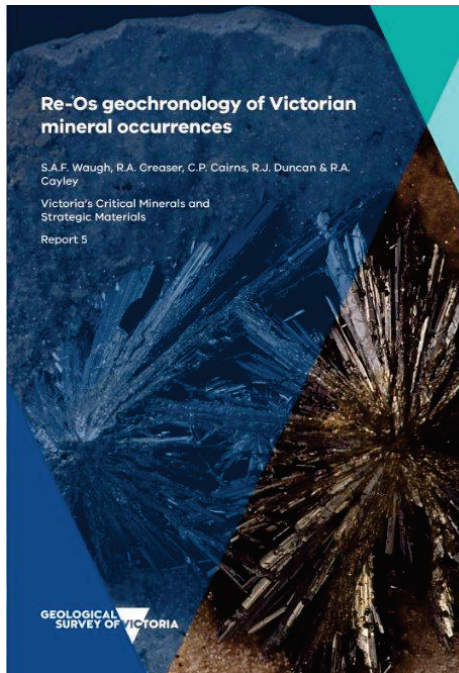
8 initial critical mineral studies:

- >40,000 new analyses
- >100 new age dates
- Geological setting and context

Further studies underway:

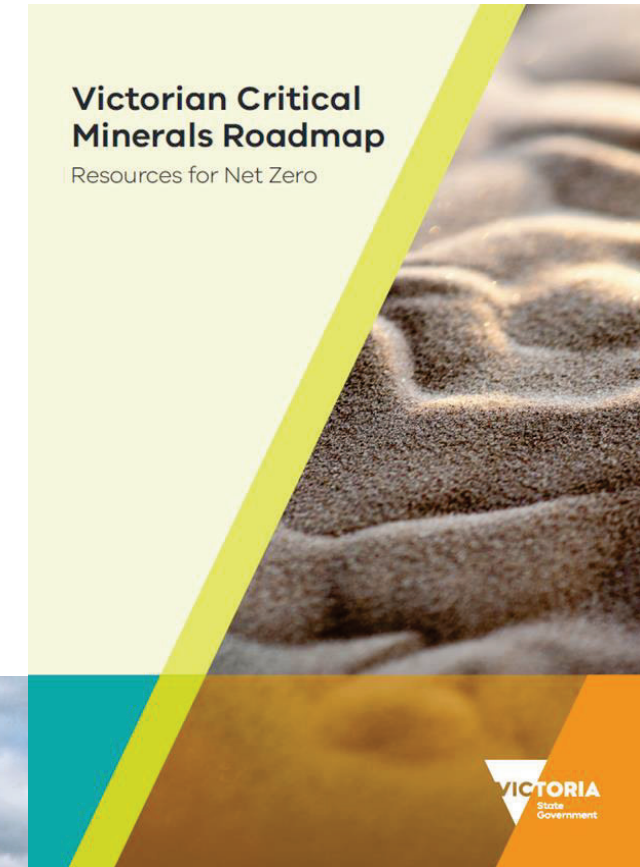
- Antimony
- Platinum group elements
- Alkaline-silicate rare earth elements
- Lithium
- Tin
- Tungsten
- High purity quartz silica

[GSV Search Assistant: Critical Minerals](#)



Victoria's vision for the future

- A world-leading responsible critical minerals sector that:
 - ✓ Has timely approvals for development
 - ✓ Delivers significant economic benefits for regional communities
 - ✓ Is environmentally responsible
 - ✓ Creates opportunities for future downstream industries
 - ✓ Forms strong and lasting partnerships with local communities and Traditional Owners



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Thank you

shannon.brown@deeca.vic.gov.au

Acting Manager – Exploration and Development

Resources Victoria

resources.vic.gov.au



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De-risk. Discover. Develop.

Unlocking Western Australia's mineral wealth

Michele Spencer
Executive Director Geological Survey of Western Australia
Department of Mines, Petroleum and Exploration



Department of **Mines,
Petroleum and Exploration**

Japan—Australia Mineral Resources Investment Seminar | Sep '25 | #AustraliaMinerals

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Department of Mines, Petroleum and Exploration



Geological Survey of Western Australia

Geoscientific data, information and services to support the responsible use of the State's natural resources.



Mining tenure and petroleum titles

Learn about getting mining tenure and energy resource titles in Western Australia.



Resource and environmental compliance

Environmental requirements for mineral resources and compliance for energy resources.



Aboriginal Empowerment Unit

A dedicated team focused on building empowerment and connection with Aboriginal and Torres Strait Islander people.

- Formed 1 July 2025
- Oversees policy and regulates the resources sector
- Critical role in the state's economy

Aboriginal engagement: an essential development step



- Legislation recognises Aboriginal Australians connection to land and sea
- Free, Prior and Informed Consent (FPIC) principle
- Each community is unique, and cultural protocols vary across the state.

Images of Wanjina are characterised by halo like headdresses, mouthless faces and large round eyes.
(Donkey Ridge, north-western Kimberley)
Image Credit: Grahame Walsh

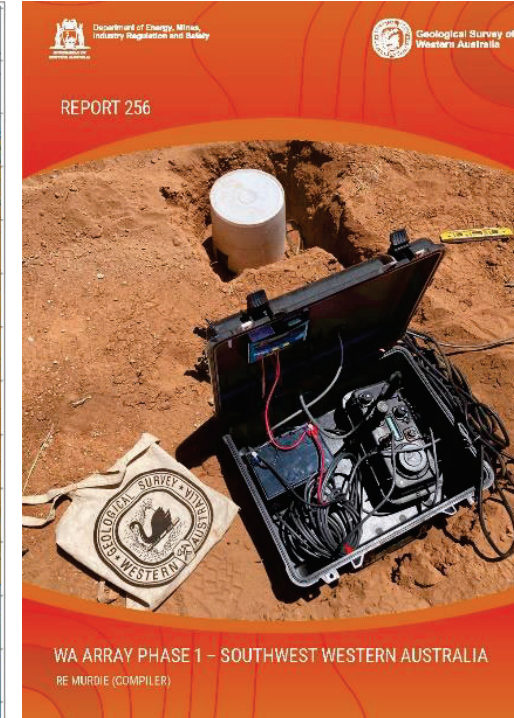
De-risk. Discover. Pre-competitive data and exploration

Providing trusted advice

- Print and digital maps
- Data packages
- Digital core atlas
- GIS layers
- Technical reports and records

Exploration Incentive Scheme

- Accelerate exploration
- Co-funded drilling, geophysics, energy analysis



Discover. Develop. Case study: Nova operation

- 1998 GSWA regional geochemistry field work
- 2000 GSWA geochemistry data published: Ni-Cu-Co anomaly
- 2007 Exploration tenement E28/1724 granted
- 2009 Exploration Incentive Scheme begins
- 2010 GSWA aeromagnetic data anomaly
- 2011 EIS co-funded diamond drillhole
- 2012 Discovery hole
- 2014 Mining lease M28/0376 granted
- 2016 Mining begins
- 2024 Production 20.8kt Ni, 9.9kt Cu, 735t Co, at cost: A\$3.99/lb Ni, employs 543 FTE (2023)



Unlock Western Australia's Rare Earths

Operational

- Mt Weld - 12 ktpa NdPr, Lynas Rare Earths
- Kalgoorlie processing facility - 9 ktpa NdPr, Lynas Rare Earths

Advanced projects

- Eneabba refinery - 23 ktpa TREO, Iluka (under construction)
- Yangibana project - 37 ktpa TREO, Hastings Tech
- Browns Range - Feasibility study, Northern Minerals

Early-stage projects

- North Stanmore - Victory Metals
- Cummings Range - RareX
- West Arunta - WA1 Resources

27 652 t
Tonnes sold



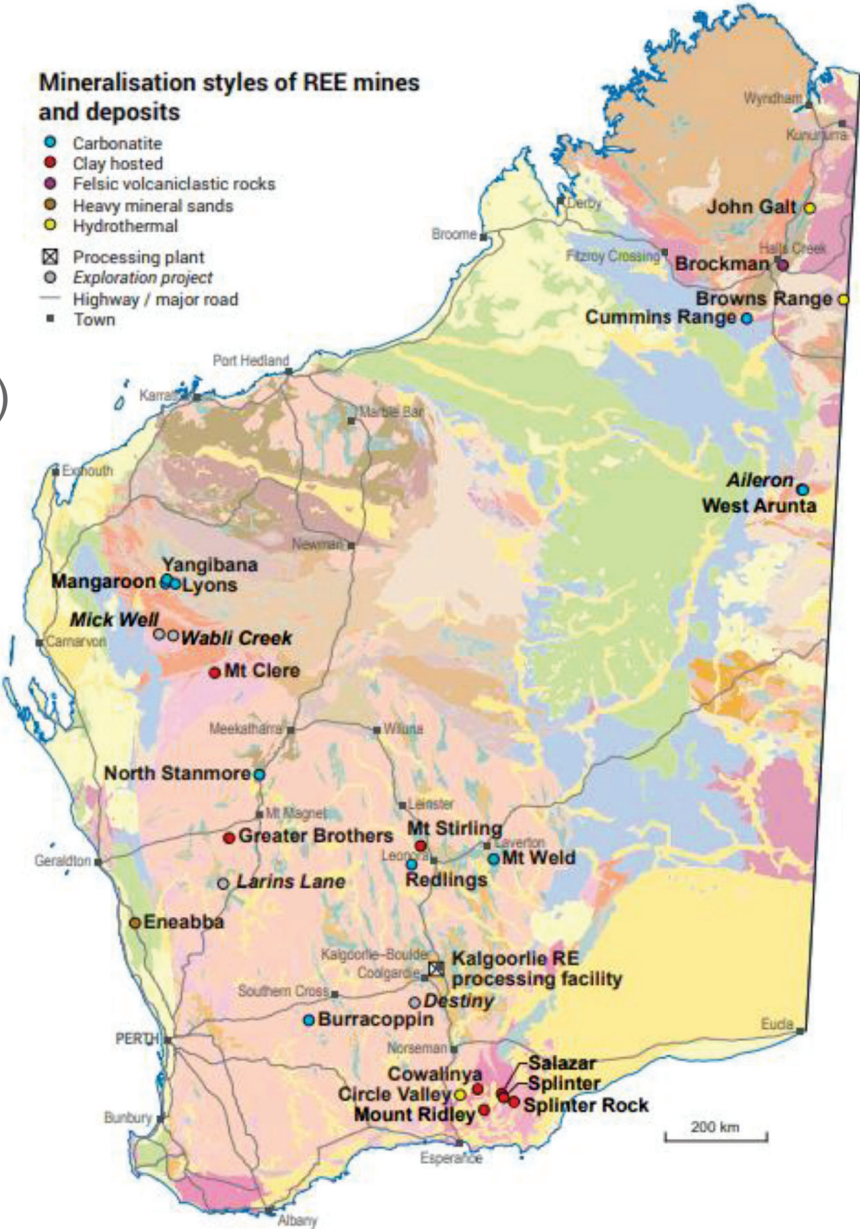
834
Full-time
employees



\$4117 m⁺
Investment
projects

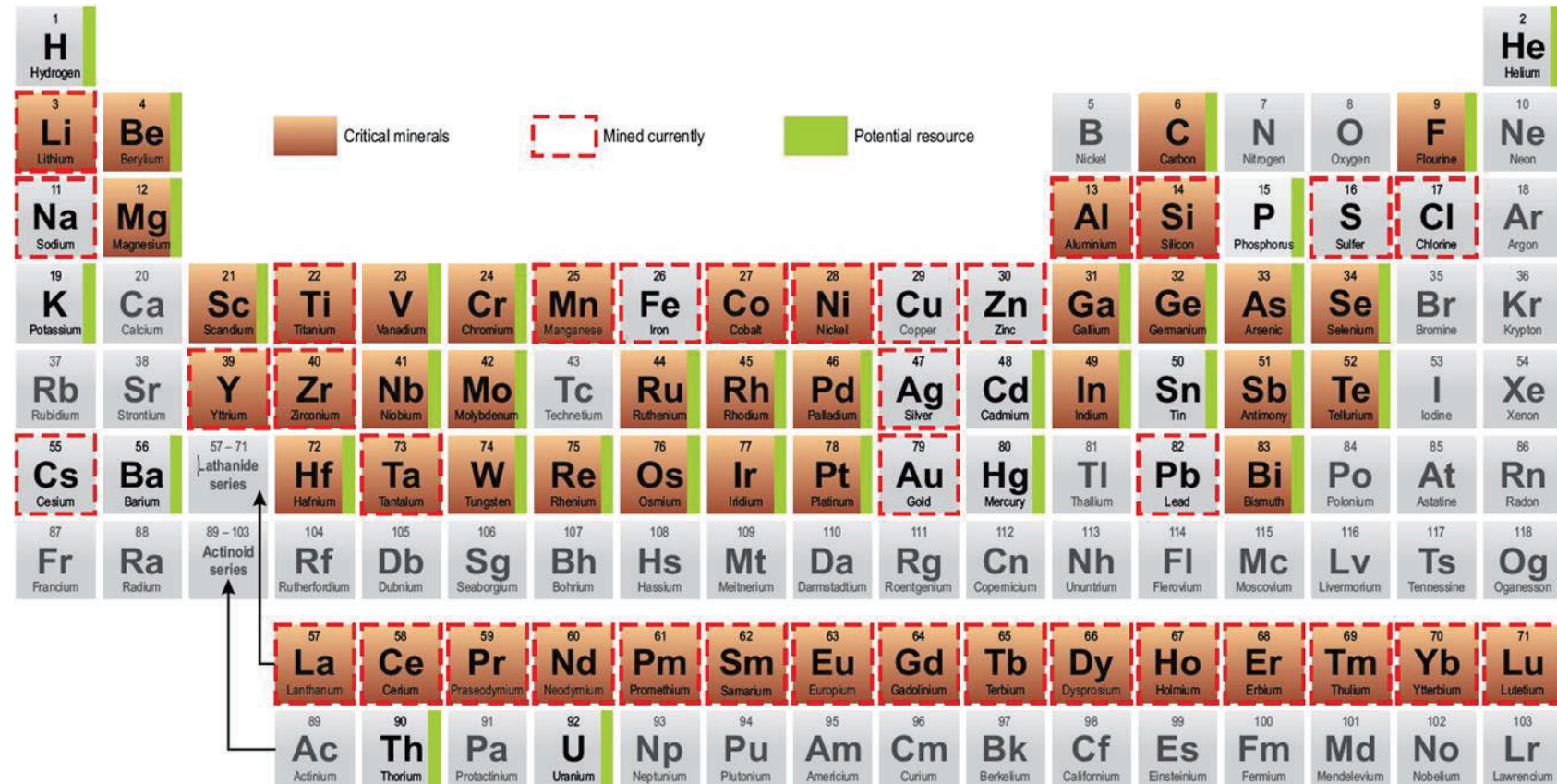


4th
Production
world ranking



The Western Australian advantage

- Resource-rich
- Resource sector success underpinned by:
 - ✓ world-class geoscience
 - ✓ robust regulatory system
 - ✓ strong research sector
 - ✓ highly-skilled workforce
 - ✓ emerging mid-stream processing industry
 - ✓ strong support from both state and federal governments



Thank you for listening—look us up to learn more.



Image supplied courtesy of Fortescue (Eliwana mine site)