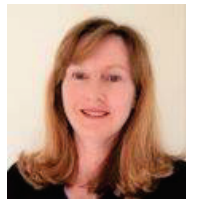


AUSTRALIA MINERALS

REALISE THE OPPORTUNITY

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

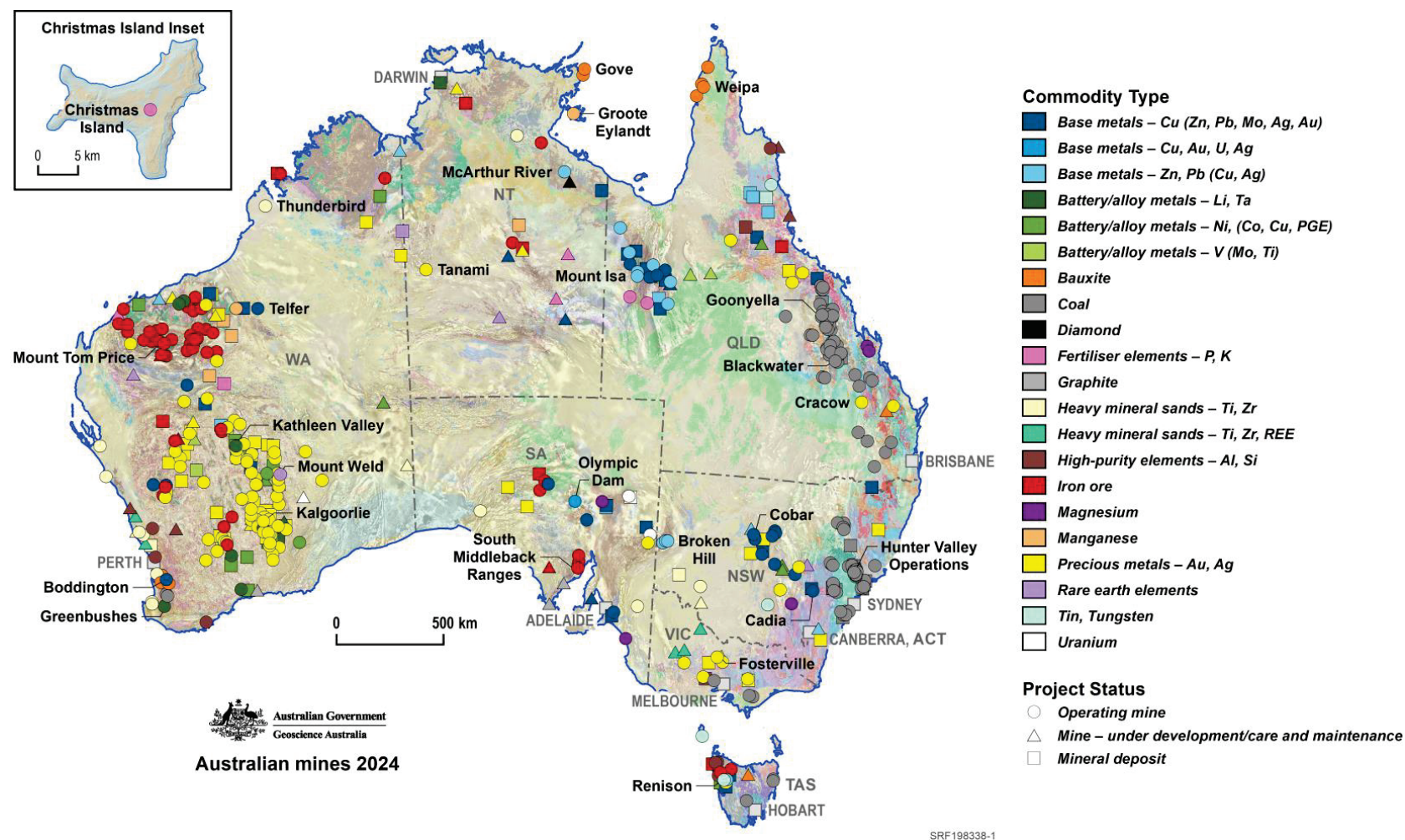
Australia Minerals



- 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



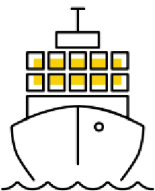
>300 operating mines



14.5% GDP



300k direct employment,
1.1m indirect

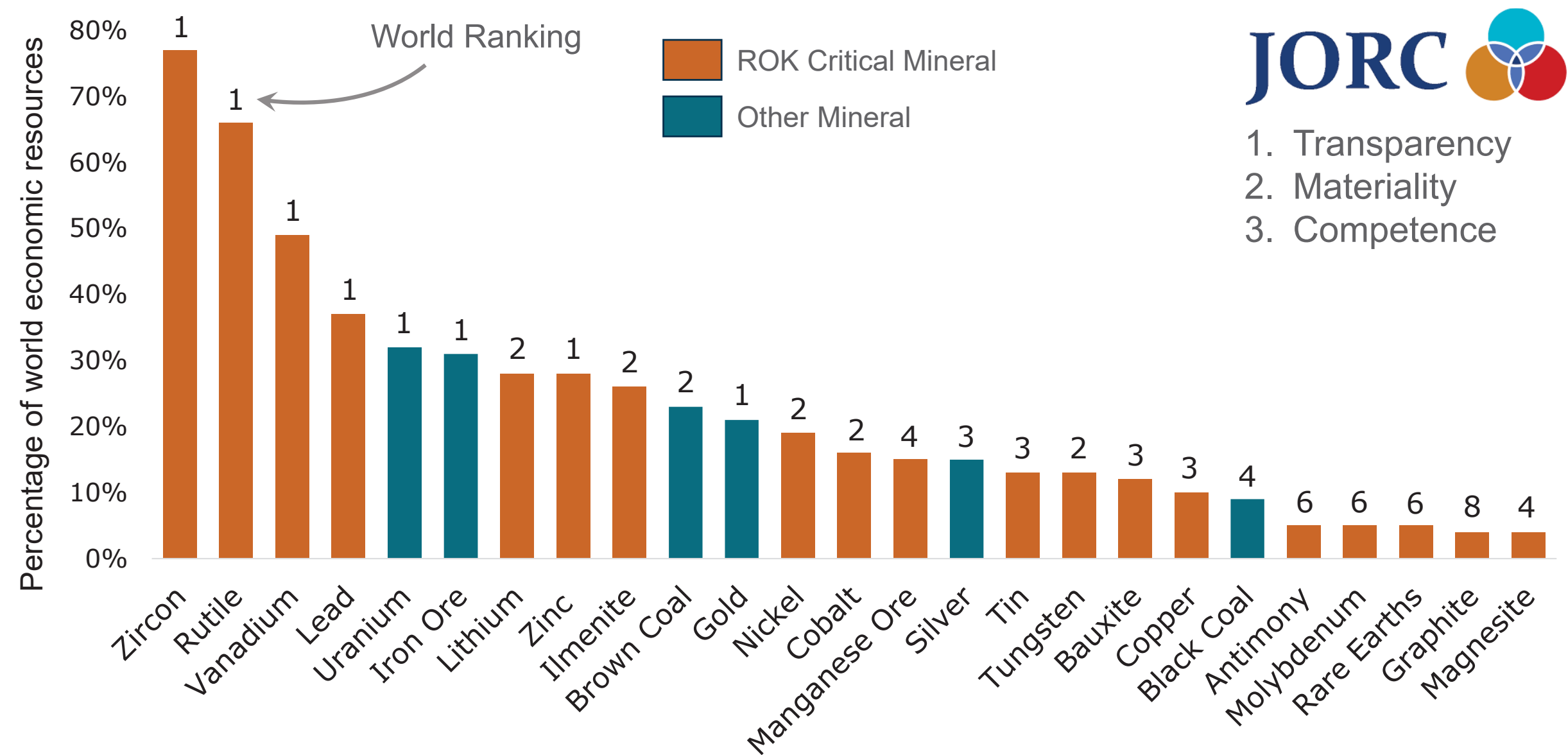


\$395b exports
(61% of total)

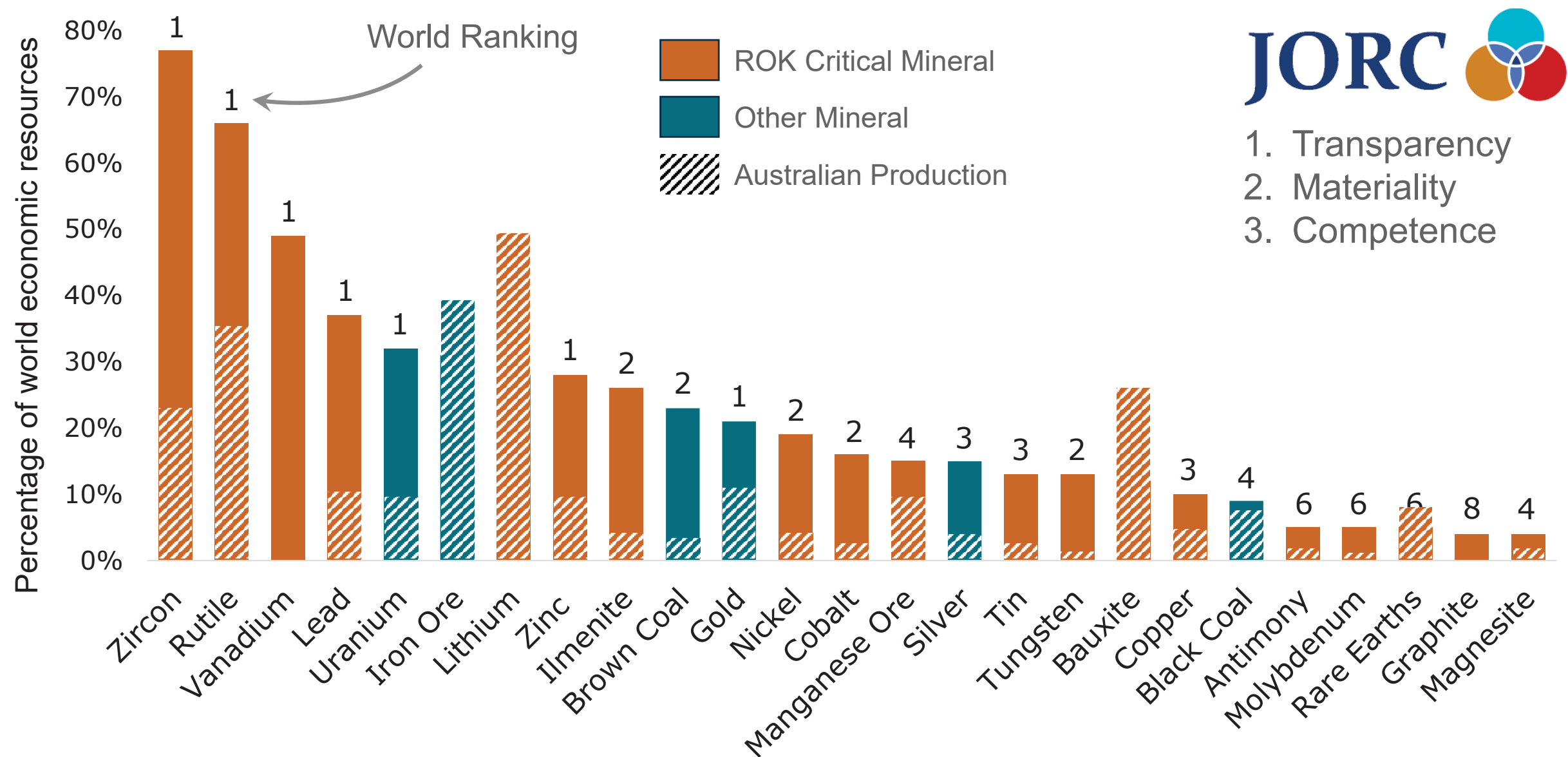
ROK's Critical Minerals List: what Australia can supply

High potential	Moderate potential	Low potential	 Current production	 Potential production
 Aluminium	 Graphite	 Nickel	 Tantalum	
 Antimony	 Indium	 Niobium	 Tin	
 Bismuth	 Lead	 Platinum Group Elements	 Titanium	
 Chromium	 Lithium	 Rare Earth Elements	 Tungsten	
 Cobalt	 Magnesium	 Selenium	 Vanadium	
 Copper	 Manganese	 Silicon	 Zinc	
 Gallium	 Molybdenum	 Strontium	 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



*Net zero
transition
stream*

Renewable
hydrogen

Green metals

Low carbon
liquid fuels

*Economic
resilience &
security
stream*

Critical minerals
processing

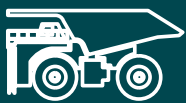
Clean energy
manufacturing

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
- **\$5b 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**



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

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.

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

Battery Breakthrough Initiative



Australian Government
Australian Renewable
Energy Agency

ARENA

\$500 million to support battery manufacturing capability in Australia

Funding for projects that contribute to one or both program outcomes:

- Enhance Australia's battery manufacturing capability to improve supply chain resilience and support emissions reduction.
- Commercialise battery manufacturing processes or technologies that can contribute to emissions reduction.

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.

Seoul Office
18th Floor, Kyobo Building
1 Jongro, Jongno-gu
Seoul (03154) South Korea
+82 2 398 2800
seoul@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

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.



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
- **\$5b 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**



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



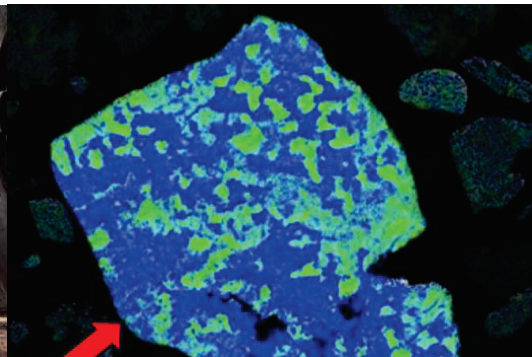
Airborne electromagnetics



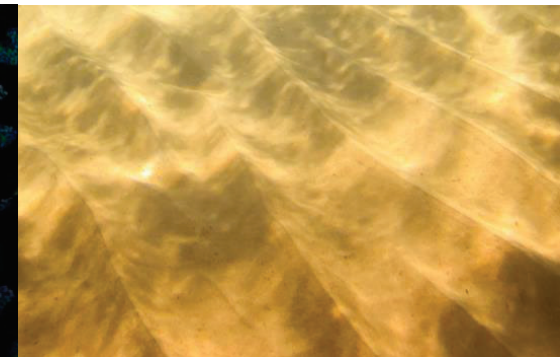
Seismometer installation



Reflection seismic trucks



Geochemical characterization



Seabed mapping



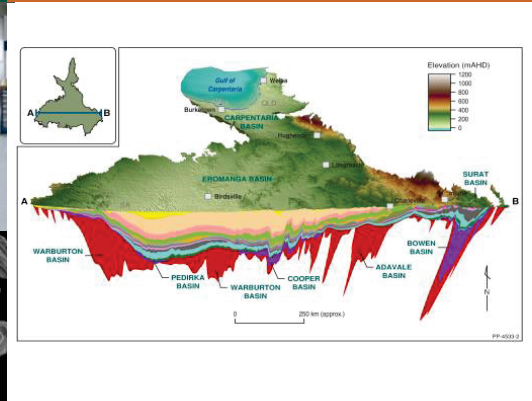
High performance computing



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

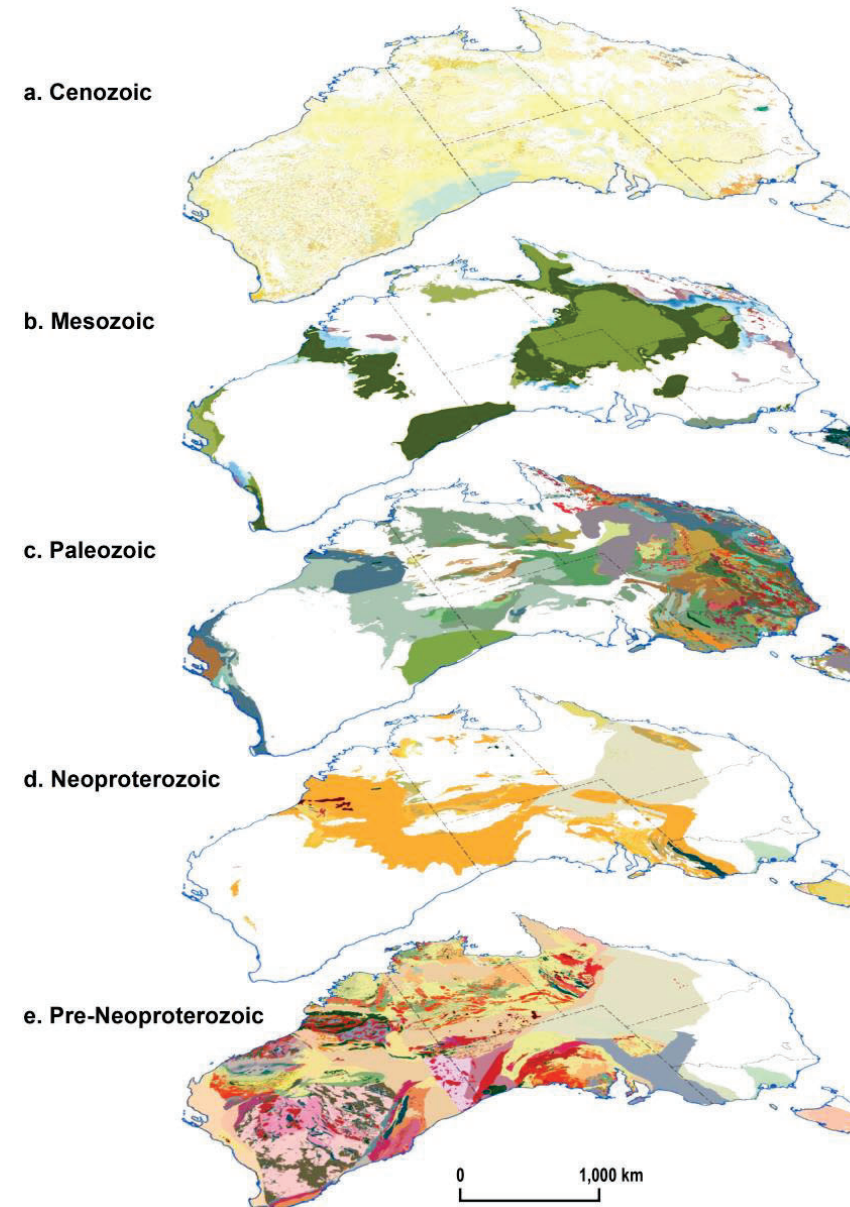
Sanchez et al., 2024

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

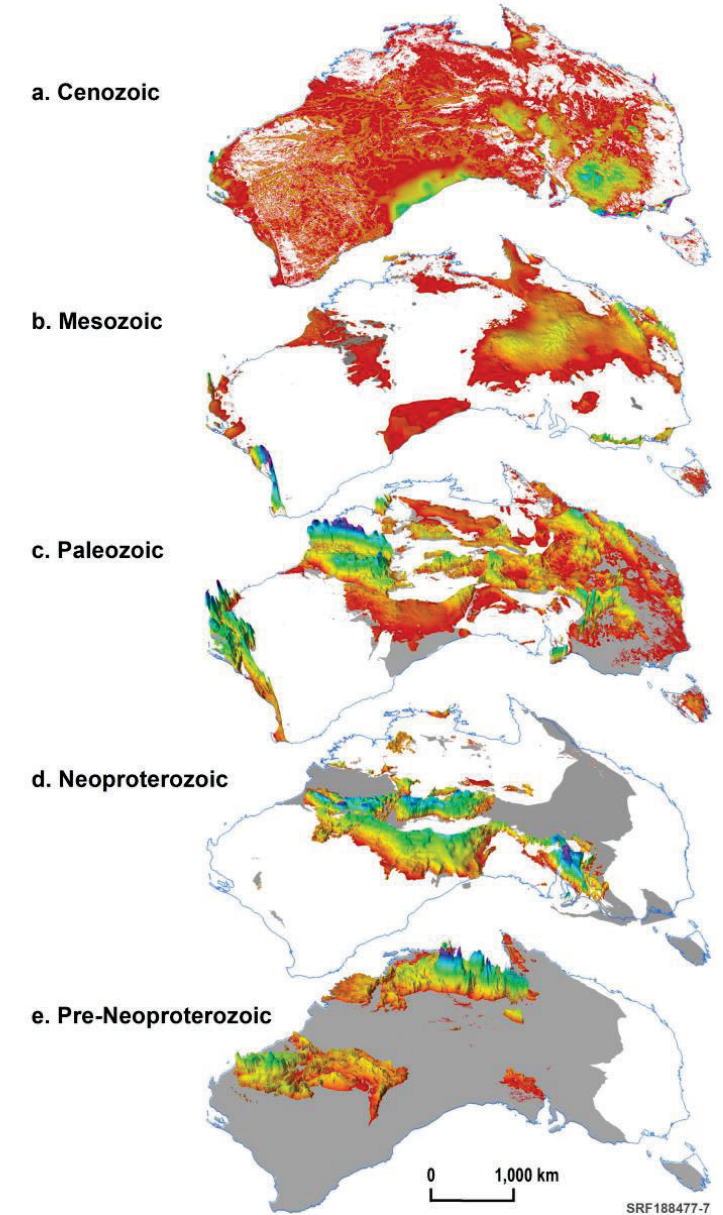
Rollet et al., 2024

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

Layered geology maps

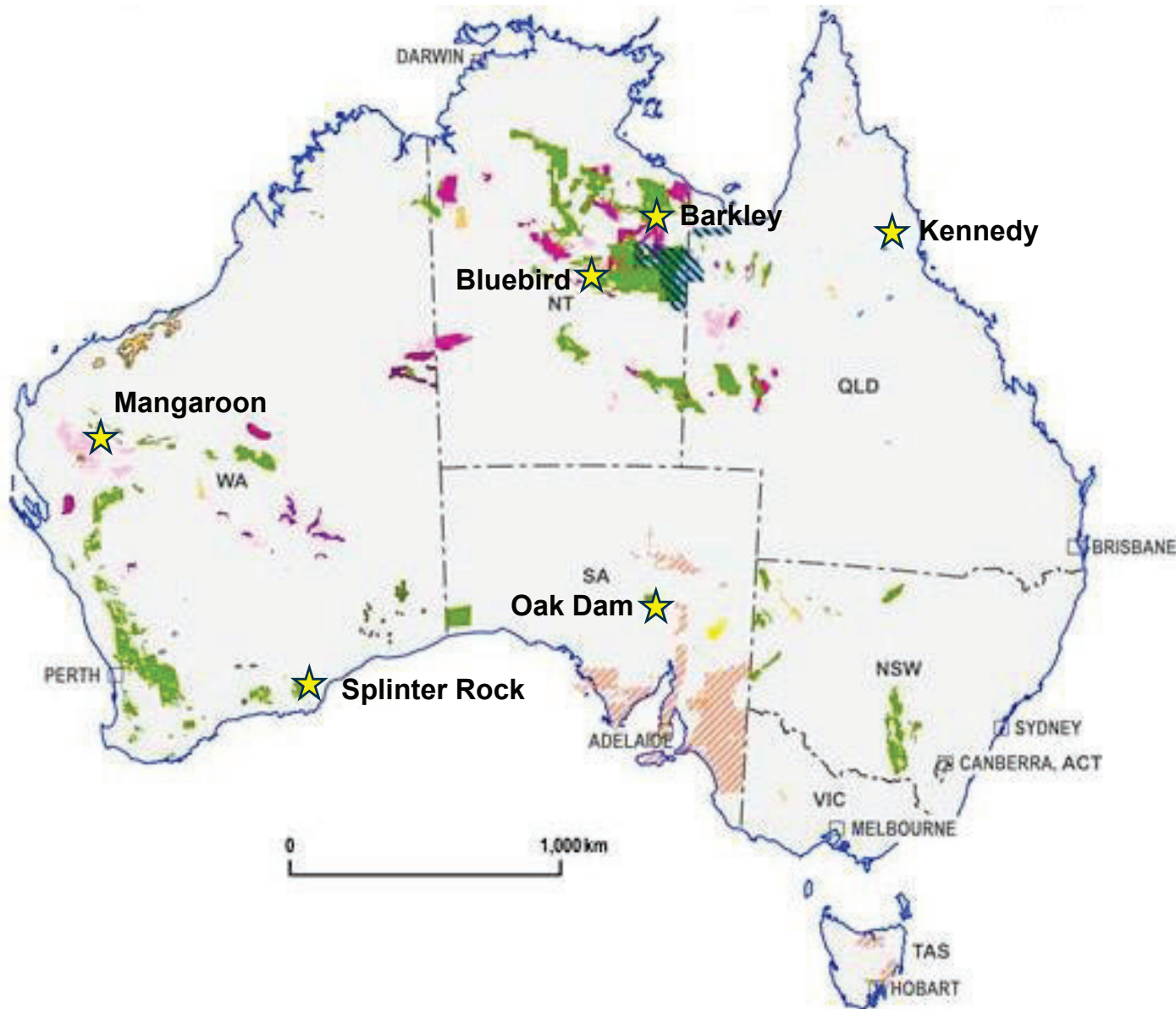
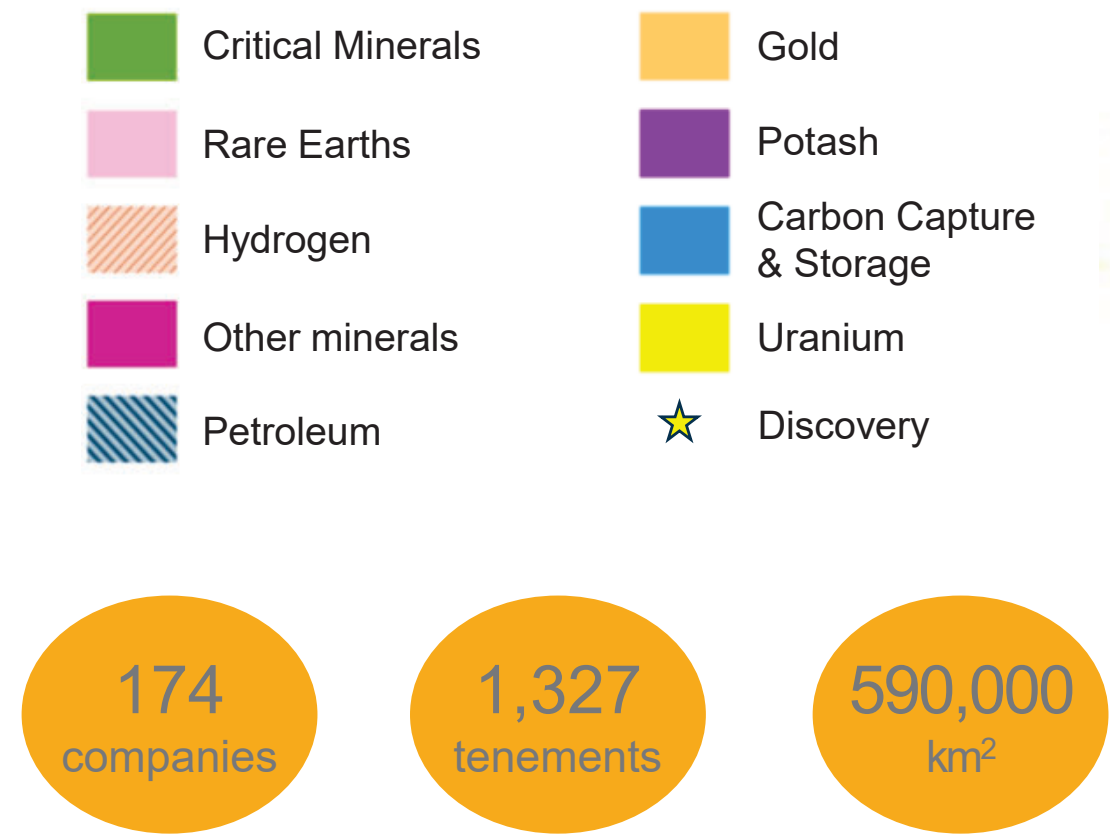


Layer thickness maps



Impact of government geoscience on exploration in Australia

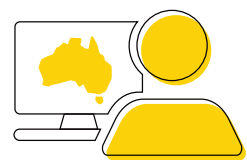
Tenements taken up or reinvigorated by government geoscience since 2016 (as of February 2025)



A world leading mining destination



Further information



Data Discovery Portal
portal.ga.gov.au



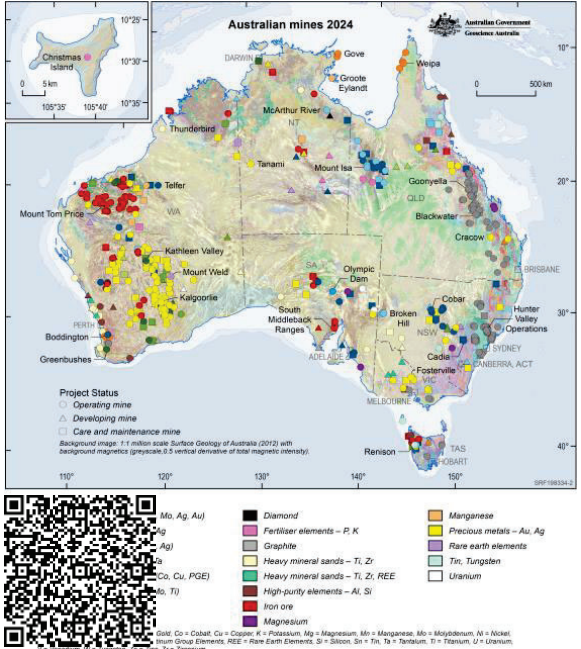
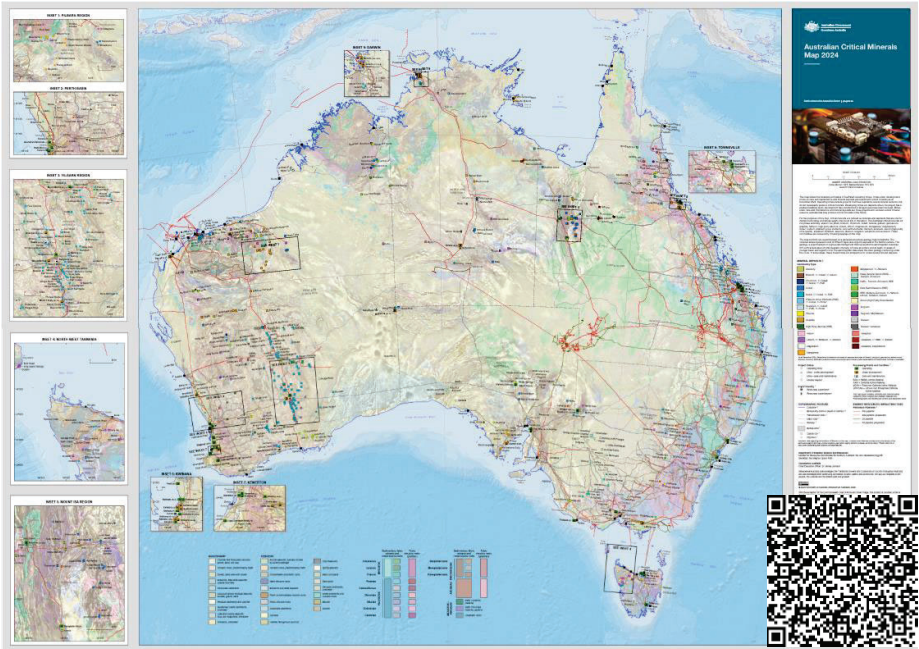
Websites

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



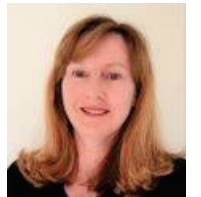
Contacts

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



Thank you

Allison Britt
Director, Minerals Resources Advice and Promotion
Geoscience Australia



AUSTRALIA MINERALS

REALISE THE OPPORTUNITY

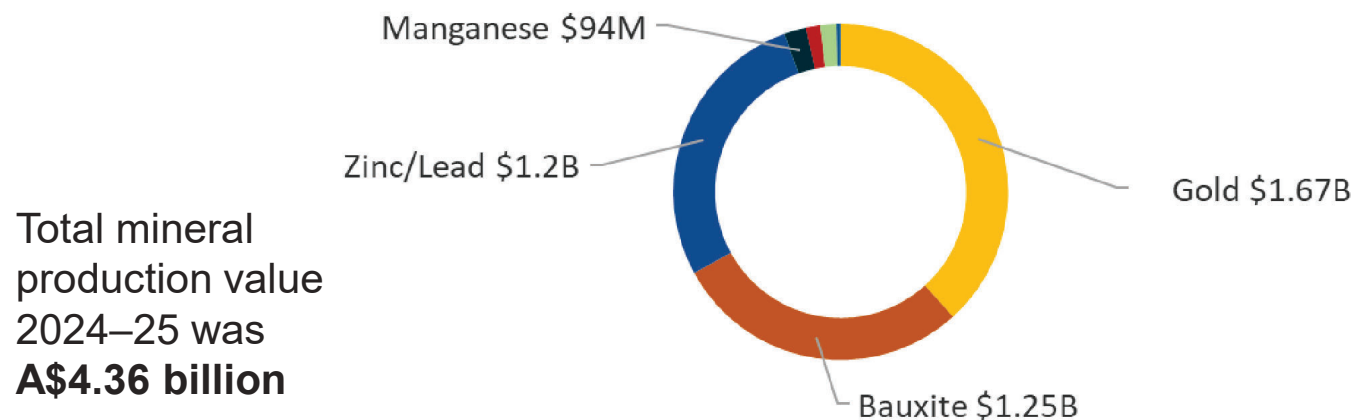
Critical minerals opportunities in Australia's Northern Territory

Ian Scrimgeour
Senior Executive Director
Northern Territory Geological Survey



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



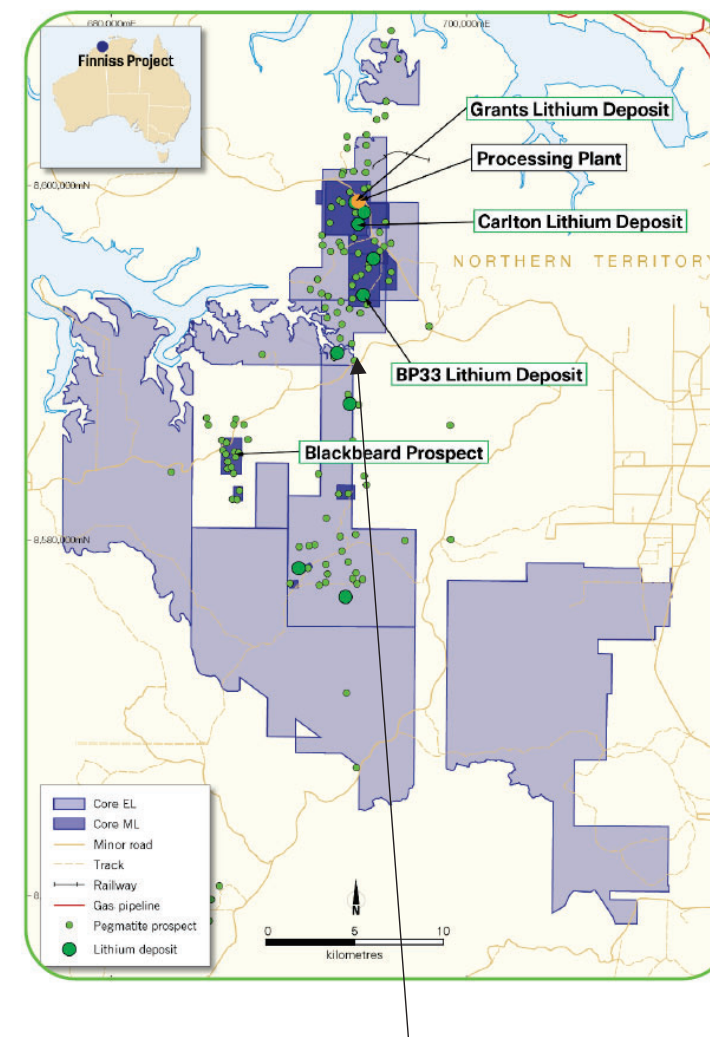
Lithium

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

Recent updates:

- 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
- Enabling construction to recommence in late 2025



Lithium Plus Minerals Ltd – Lei

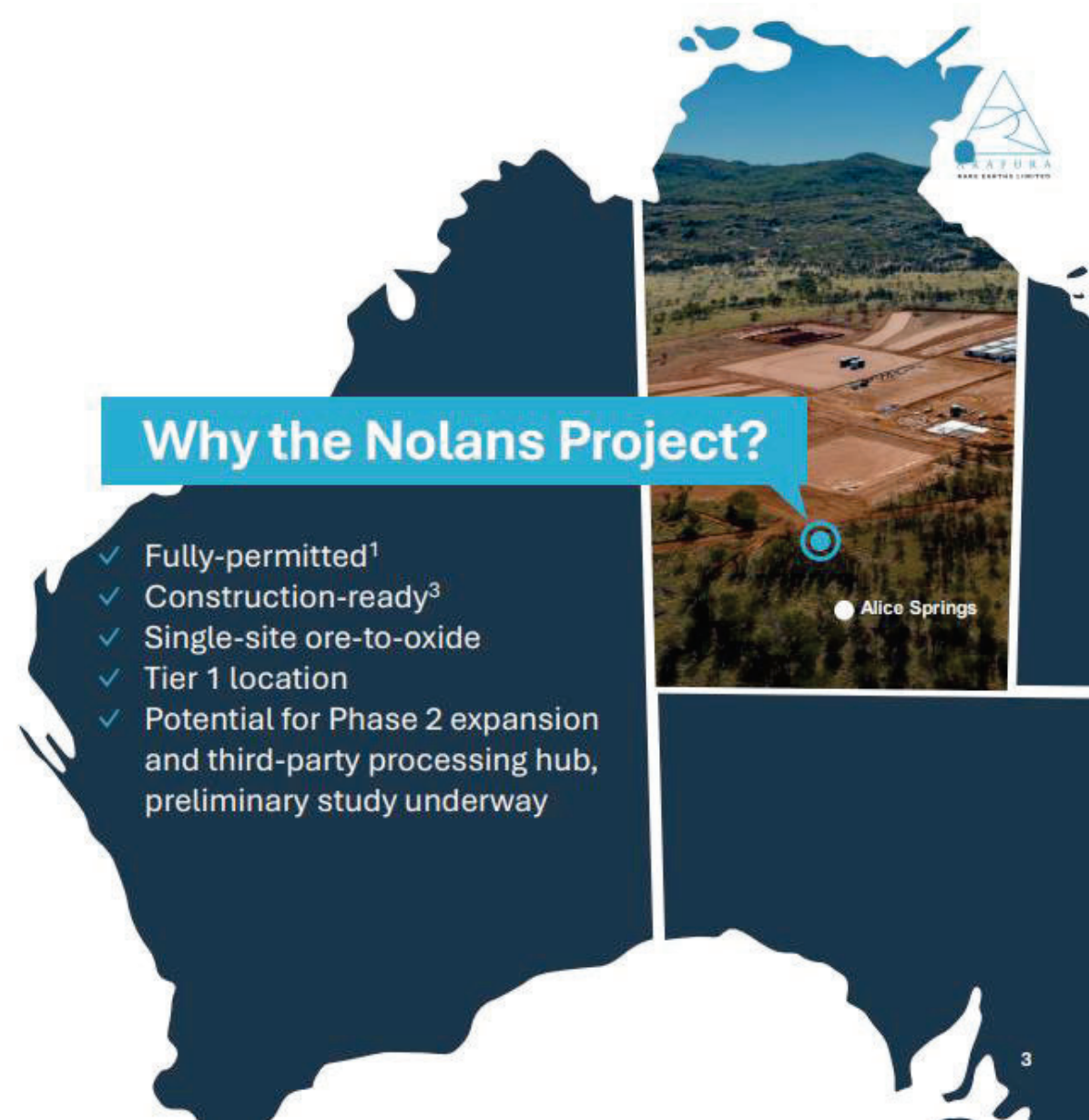
- 4.1 Mt @ 1.43% Li₂O
- Development approvals underway

Rare Earths (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



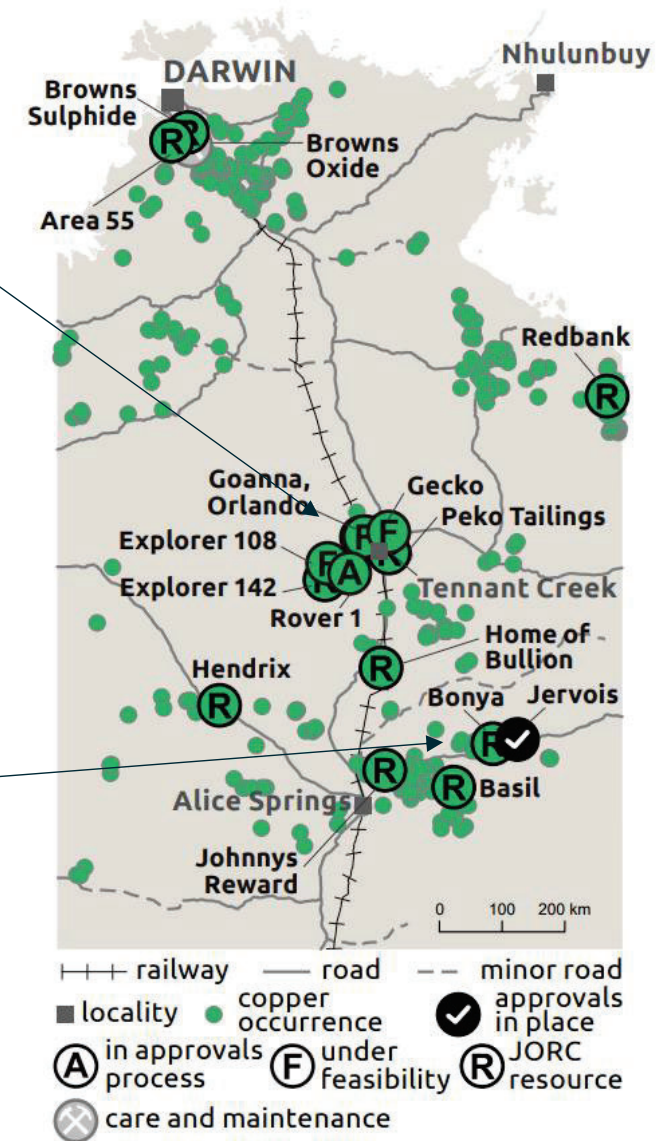
Copper

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

- Multiple companies assessing consolidation and development options including multi-user processing facility for copper, gold and critical minerals from multiple high-grade copper-gold deposits (**Tennant Mines, Emmerson Resources, CuFe Ltd, Tennant Minerals, Castile Resources**)
- More than 500kt of contained copper in recent resource upgrades including for Tennant Mines' Warrego deposit and CuFe Ltd's Gecko deposit.

KGL Resources Ltd – Jervois

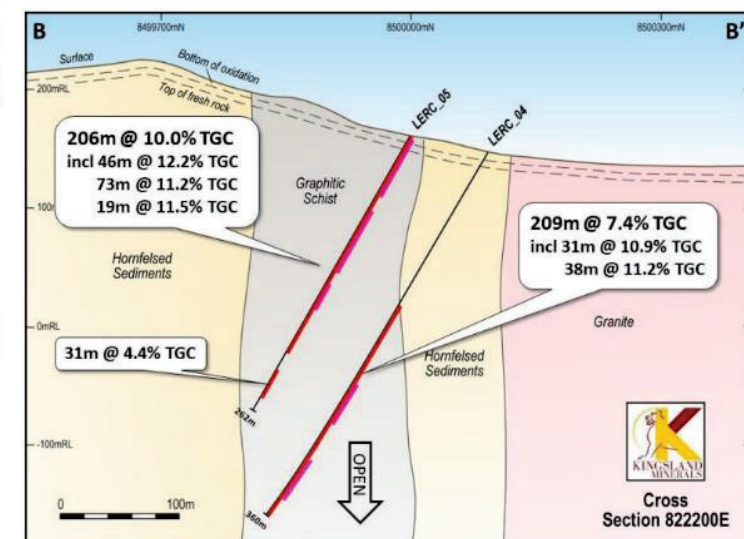
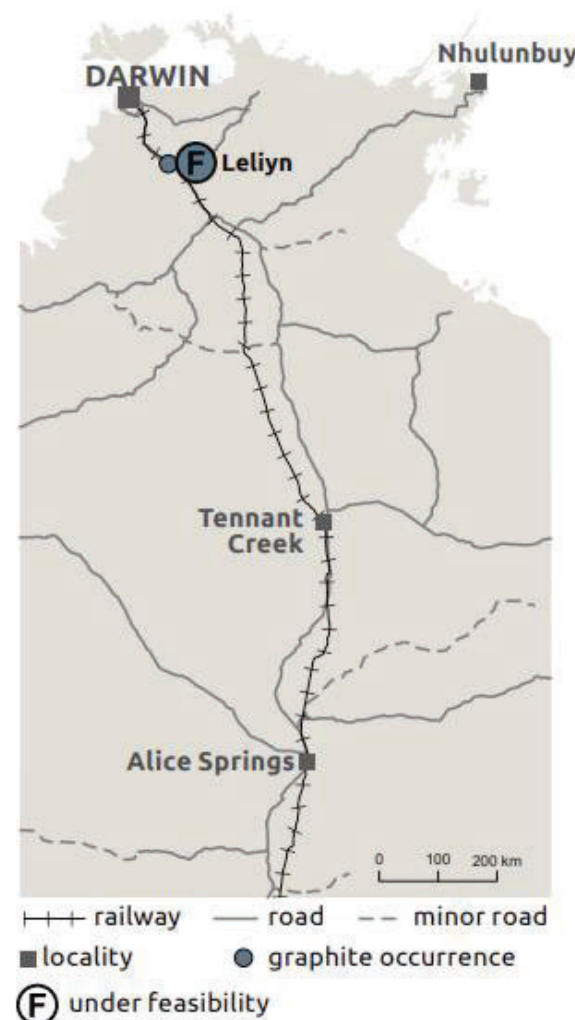
- NT's largest and most advanced copper project
- **27.45 Mt @ 1.87% Cu, 25.3 g/t Ag, 0.24 g/t Au**
- Proposed 10+ year mine with significant upside, producing 30,000 tpa Cu (in concentrate).
- Revised feasibility study released February 2025
- Fully approved, seeking project finance



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 99.97% purified spherical graphite produced from Leliyn graphite concentrate, suitable for anode material
- Scoping study due for release Q3 2025
- Assessing Gallium as a by-product
- Strategic partner Quinbrook investigating feasibility of downstream graphite processing facility near Darwin.



Other opportunities

Magnesium

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

Phosphate

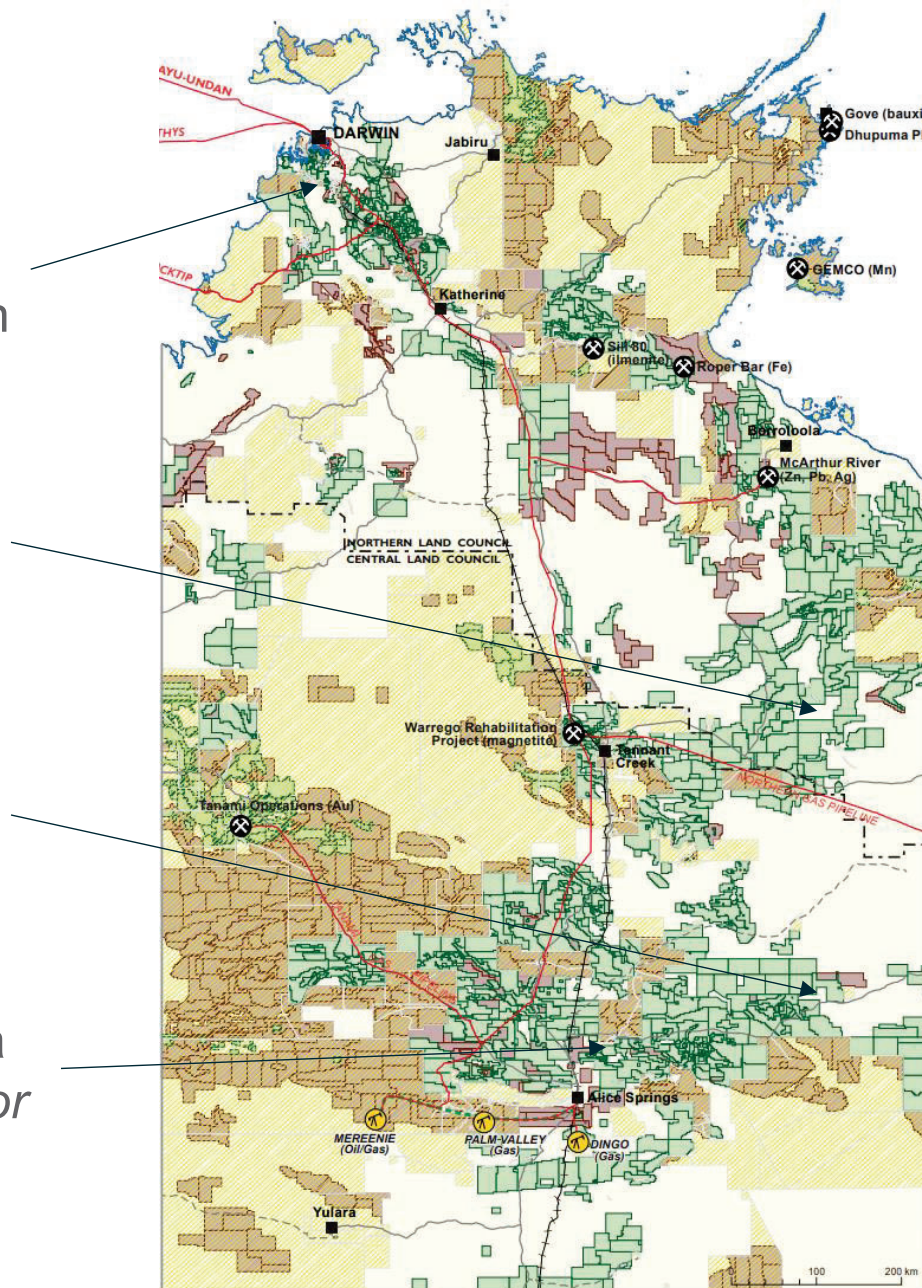
Australia's largest undeveloped phosphate deposits (*Avenira Ltd* and *Verdant Minerals Ltd*)

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* – joint venture with *Sumitomo Corporation* for *Speewah Fluorite* project in WA)



Exploration
licences in
the NT

Green = granted
Red = applications

Critical Minerals in the NT 2025



노던 테리토리의 핵심 광물	
알루미늄*	니켈
코발트	인산염*
구리*	희토류 원소
갈륨	타이타늄
흑연	텅스텐
리튬	바나듐
마그네슘	아연*
망간	지르코늄
몰리브덴	

노던 테리토리의 신흥 핵심 광물	
안티몬	스칸듐
베릴륨	규소
비스무트	탄탈륨
플루오르	텔루륨
게르마늄	주석*
고순도 알루미늄	
니오븀	
백금족 원소	



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 MOU with KOMIR (signed April 2024)

Mining development reforms

- New mineral royalty regime (5% for concentrates; 3.5% for processed materials)
- Territory Co-ordinator appointed to fast-track development

NT Government supports downstream processing

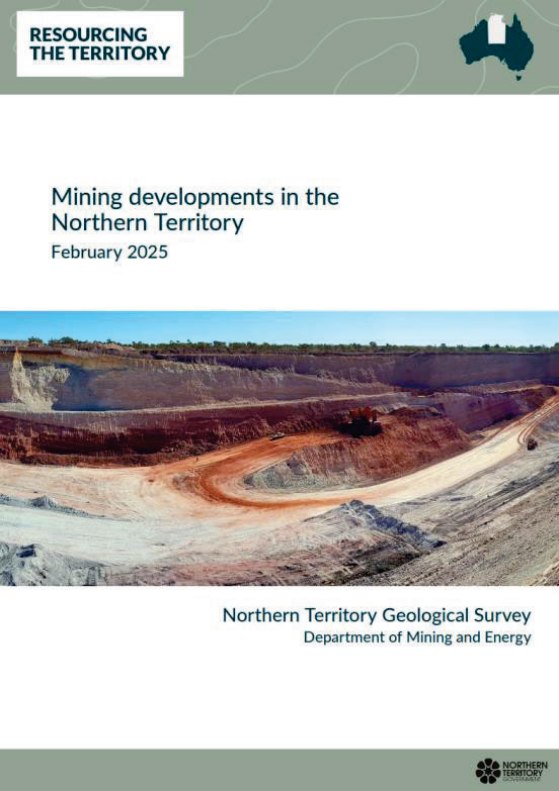
- Evaluating potential for low emission hydrocarbons, hydrogen, advanced manufacturing, CCS and minerals processing near Darwin



For more information



Critical minerals in the Northern Territory (Korean version)



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

AUSTRALIA  MINERALS

REALISE THE OPPORTUNITY

Critical minerals opportunities in Australia's Northern Territory

Ian Scrimgeour

Senior Executive Director

Northern Territory Geological Survey

ian.scrimgeour@nt.gov.au, T: +61 8999 5377



AUSTRALIA MINERALS

REALISE THE OPPORTUNITY

New South Wales critical minerals
and high-tech metals

Yoojin Kim
Investment NSW
NSW Government





NSW Resources supports the development of the state's mineral resources through:

- Regulating safe and environmentally sustainable mining
- Making New South Wales an investment destination for exploration and mining
- Delivering efficient and effective titles assessments and permitting
- Providing geoscientific expertise, products and geological data to industry

NSW Resources

NSW minerals sector

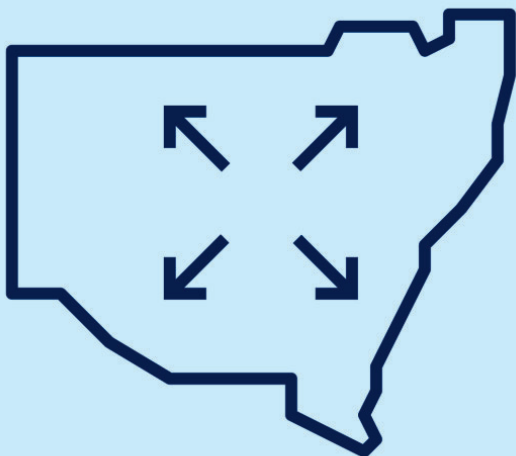
Snapshot of New South Wales' mining industry



\$2.94 billion
in royalties (FY24)

59%

of the state's
merchandise
export revenue



Major contributor
to regional areas
\$31.6 billion
to GSP (4.1%)

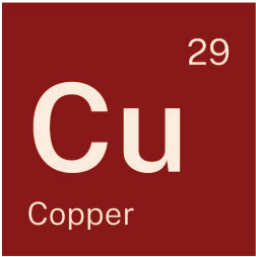
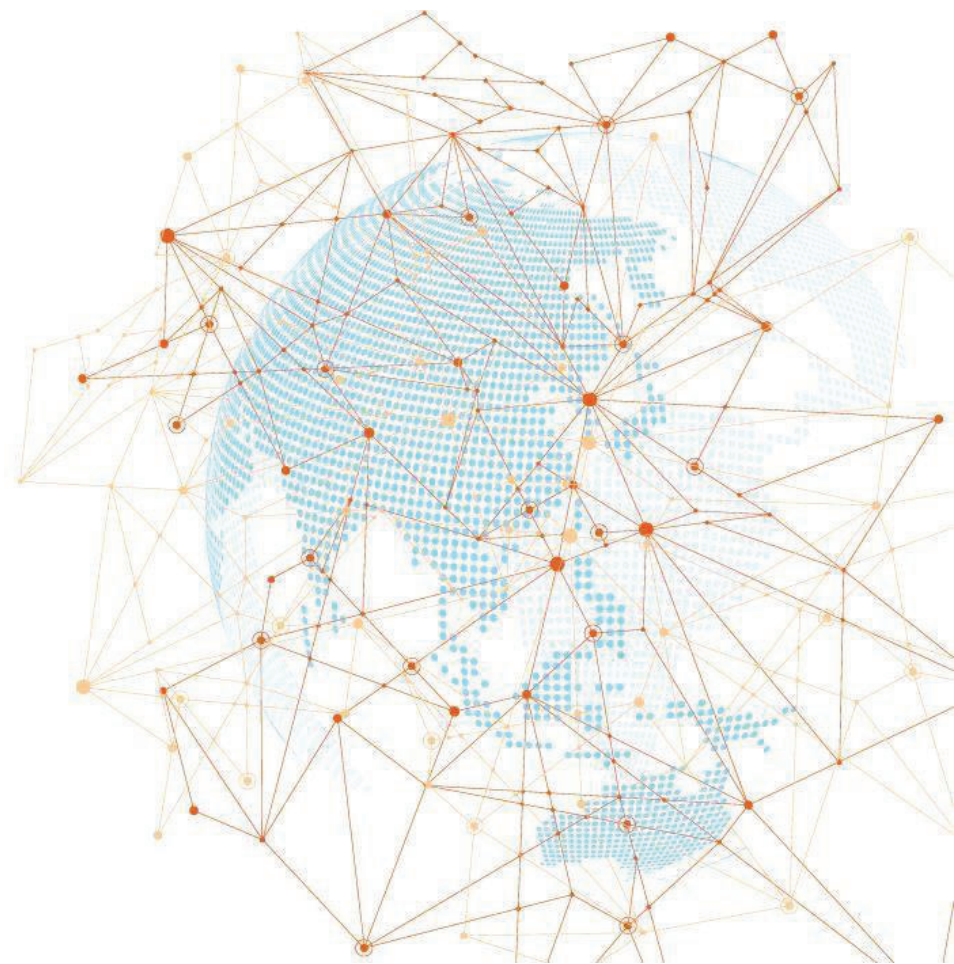


31,000 people
directly
employed
in mining

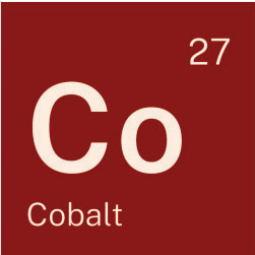


> 50 active mines
15 major metals mined

Global metal demand for the energy transition



x2 today's production



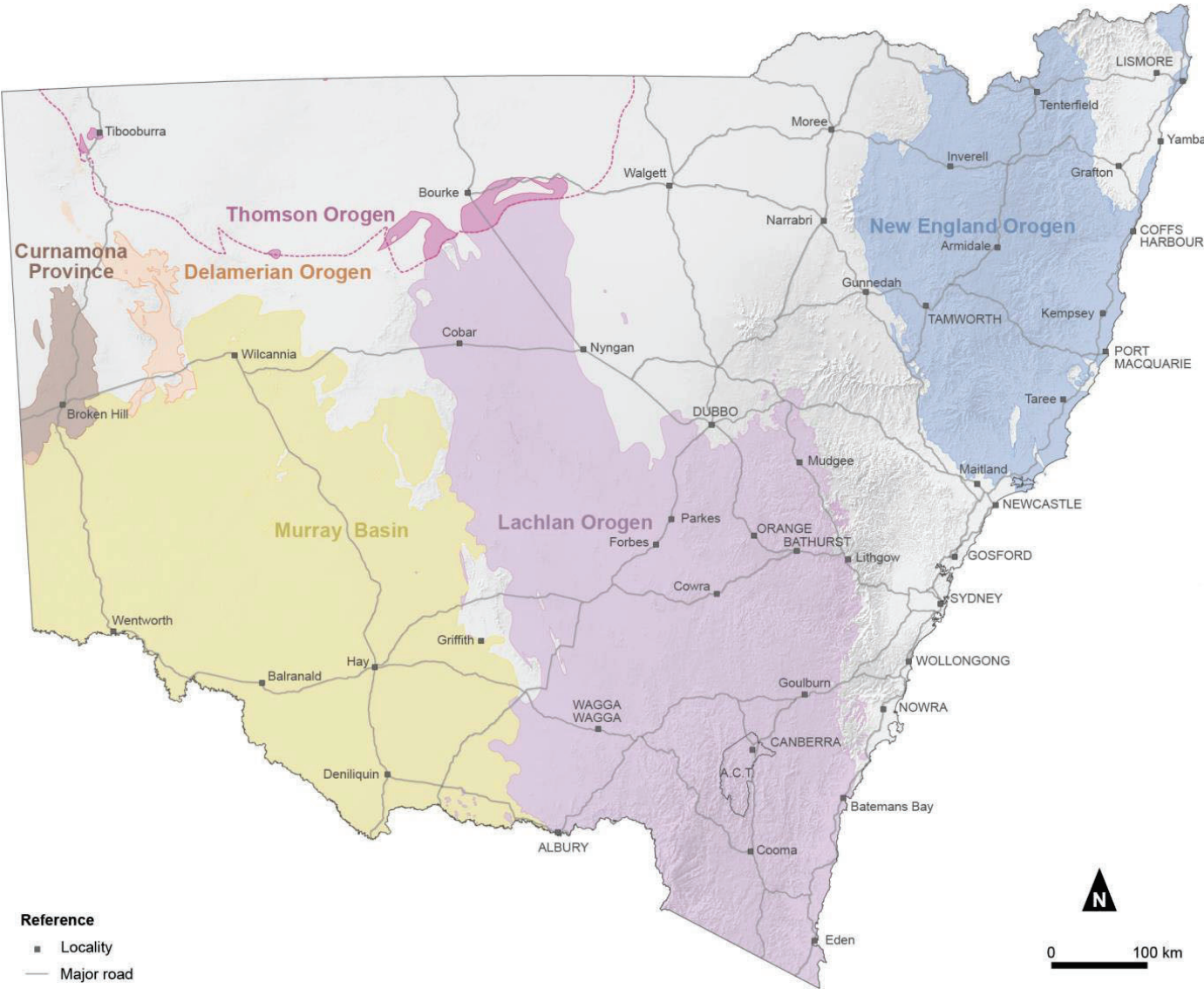
x2 today's production



x30 more nickel

NSW critical minerals

21 of the 31 critical minerals on the Australian Government’s critical minerals list



Broken Hill	Murray Basin	Lachlan Orogen	New England
Chromium Cobalt PGE Tungsten Vanadium	REE Titanium Zirconium	Bismuth Chromium Cobalt Hafnium High-purity alumina Indium Lithium Magnesium Molybdenum Nickel Niobium PGE REE Scandium Silicon Tantalum Tungsten Vanadium Zirconium	Antimony Chromium Cobalt High-purity alumina Indium PGE Scandium Tungsten

Known/potential NSW occurrence

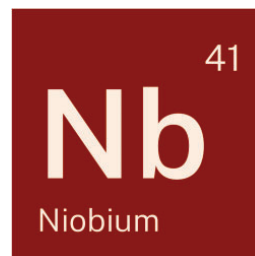
New South Wales hosts aluminium, copper, tin and zinc which are on Australia’s strategic minerals list, while silver is a priority metal in New South Wales

The strength of New South Wales minerals

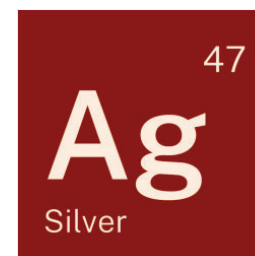
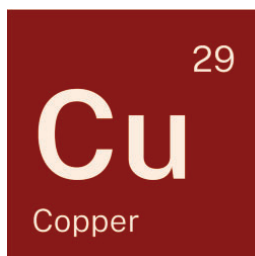
An abundance of copper, cobalt, silver, gold, scandium, rare earth elements and other minerals



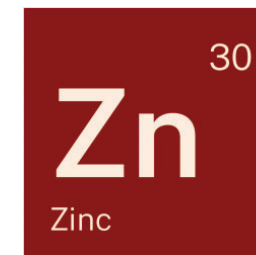
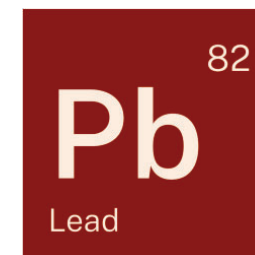
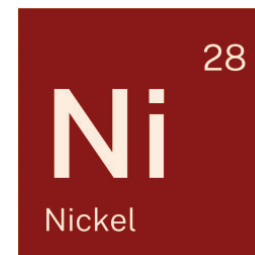
NSW ranked
No.1



NSW ranked
No. 2



NSW ranked
No. 3



Economic Demonstrated Resource (EDR)

AUSTRALIA MINERALS | NEW SOUTH WALES

K-Resources—Australia Minerals Investment Seminar | Sep '25 | #AustraliaMinerals

NSW Resources

NSW Critical Minerals and High-Tech Metals Strategy (2024-35)

NSW Critical Minerals and High-Tech Metals Strategy

Vision

NSW is a leader in critical minerals and high-tech metals, generating economic prosperity through exploration, mining, processing, recycling and advanced manufacturing.

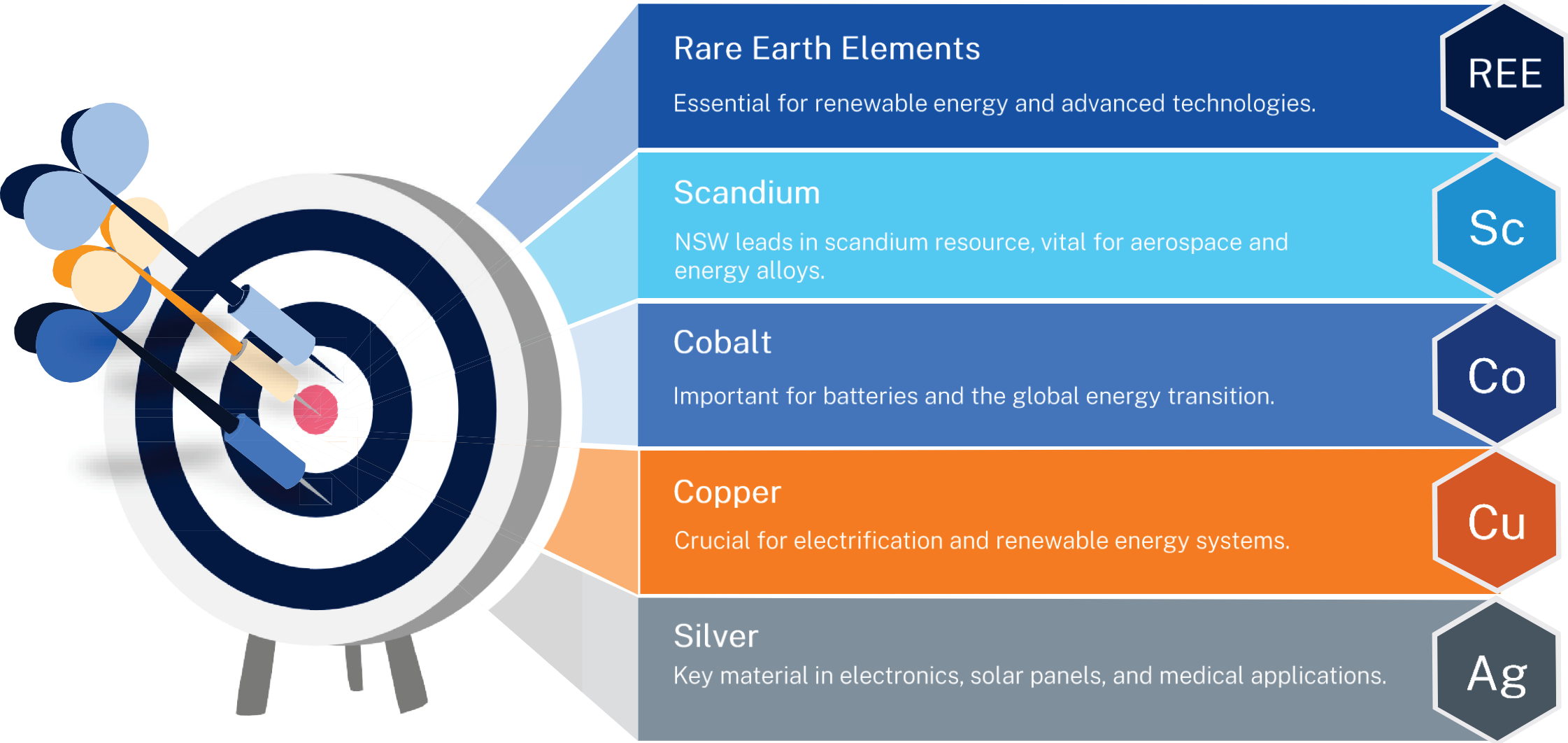
Mission

NSW will utilise its strengths in human capital, innovation, and resources to drive sovereign capability, and create jobs and export revenue across the critical minerals supply chain.



nsw.gov.au/regional-nsw/critical-minerals-and-high-tech-metals-strategy-2024-35

NSW priority metals



Strategic pillars



Encourage exploration

Support the growth of the critical minerals exploration industry through pre-competitive data to minimise investment risk.



Incentivise production

Increase investment certainty and streamline planning approvals to support the transition from exploration to production.



Establish supply chains

Harness our strengths in research and innovation to drive the growth of domestic processing, manufacturing and metals recycling in NSW.



Develop future-ready skills

Grow the critical minerals workforce with a focus on skills and training to support local communities to access new economic opportunities



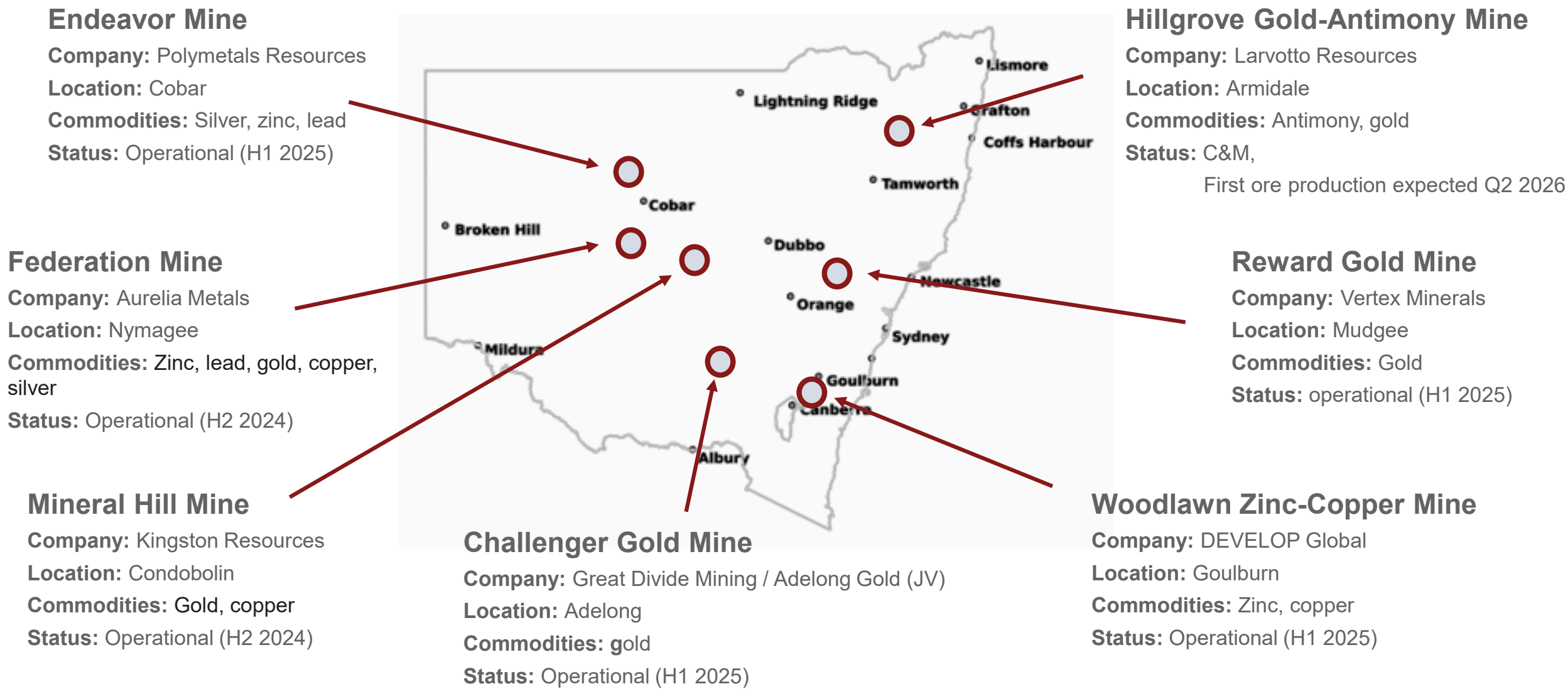
Engage communities

Adopt a continuous improvement approach to the state's robust regulatory approach, to provide certainty to local communities and minimise environmental impacts.

NSW Resources

NSW Critical Minerals and High-Tech Projects

Mine starts / re-starts



Exploration sector in NSW

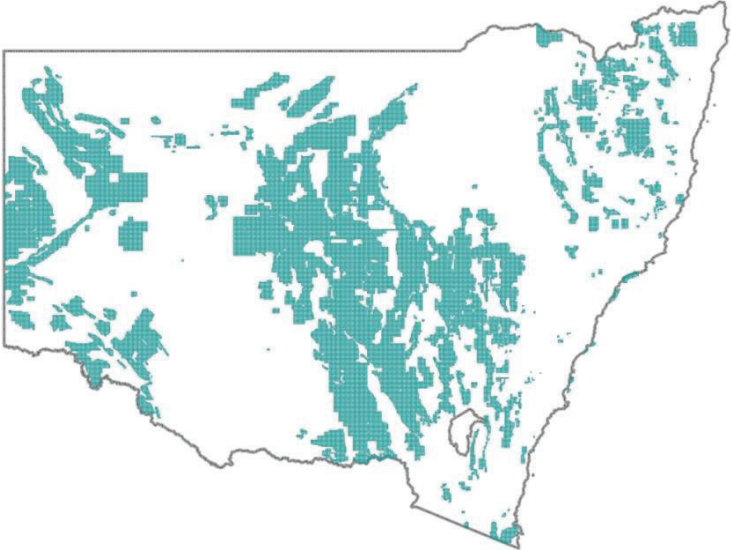
101 ELs granted
in FY24

74
for metallic
minerals

27
for other
minerals



Steady growth
of coverage of exploration titles



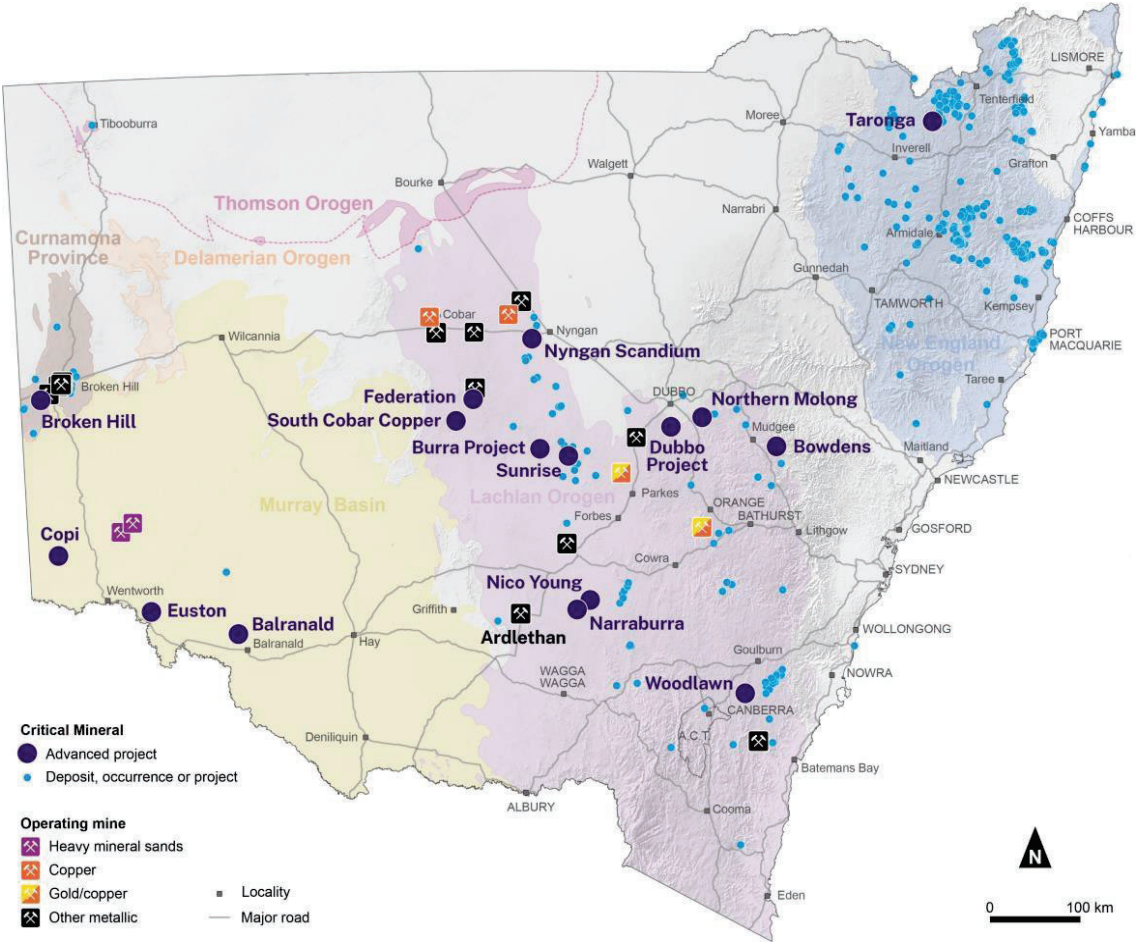
37% of the state
is currently covered by
mineral exploration licences
(up from 34% in 2022)



Most exploration activity is for Group 1 minerals – gold, copper, silver and other 'critical minerals'

New critical minerals and high-tech metals projects

Project	Company	Stage	Metals
Ardlethan	Australian Tin resources	Approved	Sn
Nyngan Scandium	Scandium International Mining	Approved	Sc (LREE)
Balranald	Iluka Resources	Approved	Ti, Zr, REE
Dubbo Project	Australian Strategic Materials	Approved	REE (+ Zr, Nb, Hf, Ta)
Sunrise	Sunrise Energy Metals	Approved	Co, Ni, Sc
Syerston	Sunrise Energy Metals	Approved	Sc
Bowdens Silver	Silver Mines	Feasibility	Ag
Broken Hill Cobalt	Cobalt Blue	Feasibility	Co
Copi	RZ Resources	Feasibility	Ti, Zr, REE
Burra Project	Rio Tinto	Feasibility	Sc, Ni, Co
Euston	Iluka Resources	Feasibility	Ti, Zr, REE
Taronga Tin	First Tin	Feasibility	Sn
Narraburra REE	Godolphin Resources	Advanced Exploration	REE



New South Wales has a significant pipeline of approved, developing, and advances exploration projects (~45 projects)

NSW government support

NSW Mining Concierge



Investment Attraction



mining.concierge@regional.nsw.au

Thank You



Rob Blayney

Manager Investment Attraction

NSW Resources

Department of Primary Industries and Regional Development

NSW Government

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M +61 425 248 503

E Rob.Blayney@regional.nsw.gov.au

www.resources.nsw.gov.au/invest-nsw/industry-support

AUSTRALIA MINERALS

REALISE THE OPPORTUNITY

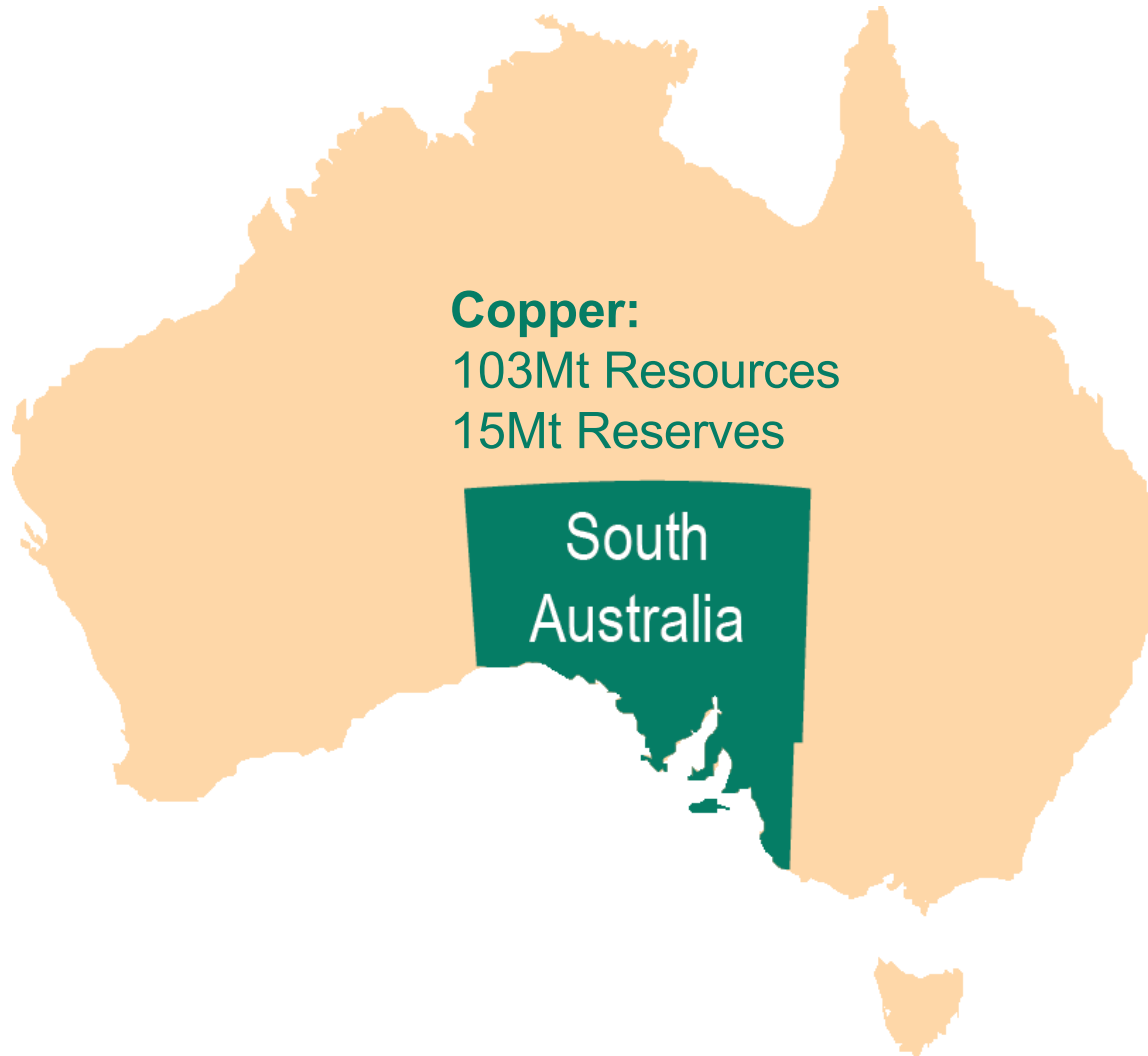
Critical and Strategic Minerals in South Australia

Enabling the Global Transition

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

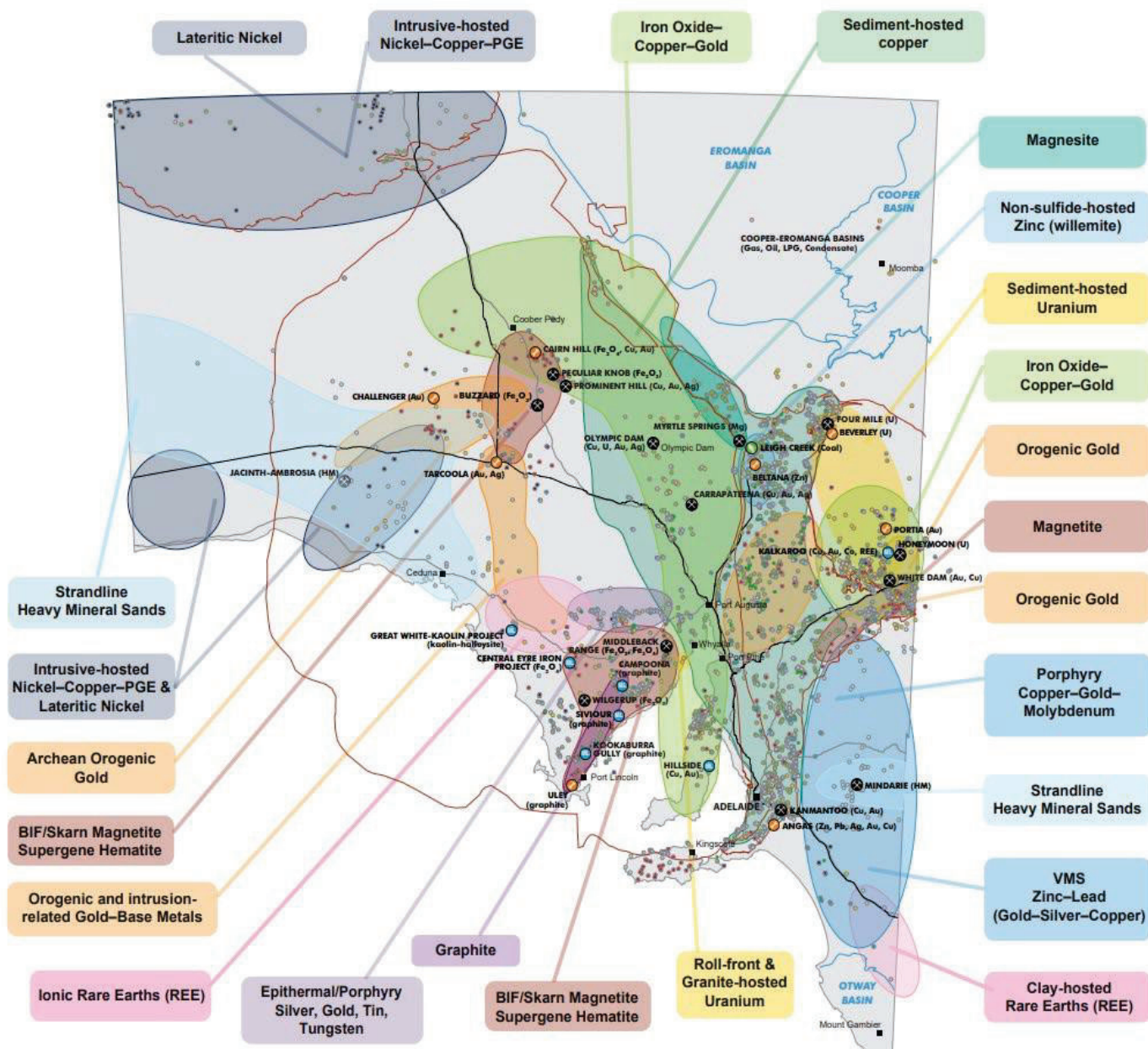


South Australia: The Copper State



- 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 \$4.36 billion in 2024.
- South Australia has world-class precompetitive geoscience data and regulatory framework.

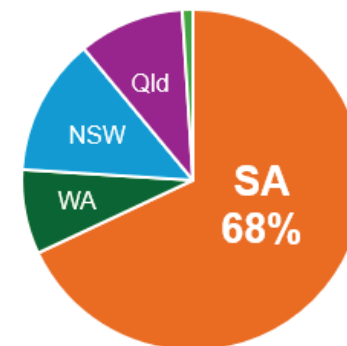
South Australia: Copper | Graphite | Magnetite | Uranium | Critical Minerals



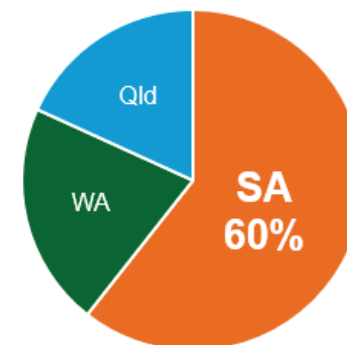
- Overlapping multi-commodity mineral systems
- South Australia hosts 68% of Australia's **copper** & 60% Australia's **graphite** resources*
- High-quality magnetite, feedstock for DRI and Green Iron manufacture
- Largest deposit of **uranium** in the world, 4th largest producer globally
- Proven resource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

* [Australia's Identified Mineral Resources | Geoscience Australia](#)

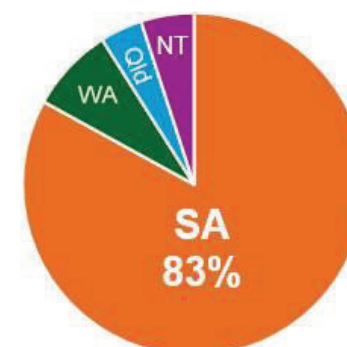
COPPER in AUSTRALIA



GRAPHITE in AUSTRALIA



URANIUM in AUSTRALIA



South Australia | Precompetitive Geoscience

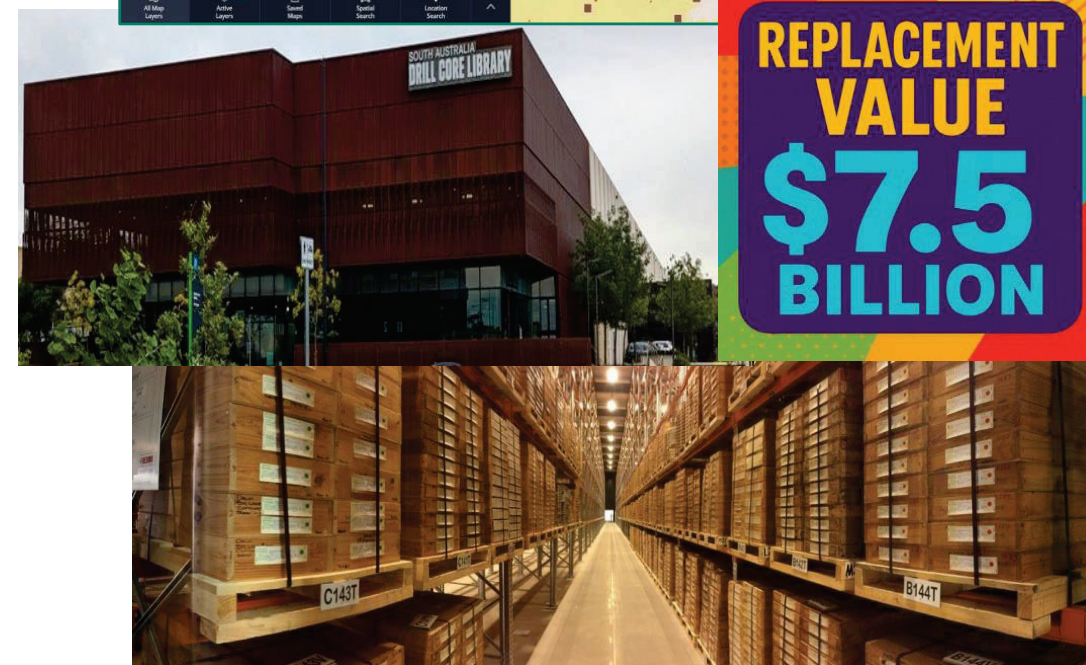
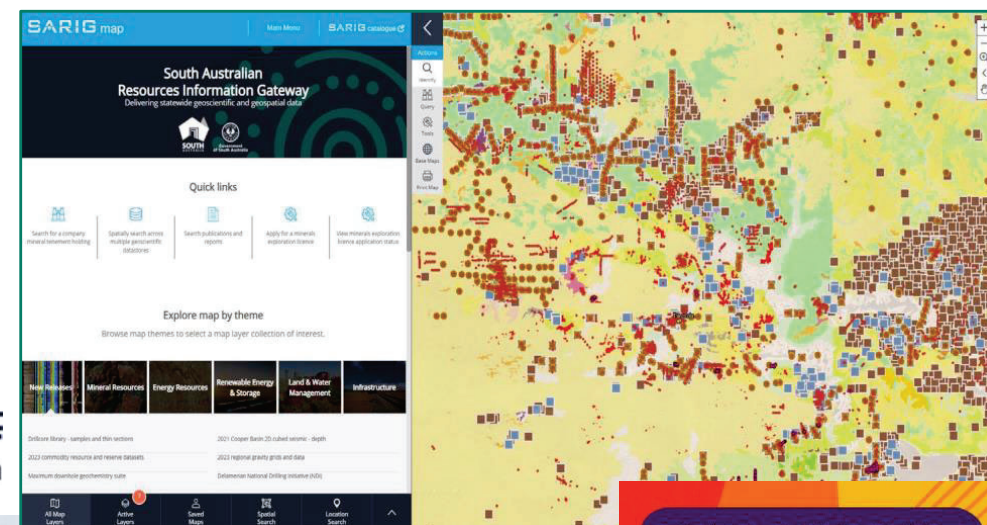
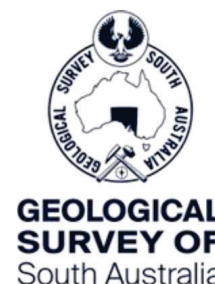
SARIG, the South Australian Resources Information Gateway is a comprehensive digital platform developed and maintained by the Geological Survey of South Australia.

- It provides global, open access to South Australia's precompetitive geoscientific data and information, mining and exploration project information, and infrastructure mapping.

The **South Australia Drill Core Library** is a world-class facility managed by the Geological Survey of South Australia.

- It serves as a central repository for geological samples, primarily drill cores, collected over more than **135 years** of mineral and energy exploration across the state.
- Over 10 million metres of drill core and cuttings, ~8000 rock specimens & 21,000 thin sections, cataloguing South Australia's geology.

SARIG & The Drill Core Library are both designed to support researchers, industry professionals, government agencies, and the public by streamlining open access to critical geological and resource-related information.



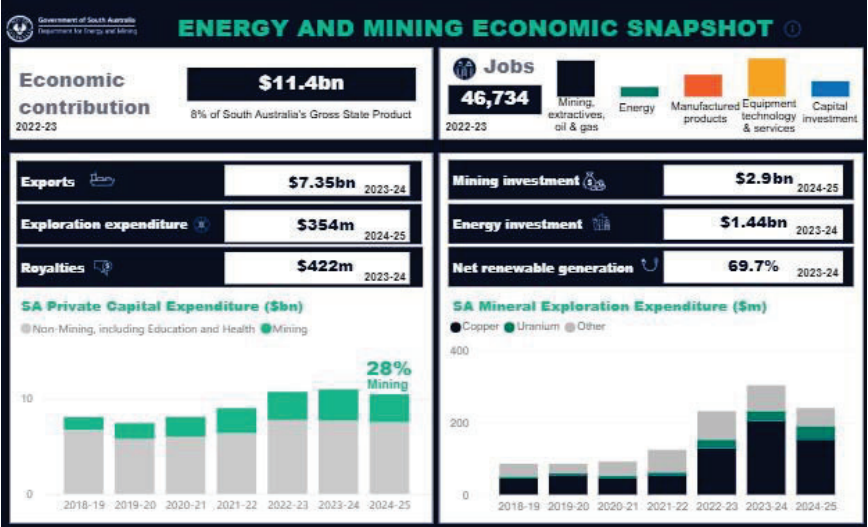
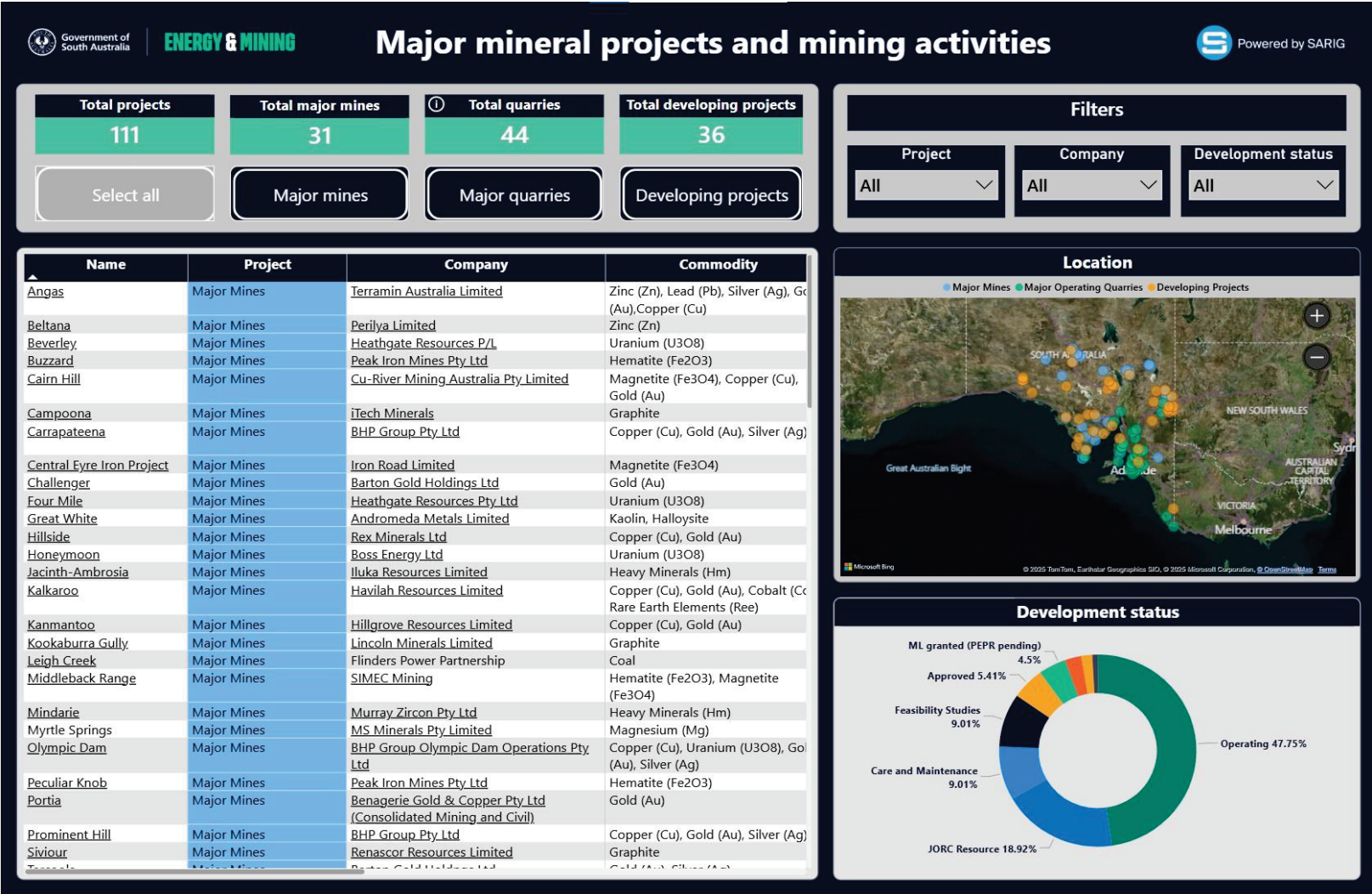
**REPLACEMENT
VALUE
\$7.5
BILLION**

Dashboard Delivery | available now

The easiest way to find information on South Australia’s mineral and mining projects is via our new Power BI dashboards.

[Major projects and mining activities | Energy & Mining](#)

[Economic dashboard | Energy & Mining](#)



South Australia's Critical Minerals dashboards



South Australia | next-generation data delivery

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.

Time slice

Stratigraphic unit

Province

Event

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

Before

After

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

Model

Map

Document

Dataset

Application

EXPLORE BY CATEGORY

Exploration

Energy

Geology

Geophysics

Environment

Spatial

EXPLORE BY COLLECTION

Departmental publications

Mineral exploration company reports

Mineral mining reports

Legislation and guidance

Exploration initiatives

Geoscience reports and publications

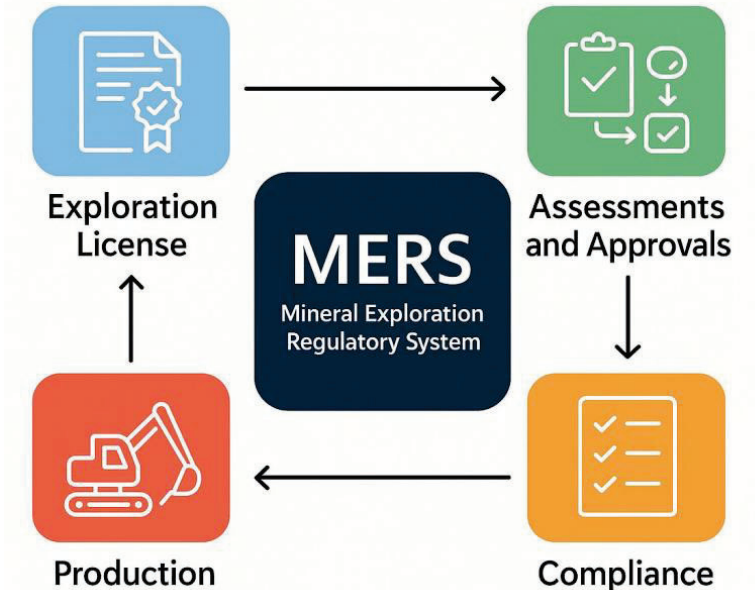
AUSTRALIA MINERALS | SOUTH AUSTRALIA

K-Resources—Australia Minerals Investment Seminar | Sep '25 | #AustraliaMinerals

Mineral Regulatory Framework

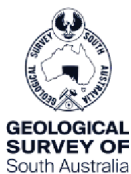
- In South Australia the 'Crown' (State) owns the minerals in the ground
- State legislation provides tenure rights to explore for, and extract, minerals
- Primary legislation is the *SA Mining Act 1971* and Mining Regulations 2020 – metals, coal, uranium, opal, extractive minerals
- Administered by the Department for Energy and Mining – the Lead Agency
- Other state legislation for Health and Safety, Water and natural resource management, Indigenous Heritage, and Environment Protection.

One window to government approach taken by DEM when working with co-regulatory agencies



MERS manages the entire lifecycle of regulation for the resources sector within South Australia, from exploration, quarrying and mining licensing and lease impact assessment and management, through to regulated compliance and royalties.

Useful Links and Contacts | SOUTH AUSTRALIA



Dr Bronwyn Camac:

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Bronwyn.camac@sa.gov.au



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Regional Director South Australia – Japan & Korea,
Department of State Development
Sally.Townsend@austrade.gov.au



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](#)



Department for State Development

[Invest In Prosperity Projects SA](#)

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Thank you

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



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REALISE THE OPPORTUNITY

Minerals investment opportunities in Tasmania

2025 Update

Rebecca Sproule
Chief Government Geologist
Mineral Resources Tasmania



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

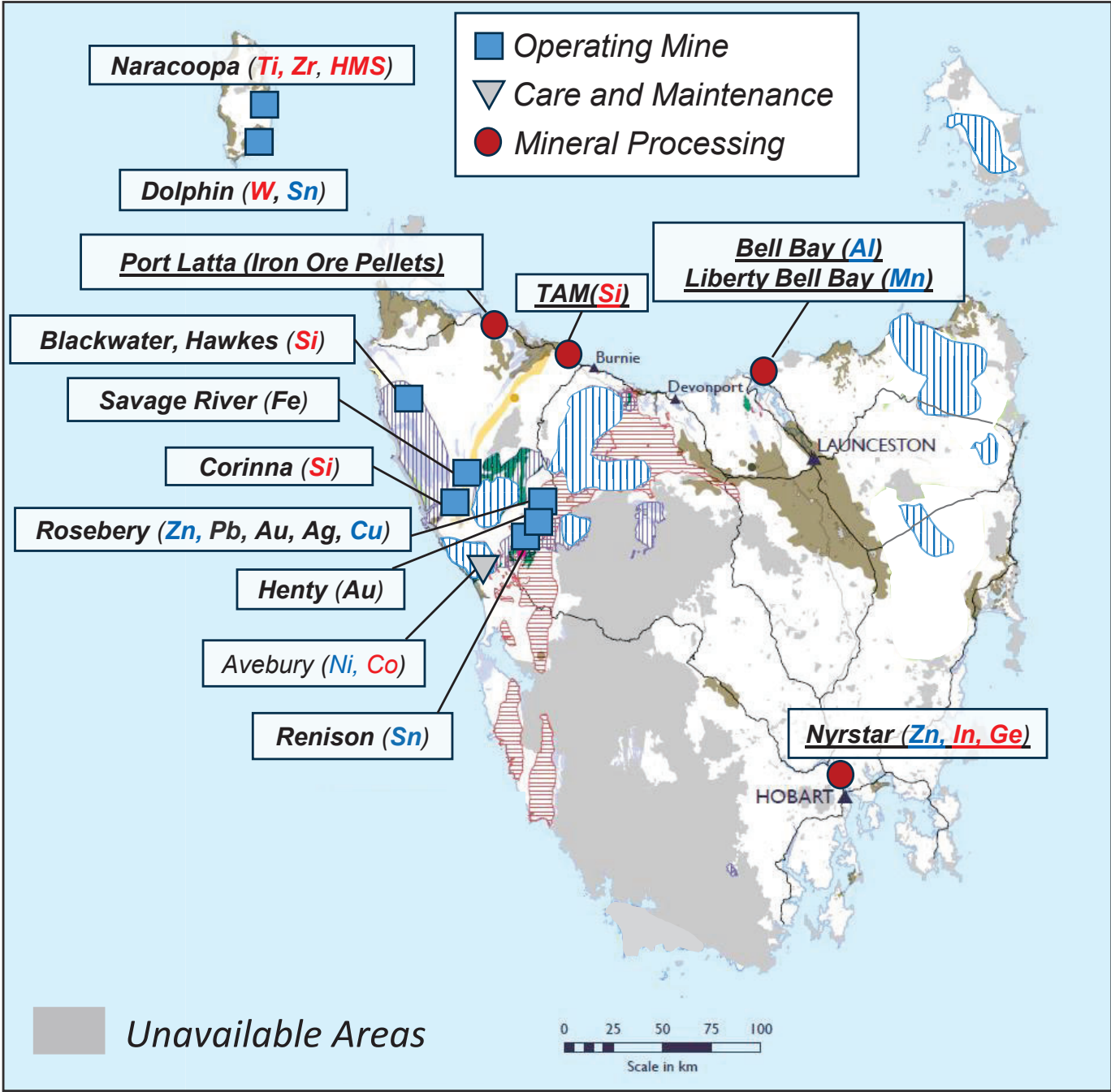


Current production and processing

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



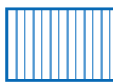
Production in bold
Processing underlined
Strategic minerals in blue
Critical minerals in red



A pipeline of opportunities

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

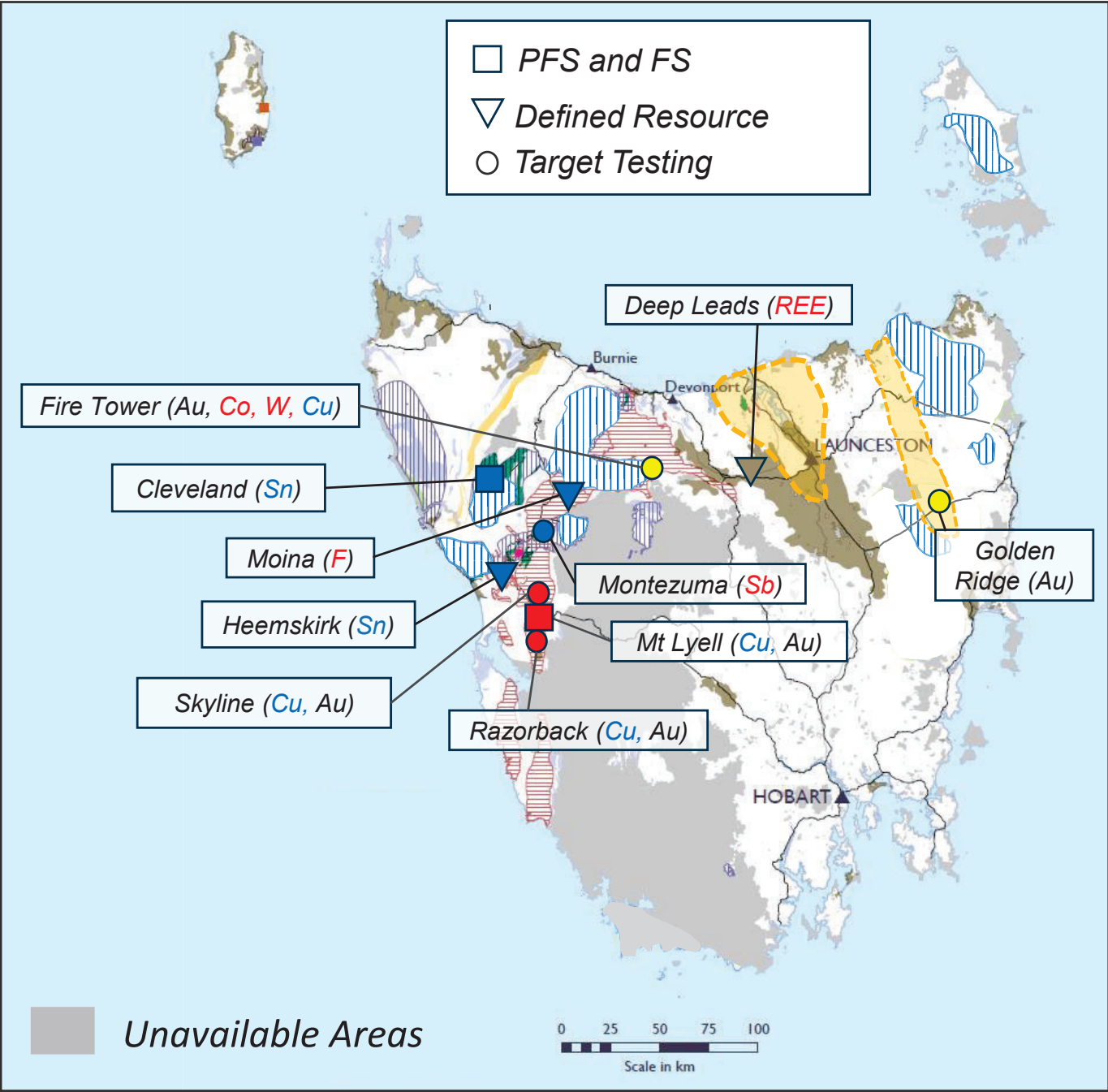
 **Cu, Zn, Pb, Au, In, Ge, Sb**

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

 **Au, Ag, Sb**

 **REE, Ti, Zr**

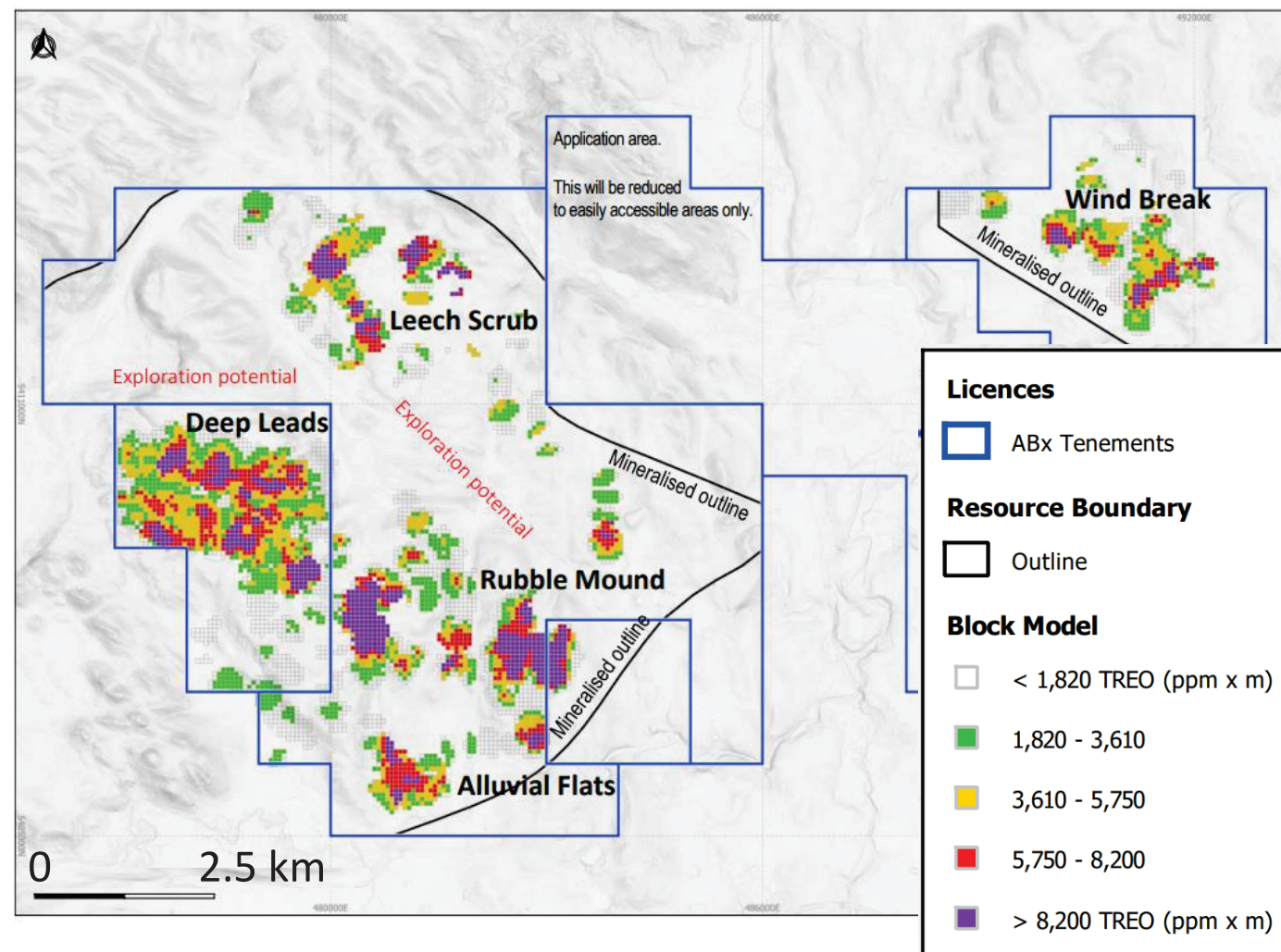
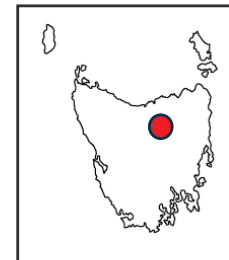
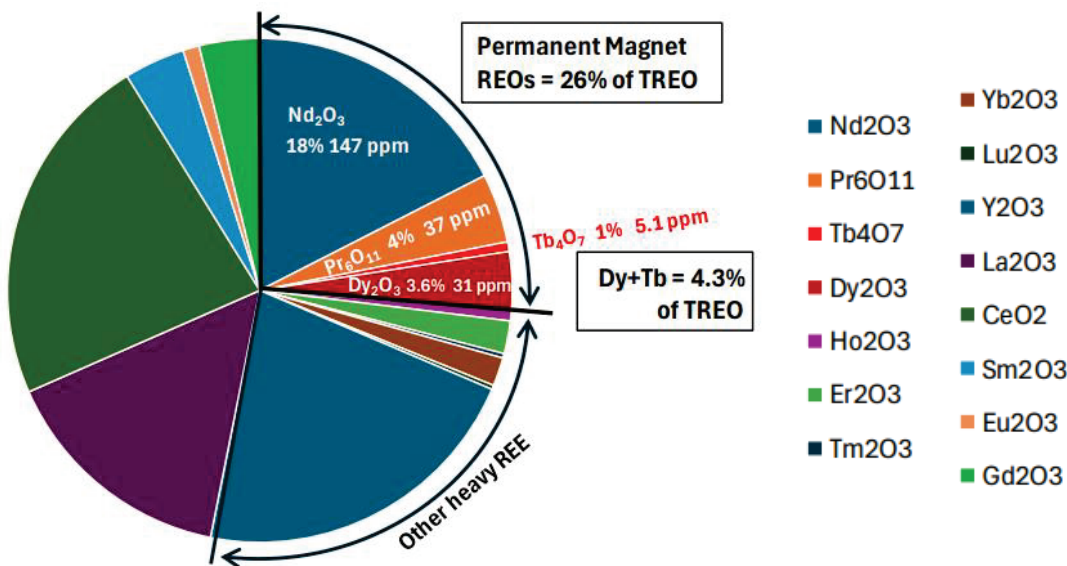
Production in bold
Strategic minerals in blue
Critical minerals in red



Project pipeline – Deep Leads

Rare earth elements

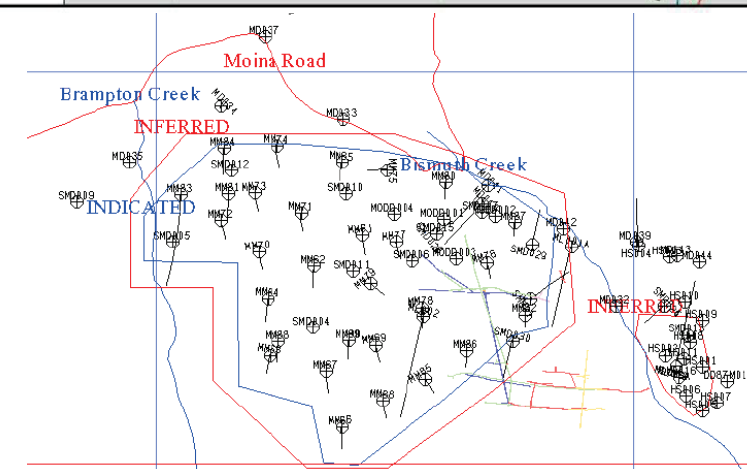
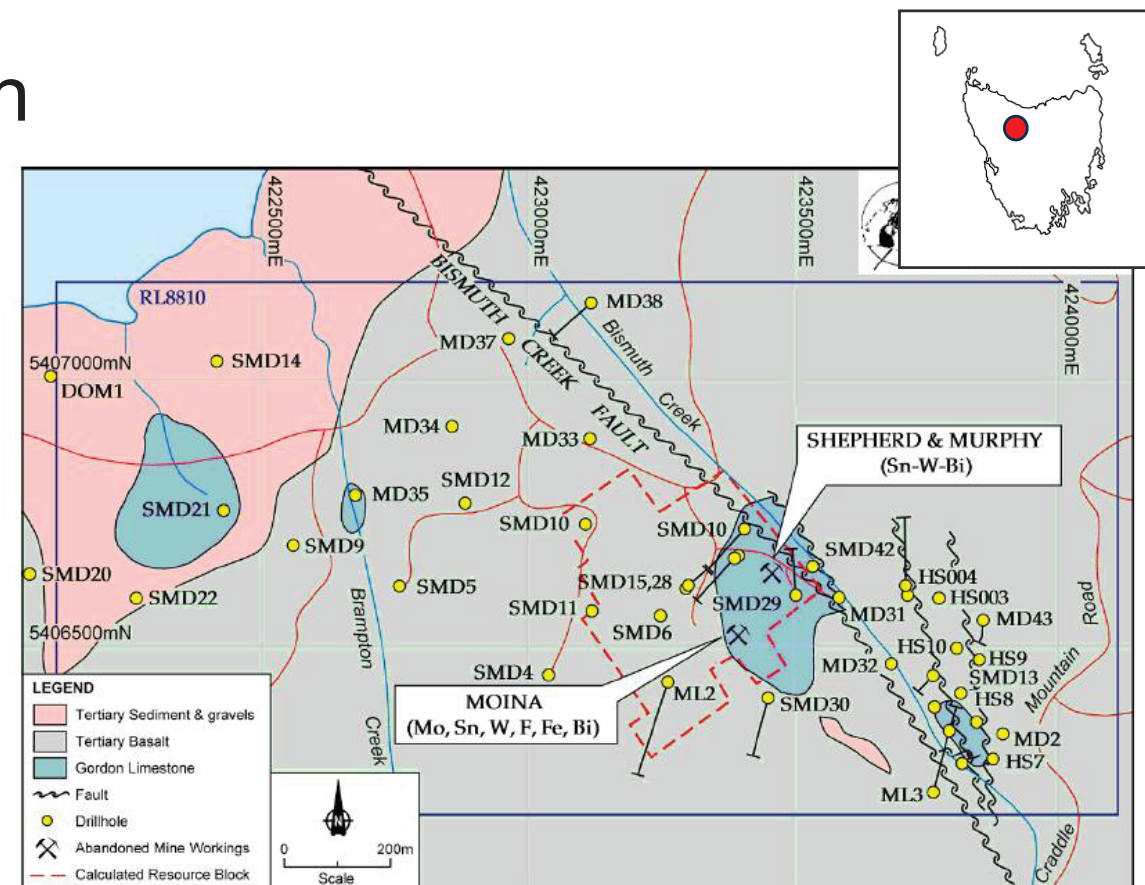
- 89 Mt at 844 ppm TREO (May 2024) based on drill out of only 29% of identified mineralized outline
- Ionic adsorption clay (IAC) type with highest Dy and Tb proportions of any IAC worldwide
- Highly favourable testwork with high rare earth extraction in 30 minutes at pH4 with low acid consumption



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
- Current drilling is ongoing to bring inferred resources to indicated
- Pre-feasibility studies in progress

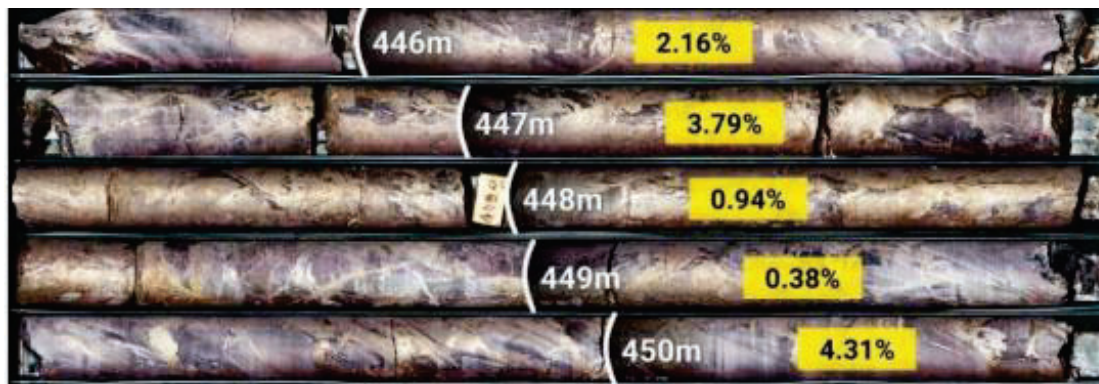


Project pipeline

Stellar Resources – Heemskirk

Tin

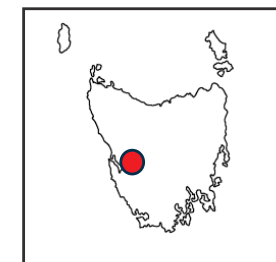
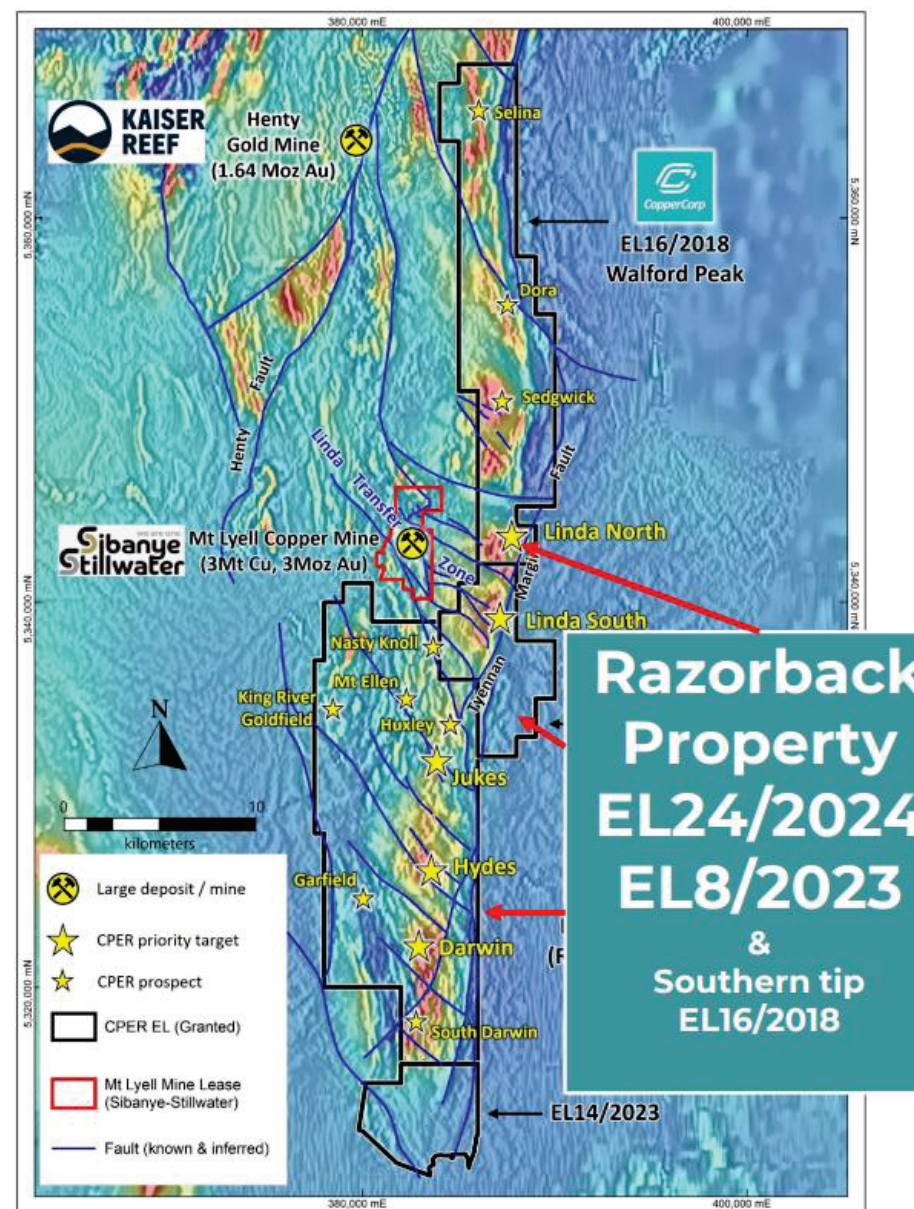
- Total resource of 7.5 Mt @ 1.04% Sn (77.9 kt contained Sn)
- Resource open at depth
- Favourable metallurgy (97% cassiterite) with 69% recovery in 2019, anticipated to increase to 75%
- Pre-feasibility studies in progress
- Off-take unencumbered



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 & 0.19g/t Au (from 72.0 m)
 - 50 m @ 0.66% Cu & 0.27g/t Au (from 498.0 m)
 - Hydes channel sampling
 - 24 m @ 0.74% Cu & 0.36g/t Au, including 14 m @ 0.97% Cu & 0.56 g/t Au



Jukes high grade

For further information



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Thank you

Rebecca Sproule
Chief Government Geologist
Mineral Resources Tasmania



AUSTRALIA MINERALS

REALISE THE OPPORTUNITY

Victoria's Critical Mineral Opportunities:

Antimony, mineral sands and more

Cameron.Cairns@deeca.vic.gov.au

Manager Minerals Geoscience
Resources Victoria



Energy,
Environment
and Climate Action

Victoria: Where in the world?



Victoria: a world-renowned jurisdiction

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

Population: 7.01 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](#)
- Progressive renewable energy and net-zero targets



Victorian investment support



Haesook Chung
Trade and Investment Manager
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INVEST VICTORIA



Minjung Kang
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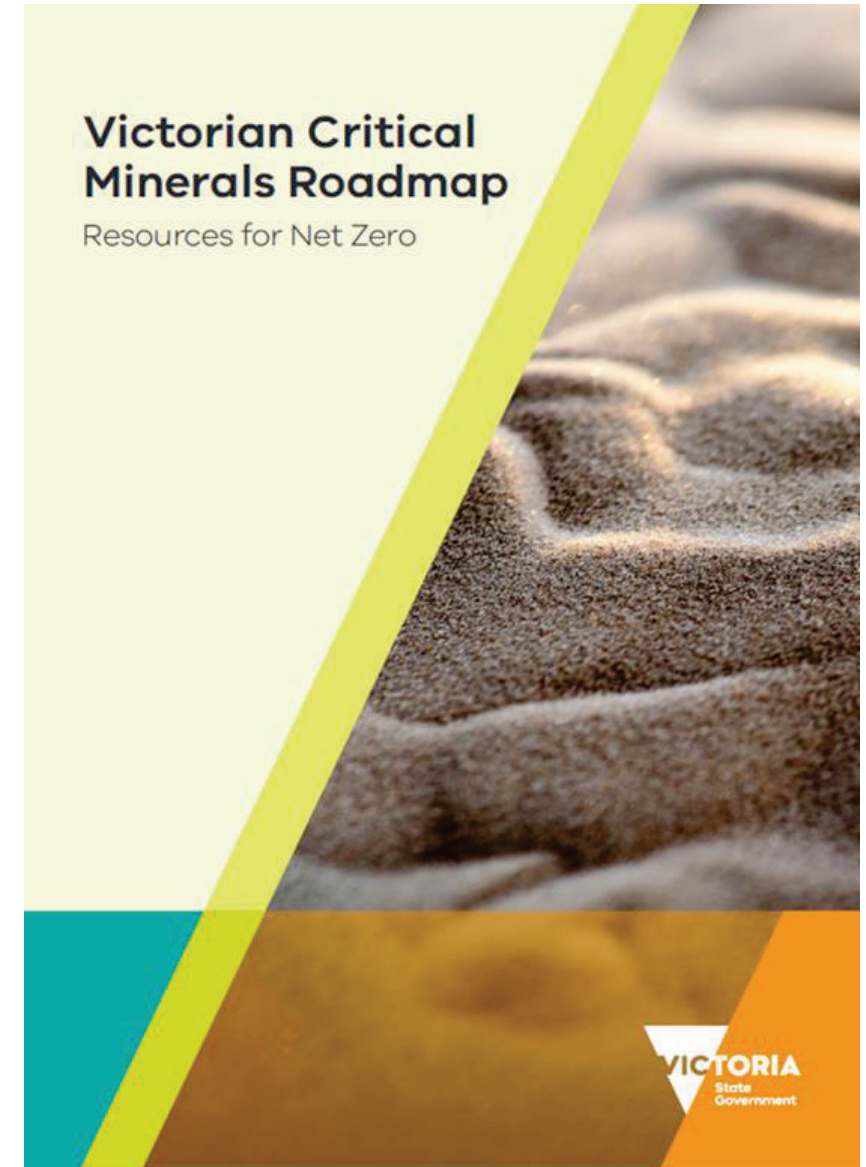
[Victorian Government Trade and Investment](#)
Level 21 Seoul Finance Centre
136 Sejong-daero Jung-gu
Seoul 100-768, Republic of Korea

The Victorian Critical Minerals Roadmap

Our vision

A world-leading ethical 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



[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.

Demonstrated critical mineral resources



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.

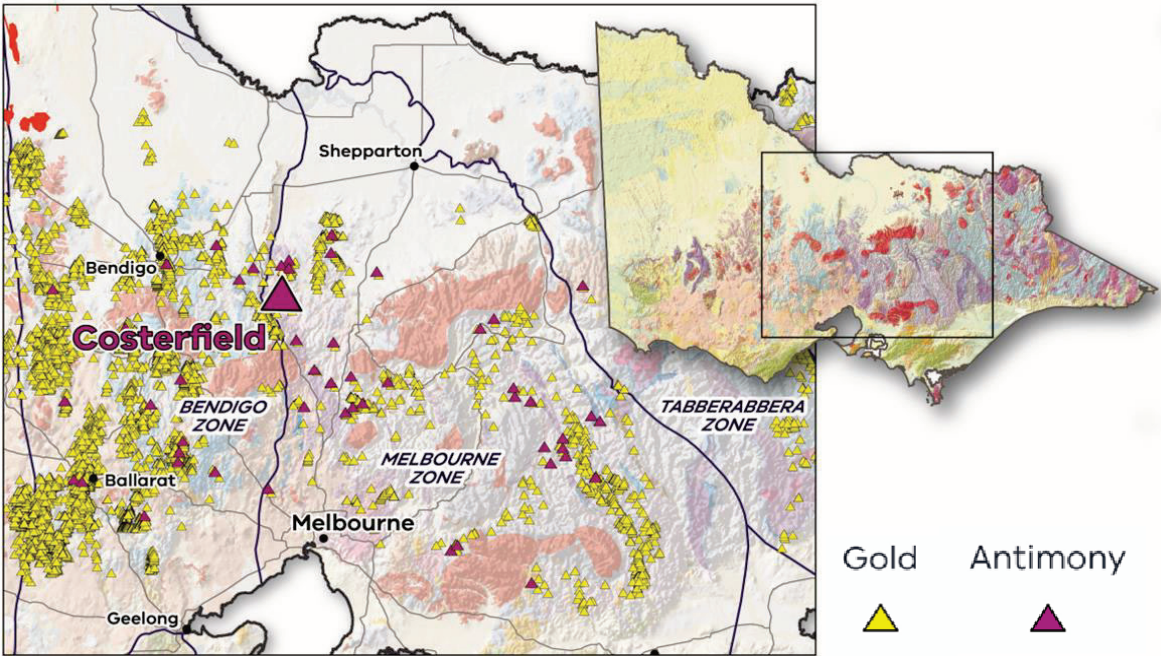
It has produced up to **4% of the world's antimony**.

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



New areas for resource extension and production identified



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:

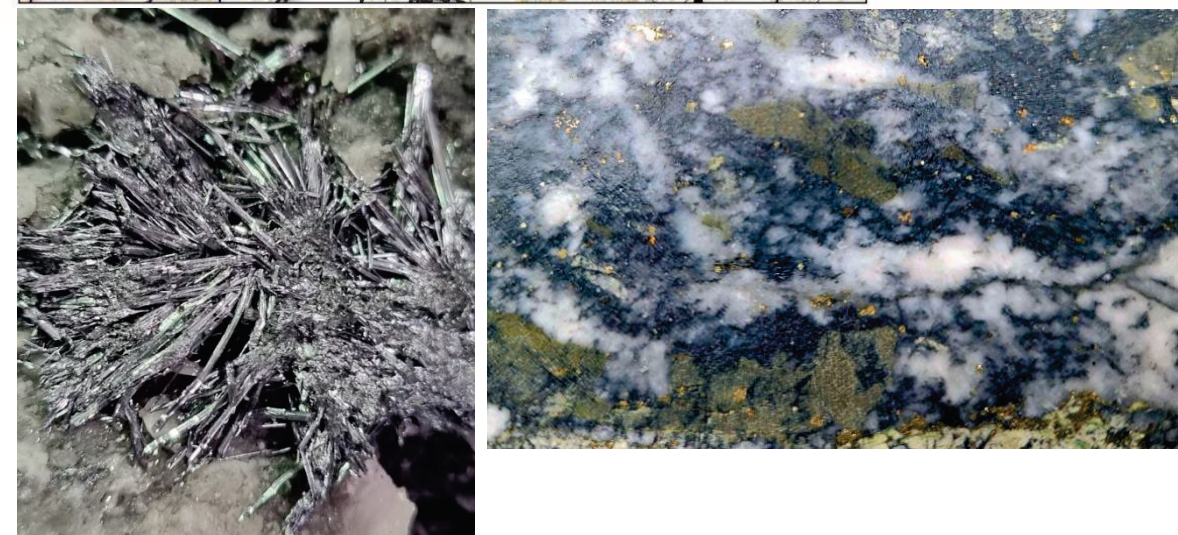
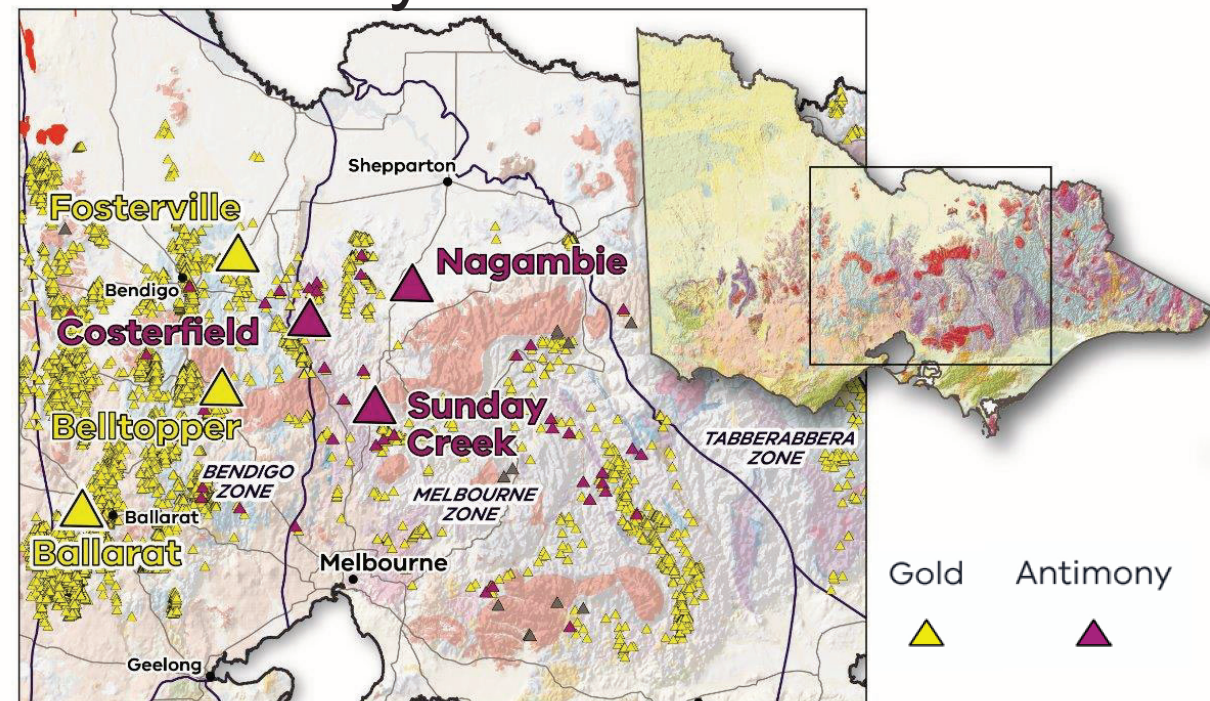
- 54 individual intersections >100 g/t AuEq x m
- SDDSC144: 242.1 m @ 6.0 g/t AuEq (uncut)
 - Incl. 0.16 m @ 3,330.0 Au, 11.7% Sb

Nagambie Resources – Nagambie Mine

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

Recent drilling highlights:

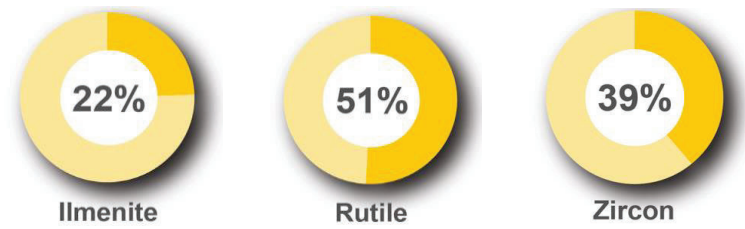
- NAD046: 1.26 m @ 4.7% Sb and 3.1 g/t Au
- NAD048 1.2 m @ 3.3% Sb and 4.5 g/t Au



Mineral sands

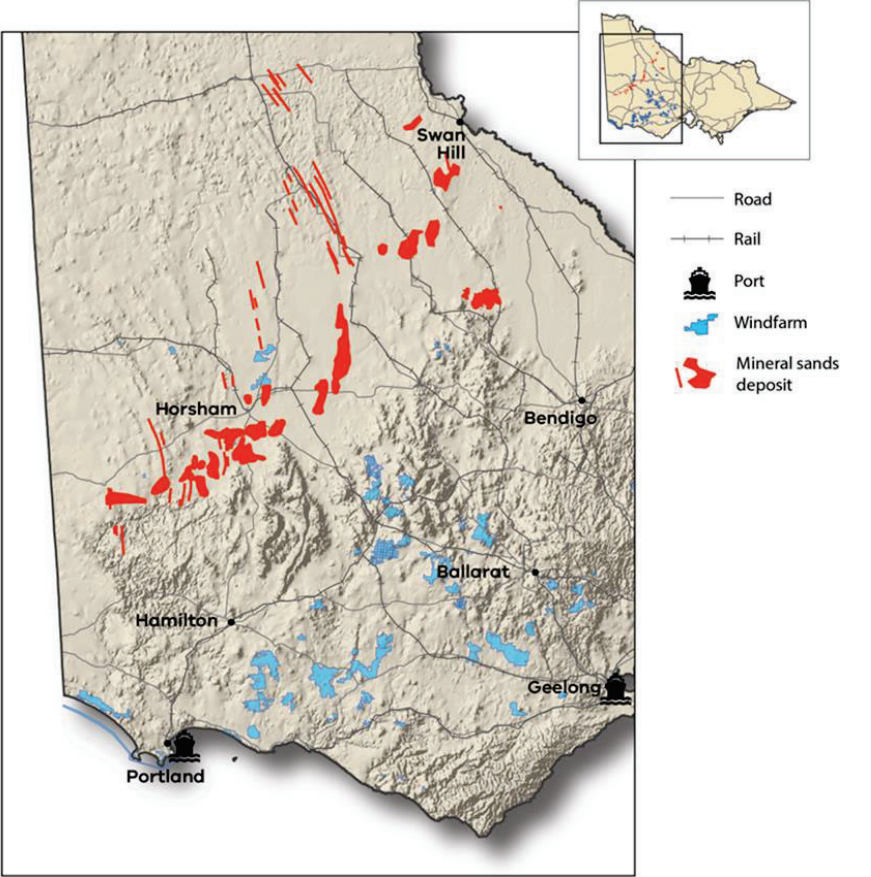
Northwest Victoria is home to the critical minerals required for electrification and decarbonisation.

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**)

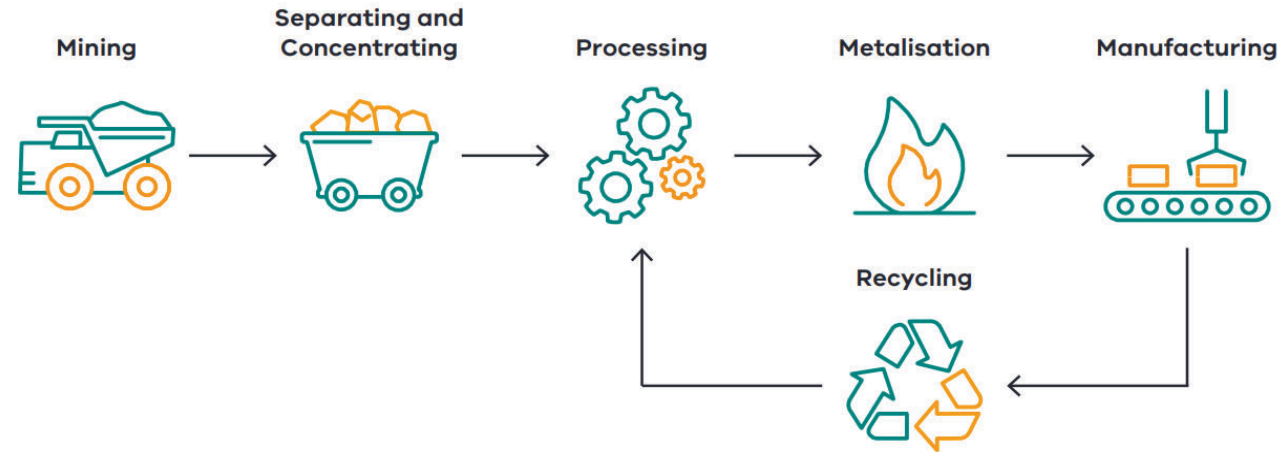


Astron Corporation Donald Mineral Sands Project	VHM Limited Goschen Project	WIM Resource Avonbank	Iluka Resources Wimmera Project	ACDC Metals Goschen Central
5,783 Mt Mineral Resource 185 Mt of total heavy minerals Definitive Feasibility Study 2021 Environmental Effects Statement approved Mining Licence 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	Rare Earth Element metallisation study
Conducting preliminary economic impact analysis that considers opportunities for Victoria in establishing processing facilities to produce antimony trioxide or ingot	Conducting a Pre-Feasibility study that will consider REE metallisation in Victoria to enable a fully integrated REE supply chain in Australia



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

[Stavely Geoscience Project](#)

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



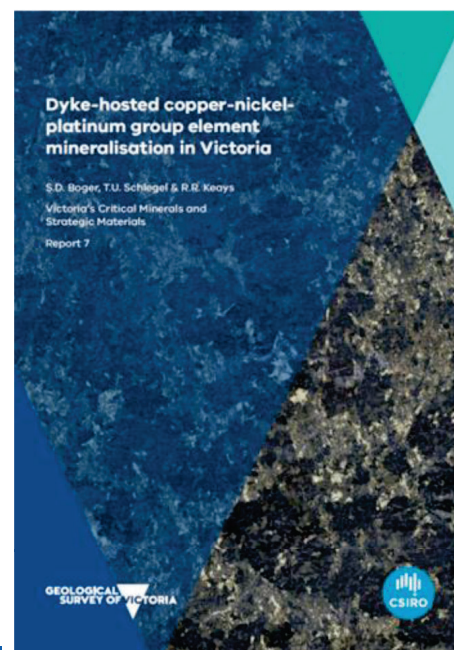
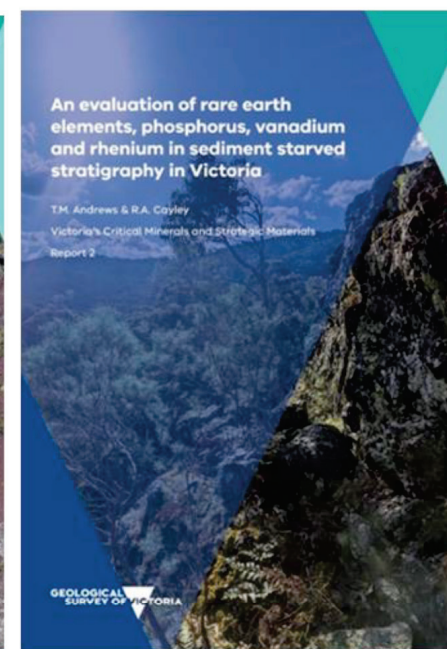
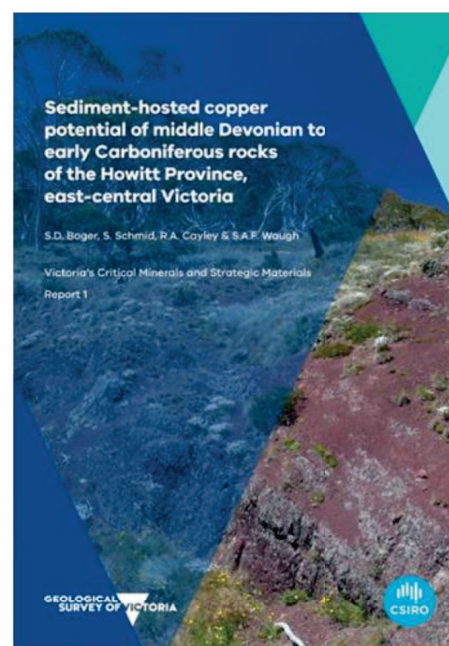
New data and knowledge

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

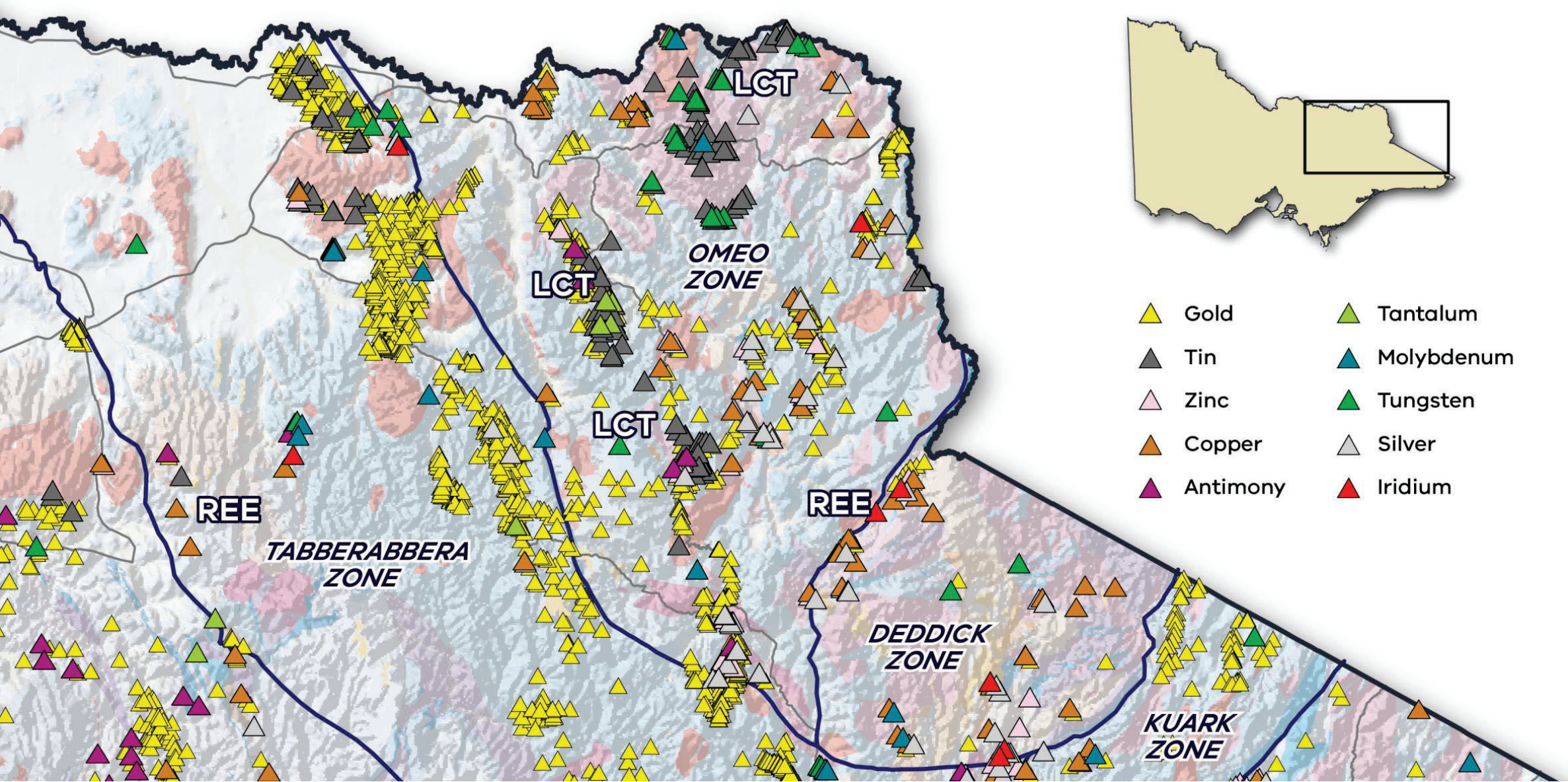
Further studies underway

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

[Critical Mineral reports download](#)



Lithium-caesium-tantalum, tin and tungsten



Victoria's geoscience: a wealth of freely accessible data and knowledge

Pre-competitive data and knowledge

- [Free maps, reports and data](#)
- [GeoVic](#) – free online mapping application

Geology

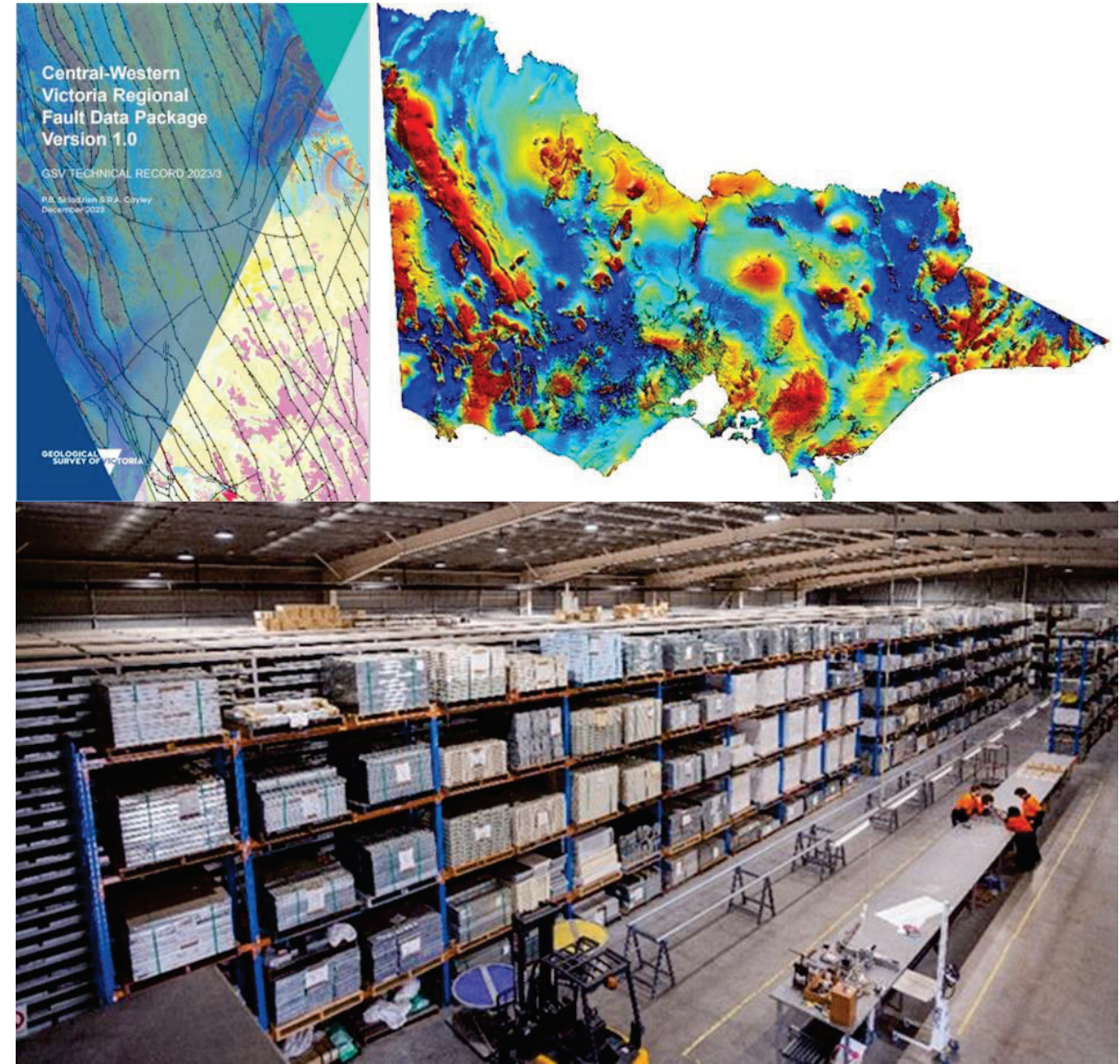
- Seamless – [1:250k](#) and [1:50k](#)
- [3D geological full crust model](#)

Geophysics

- Modern, state-wide

Drill Core Library

- 1.5 million metres of drill core and cuttings
- [>13,000 drill holes](#)



AUSTRALIA MINERALS

REALISE THE OPPORTUNITY

Thank you

Cameron.Cairns@deeca.vic.gov.au

Manager Minerals Geoscience
Resources Victoria



Energy,
Environment
and Climate Action

AUSTRALIA MINERALS

REALISE THE OPPORTUNITY

Western Australia Rare Earths: Powering Korea's Future

Dr. Charlotte Hall
General Manager Investment
Department of Mines, Petroleum and Exploration



Department of **Mines,
Petroleum and Exploration**

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



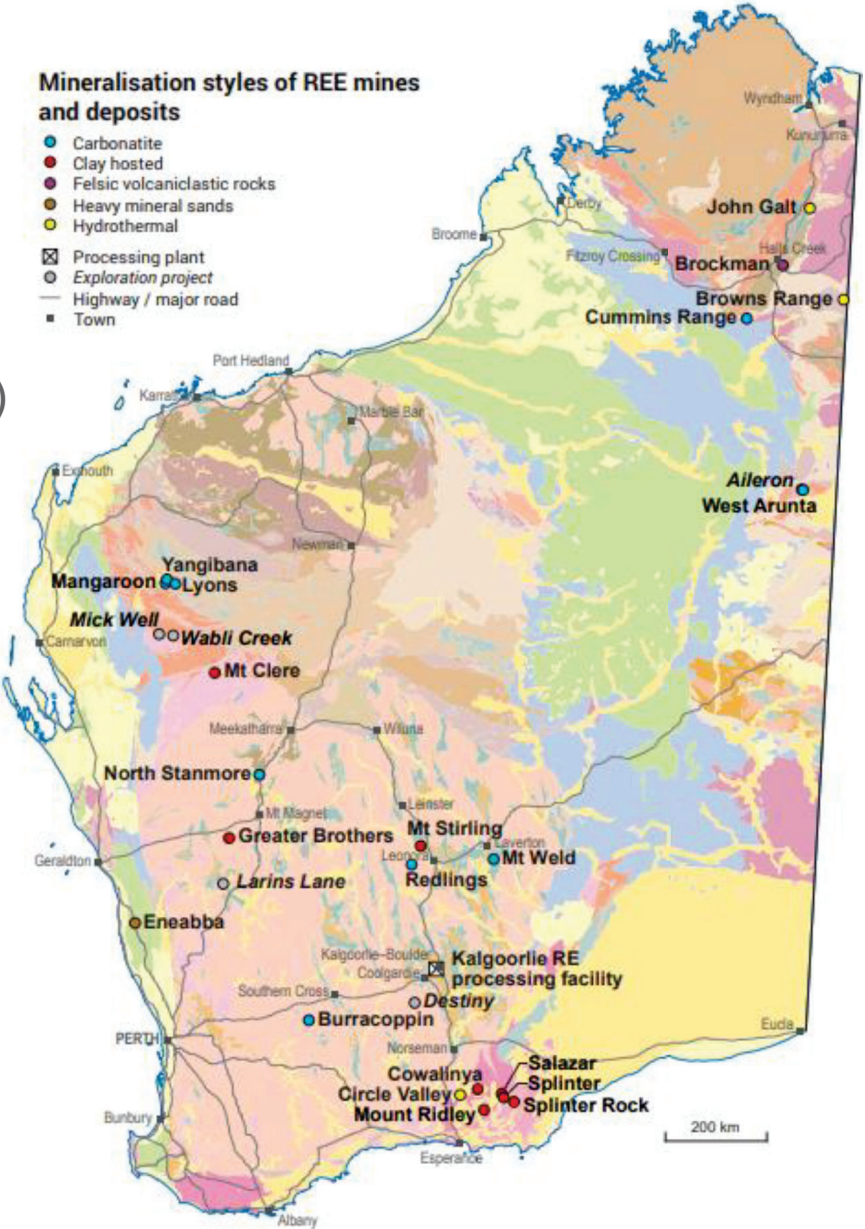
834
Full-time
employees



\$4117 m⁺
Investment
projects

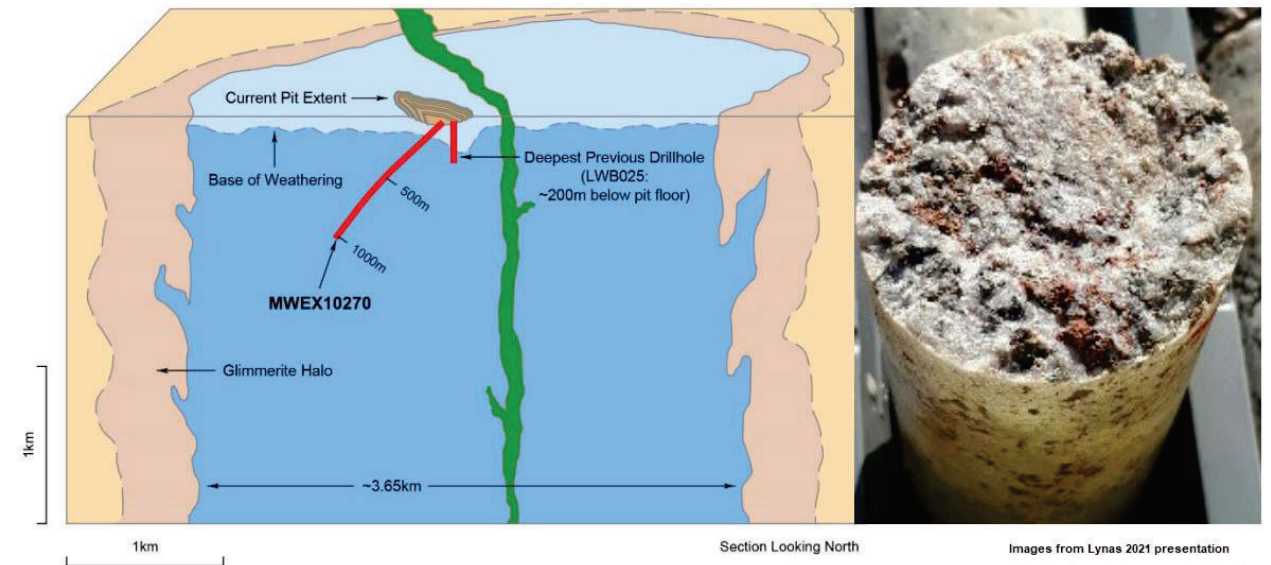


4th
Production
world ranking



OPERATIONAL – Lynas Rare Earths (Mt Weld deposit)

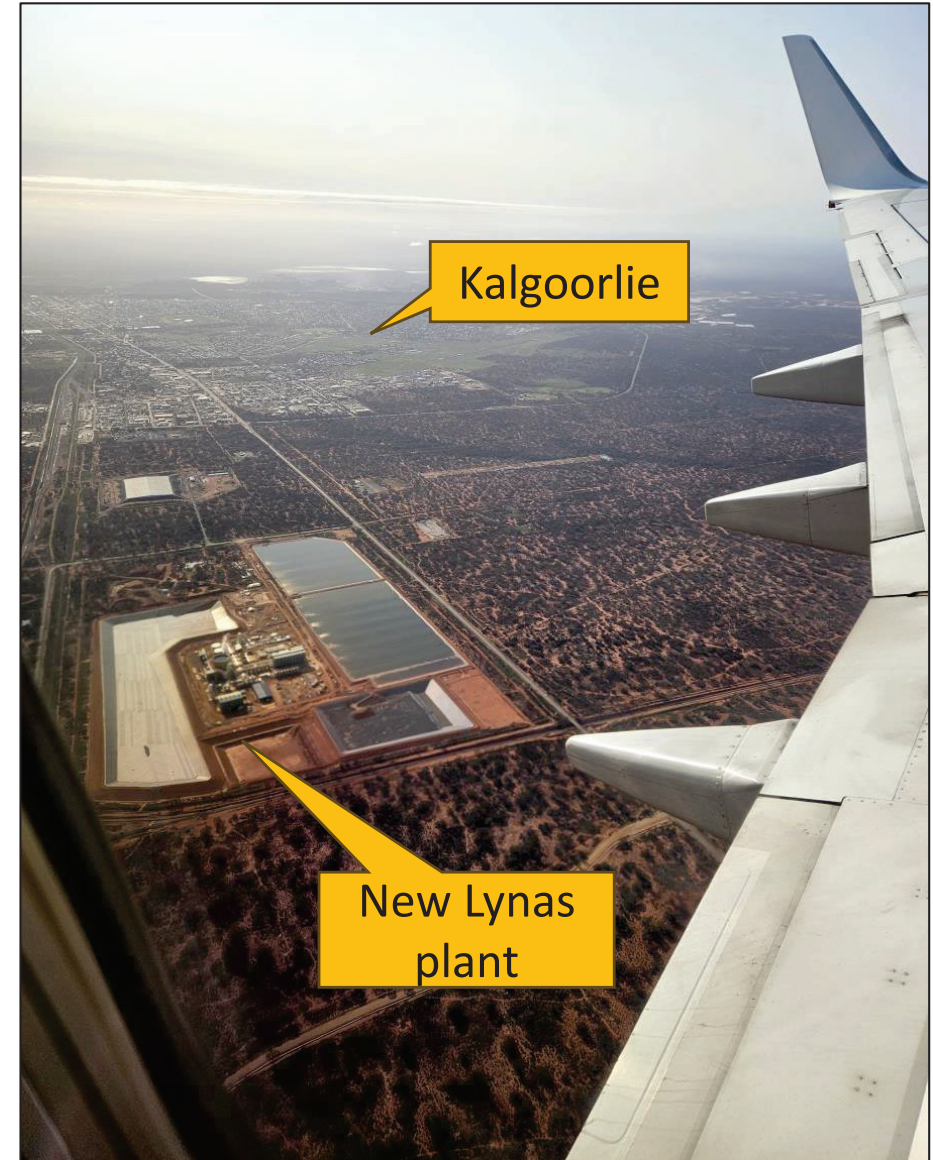
- Tier 1 deposit
- Nd, Pr
- HREE (Dy, Tb)
- Mixed Rare Earth Carbonate (MREC) production
- 106 Mt @4.12% TREO
- Carbonatite depth greater than 1000 m
- >35-year mine life
- Power from Solar – Wind – Gas



OPERATIONAL – Lynas Rare Earths Kalgoorlie processing plant

New processing plant had first feed in December 2023.

- Feedstock capacity to produce approx. 9 kilotonnes/year NdPr
- Ramping up Mixed Rare Earth Carbonate (MREC) production for Malaysian facility
- Power – electrical
- Has greenhouse gas (GHG) management plan



ADVANCED PROJECTS – Building the Next Wave

Iluka's Eneabba integrated Rare Earth refinery

- Supported by the Australian Government's Critical Mineral Facility fund
- Secured AU\$1.65 billion non-recourse loan
- Risk sharing provides robust platform
- Stockpile of monazite and other heavy mineral sands
- From 2027 – Nd, Pr, Dy, Tb and more
- Other mineral sand deposits for Zr, Ti
- Products from other States ensures feedstock



NEW FRONTIERS – Early mover opportunities

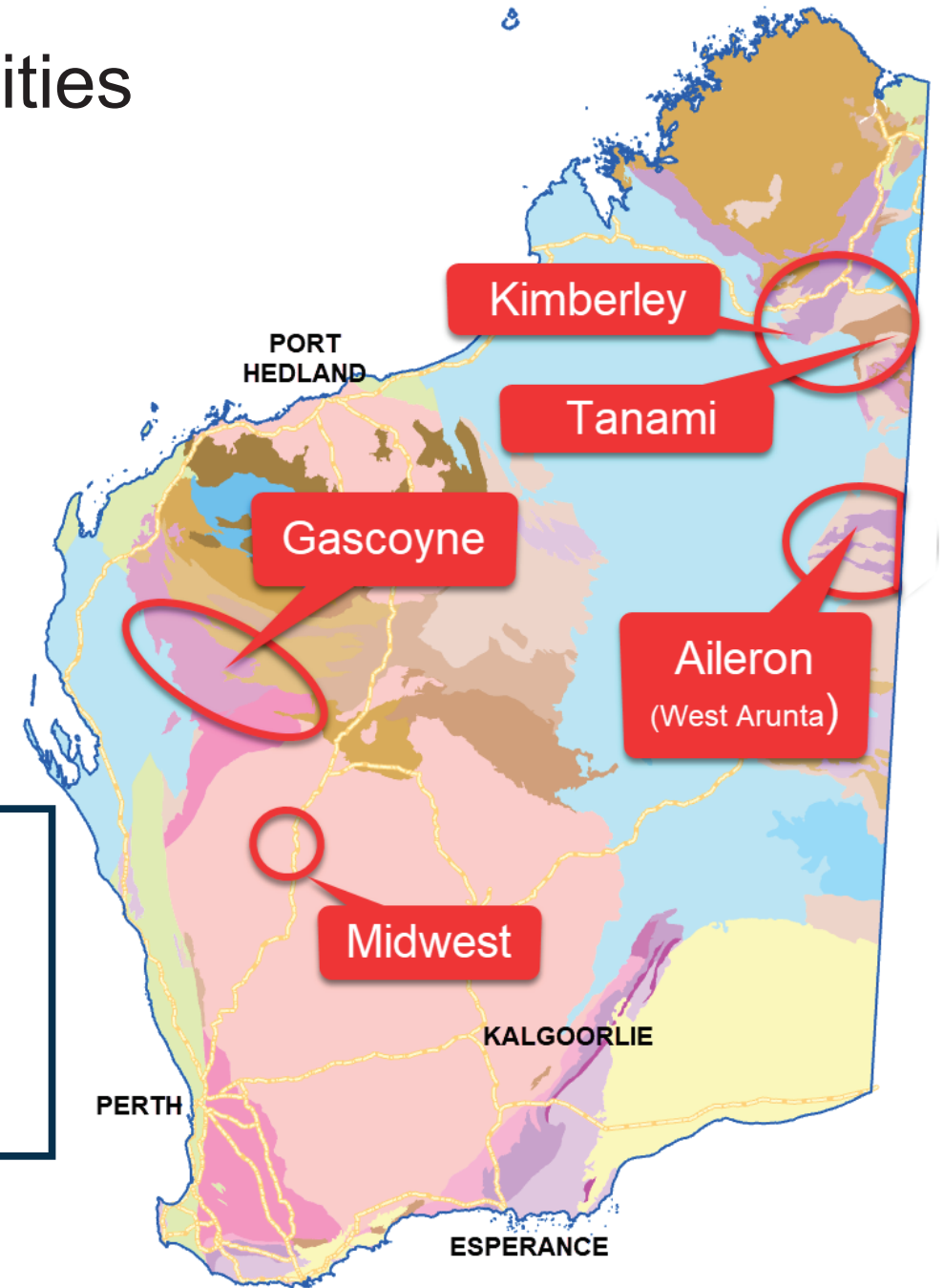
Overlooked

Considered un-prospective

Searching for another commodity

And is now

HOT PROPERTY

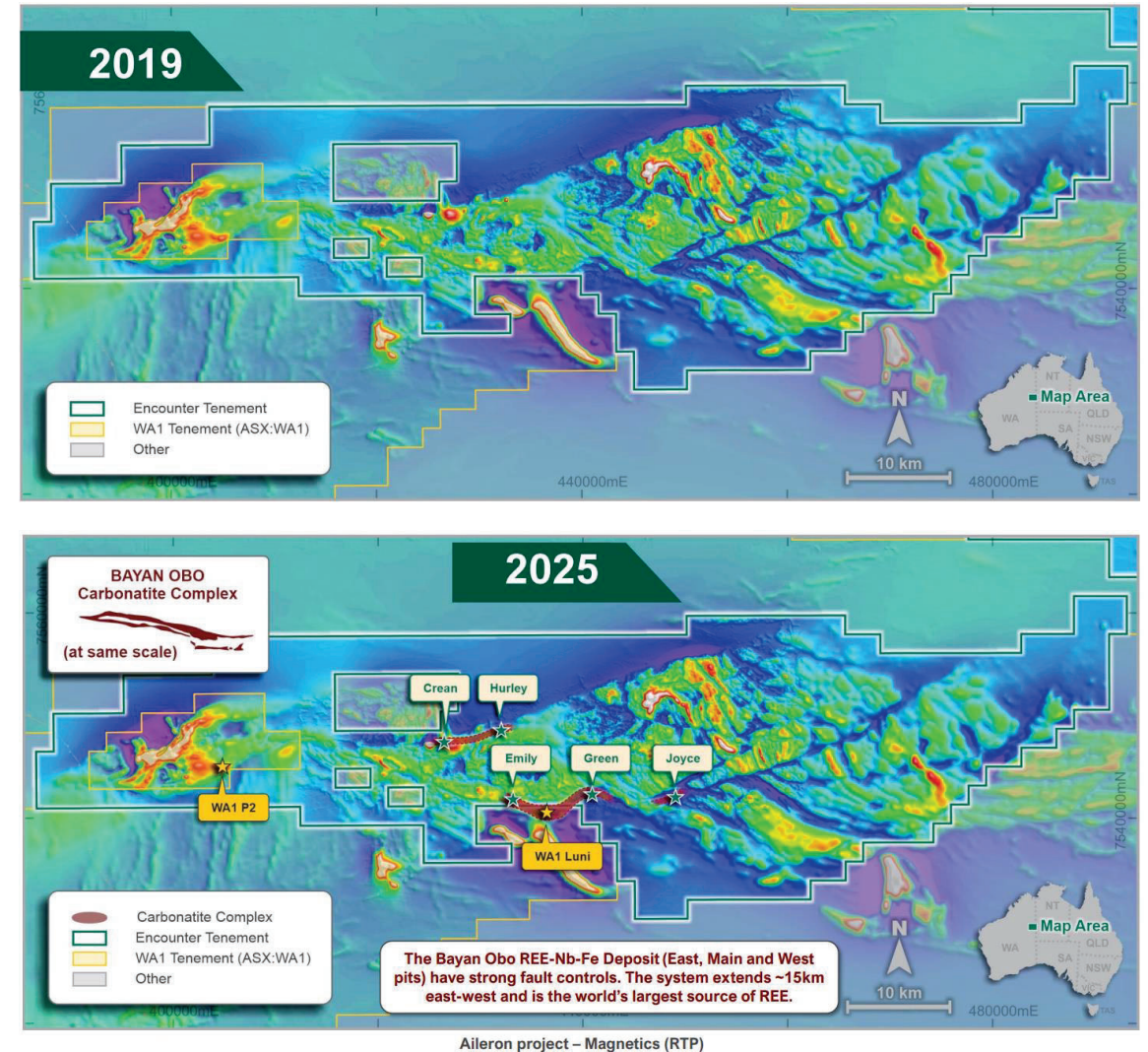


Aileron Province – went looking for copper gold, found REE and Nb

ENCOUNTER RESOURCES

WA1 RESOURCES

- Exceptionally well mineralised suite of intrusions
- Carbonatites host significant REE o 52m @ 1.7% TREO from 81m, incl. 16m @ 3.3% TREO (Encounter Resources)
- Globally significant Niobium resources
- Incredible conversion rate – target to discovery



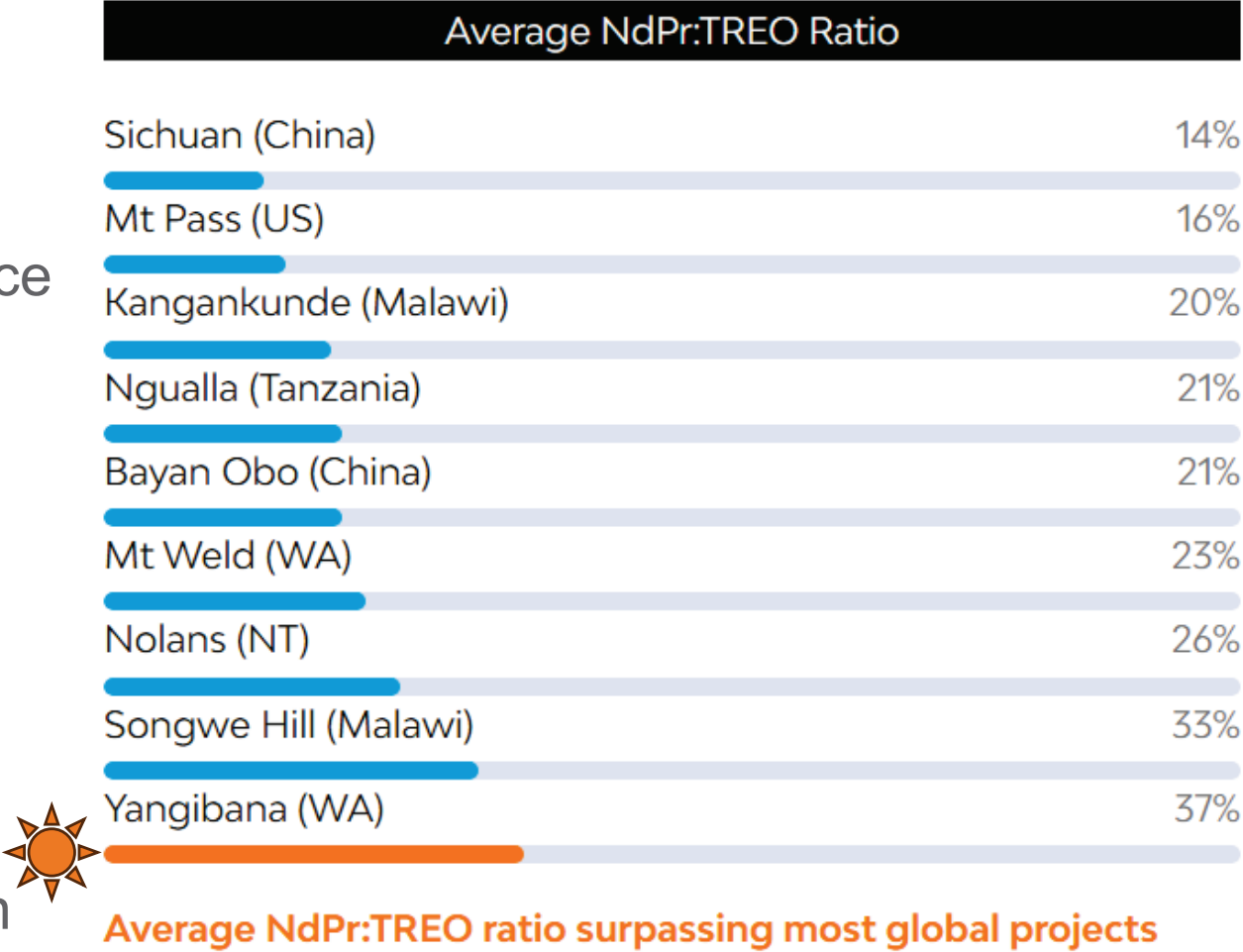
Gascoyne – Nb–REE Early mover opportunities

Hastings Technology Metals Ltd

- Moving to build mine and beneficiation plant (Stage 1)
- Stage 2 hydrometallurgical plant to produce mixed rare earth concentrate (MREC)

Dreadnought Resources

- 2022, discovered the Yin Rare Earth Ironstone deposit
- 2023 the Gifford Creek Nb-REE Carbonatite discovery
- Other commodities – Au, Ni, Cu, PGE – in the same region



Email: Minerals.Investor@dmpe.wa.gov.au



Information
on
commodities

<https://www.wa.gov.au/organisation/departments/mines-petroleum-and-exploration>