Critical Minerals Guru Jack Lifton and Brian Leeners on the Homerun Resources' Silicon Challenging China's Solar-Glass Dominance

written by Tracy Hughes | July 15, 2025

July 15, 2025 – **Silicon, the quiet titan of modern technology**, commands a market ten to fifteen times larger than rare earths, yet it still glides under mainstream investors' radar. That paradox is precisely what drew **InvestorNews** host **Jack Lifton** to **Brian Leeners**, CEO and Director of Homerun Resources Inc. (TSXV: HMR | OTCQB: HMRFF), a Brazilian-based upstart determined to rewrite the global supply story for ultra-high-purity **silica**.

Homerun styles itself as "**a vertically integrated materials leader revolutionizing green energy solutions through advanced silica technologies**," and Leeners wasted no time arguing why the claim is more than marketing gloss. "We've really built a platform based on a core asset—our high-quality, **high-purity silica in Brazil**," he told Lifton. From that platform, he explained, spring four converging businesses: purifying quartz to 99.99-plus percent; turning that feedstock into solar glass for Brazil's booming photovoltaic market; folding the material into a Department of Energy (DoE)–backed long-duration energy-storage system; and marrying all of it with an AI-driven energy-management platform.

Lifton, who began refining silicon at Westinghouse in the 1960s, conceded the company had escaped even his seasoned gaze. "I didn't know that you existed," he admitted, **calling Homerun's**

strategy “in the very top tier of vertical material industries.” The hosts’ astonishment mirrored a broader industry blind spot: **while investors chase lithium and nickel headlines, semiconductor-grade silica remains overwhelmingly Chinese-controlled**, a fact Leeners intends to change. “It’s going to take new techniques to change that dominance,” he said. “We’re pretty good at the creativity.”

Those techniques include a **collaboration with UC Davis** to replace heat-hungry, carbon-heavy furnaces with “thermoelectric” purification that uses electricity to do the heavy lifting. Leeners described proof-of-concept results that already meet electronics-grade thresholds, adding that the same method can drive quartz directly to silicon metal or into silicon-graphite mixes such as silicon carbide. **“If you want to be in the silicon space effectively, you’re going to need a new way to produce silicon because the Chinese dominate,”** he said.

Commercial scale is next. On July 9 the company disclosed a second competitive bid to build Latin America’s first dedicated solar-glass plant, a 1,000-ton-per-day facility budgeted at roughly €150 million. The German consortium GS Engineering, combining Grenzebach and Sorg, joins HORN Glass Industries AG on the shortlist. A memorandum of understanding with the municipality of Belmonte, Bahia, has already secured land and infrastructure adjacent to Homerun’s silica resource, streamlining logistics from quarry to furnace.

Solar glass is more than a side project; it is the company’s margin fulcrum. **“Silica is the biggest component of solar glass,”** Leeners said, noting that his raw quartz can feed furnaces straight from the wash-and-sort plant—no costly pre-processing required. That purity edge, he argues, will let Homerun sell “the best quality solar glass in the world” while leveraging Brazil’s own solar-installation boom.

Energy-storage ambitions run in parallel. At the **National Renewable Energy Laboratory** in Colorado, Homerun's sand is being engineered into "Enduring," a long-duration thermal battery that stores electricity as heat inside silica and releases it on demand. If successful, the project could offer an alternative to lithium-ion batteries for industrial heat or grid-scale power. "Electricity in, heat stored, electricity and heat out," Leeners summarized. The company is also exploring silicon-enhanced graphite anodes, betting that hybrid chemistries will dominate next-generation lithium-ion cells.

Lifton pressed him on timelines. While exact production dates remain fluid, Leeners said the solar-glass plant's bankable feasibility study is underway and the purification circuit design is being costed by Dorner German Engineering. He added that Homerun has begun acquiring European distribution assets to create "pull-through" demand for its materials: "You not only create push for your products, but you create pull."

Investor interest may hinge on margins as much as mission, and here Leeners was blunt. "If you're selling raw commodity, you're making lesser margin. If you're using your own product in the industrial material space, you're getting better margin," he said. Achieving four-nines purity opens the top of the pricing pyramid—a realm Lifton knows well from his semiconductor days. "You kill yourself to make ultra-high-purity material just so you can then contaminate it again," the veteran chemist quipped, half-joking at the irony of precision doping.

The irony is not lost on Homerun, which pitches its three-phase roadmap as both profitable and virtuous. By harnessing zero-waste thermoelectric purification, AI-optimized energy management, and regionally sourced renewables, the company insists it can undercut Chinese incumbents on carbon intensity and cost. "We maintain an uncompromising commitment to ESG

principles," Leeners said, pointing to local jobs in Bahia and the promise of a solar-glass supply chain that never leaves Latin America.

Lifton left his audience with a reminder that the silicon market's sheer scale eclipses its rare earth cousin many times over—a fact Wall Street forgets at its peril.

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About Homerun Resources Inc.

Homerun is a vertically integrated materials leader revolutionizing green energy solutions through advanced silica technologies. As an emerging force outside of China for high-purity quartz (HPQ) silica innovation, the Company controls the full industrial vertical from raw material extraction to cutting-edge solar, battery and energy storage solutions. Our dual-engine vertical integration strategy combines:

Homerun Advanced Materials

- Utilizing Homerun's robust supply of high purity silica sand and quartz silica materials to facilitate domestic and international sales of processed silica through the development of a 120,000 tpy processing plant.
- Pioneering zero-waste thermoelectric purification and advanced materials processing technologies with University of California – Davis.

Homerun Energy Solutions

- Building Latin America’s first dedicated high-efficiency, 365,000 tpy solar glass manufacturing facility and pioneering new solar technologies based on years of experience as an industry leader in developing photovoltaic technologies with a specialization in perovskite photovoltaics.
- European leader in the marketing, distribution and sales of alternative energy solutions into the commercial and industrial segments (B2B).
- Commercializing Artificial Intelligence (AI) Energy Management and Control System Solutions (hardware and software) for energy capture, energy storage and efficient energy use.
- Partnering with U.S. Dept. of Energy/NREL on the development of the Enduring long-duration energy storage system utilizing the Company’s high-purity silica sand for industrial heat and electricity arbitrage and complementary silica purification.

With six profit centers built within the vertical strategy and all gaining economic advantage utilizing the Company’s HPQ silica, across, solar, battery and energy storage solutions, Homerun is positioned to capitalize on high-growth global energy transition markets. The 3-phase development plan has achieved all key milestones in a timely manner, including government partnerships, scalable logistical market access, and breakthrough IP in advanced materials processing and energy solutions.

Homerun maintains an uncompromising commitment to ESG principles, deploying the cleanest and most sustainable production technologies across all operations while benefiting the people in the communities where the Company operates. As we advance revenue generation and vertical integration in 2025, the

Company continues to deliver shareholder value through strategic execution within the unstoppable global energy transition.

To learn more about Homerun Resources Inc., click here

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