

Grid Metals' Lucy South Emerges as the West's Second-Largest Cesium Resource in Active Development

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Cesium occupies an unusual corner of the critical minerals market. It is extraordinarily rare, strategically important and used across industries ranging from energy and telecommunications to defense, yet it remains unfamiliar even to many experienced resource-market participants. For [Grid Metals Corp.](#) (TSXV: GRDM | OTCQB: MSMGF), that scarcity is becoming increasingly important following the announcement of a maiden Mineral Resource Estimate at the Lucy South pegmatite on its Falcon West Property in southeastern Manitoba.

During a recent InvestorNews interview hosted by Tracy Hughes, Robin Dunbar, President, CEO and Director of Grid Metals, discussed the significance of the new resource and the company's plans to move Lucy South toward development. Grid [reported](#) an open-pit measured resource for the Lithium-Cesium-Tantalum Zone of 51,500 tonnes grading 2.58% Cs_2O and 1.47% Li_2O , containing 1,322 tonnes of Cs_2O . Within it is a higher-grade Pollucite Zone containing 15,600 tonnes grading 5.19% Cs_2O and 1.76% Li_2O . The resource averages approximately 20 metres below surface, remains partly open in several directions and, according to Grid, establishes Lucy South as the second-largest cesium resource being actively developed globally by Western-domiciled exploration and development companies.

"It's probably about half of one year's global supply of cesium feedstock, so significant," Dunbar told Hughes. "And the deposit

is also significant. It's near surface in a great location, easy to extract, easy to process." Those characteristics take on additional importance because cesium supply is highly concentrated and new primary sources are exceptionally uncommon. Grid estimates that only six cesium-bearing pollucite deposits have been discovered globally and only three primary cesium mines have ever operated.

A Rare Metal with Strategic Applications

The cesium market is broadly divided between cesium formate, used as a high-density drilling and completion fluid in demanding oil and gas wells, and a collection of specialized technology applications. Dunbar pointed to uses in petrochemical refining, optical and medical technologies, defense applications, night-vision equipment and atomic clocks associated with GPS and telecommunications networks. He also highlighted emerging applications such as perovskite solar cells, where cesium could play a role in future generations of photovoltaic technology.

"The world would use more cesium if you had it," Dunbar said. "But it's incredibly rare." That rarity is closely connected to geology. Pegmatites themselves are common, but economically interesting concentrations of cesium occur only in highly fractionated pegmatites, with pollucite representing the preferred mineral feedstock for the cesium chemicals industry. Cesium has consequently been designated a critical mineral by both Canada and the United States, where supply-chain vulnerability has elevated interest in potential Western sources.

Location and Processing Could Matter

Falcon West's location adds another dimension to the project. The property lies approximately 130 kilometres east of Winnipeg and just 500 metres north of the Trans-Canada Highway, with access to nearby rail infrastructure and Manitoba's hydroelectric power grid. "Many, many deposits like this are in the middle of nowhere," Dunbar said, contrasting those projects with Falcon West's existing infrastructure and accessibility. Grid also controls a substantial land position across a belt that Dunbar believes has received relatively little modern exploration, giving the company additional targets as it searches for more cesium-bearing pegmatites.

Processing could prove equally important. Rather than describing a conventional processing operation involving a large plant, tailings facility and extensive water requirements, Dunbar compared the concept under consideration to a quarry. Material could potentially be mined, crushed and passed through X-ray ore sorting to separate pollucite-rich material and produce a cesium concentrate. "It's really more akin to a quarry," he explained. "That's important because the CAPEX is very, very low."

Grid has engaged SGS Canada Inc. to conduct ore-sorting test work, an important step in determining whether that relatively simple processing concept can be demonstrated technically. Dunbar said results were expected within approximately six to eight weeks of the interview. If the test work supports the concept, the absence of a conventional milling circuit, extensive water use and tailings infrastructure could distinguish Falcon West from many other critical minerals development projects. The company is simultaneously working on mine planning for what Dunbar described as a relatively small and shallow open pit.

Moving Lucy South Toward Development

With the maiden resource established, Grid is now pursuing several development workstreams simultaneously. Dunbar said engineering work is underway, ore-sorting testing is progressing and the company plans to advance permitting with the Province of Manitoba. Grid's September 30 announcement states that it is advancing Lucy South toward potential commercial production through government and First Nations engagement, metallurgical testing and permitting preparation.

Relationships with Indigenous communities are also part of that process. Dunbar emphasized Grid's existing relationships and agreements with First Nations in the region, describing them as an important element of project advancement in Manitoba. At the same time, the company is maintaining discussions with provincial and federal governments as Canada and the United States increasingly focus policy and capital on establishing secure domestic and allied critical mineral supply chains.

For Dunbar, the objective extends beyond developing a single deposit. "We really want to become the go-to company in the next five years for cesium," he told Hughes. Reaching that position would require Grid to move Lucy South toward production, continue exploring for additional resources and develop commercial relationships with customers capable of purchasing its cesium product. The existing Lucy South deposit remains partly open to the northeast, southeast and southwest, while Grid is planning additional winter drilling to search for further cesium occurrences in the immediate area.

Strong Partners Behind Grid

Grid is not advancing Falcon West alone. The property is subject to a joint venture with Avenir Minerals Limited, a wholly owned

subsidiary of Agnico Eagle Mines Limited (NYSE: AEM | TSX: AEM), with Grid holding an 85% interest and remaining operator. Avenir holds the remaining 15% and has the right to increase its interest to 30% following completion of a Preliminary Economic Assessment or adoption of a mine plan.

Dunbar views the relationship as important validation of both the project and the team behind it. "Quality companies like Avenir don't get involved with companies that they don't trust and they don't feel are competent," he told Hughes. Grid has also established relationships elsewhere in its portfolio with major international mining companies, including Teck Resources Limited (TSX: TECK.A | TECK.B | NYSE: TECK) and Sweden's Boliden AB (STO: BOL), reinforcing Dunbar's argument that attracting credible partners has become part of the company's track record.

Dunbar himself has spent more than 25 years in the resource sector, experience he believes will be important as Grid attempts to move from resource definition into development. His emphasis throughout the interview was less on the size of the company than on its ability to assemble an experienced team, establish partnerships and execute the steps required to advance a project.

Lucy South has now moved beyond being an intriguing cesium occurrence. It has a measured mineral resource, an 85% Grid-owned project structure with an Agnico Eagle subsidiary as partner, unusually strong infrastructure access and a development program already underway. In a critical minerals industry frequently characterized by enormous capital requirements, complex processing flowsheets and long development timelines, Falcon West presents a distinctly different proposition: a shallow occurrence of an exceptionally rare mineral that Grid believes could potentially be mined and concentrated using comparatively straightforward methods.

Whether that geological and logistical simplicity ultimately translates into commercial production will depend on the engineering, metallurgical, permitting and economic work still ahead. What Grid has established with its maiden resource, however, is that Lucy South has become a potentially significant Western cesium project at a time when governments and industry are increasingly focused on securing supplies of precisely these rare and strategically important materials.

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