

The Next Critical Mineral: How Homerun Resources Is Building the Infrastructure for AI, Solar and Advanced Manufacturing

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The conversation surrounding critical minerals has traditionally focused on lithium, rare earth elements, graphite, and copper. Yet one of the most important materials enabling the next generation of artificial intelligence, renewable energy, advanced electronics, and photonics has largely remained outside the spotlight—high-purity silica.

That may be beginning to change.

In a recent interview with InvestorNews, Brian Leeners, CEO and Director of [Homerun Resources Inc.](#) (TSXV: HMR | OTCQB: HMRFF), explained why the company believes high-purity silica is emerging as one of the most strategically important industrial materials of the coming decade, and why Homerun has spent the past several years positioning itself to capture value across the entire supply chain rather than simply mining and selling silica sand.

“The world is finally beginning to recognize that not all silica is created equal,” Leeners explained.

While silica is abundant globally, the ultra-high-purity material required for solar glass, photonics, semiconductor applications, silicon carbide, advanced batteries, quantum

computing, and optical technologies represents only a tiny fraction of global supply. According to Leeners, approximately 99.9% of silica deposits cannot meet the demanding specifications required for these advanced applications.

That distinction is becoming increasingly important as governments seek to localize critical supply chains supporting artificial intelligence infrastructure and the global energy transition.

Leeners noted that China's latest Five-Year Plan specifically identifies high-purity silica as a strategic material for solar manufacturing, silicon carbide, fused silica, and battery technologies. Similar priorities are now emerging across North America and Europe as governments work to diversify critical mineral supply chains away from concentrated sources.

For Homerun, the opportunity begins with its exceptionally high-purity silica resource in Bahia, Brazil, but the company's strategy extends well beyond resource development.

Rather than positioning itself as a traditional mining company, Homerun is executing what Leeners describes as a vertically integrated advanced materials platform. The company's business model combines four complementary pillars: high-purity silica production, solar glass manufacturing, energy storage technologies, and advanced energy solutions.

That integrated strategy was reinforced earlier this year when Homerun completed a positive Bankable Feasibility Study for what is expected to become the Americas' first primary solar glass manufacturing facility in Brazil. The study confirmed attractive project economics while advancing the project into permitting, detailed engineering, and financing.

"Our next major milestone is capitalization," Leeners said. "The

plan is there. The engineering is there. Now investors should watch for the financing that allows us to move into construction.”

The company has also begun generating commercial momentum beyond the solar market.

Recent announcements include the delivery of Homerun’s first commercial shipment of high-purity industrial silica sand under a distribution agreement, creating near-term revenue opportunities while management remains focused on higher-margin advanced materials markets. According to Leeners, outsourcing traditional industrial markets allows Homerrun’s internal team to concentrate on technologies capable of generating substantially greater long-term value.

Another differentiator is Homerrun’s growing relationship with Brazil.

Leeners described Brazil as uniquely positioned within the global critical minerals landscape, noting the country’s abundant mineral resources and increasingly supportive industrial policies. Homerrun has become closely aligned with Brazilian government initiatives designed to build domestic manufacturing capacity around critical materials, giving the company access to strategic industrial development programs and financing opportunities.

The company’s recent listing on Brazil’s B3 exchange further strengthens that relationship while increasing visibility among local investors and institutions.

Perhaps the most compelling aspect of the interview, however, was Leeners’ broader vision for glass itself.

Historically viewed as a passive construction material, glass is

increasingly becoming an active component of next-generation technologies.

Whether enabling photovoltaic modules, photonics, AI infrastructure, silicon carbide applications, quantum computing, or advanced energy storage systems, specialized glass products are expected to play an expanding role across multiple high-growth industries.

“The industry is moving from passive glass to active glass,” Leeners said. “That industrial transition is enormous, but very few investors are watching it.”

That evolution also explains Homerrun’s acquisition of perovskite solar technology capabilities. While some investors questioned the move at the time, Leeners argued that combining premium solar glass with next-generation photovoltaic technologies creates significant long-term strategic synergies within the company’s vertically integrated business model.

Throughout the discussion, Leeners repeatedly returned to the concept of vertical integration.

Rather than developing individual projects in isolation, Homerrun is attempting to build an interconnected ecosystem where each business unit reinforces the others—from silica extraction and purification through solar glass manufacturing, energy storage, advanced photovoltaics, and AI-enabled energy management.

“It’s like putting together a jigsaw puzzle,” he explained. “Each vertical creates value on its own, but together they create something much larger.”

As global demand accelerates for materials supporting artificial intelligence, renewable energy, advanced manufacturing, and

strategic industrial supply chains, Homerrun Resources is positioning itself not simply as a mining company, but as an integrated advanced materials developer focused on one of the world's least appreciated critical minerals.

For investors following the evolution of critical minerals, high-purity silica may prove to be one of the sector's most closely watched strategic materials over the coming decade—and Homerrun Resources intends to be at the center of that story.

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