

*The Think Tank of the  
Critical Minerals  
Economy.*

**Ottawa Presentation  
June 9, 2026**

# **Critical Minerals Institute (CMI)**





# Why Critical Minerals Matter.

Artificial intelligence data centers require copper. Semiconductor manufacturing requires gallium and germanium. Defense systems require rare earth magnets, tungsten and antimony. Nuclear power expansion requires uranium. Every major strategic technology ultimately rests upon a foundation of mineral supply chains.

# Why Now.

**No energy transition, digital transformation, or national security strategy can succeed without secure critical mineral supply chains.**

**Control of supply chains—  
not simply access to  
resources—will define the  
next phase of the global  
economy.**



## The Global Reality.

- China dominates many critical mineral processing supply chains.
- Western nations are rebuilding strategic mineral capabilities.
- Access to critical minerals is increasingly a matter of economic and national security.

# The CMI Watchlist.



CMI tracks 24 strategic materials across 12 official critical mineral lists spanning Canada, the United States, Australia, the United Kingdom, the European Union, India, Japan, South Korea and NATO.



A mineral becomes critical when its production is dominated by one or two countries—particularly where those jurisdictions present reliability risks to ongoing global supply.



**Supply concentration—not geological scarcity—is the defining risk factor.**

# CMI Top 5 Critical Minerals

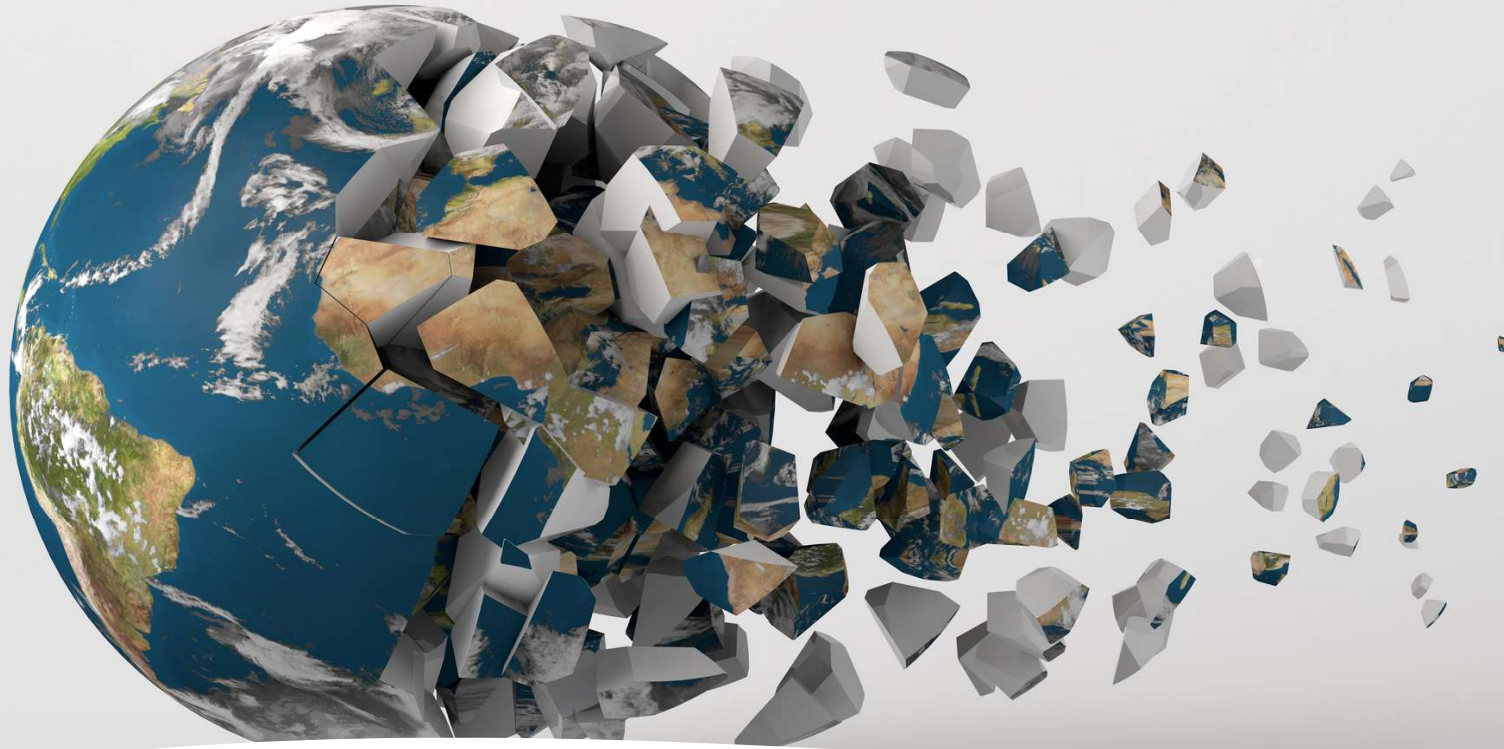
1. Copper (Cu)
2. Gallium (Ga)
3. Rare Earth Elements (REEs)
4. Tungsten (W)
5. Uranium (U)

## 2026 CMI Watchlist Highlights

- Tungsten elevated to the Top 5
- Rhenium and Indium added

## Periodic Table of the Elements

|  |  |  |  |   |  |   |  |  |   |  |  |   |   |  |   |  |  |  |   |   |  |
|--|--|--|--|---|--|---|--|--|---|--|--|---|---|--|---|--|--|--|---|---|--|
| 1<br><b>H</b><br>Hydrogen<br>1.008               |  |  |  |   |  |   |  |  |   |  |  |   |   |  |   |  |  | 13<br>IIIA<br><b>B</b><br>Boron<br>10.81 |   | 14<br>IVA<br><b>C</b><br>Carbon<br>12.011 |  |
| 7<br>VIIB<br><b>Mn</b><br>Manganese<br>54.938044 |  |  |  |   |  |   | 8<br>VIIB<br><b>Fe</b><br>Iron<br>55.845 |  | 9<br>VIIB<br><b>Co</b><br>Cobalt<br>58.933194 |  | 10<br>VIIB<br><b>Ni</b><br>Nickel<br>58.6934 |   | 11<br>IB<br><b>Cu</b><br>Copper<br>63.546 |  | 12<br>IIB<br><b>Zn</b><br>Zinc<br>65.38 |  | 13<br>IIIA<br><b>Al</b><br>Aluminium<br>26.9815385 |  | 14<br>IVA<br><b>Si</b><br>Silicon<br>28.085 |   |  |
| 25<br><b>Mn</b><br>Manganese<br>54.938044        |  | 26<br><b>Fe</b><br>Iron<br>55.845      |  | 27<br><b>Co</b><br>Cobalt<br>58.933194  |  | 28<br><b>Ni</b><br>Nickel<br>58.6934      |  | 29<br><b>Cu</b><br>Copper<br>63.546      |   | 30<br><b>Zn</b><br>Zinc<br>65.38         |  | 31<br><b>Ga</b><br>Gallium<br>69.723    |   | 32<br><b>Ge</b><br>Germanium<br>72.630 |   |  |  |  |   |   |  |
| 43<br><b>Tc</b><br>Technetium<br>(98)            |  | 44<br><b>Ru</b><br>Ruthenium<br>101.07 |  | 45<br><b>Rh</b><br>Rhodium<br>102.90550 |  | 46<br><b>Pd</b><br>Palladium<br>106.42    |  | 47<br><b>Ag</b><br>Silver<br>107.8682    |   | 48<br><b>Cd</b><br>Cadmium<br>112.414    |  | 49<br><b>In</b><br>Indium<br>114.818    |   | 50<br><b>Sn</b><br>Tin<br>118.710      |   |  |  |  |   |   |  |
| 75<br><b>Re</b><br>Rhenium<br>186.207            |  | 76<br><b>Os</b><br>Osmium<br>190.23    |  | 77<br><b>Ir</b><br>Iridium<br>192.217   |  | 78<br><b>Pt</b><br>Platinum<br>195.084    |  | 79<br><b>Au</b><br>Gold<br>196.966569    |   | 80<br><b>Hg</b><br>Mercury<br>200.592    |  | 81<br><b>Tl</b><br>Thallium<br>204.38   |   | 82<br><b>Pb</b><br>Lead<br>207.2       |   |  |  |  |   |   |  |
| 107<br><b>Bh</b><br>Bohrium<br>(270)             |  | 108<br><b>Hs</b><br>Hassium<br>(289)   |  | 109<br><b>Mt</b><br>Meitnerium<br>(278) |  | 110<br><b>Ds</b><br>Darmstadtium<br>(281) |  | 111<br><b>Rg</b><br>Roentgenium<br>(282) |   | 112<br><b>Cn</b><br>Copernicium<br>(285) |  | 113<br><b>Nh</b><br>Nihonium<br>(286)   |   | 114<br><b>Fl</b><br>Flerovium<br>(289) |   |  |  |  |   |   |  |
| 61<br><b>Pm</b><br>Promethium<br>(145)           |  | 62<br><b>Sm</b><br>Samarium<br>150.36  |  | 63<br><b>Eu</b><br>Europium<br>151.964  |  | 64<br><b>Gd</b><br>Gadolinium<br>157.25   |  | 65<br><b>Tb</b><br>Terbium<br>158.92535  |   | 66<br><b>Dy</b><br>Dysprosium<br>162.500 |  | 67<br><b>Ho</b><br>Holmium<br>164.93033 |   | 68<br><b>Er</b><br>Erbium<br>167.259   |   |  |  |  |   |   |  |
| 93<br><b>Np</b><br>Neptunium<br>(237)            |  | 94<br><b>Pu</b><br>Plutonium<br>(244)  |  | 95<br><b>Am</b><br>Americium<br>(243)   |  | 96<br><b>Cm</b><br>Curium<br>(247)        |  | 97<br><b>Bk</b><br>Berkelium<br>(247)    |   | 98<br><b>Cf</b><br>Californium<br>(251)  |  | 99<br><b>Es</b><br>Einsteinium<br>(252) |   | 100<br><b>Fm</b><br>Fermium<br>(257)   |   |  |  |  |   |   |  |



## Canada's Critical Minerals Moment in a Fragmenting World

According to the Government of Canada, the country currently hosts **56 active critical mineral mines, 31 processing facilities, and 171 advanced critical mineral projects**. More than \$64 billion worth of minerals and metals were produced in Canada in 2024, while exploration spending reached approximately \$2.1 billion in 2025.



# The Opportunity for Canada.

## **Canada has:**

- ✓ Critical mineral resources
- ✓ Technical expertise
- ✓ Stable rule of law
- ✓ Global credibility

## **Canada's challenge:**

Turning resources into complete supply chains.



# CMI DIRECTORS

A global leadership team driving intelligence, collaboration, and strategic insight across the critical minerals value chain.

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Executive Director



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Co-Chairman



**Melissa 'Mel' Sanderson**  
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**Nick Parry**  
Director, Critical Minerals Institute (CMI)



**Stephen Lautens**  
Director



CMI Directors bring deep experience in geology, mining, finance, policy, technology, and capital markets to advance informed decisions and long-term value across the critical minerals economy.

INDEPENDENT. GLOBAL. INFLUENTIAL.

# Why the CMI Exists.

**Research:** Independent analysis of critical mineral markets and supply chains.

**Education:** Weekly reports and monthly Masterclasses.

**Convening:** Bringing together governments, investors, industry and academia at annual event..

# What We Deliver.

- Critical Minerals Report
- Masterclasses
- Research & Advisory
- CMI Summit



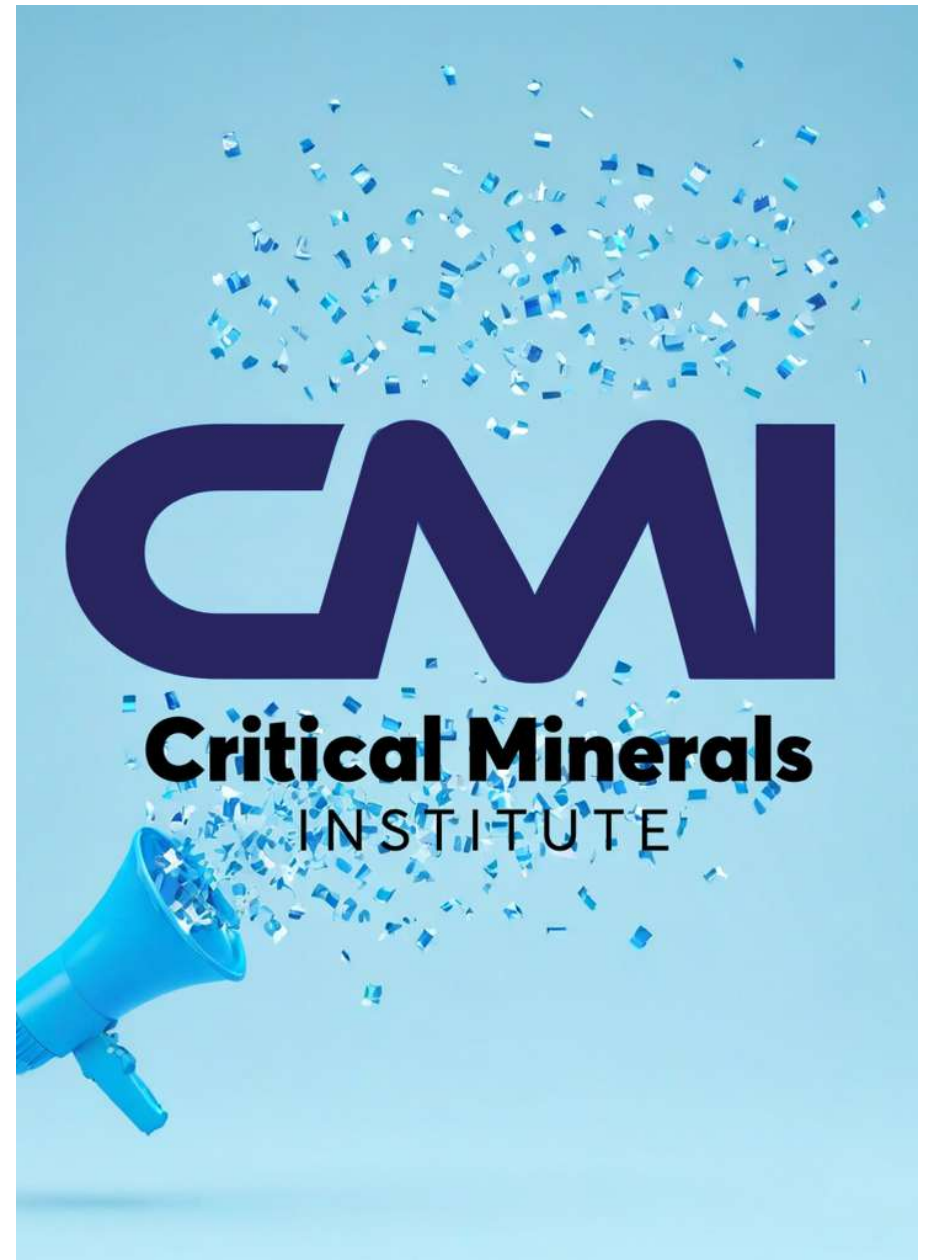
# CMI Summit

"Best conference I've ever attended."  
— Chris Richardson, IDAP Global LLP

- Government
- Industry
- Investors
- Researchers

CMI Summit 6  
May 11-12, 2027

Toronto, Canadaoronto



# Growing Global Network

**47G**  
UAMMI Institute

**AMERICAN**  
RARE EARTHS

**AMERICAN**  
TUNGSTEN

**A** Antimony  
Resources  
Corp.

**Appia**  
ACTUAL EARTH'S URANIUM CORP.

**Ara**

**COVE**  
CAPITAL

**[cymr]**<sup>®</sup>  
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**ef** ENERGY  
FUELS

nanoOne  
NANOVALCUB

neo<sup>o</sup>  
PERFORMANCE MATERIALS

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MERIRAS CORP.

**NovaCopper**

**P** POWER  
METALLIC

**Quantum**  
RARE EARTH DEVELOPMENT

**PearTree**

**SCANDIUM**  
CANADA

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**SPABTAN**  
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**Nord**  
LITHIUM

**RR**  
rentorthresources inc.

**allonnia**

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SECURITIES  
EXCHANGE

**SHMER**  
SBM  
BULLET

**Sio** SILICA

**RESOURO**  
STRATEGIC METALS

**MESTYALE MINING**  
CORPORATION

**ASM**

**CBLT**  
T/1

**GTM** GLOBAL  
TACTICAL  
METALS

**GridMetals**  
CORP.

**HAPPY CREEK**  
MINERALS LTD.

**ITO**

**NeoTerreX**  
Minerals

**Helium**  
ASTEMRE  
PURE EARTH

**TMK**  
THEY DO NOT BELIEVE IN THE SAME OLD

**VOLTA**  
METALS

**WESTERN**  
LUNOIL (has a Interest in the same)



# Become a CMI Member.

Maximize your company's presence and leadership in the critical minerals market with a **Critical Minerals Institute (CMI)** corporate membership.

Go to

**[CriticalMineralsInstitute.com](https://www.CriticalMineralsInstitute.com)**

to find out more!



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**PARTNERS**

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