

BMAC

Battery Metals
Association of Canada

A Bold Vision for Canada's Battery Value Chain

June 2024

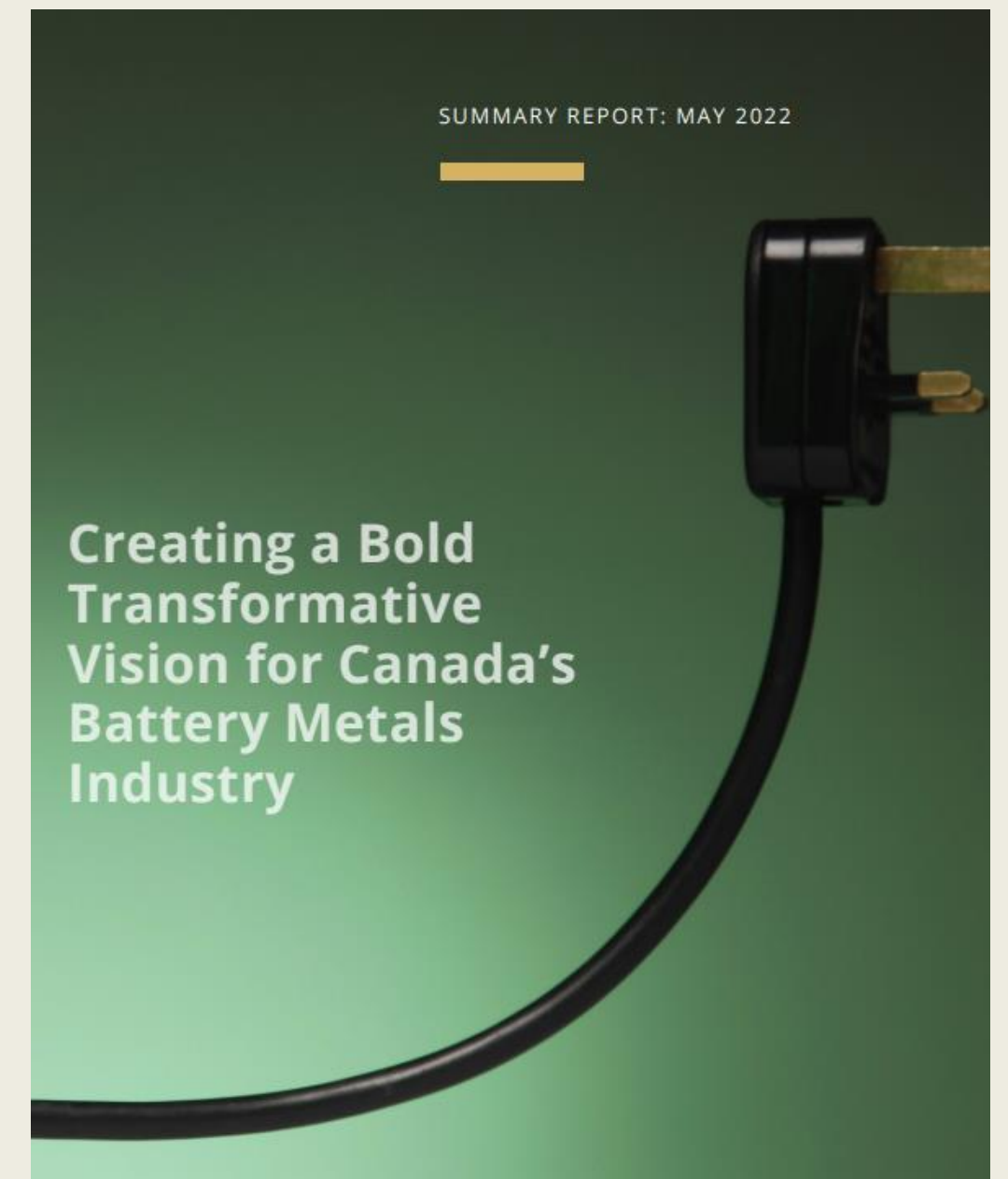


THE VISION

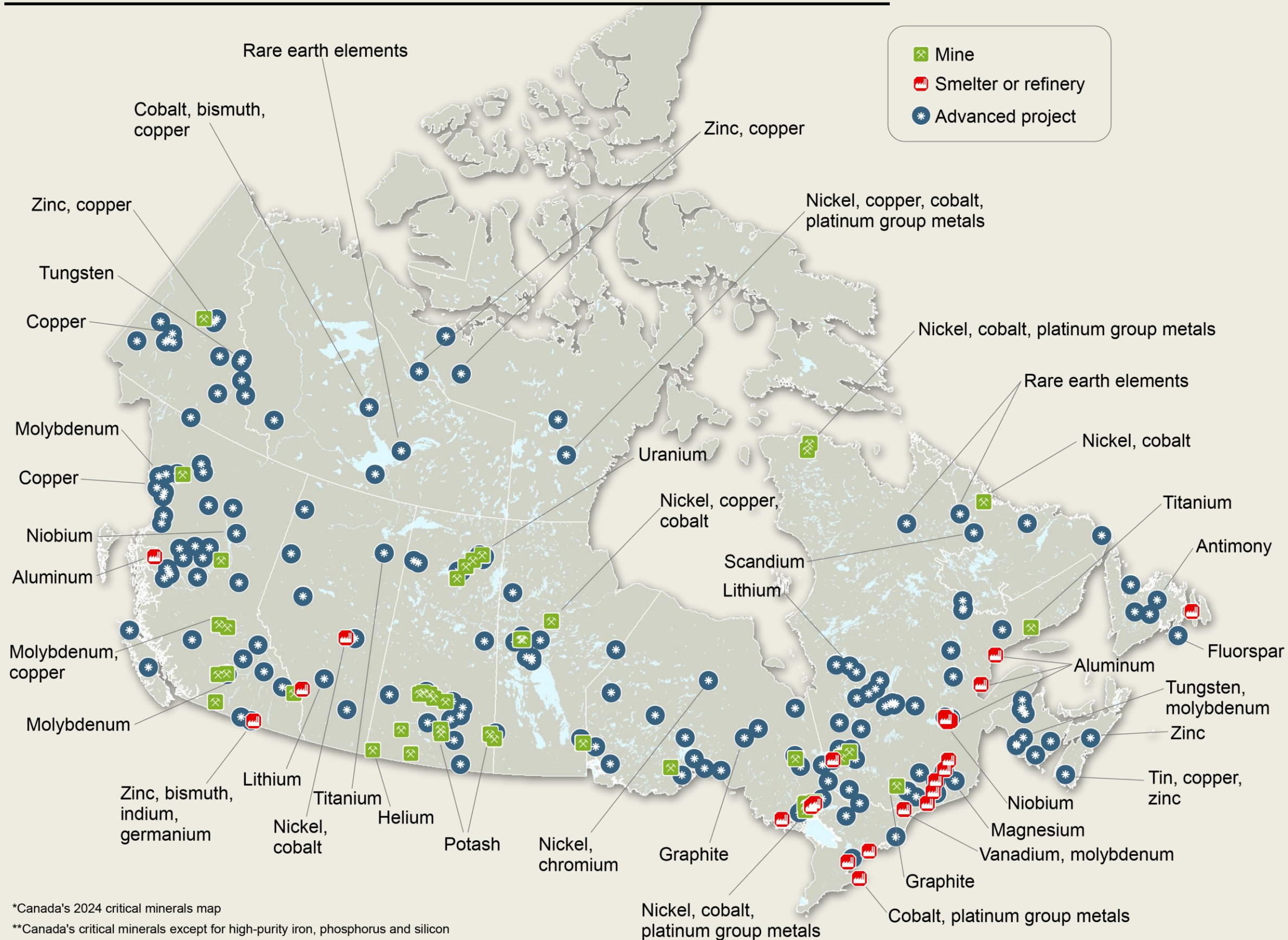
How could a strong and robust battery metals value chain be a platform that helps build a stronger, more prosperous and healthier Canada?

“...by **shifting focus beyond individual players**, significant value can be captured along the entire electric vehicle value chain. In this sense, **cross-sectoral collaboration** can play a key role in helping unlock the EV opportunity in Canada.”

“**Integrating Canadian industries** into existing markets will require strong federal leadership and **relationship building with the United States**”



THE OPPORTUNITY



“The United States and Canada enjoy **the world’s largest and most comprehensive trading relationship** that supports millions of jobs in each country and constitutes a **US\$1.95 trillion** bilateral trade and investment relationship.”

“Canada and the United States trade **over US\$2.5 billion in goods and services daily.**”

*Canada's 2024 critical minerals map

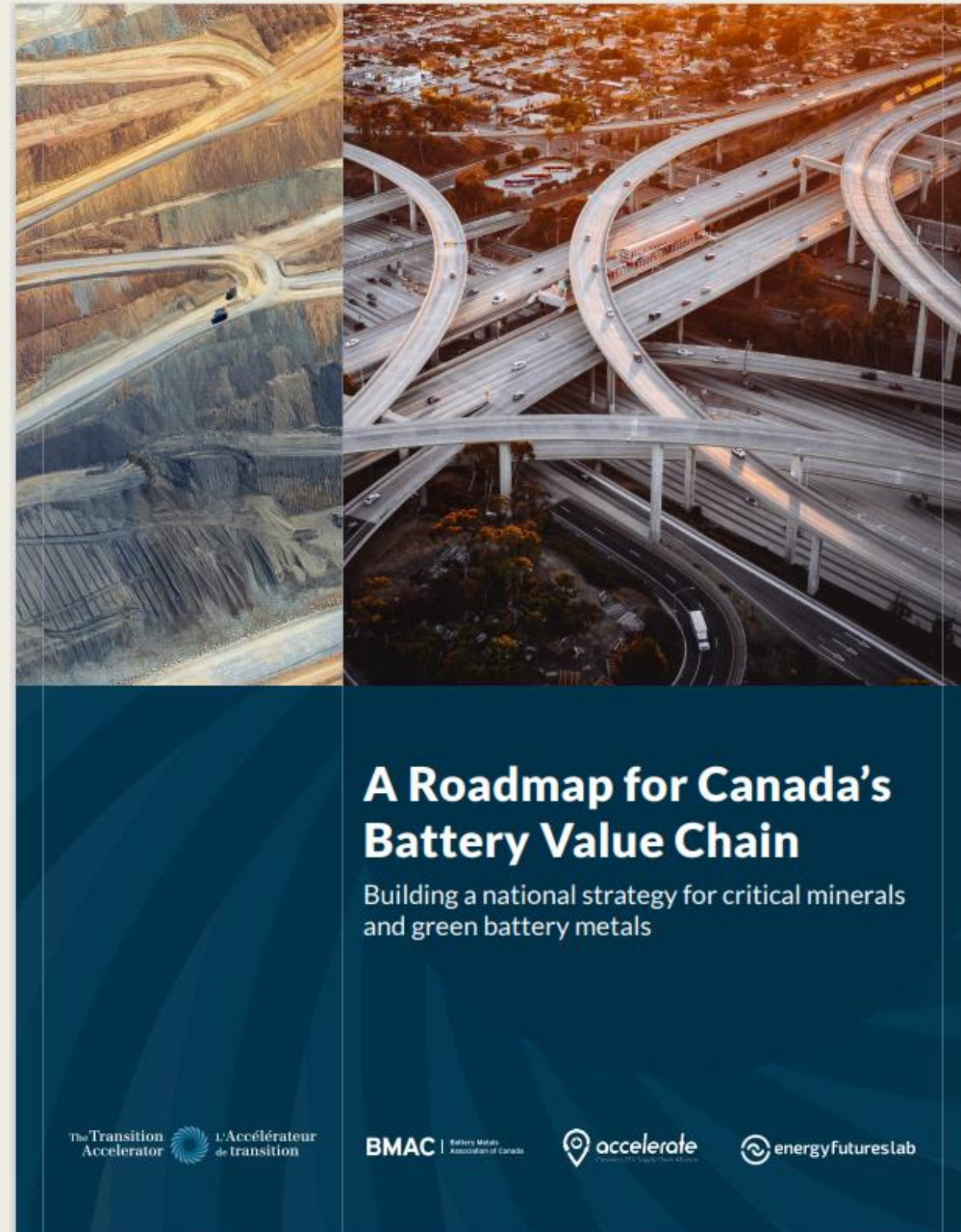
**Canada's critical minerals except for high-purity iron, phosphorus and silicon

Source: <https://www.trade.gov/knowledge-product/canada-market-overview>

Source: <https://www.canada.ca/en/campaign/critical-minerals-in-canada/critical-minerals-an-opportunity-for-canada.html>

THE DEMAND

*“Canada should... build an EV supply chain from mines to vehicles that replicates its current **10% share of North American automotive manufacturing.**”*



By 2030:

1.3M vehicles & 100 GWh battery capacity

Gigafactories = 2 – 4

Cathode Active Material Plants = 4

Anode Active Material Plants = 3

Lithium = 2 – 3 Projects

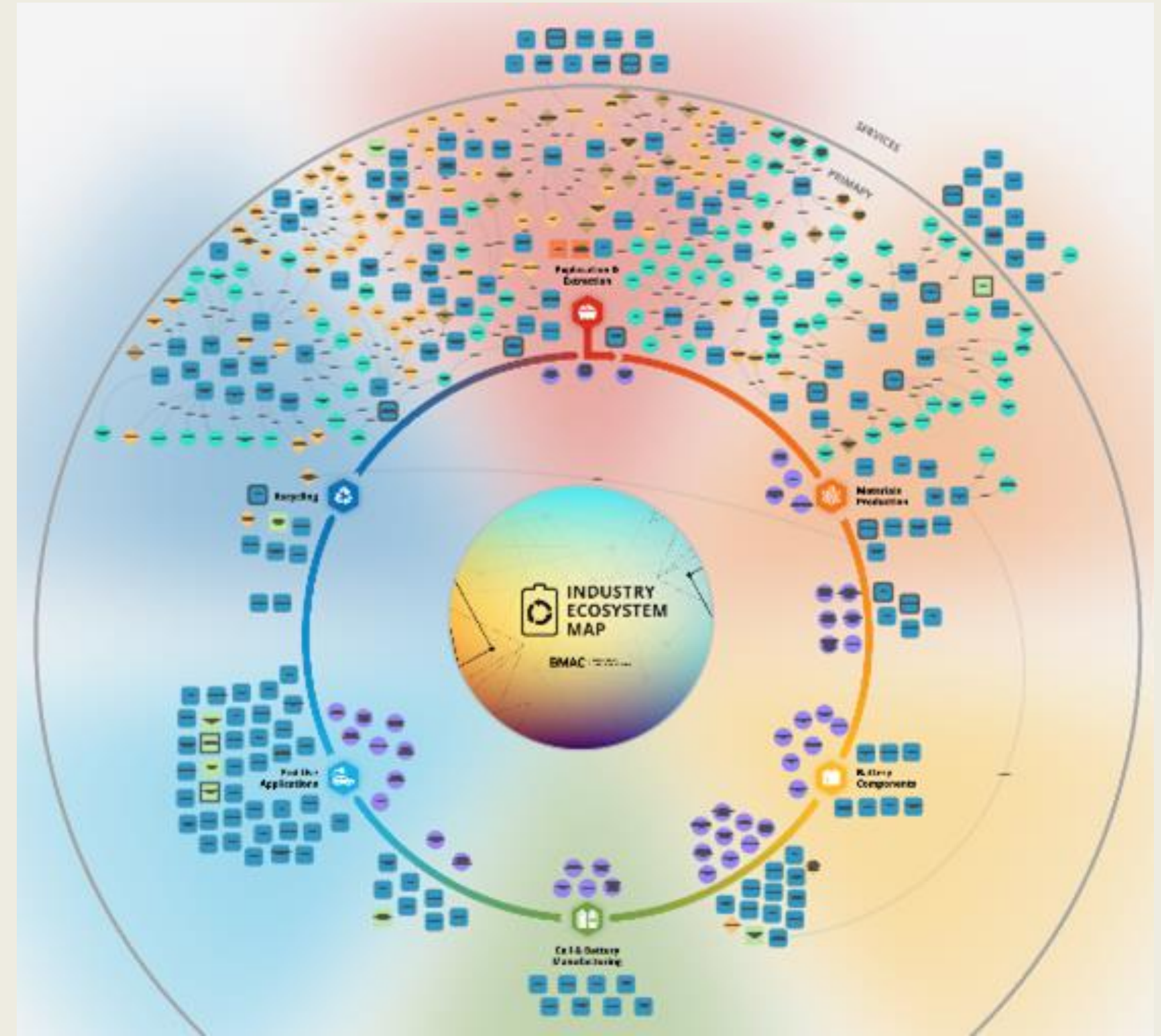
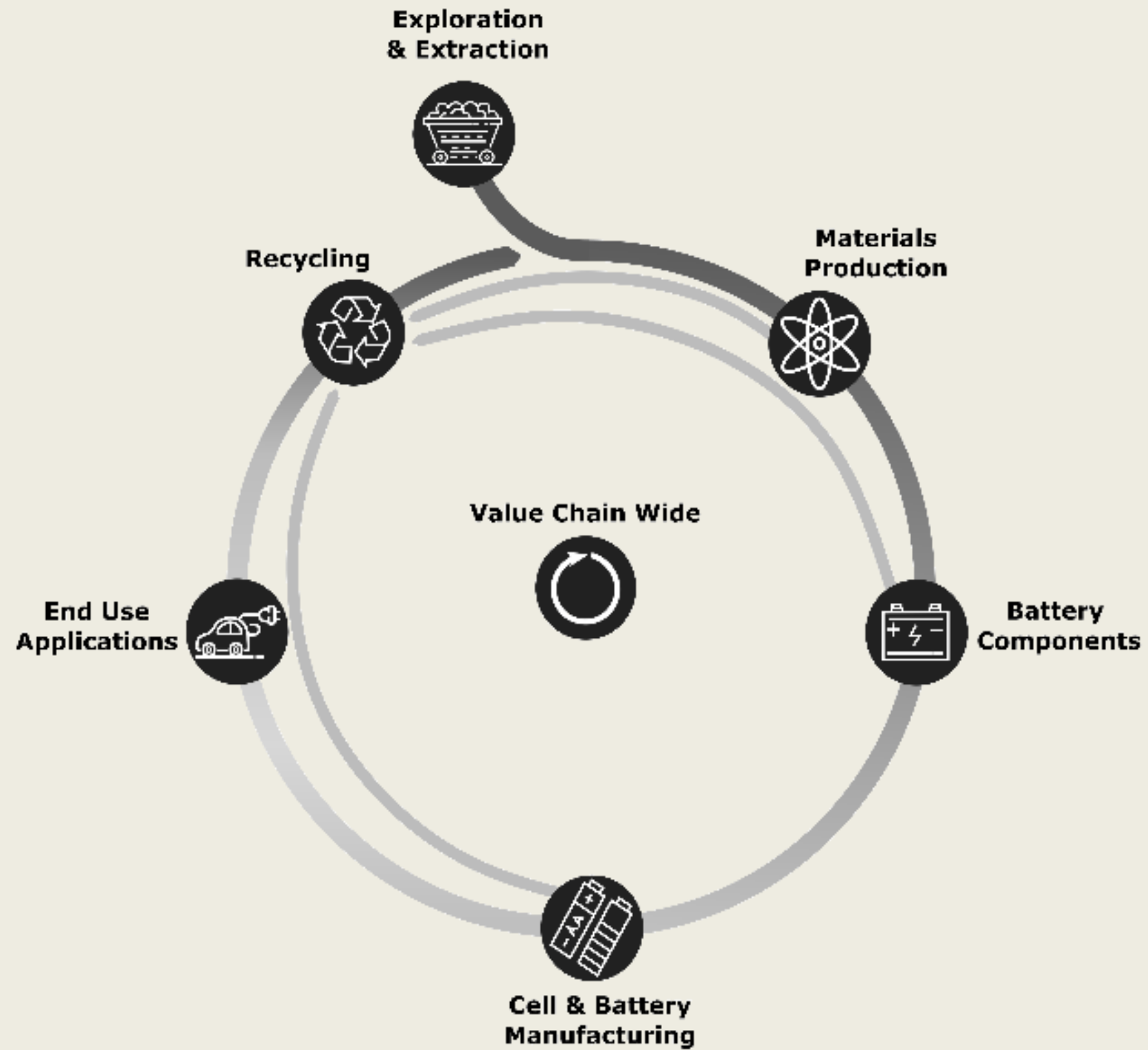
Nickel = 1 new mine + 1 new refining facility

Graphite = 1 new refining facility

THE ECOSYSTEM

“To create an integrated supply chain, government and industry must work together to co-create an industrial and innovation ecosystem that builds homegrown capacity over time.”

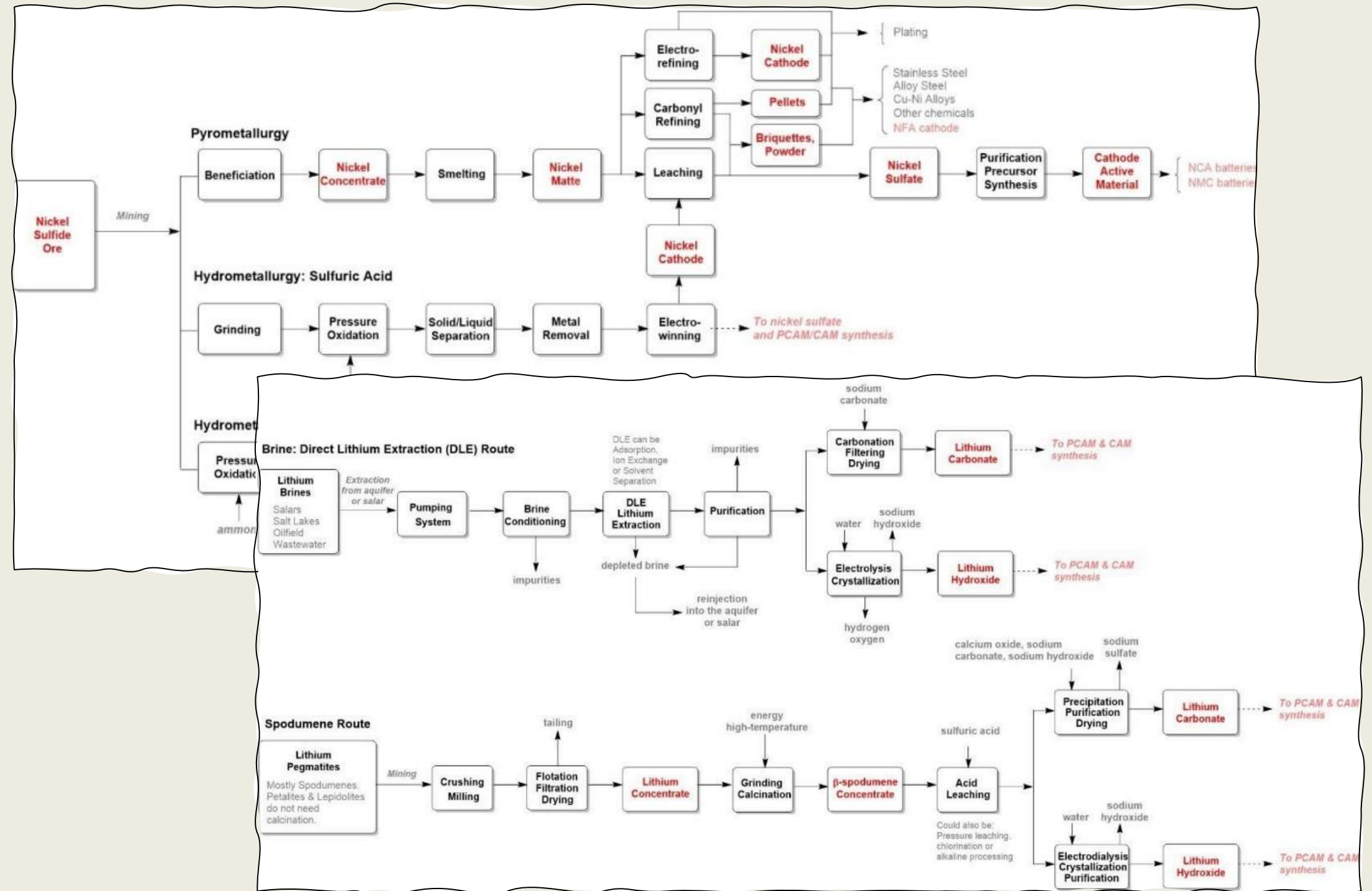
BMAC Roadmap



THE STRATEGY

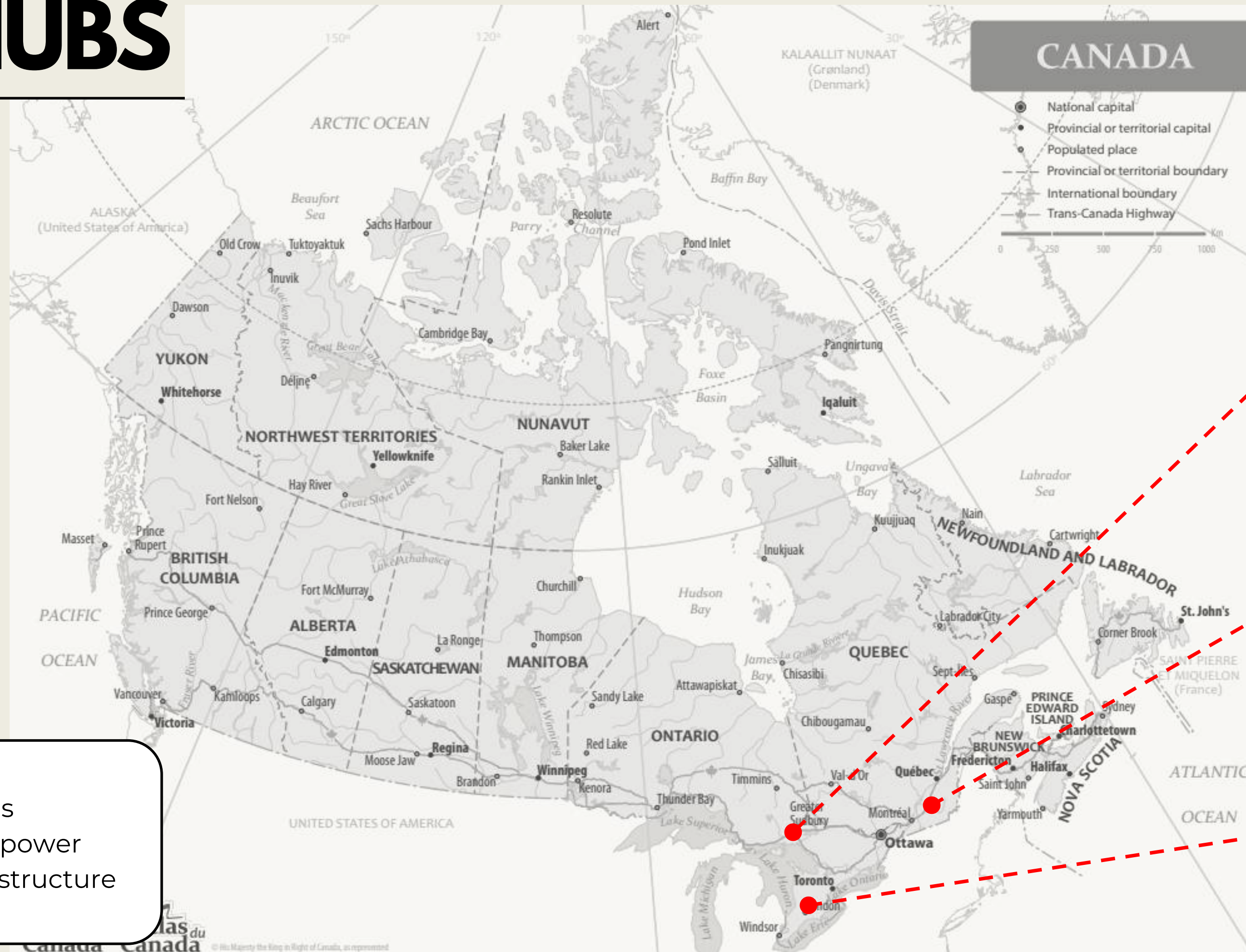
What are the **optimal processes** to produce battery ready materials in a **low-carbon** and **globally competitive** manner?

- Lithium
- Nickel
- Copper
- Graphite
- Iron
- Phosphate
- Vanadium
- REEs



“A Strong Midstream is the Linchpin of the Battery Metals Supply Chain.”

THE HUBS



Sudbury, ON

- Vale
- Glencore
- MacLean
- Epiroc
- Kovatera

Becancour, QC

- GM / POSCO
- Vale
- Ford / EcoProBM / SK On

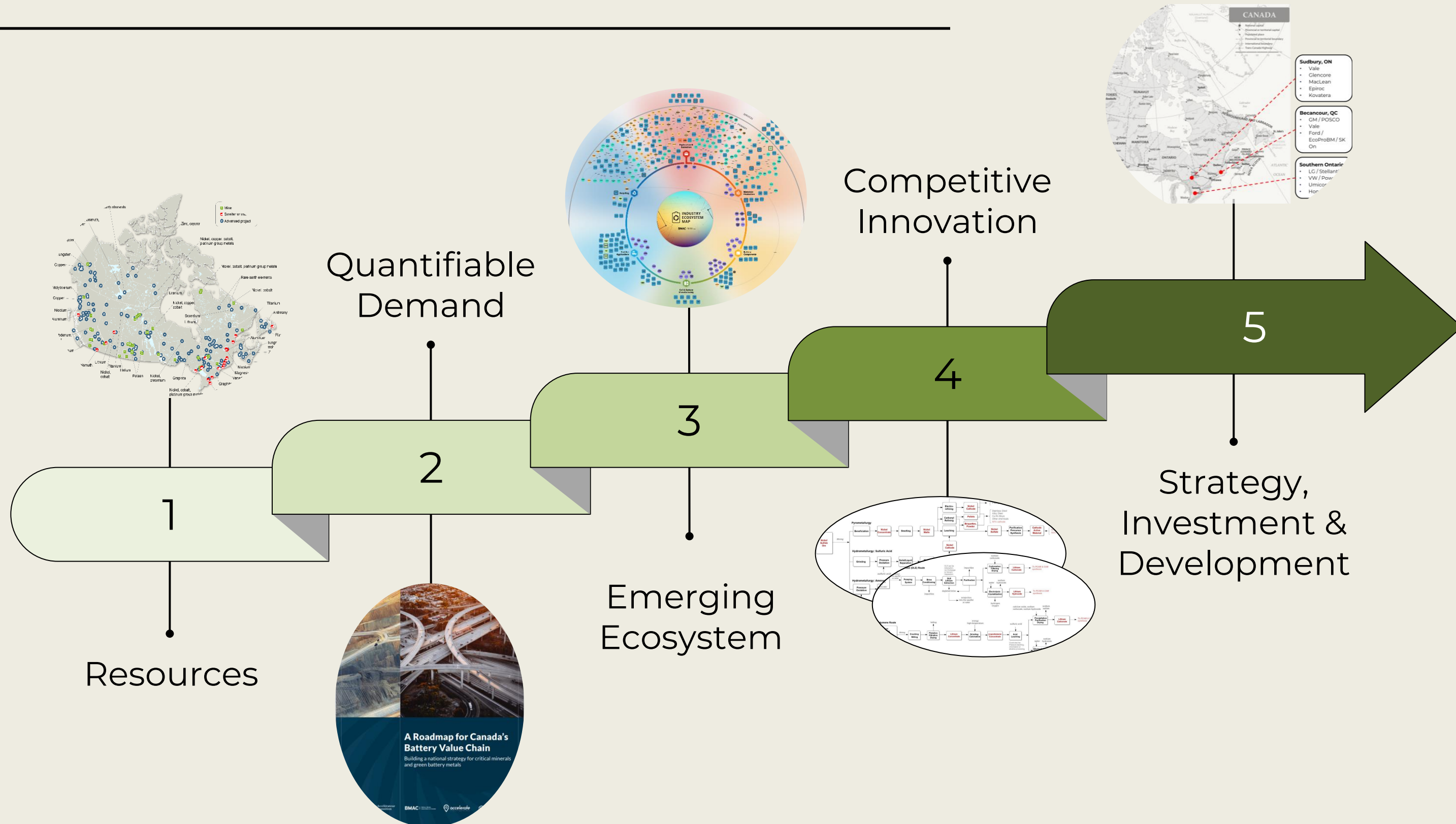
Southern Ontario

- LG / Stellantis
- VW / Powerco
- Umicore
- Honda

Access to:

- Critical Minerals
- Reliable, clean power
- Transport infrastructure
- Market

THE PATHWAY TO A ROBUST & SUSTAINABLE ECOSYSTEM



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Thank you!

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- And more...

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**THANK
YOU!**

MINES TO MARKET
**ADVANCING ROBUST
BATTERY ECOSYSTEMS**

IN NEVADA AND CANADA

