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# Update on Canadian Policies and Priorities

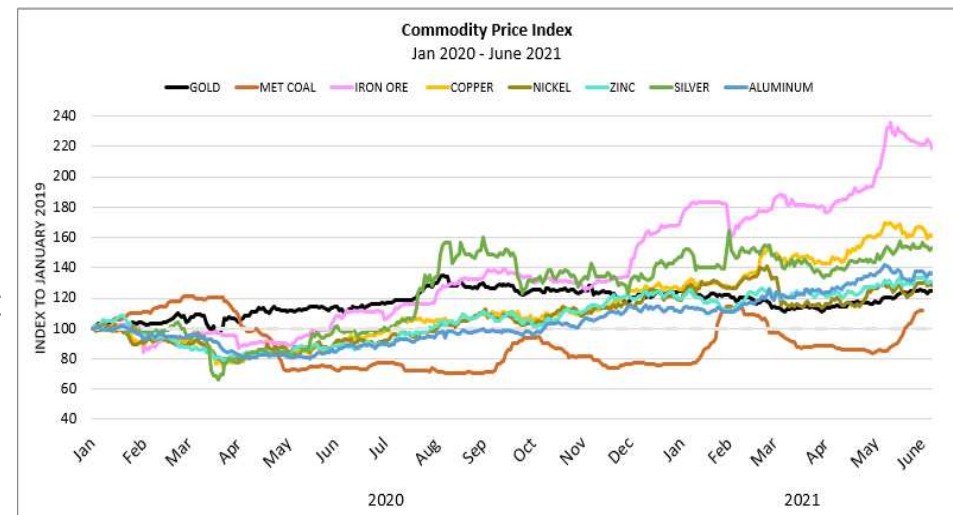
June 21, 2021

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## Canada's Mining Industry: Post - Pandemic Recovery

- The mining industry saw **sharp declines in demand** and commodity prices at the beginning of the pandemic.
- There were several **major closures and curtailments of mines** throughout Canada.
- The **mining industry has mostly recovered**, with some notable exceptions, such as the diamond industry.
- Junior **exploration companies saw much of their early work season cancelled** due to COVID-19 restrictions, but have since recovered, with support of extended flow-through share spending timelines.

*Prices of most minerals and metals have recovered the losses from the start of the pandemic, although uncertainty around economic recovery and the potential for variants in many countries continues to weigh on stable operations.*



Source: S&P Global Market Intelligence



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## ECONOMIC DEVELOPMENT AND COMPETITIVENESS

Canada's business and innovation environment for the minerals sector is the world's most competitive and most attractive for investment

### PAN-CANADIAN GEOSCIENCE STRATEGY:

Develop a collaborative, PGS that leverages next generation technology and big data to responsibly develop Canada's geological resources.

### \*AREA OF COLLABORATION\*

### CRITICAL MINERALS STRATEGY:

Develop an all-Canadian critical minerals and battery value chain



## ADVANCING THE PARTICIPATION OF INDIGENOUS PEOPLES

Increased economic opportunities for Indigenous Peoples and supporting the process of reconciliation

### INDIGENOUS PROCUREMENT CONFERENCES:

Convene conferences (in various regions) on Indigenous procurement in mining in partnership with Indigenous

### LOCAL PROCUREMENT CHECKLIST:

Develop a checklist to help increase procurement opportunities for Indigenous businesses



## THE ENVIRONMENT

The protection of Canada's natural environment underpins a responsible, competitive industry. Canada is a leader in building public trust, developing tomorrow's low-footprint mines and managing the legacy of past activities

### RE-IMAGINE NOAMI:

Refreshed mandate to focus on remediating legacy mines, improving assurances at new mines, adapting to climate change, and enabling innovative practices and technologies.

### \*RESEARCH PROJECT\*

**MINING VALUE FROM WASTE:** Conduct analysis of potential FPT legislative, regulatory and policy barriers to the development and implementation of mining value from waste projects.



## SCIENCE, TECHNOLOGY AND INNOVATION

A modern and innovative industry supported by world-leading science and technology—across all phases of the mineral development cycle

### INNOVATION CHALLENGES:

Launch of a series of innovation prize challenges that advances Canadian technology and take advantage of global opportunities in: Water treatment; Mining value from waste; Tailings; and, Indigenous knowledge



## COMMUNITIES

Communities welcome sustainable mineral development activities for the benefits they deliver

### IMPROVE MINERAL LITERACY:

Develop a pan-Canadian mineral literacy hub as a point of access for new and existing resources on Canada's mining sector. Host the "Canadians of Mining" Campaign with portraits and testimonies of people involved in the industry.



## GLOBAL LEADERSHIP

A sharpened competitive edge and increased global leadership for Canada

### CANADA BRAND FOR MINING:

Develop and champion a Canada Brand for Mining to bolster Canada's standing as an exploration and mining power, promote trade and foreign direct investment, attract talent, and promote the world's most innovative MSS industry.

### NEXT STEPS

Fall

2021

Action Plan 2021

2022

Action Plan 2022

2023

2024

2025

Action Plan 2025

[www.minescanada.ca](http://www.minescanada.ca)



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# Canada's Critical Mineral List - 2021

- GoC released Canada's Critical Minerals List on March 11, 2021
- **Canada's Critical Minerals List** – 31 minerals
  1. Essential to Canada's economic security;
  2. Required for Canada's transition to a low-carbon economy; and
  3. A potential sustainable source for our partners.
- The list provides greater certainty and predictability to industry, investors, provinces and territories and Canada's international partners on Canada's mineral priorities
- Will enable targeted policy actions to address pressure points in critical minerals supply chains and secure growth opportunities



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# Budget 2021

- \$36.8 million over 3 years, starting in 2021-22, with \$10.9 million in remaining amortization, to support **targeted research and development for upstream critical minerals processing and battery precursors and related materials engineering.**
- \$9.6 million over 3 years, starting in 2021-22, to Natural Resources Canada to create the Critical Minerals Centre of Excellence. The Centre will **coordinate federal policy and programs, and work with provincial/territorial governments, Canadian industry, and with allied foreign governments** to stimulate the development of Canadian critical mineral value chains.

In Millions	2021-22	2022-23	2023-24	Total
Critical Minerals Center of Excellence	\$2.5	\$3.6	\$3.5	\$9.6
Critical Minerals R&D	\$8.70	\$24.20	\$14.80	\$47.70

# Critical Minerals Centre of Excellence (CMCE)

## Role and Responsibilities

- Provide national policy advice and analysis in collaboration with provinces and territories and industry
- Represent the Government of Canada interests and objectives internationally in bilateral and multilateral fora
- Coordinate programmatic support for Canadian projects in collaboration with other federal partners, other levels of government and strategic partners
- Lead the development of a three year Research and Development plan in collaboration with key partners, other levels of government, industry



## Key Activities

- Leading development of the Canadian Critical Minerals Strategy
- Ensuring Canada's policy and regulatory frameworks support sector and industry growth while unlocking downstream opportunities
- Partnering with other countries to diversify global supply chains with a heightened focus on the US, Japan, EU, UK and South Korea
- Supporting investment attraction
- Improving industry access to federal programmatic support and facilitating strategically important critical minerals projects
- Enhancing FPT, indigenous and industry engagement and project coordination
- Execution of R&D programming to advance critical mineral processing



## Critical Minerals R&D

*\$48M over three years for upstream critical minerals processing, battery precursors and materials engineering*

Battery minerals  
(lithium, nickel, cobalt,  
graphite, vanadium ...)

Mineralogical transformation into battery chemicals, achieve battery grade specifications at lower cost/energy, impurity removal/control, metallurgical optimization of yield; primary sourcing; internal and external R&D, pilots

Mining Value from  
Waste

Inventory of critical minerals from waste sources, process development for recovery, repurpose and recycling of critical minerals; mineral and post consumer waste sourcing; internal and external R&D, pilots and prize challenge(s)

Clean tech and other  
value chains (REE,  
niobium)

Magnet value chain R&D for cost-competitive production of REE. Alternative processing and separation options, piloting and demonstration of successful technologies; primary sourcing; internal and external R&D, pilots and demos



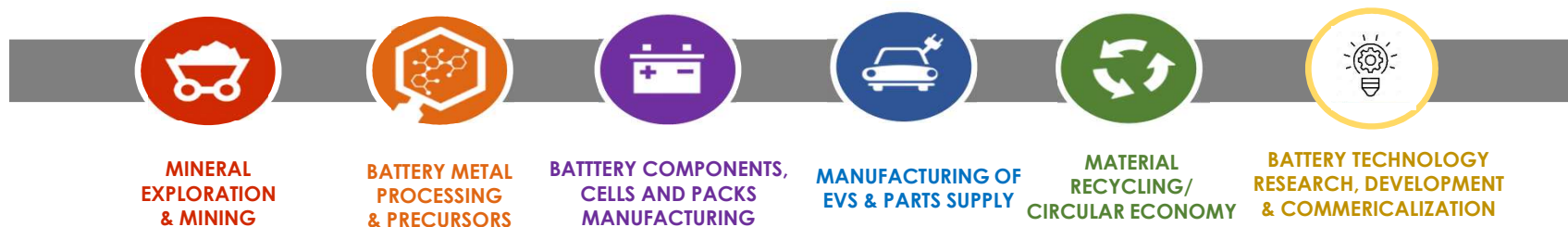
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# Mines to Mobility – Building a Battery Ecosystem in Canada

- Canada’s Mines to Mobility Initiative leverages mineral resource wealth to build an end-to-end battery innovation and industrial ecosystem
- The Mines to Mobility Initiative aligns with Canada’s strengthened climate plan *A Healthy Environment and a Healthy Economy*
  - \$8 billion Net Zero Accelerator will catalyze innovations in the development of Canadian electric vehicle production and support a battery innovation and industrial ecosystem
- We are making strategic investments, working with provincial and territorial governments and engaging industry and other stakeholders to:
  - Leverage strategic advantages in natural resources
  - Build all segments of the battery supply chain
  - Attract manufacturing mandates
  - Foster battery-related research, development and commercialization



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## Provincial & Territorial Activities

**Alberta**



*New and Modern Minerals Strategy*

**Saskatchewan**



*April 2021 Presentation of Saskatchewan's Rare Earth Processing Facility to EU Member States*

**Quebec**



*Quebec's Plan for the Development of Critical and Strategic Minerals*

**Ontario**



*Ontario's Critical Minerals List*

**Yukon**



*Developing Inventory of Critical Minerals Potential*



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