

A stylized graphic of the American flag, with the stars in the upper left and the stripes flowing diagonally across the page.

THE CRITICAL ISSUE #13

**AUGUST 2024
NEWSLETTER**



**Critical Minerals Association
USA**

AUGUST 2024

ISSUE OVERVIEW

Announcements

- EPA Awards \$27 Billion to Boost Clean Energy and Combat Climate Change
- Biden-Harris Administration Allocates Over \$240 Million for Energy-Efficient Building Codes
- EPA Awards \$1 Million Climate Resilience Grant to Support South Bronx Communities
- Biden-Harris Administration Invests \$140 Million to Lower Energy Costs, Create Jobs in Rural Nevada and Kentucky Communities

Political & Geopolitical Highlights

- America Must Present an Alternative to China's First BRI Project
- China announces new export controls for critical mineral
- Thousands protest in Serbia's Belgrade against lithium mining project
- US Aims to Boost Trade With Africa to Challenge China on Key Minerals
- Tapping unconventional resources for critical minerals
- Argentina to sign deal with US for critical minerals supply

Industry Highlights

- Penn State gets \$1M to dig into critical mineral research
- BHP's return to Argentina marks new hope for untapped copper mines.
- Rare earth developer Tactical Resources set for US listing with SPAC deal
- Miners Rio Tinto, Teck take steps to minimize Canada rail shutdown impact
- U.S. government researchers visit a Korean mine as the race against China for critical minerals heats up
- First shipment of critical minerals in over two decades departs from Churchill
- Desert Mountain Energy Aims to Restore Helium on US Critical Minerals List, Highlights Arizona Focus

International Highlights

- USGS flights map critical minerals, toxins in the Carolinas and Virginia
- How Chinese investors tried to take over an Australian mining company
- The fight for iron sands: the bitter battle to protect New Zealand's sea-floor riches

Events Calendar

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UPDATES

Biden-Harris Administration Allocates Over \$240 Million for Energy-Efficient Building Codes

The U.S. Department of Energy (DOE) has awarded over **\$240 million** to 19 state and local governments to adopt innovative building codes aimed at improving energy efficiency and resilience. Funded by the **Inflation Reduction Act and the Bipartisan Infrastructure Law**, these grants will support projects in cities like Cincinnati, Kansas City, Philadelphia, and New York City, helping reduce emissions and lower energy costs. This initiative is part of the **Justice40 Initiative**, ensuring 40% of benefits go to disadvantaged communities. Applications for additional funding close on **September 13, 2024**.

For more details, visit the Infrastructure Exchange under **Record Number DE-RD2-0003056**.

EPA Awards \$27 Billion to Boost Clean Energy and Combat Climate Change

The U.S. Environmental Protection Agency (EPA) has allocated **\$27 billion** in grants under the **Greenhouse Gas Reduction Fund**, marking the 2-year anniversary of the Inflation Reduction Act. This funding will accelerate clean energy projects nationwide, targeting low-income and disadvantaged communities.

The grants support three major programs: the **\$14 billion National Clean Investment Fund (NCIF)**, the **\$6 billion Clean Communities Investment Accelerator (CCIA)**, and the **\$7 billion Solar for All program**. These initiatives will lower energy costs, create jobs, and advance the Biden-Harris Administration's Justice40 Initiative.

Biden-Harris Administration Invests \$140 Million to Lower Energy Costs, Create Jobs in Rural Nevada and Kentucky Communities

The Biden-Harris Administration has **allocated \$140 million** for clean energy projects in rural Nevada and Kentucky under the **Inflation Reduction Act**. USDA Deputy Secretary Xochitl Torres Small announced this in Pahrump, Nevada, supporting the **Powering Affordable Clean Energy (PACE) program**. This initiative aims to reduce energy costs, ensure reliable clean energy, and create jobs in rural areas.

Key investments include:

- **\$80.3 million** by Valley Electric Association in Nevada for a **37-megawatt solar power system** expected to power **3,500 homes**.
- In Kentucky, about **\$62.5 million** will fund various solar and hydroelectric projects, enhancing energy production and supporting local communities.

These projects are part of the USDA's **Rural Partners Network** and the **Justice40 Initiative**, focusing on benefits for disadvantaged communities.

EPA Awards \$1 Million Climate Resilience Grant to Support South Bronx Communities

The EPA has awarded the Bronx River Alliance and Youth Ministries for Peace and Justice a **\$1 million grant via the Community Change Grants Program, funded by the Inflation Reduction Act**. This initiative supports efforts to tackle environmental and climate justice challenges in overburdened communities. EPA Regional Administrator Lisa F. Garcia and local leaders highlighted the creation of a **Bronx Climate Justice Task Force during a Bronx tour, focusing on enhancing community resilience and local involvement in climate justice projects**.

Senate Majority Leader Chuck Schumer, Senator Kirsten Gillibrand, and Representative Ritchie Torres all praised the grant's role in promoting climate resilience. The EPA continues to accept applications for the program until **November 21, 2024**.

POLITICAL & GEOPOLITICAL HIGHLIGHTS

America must present an alternative to China's first BRI project

The great power competition for tomorrow's critical mineral supplies will play out in African ports and mines. Despite falling behind China in foreign investment, America has the opportunity to catch up and secure access to the resources that power next-generation military and commercial technologies. But to compete, we must understand China's role as an alternative lender and developmental partner. Out of all African countries, Tanzania best exemplifies the potential of Chinese engagement as well as the danger that America and its allies could be shut out of an essential supply chain for critical minerals.

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China announces new export controls for critical mineral

China's Ministry of Commerce announced new controls Thursday on the export of antimony, a critical mineral used in a range of products from military ammunition, nuclear weapons and night goggles to batteries.

The curbs, which will go into effect on September 15 according to a ministry statement on its website, are but the latest in an ongoing race for resources with China. The nation is currently the largest producer of antimony, accounting for 48% of the critical mineral's globally mined output.

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Thousands protest in Serbia's Belgrade against lithium mining project

Thousands of people have taken to the streets of the Serbian capital to protest against the rebooting of a controversial lithium mine set to serve as a vital power source in Europe's green energy transition.

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US aims to boost trade with Africa to challenge China on key minerals

It's unclear whether Donald Trump or Kamala Harris will triumph in the Nov. 5 presidential election, but one thing's for sure: America's next leader must ensure it doesn't lose out in the competition to secure supplies of key minerals needed to produce clean energy.

More than a fifth of the world's reserves for minerals essential to the green-energy transition — including cobalt, copper, nickel and lithium — are in Africa, and China has more operational mines on the continent to tap them than the US does.

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Tapping unconventional resources for critical minerals

Dominance over global supply chains for critical mineral and rare earth elements (REE) is the next stage of great power competition, according to US Congressman Rob Wittman, who was appointed in June to co-lead the US House Select Committee's new critical minerals policy working group.

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Argentina to sign deal with US for critical minerals supply

Argentina is expected to sign a deal with the US that would draw more investment and trade in the critical minerals sector, according to a State Department official.

President Javier Milei's government will sign a memorandum of understanding with the US this week, during a visit to Argentina by US Under Secretary of State Jose Fernandez.

Fernandez will also visit Ecuador and Peru "to engage key partners in the Western hemisphere on critical minerals supply chains and developments," according to a statement on Wednesday. The agreement with Argentina will make it easier for the South American nation to work with countries under the Minerals Security Partnership (MSP) — a US-led group that includes 14 countries, and the European Union.

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INDUSTRY HIGHLIGHTS

Penn State gets \$1M to dig into critical mineral research

As more federal money goes out to deal with the critical mineral supply chain, Pennsylvania gets another grant.

The latest, almost \$1 million to Penn State University, will focus on researching whether boron nitride can replace gallium in semiconductors.

Gallium currently has no domestic source, and is one of dozens of minerals where China dominates the refining and processing of them.

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BHP's return to Argentina marks new hope for untapped copper mines

A new incentive regime for mining in Argentina is attracting major players such as BHP, who are starting to eye the South American country as the world's next frontier for copper, more than half a dozen mining industry officials told Reuters.

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Rare earth developer Tactical Resources set for US listing with SPAC deal

Tactical is currently developing the Peak project located southeast of El Paso, Texas, with the aim of becoming the next rare earth elements (REE) producer on American soil. Its flagship project contains the exclusive rights to acquire REE-enriched tailings and stockpiled materials extracted from the Sierra Blanca quarry.

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Miners Rio Tinto, Teck take steps to minimize Canada rail shutdown impact

Rio Tinto said on Thursday the labor dispute between Canada's two biggest railway companies and their workers would likely disrupt their operations and the miners were taking steps to mitigate the damage.

A Rio Tinto spokesperson said the company's contingency plans to minimize the impact included trucking certain materials and products and increasing use of its own rail network. Teck said it was looking to use alternative transportation, without specifying.

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U.S. Government researchers visit a Korean mine as the race against China for critical minerals heats up

U.S. government researchers recently visited a South Korean mine to assess progress towards boosting supply of a critical metal called tungsten from areas outside China, the mine operator said Wednesday. The Sangdong Mine, owned by a subsidiary of Canada-based Almonty Industries, is set to resume operations this year.

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First shipment of critical minerals in over two decades departs from Churchill

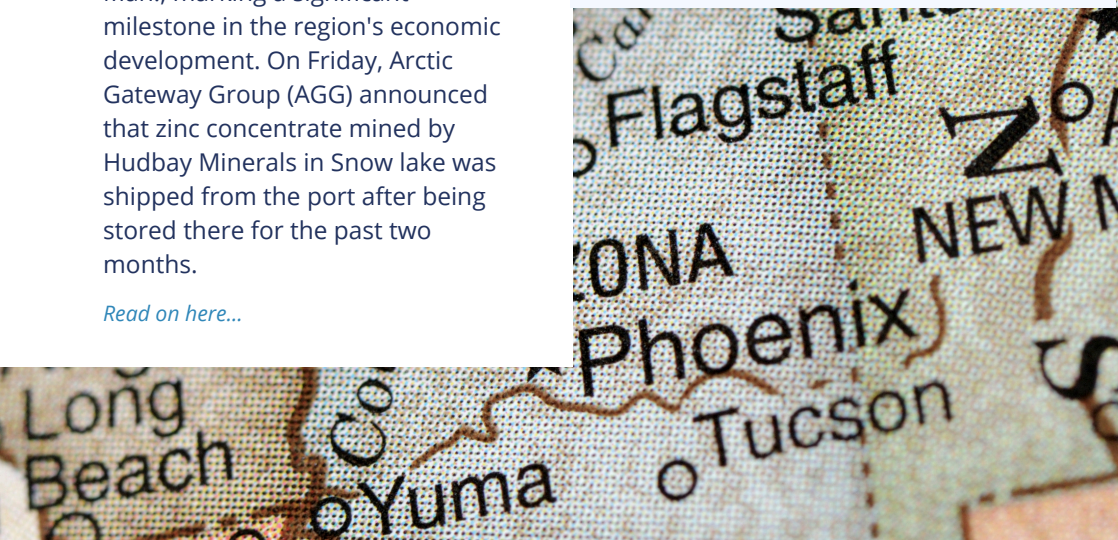
The first shipment of critical minerals in over 20 years has been exported from the port of Churchill, Man., marking a significant milestone in the region's economic development. On Friday, Arctic Gateway Group (AGG) announced that zinc concentrate mined by Hudbay Minerals in Snow lake was shipped from the port after being stored there for the past two months.

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Desert Mountain Energy aims to restore Helium on US Critical Minerals List, highlights Arizona focus

Desert Mountain Energy, a company specializing in helium exploration and production, is actively working to reinstate helium on the United States Geological Survey's (USGS) critical mineral list. This announcement comes as part of the company's broader efforts to streamline helium extraction processes in Arizona. Helium was removed from the USGS critical minerals list in November 2021, a surprising move given its inclusion in the list as recently as 2018. The USGS, an agency under the Department of the Interior (DOI), is mandated by the Energy Act of 2020 to update the list of critical minerals at least every three years.

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INTERNATIONAL HIGHLIGHTS

USGS flights map critical minerals, toxins in the Carolinas and Virginia

Over the next year, you might notice what looks like a low-flying plane on a lollipop stick flying back and forth. Those flights are part of a federal geological survey of rare earth minerals over the Carolinas and Virginia that begins this month. And that lollipop stick is a passive sensor. U.S. Geological Survey geophysicist Anji Shah oversees an initiative to map critical mineral resources like cobalt and lithium in the Carolinas and Virginia. She said the data will provide a rough sketch of what lies miles beneath our feet.

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The fight for iron sands: the bitter battle to protect New Zealand's sea-floor riches

Over the past 11 years the region's seafloor has generated global interest and become a bitter battleground between a mining company and the locals who live and work along the coast.

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How Chinese investors tried to take over an Australian mining company

A protracted corporate struggle between an Australian mining company and Chinese investors has pulled back a curtain on the intensifying global conflict for critical minerals as the United States and its allies try to break Beijing's control over an industry that will be central to the green revolution. The boardroom battle began last year, when Northern Minerals — a small Australian miner with big designs on the world's rare earths markets — needed to raise money. But according to corporate filings and interviews, when the company began to look into who, exactly, had bought its newly issued \$16 million of shares, executives started to sweat.

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CONFERENCE CALENDAR 2024

SEPTEMBER

FT LIVE

26 - 27 Sept
London, UK

OCTOBER



29 - 31 Oct
Sydney, Australia

NOVEMBER



6 - 7 Nov
Cape town , South Africa

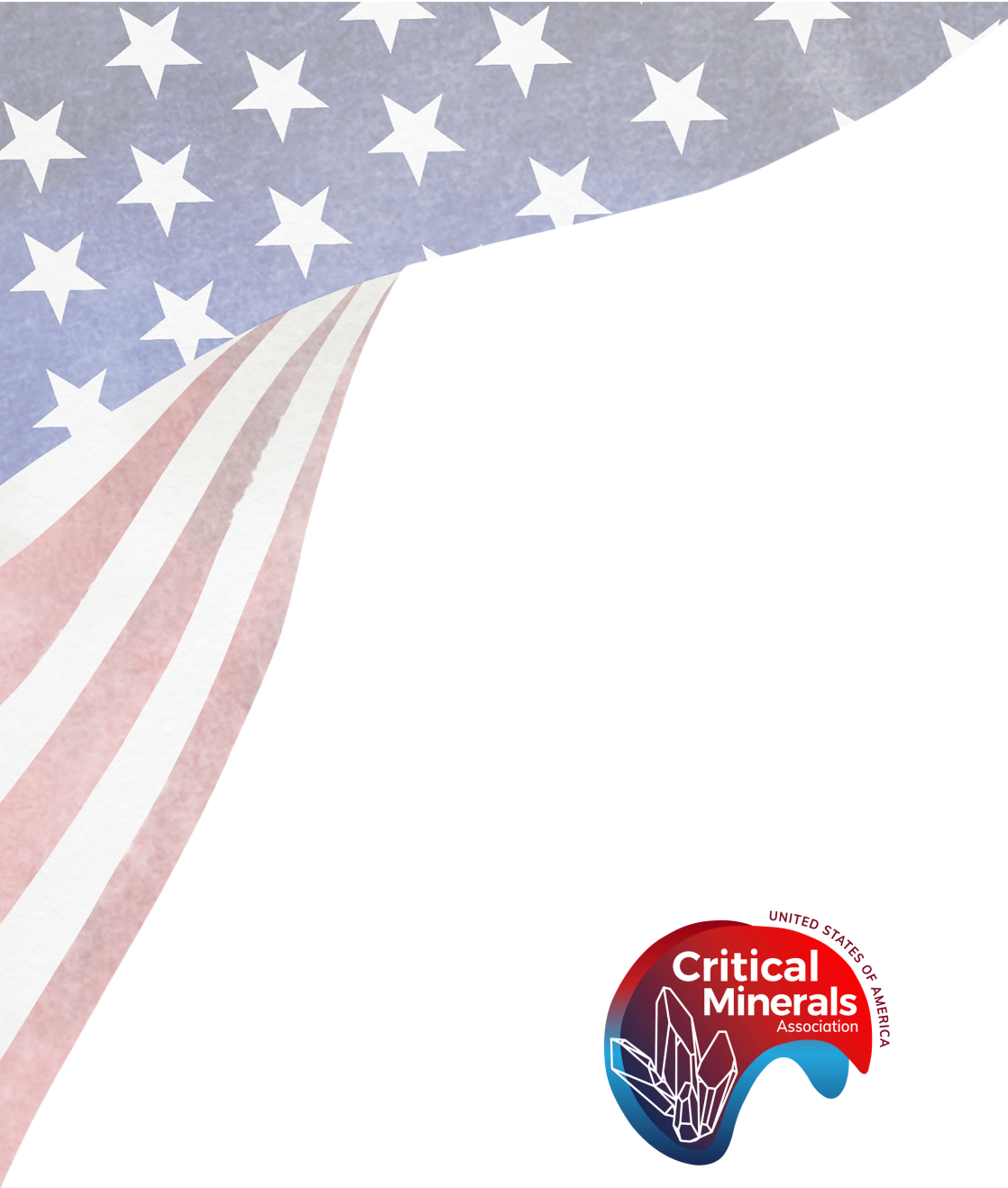
DECEMBER



3 - 5 Dec
London, UK



2 Dec
London, UK



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