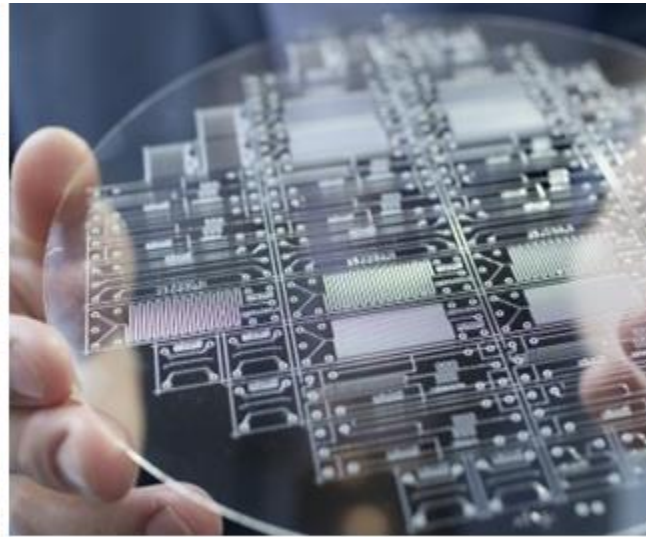


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Benchmark Breakfast Briefing: Fluorine in the Battery and EV age

Jessica Roberts, Head of Forecasting, Benchmark Mineral Intelligence, UK

Fluorspar supply & demand overview

Maximilian Court, Product Director – Battery Chemicals, Benchmark Mineral Intelligence, UK

Fluorspar & HF processing: trends & cost curves

Project Blue, South Africa

Mongolian fluorite deposits and their geochemical characteristics

Dr Tumenbayar Baatar, Director, SFP, & Banzragch Janchiv, Geologist, Mongolia

China fluorspar supply review

Xinhua Liao, President, Fujian Haojingda Industry Co., Ltd, China

Pakistan's fluorspar production progress: first acidspar plant development

Shahid Hamid Jafri, CEO, Perfect Associates, Pakistan

Lost Sheep Fluorspar Project, Delta, Utah: Progress & Outlook

James Walker, CEO, Ares Strategic Mining, Canada

Tivan Ltd: Introducing the Speewah Fluorite Project

Brendon Nicol, Process Manager, Tivan Ltd, Australia

Hydrofluoric Acid: Accelerating the e-mobility journey – Asian Supply & Demand outlook

Samantha Wietlisbach, Director Minerals Research, S&P Global, Switzerland

Challenges & opportunities faced by Western fluorspar miners from renewable energy

Peter Robinson, Managing Director, Fluorspar Ventures, UK

Production of AlF_3 from fluorosilicic acid by neutralisation with hydrated Al_2O_3

Dr Alexey Morozkov, JSC "NIUIF", PhosAgro, Russia

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The making of fluorine-containing materials for OPTICALization: starting from fluorspar

Dr Dexi Weng et al, Managing Director, Dexyan Global Poly Research Institute, USA

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Britannia Refined Metals Ltd	Fluorspar Ventures Ltd	Minersa Group	SST Srl
Buffalo Fluorspar (PTY) Ltd	Gannon Eco	Ministry of Mining & Heavy Industry	Steel Services Sarl
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Elixir Prahovo	Innovx	Rio Tinto	
		Rotterdam Bulk Logistics	

Thanks for the excellent and well organised Fluorine Forum 2023 in Cannes. Great presentations and exchange of information with other delegates from the fluorspar industry was extremely valuable. We also had many opportunities to introduce our fluorspar company. It was our first IMFORMED event, but certainly not the last. We look forward to the next Fluorine Forum in 2024 in Ulaanbaatar!

Hasan Firat, Export Manager, Keles Mining, Turkey

Congratulations on the great success of the Cannes Fluorspar conference. We are looking forward to seeing you in Mongolia.

Cassie Yan, Sales Manager, Do-Fluoride New Materials Co. Ltd, China

The Koura team had a great time in Mandelieu-La-Napoule meeting with other producers and consumers of fluorine. Massive thanks to IMFORMED; yet another fantastic event!

Kerry Satterthwaite, Director Business Intelligence, Koura, UK

Your record-breaking Fluorine Forum 2023 was a great experience and success. A special thanks once again for all your efforts in making this great event in Cannes a memorial experience.

Carl Taljaard, Group Executive Chairman, Sallies Holdings, South Africa

Thank you very much for organising Fluorine Forum at Cannes. Everything was organised very well. I attended it first time and found to be very useful. It was great opportunity to hear eminent speakers to know about the latest development in the Fluorine sector and networking people gathered across the globe from 31 countries.

Naveen Kumar, Executive Director, Hyspec Chemicals Ltd, India

An outstanding, well-organised conference.

Gabriele Pupo, CEO, Fluorok Ltd, UK

Fantastic venue, great presentations, didn't get much time for the roundtables due to suppliers' meetings!

Corwin Miller, Sourcing Manager, Lincoln Electric Co., USA

Malcolm Crawford 1951 – 2022



PROGRAMME

MONDAY 16 OCTOBER

17:00 **Registration**

19:00 **Welcome Reception sponsored by**



TUESDAY 17 OCTOBER

07:30 **Registration**

INTRODUCTION | OVERVIEWS: SUPPLY | SHIPPING

09:00 **Welcome & Introduction**

Ismene Clarke, Director & Mike O'Driscoll, Director, INFORMED, UK

09:30 **Fluorspar market overview**

Alison Saxby, Research Director, Project Blue, UK

10:00 **The state of mineral logistics: shipping market review**

Robert van Muiden, Managing Owner, RoBuLog - Rotterdam Bulk Logistics, the Netherlands

10:30 COFFEE

PROGRAMME

TUESDAY 17 OCTOBER (continued)

CHINA MARKET | MONGOLIA SUPPLY

- 11:30 **Fluorochemical industry new development trends in China**
Lingyun Li, Vice Chairman, Do-Fluoride New Materials Co. Ltd, China
- 12:00 **Development of the Delgerkhaan fluorspar deposit, north-east Mongolia**
Hattori Junichi, Chairman, Wayo-Fluorite LLC, Japan
- 12:30 **Mongolia's fluorspar sector prospects & objectives**
Tsevegmed Sandiv, Vice Chairman, Mongolian Association of Fluorite Miners, Mongolia

13:00 LUNCH

NEW SOURCE POTENTIAL:

ITALY | GERMANY | SOUTH AFRICA | AUSTRALIA

- 14:30 **Rejuvenating the Silius fluorspar mine, Sardinia, Italy**
Umberto Gioia, Managing Director, Mineraria Gerrei Srl, Italy
- 15:00 **Re-opening the Käfersteige Mine in Pforzheim, Germany**
Simon Bodensteiner, Managing Director, Deutsche Flussspat GmbH, Germany
- 15:30 **The potential for new fluorspar mines and developments in South Africa**
Allan Daniel Saad, Project Manager & Consulting Geologist, Red Sands Mining & Exploration cc, South Africa
- 16:00 **Australia: a new frontier for fluorspar supply from Tasmania**
Joseph Gutnick, Director, Mazel Resources Pty Ltd, Australia

PROGRAMME



TUESDAY 17 OCTOBER (continued)

16:30 COFFEE & ROUNDTABLE NETWORKING SESSION

Theme	Roundtable Host
New Sources/Supply	Allan Saad, Director, Red Sands Mining and Exploration cc, South Africa
Logistics/Shipping	Robert van Muiden, Managing Owner, RoBuLog – Rotterdam Bulk Logistics, the Netherlands
China	Ann Song, Managing Director, Luoyang Aurora Minechem Co. Ltd, China
Mongolia	Tsevegmed Sandiv, Vice Chairman, Mongolian Assoc. of Fluorite Miners, Mongolia
Fluoropolymers	Bruno Ameduri, Senior Research Director, CNRS, Institut Charles Gerhardt, France
CRM/Batteries/EV	Peter Robinson, Managing Director, Fluorspar Ventures Ltd, UK

17:30 CLOSE OF DAY 1



18:00 Drinks Reception sponsored by



PROGRAMME

WEDNESDAY 18 OCTOBER

MARKETS 1: BATTERIES | WELDING

- 09:00 **Fluorspar's role in electric vehicles and the energy transition**
Simon Moores, CEO, & Jessica Roberts, Head of Forecasting, Benchmark Mineral Intelligence, UK
- 09:30 **Fluorine: the fundamental element on the path to net zero**
Samantha Wietlisbach, Director Minerals Research and Analysis, S&P Global Commodity Insights, Switzerland
- 10:00 **Fluorspar use in the welding market**
Corwin Miller, Sourcing Manager, Lincoln Electric Co., USA

10:30 COFFEE

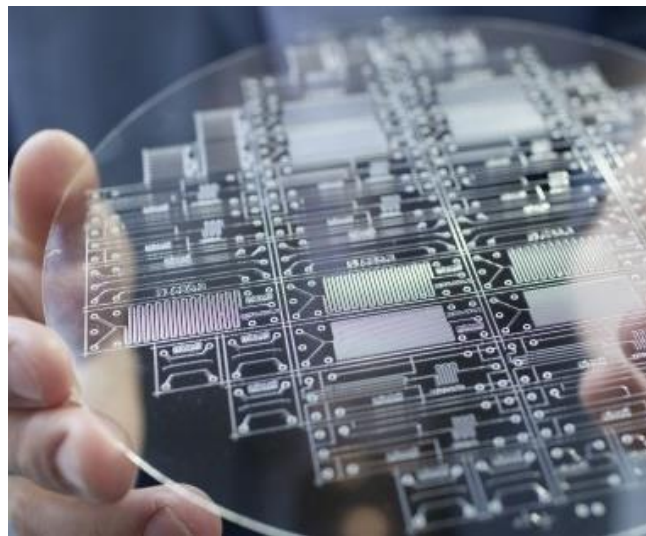
MARKETS 2: FLUOROPOLYMERS

- 11:30 **The EU PFAS restriction proposal & its impact on the EU fluoropolymers market**
Nicolas Robin, Director Fluoropolymers Group, Plastics Europe, Belgium
- 12:00 **Fluorochemicals – key ingredients in OPTICALization of super-big data world**
Dr Dexi Weng, Managing Director, Dexyan Global Poly Research Institute, USA
- 12:30 **The overall situation of poly- or perfluoroalkyl substances (PFASs) and recycling of fluoropolymers**
Bruno Ameduri, Senior Research Director, CNRS, Institut Charles Gerhardt, France
- 13:00 **Revolutionising fluorochemical production: developing an HF-free fluorination process**
Gabriele Pupo, CEO, Fluorok, UK

13:30 LUNCH & CLOSE OF CONFERENCE

Fluorspar market overview

Setting the Scene | Points of Interest & Discussion



Supply highlights

CANADA

Canada Fluorspar new ownership?; resumption end-2023/24?

USA

Ares Strategic Mining Lost Sheep Fluorspar Project, Delta, UT; 50-180,000 tpa lump metspar plant for steel, ceramics, glass; Oct. 2023 approval to complete plant construction & commissioning; purchase of flotation plant to be shipped to site.

GERMANY

Deutsche Flussspat to restart the Käfersteige mine, Pforzheim.
Fluorchemie Group undergoing ownership transition; new Phoenix mine/plant, Gehren, Thuringia in 2024?

ITALY

Mineraria Gerrei to restart Silius mine, Sardinia; 70,000 tpa acidspar, on stream end-2024

SWEDEN

Tertiary Minerals: Swedish Govt. annulled Mining Inspectorate's 2019 decision not to grant Storuman Project exploitation concession; decision to be re-examined.

PAKISTAN

Balochistan Prov. Govt. Mineral Resources Ltd/Platinum Mining Corp. JV CaF₂ process plant 60-250,000 tpa, Hub; sourced from Loralai 1.6m t deposit

INDIA

Navin Fluorine new 40,000 tpa HF plant, Dahej, Gujarat; on stream 2027.
Indian Govt. cut customs duty on acidspar imports from 5.0% to 2.5%.

MONGOLIA

Wayo-Fluorite restarting Delgerkhaan mine, Khentii, 2024
Mongolczechmetall commissioned 100-150,000 tpa CaF₂ plant, Chuluut Tsagaan Del, Tuv

CHINA

Rising prices, tight supply; mines facing closures, stricter safety & environmental regulations.

JAPAN

Mexichem Fluor Japan/Sojitz Corp. JV HF plant, Kitakyushu; on stream 2025

AUSTRALIA

Mazel Resources developing Moina deposit, Tasmania
ABx Group raised \$1.5m to fund ALCORE pilot plant, NSW; F from Al smelter waste to produce HF + AlF₃

Market highlights

China acidspar price hikes

Post-National October Holiday

- Producers raising prices >20%, or temporarily suspending quotes.
- Record breaking EXW RMB3,600-4,100(US\$493-562)/t
- Tight supply owing to government safety & environment inspections, reactions to accidents = closures, production halts

Japan lifts HF export restrictions to South Korea

March 2023: Japan lifted curbs (imposed 2019) on hydrogen fluoride, fluorinated polyamide and photoresist imported by SK to produce semiconductors and displays.

South Korea announced plans to utilise \$234bn in private investment to create “world's largest semiconductor cluster” in the Seoul metropolitan area, Gyeonggi province.



Dawn Dong, Sales Representative,
Luoyang Aurora Minechem Co. Ltd



China Roundtable Host
Ann Song, Managing Director,
Luoyang Aurora Minechem Co. Ltd

"According to our contact with hydrofluoric acid companies, they describe the fluorspar market as crazy...they have never encountered anything like this before."



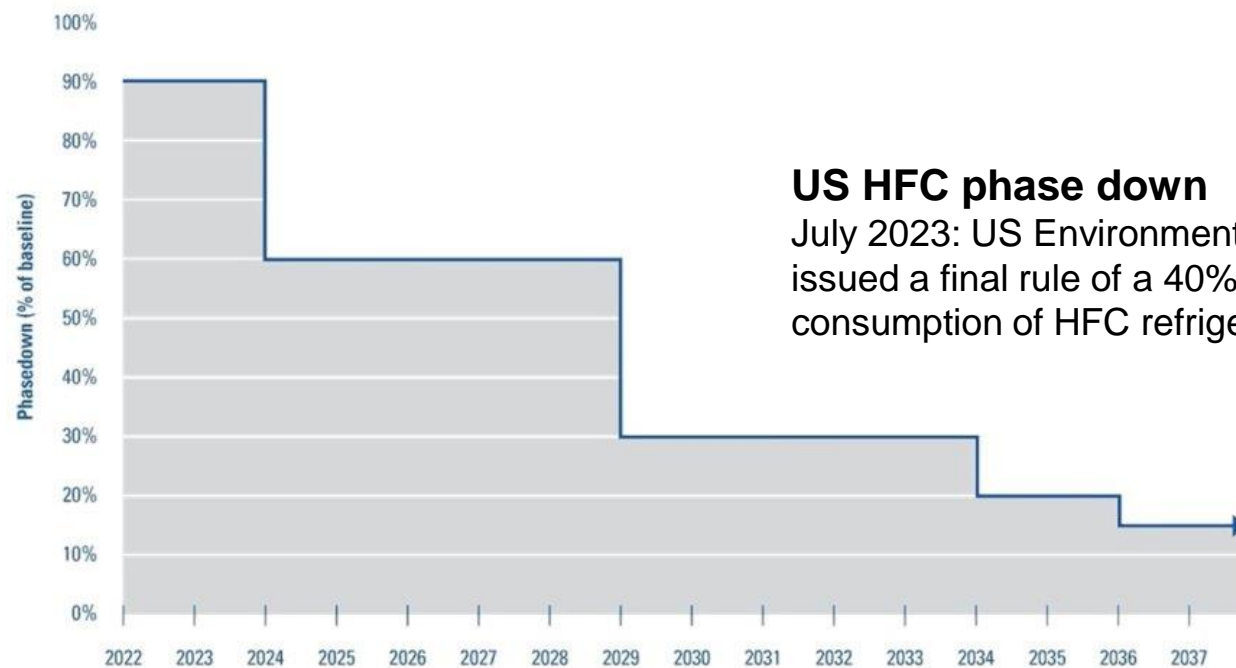
Shunchang fluorspar flotation plant, Fujian, Haojingda Industrial Co.;
600,000 tpa ore processing capacity

Market highlights

EU F-gas phase out

5 Oct. 2023: The European Parliament and Council reached a provisional deal on specific bans in the use of HFCs and HFOs and a complete phase out of F-gases by 2050.

- Consumption of HFCs completely phased out by 2050
- Production of HFCs, in terms of production rights granted by the Commission, will be phased out to a minimum (15%) from 2036



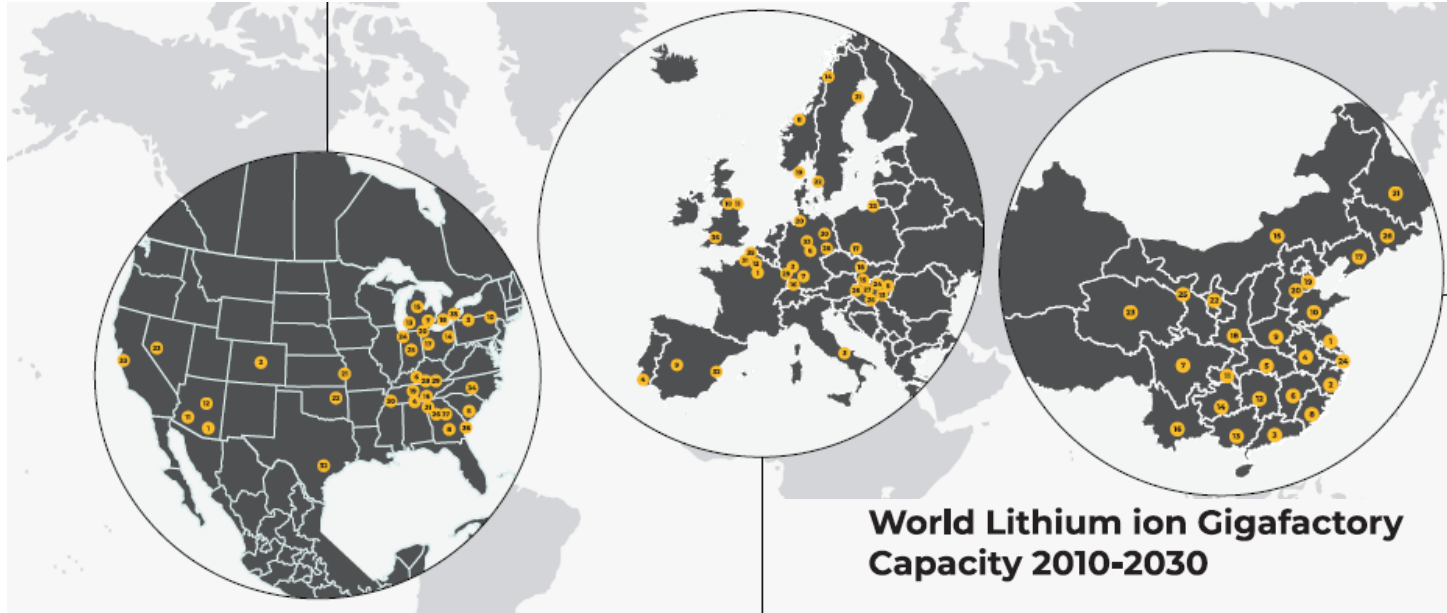
US HFC phase down

July 2023: US Environmental Protection Agency (EPA) issued a final rule of a 40% cut in the production and consumption of HFC refrigerants from 2024.

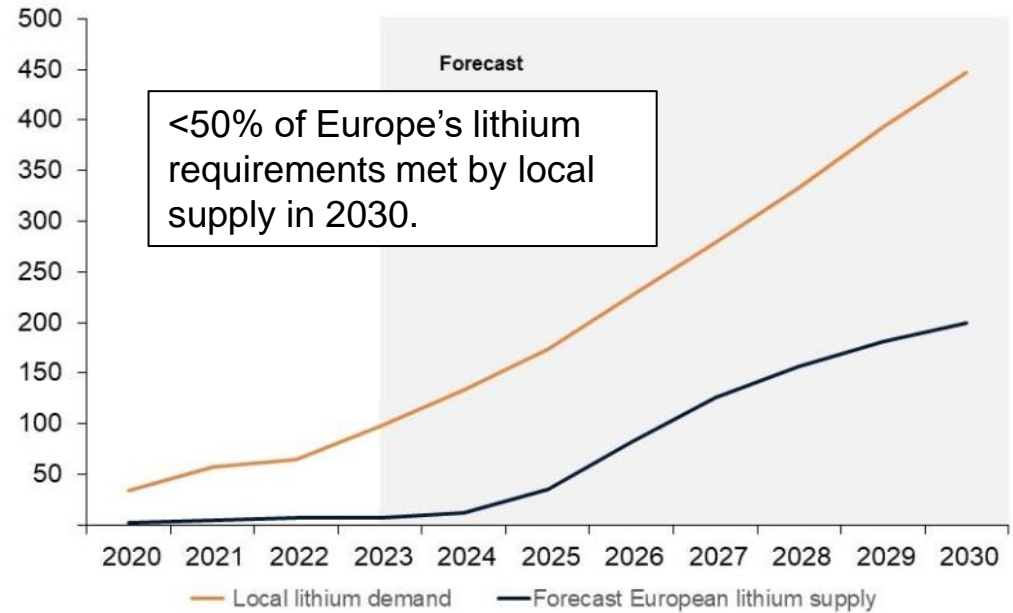
Source: EPA

Market highlights

Li-ion battery market growth

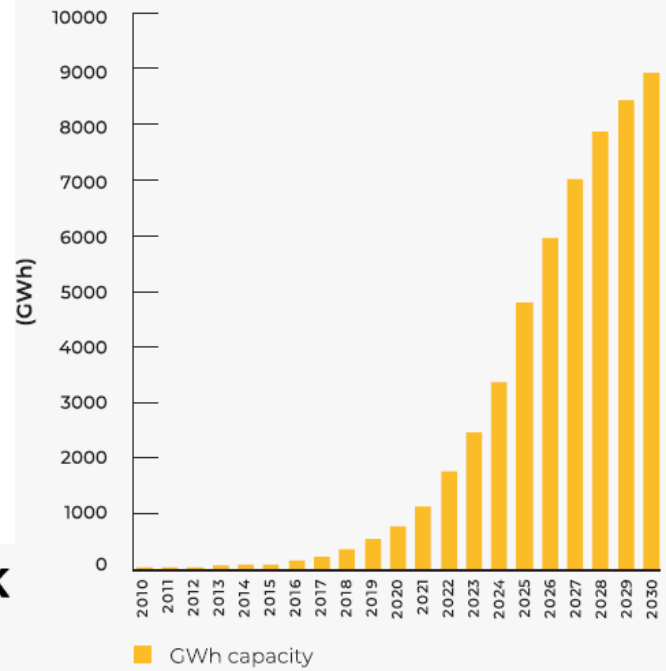


European lithium supply and demand from proposed mines
Thousand tonnes of LCE



Source: Rystad Energy's Battery Solution, October 2023
A Rystad Energy graphic

World Lithium ion Gigafactory Capacity 2010-2030



LIB electrolyte – new materials?

Lithium bis(fluorosulfonyl)imide (LiFSI) “significantly better” than that of lithium hexafluorophosphate decomposes more readily at high temperatures and is sensitive to water, therefore can be used in high temperature and high voltage environments.



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China's refractories industry: status, key challenges, influencing factors, & demand

Dr Wang Zhanmin, VP Manufacturing, Sinosteel Luonai Materials Technology, China

Magnesite developments in Liaoning province

Zhao Liqiang, General Manager, Haicheng Magnesite Group Co. Ltd, China

Review & outlook for China's economy & downstream refractory markets

Dr Adam Gao, Associate Director, Mining Materials, S&P Global, China

Navigating shipping ex-China in 2024 with geopolitics, sanctions & Red Sea crisis

Eddie Boo Koh, Regional General Manager Greater China, Access World, China

Exploring refractory raw material procurement from China: potential & challenges

Devang Chowdhary, Director, Thyme Corp., Germany

Refractories without China?

Dr Richard Flook, Managing Director, Mosman Resources, Australia

Evolving performance needs for alumina raw materials in China's refractories market

Chris Parr, VP Science & Technology, Imerys, France

Developments in producing high grade refractory magnesia in China

Prof. Zongqi Guo, Xi'an University of Architecture and Technology, China

Trends & developments in China's refractories market

Marco Olszewsky, President RHI Magnesita China & APAC, China

The changing face of technology and its impact on refractory raw materials

Dr Rainer Gaebel, Managing Director, Refratechnik Holding GmbH, Germany

China's graphite supply situation

Madam Xia Xiaomin, General Manager, CNBM Heilongjiang Graphite New Materials Co. Ltd, China

Trends in Chinese alumina supply and applications in the refractories market

Dr Feng Wang, Director Sales China & Southeast Asia, Almatix, China

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Salt global supply overview & Asian chlor-alkali market

Dr Stefan Schlag, Managing Director, Salt Market Information, Switzerland

The role of salt in the chlor-alkali industry & its outlook

Stephanie König, Head of European Chlor-Alkali, Argus Media Ltd, UK

SEASALT Europe: Challenges & opportunities of a unique industry

Gonzalo Diaz Caicoya, President, SEASALT Europe & General Manager, Bras del Port, Spain

Solar salt works & technology developments on increasing salt yield

Dr Bhoomi Andharia, Senior Scientist, CSIR-CSMCRI, India

Advancements in solar salt industry: a comprehensive exploration of automation

Param H Dave, Manager, Tata Chemicals Ltd, India

Status of Pakistan salt supply, markets & future prospects

Ismail Suttar, Chief Executive Officer, HubSalt, Pakistan

The California Supreme Salt project

Vladimir Sedivy, President, Salt Partners Ltd, Switzerland

The potential of sodium-ion batteries & salt requirements

Sean Hoffman, Critical Minerals Research Analyst, Project Blue, South Africa

Crystallizer pilot study to produce high-purity NaCl salt from desalination brine

Dr Christopher Fellows, Researcher, Saline Water Conversion Corp., Saudi Arabia

Innovation approach to salt plant optimisation

Titan Salt, Netherlands

Vacuum salt production in Bangladesh: Fourth generation technology

Eörs Kondorosy, Managing Director, Evatherm AG, Switzerland

Salt production developments in Kazakhstan

Ioanna Ponomarenko, President, Araltuz JSC, Kazakhstan

The Salt of Diplomacy: EU salt's collaborative approach to industry advancement

Dr Urs Ch. Hofmeier, President, EU salt & CEO, Schweizer Salinen AG, Switzerland

The use of bittern after salt crystallisation for production of by-products

Dr Stephan Kaps, Head of Department, K-UTEC AG Salt Technologies, Germany

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