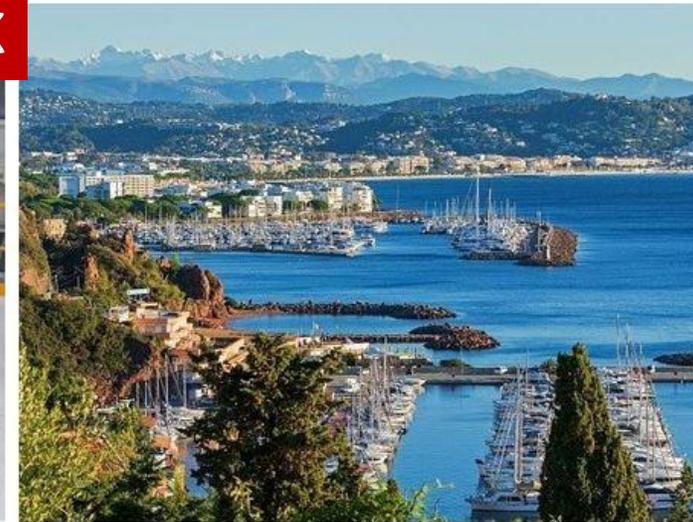
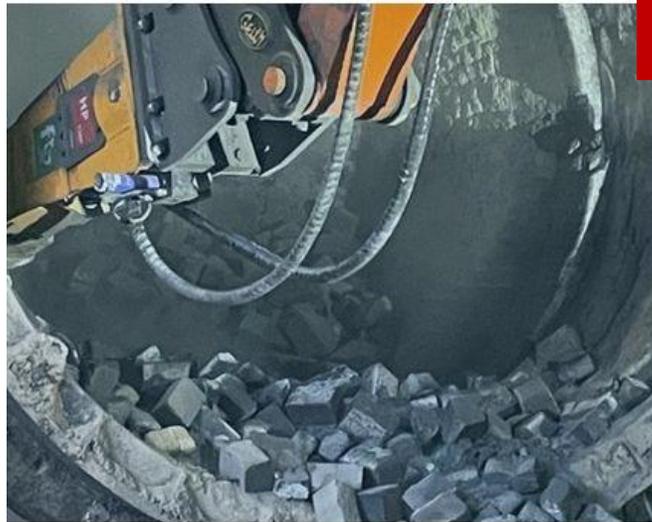


MINERAL RECYCLING FORUM 2025

Pullman Cannes Mandelieu, 9-11 April 2025

Secondary raw material sources, supply, processing, and markets

SUMMARY SLIDE DECK



The networking and knowledge hub for the industrial mineral recycling business

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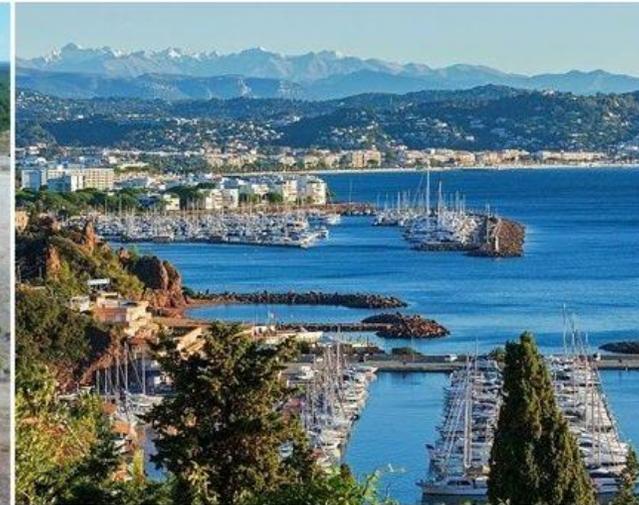
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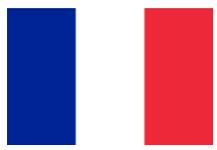
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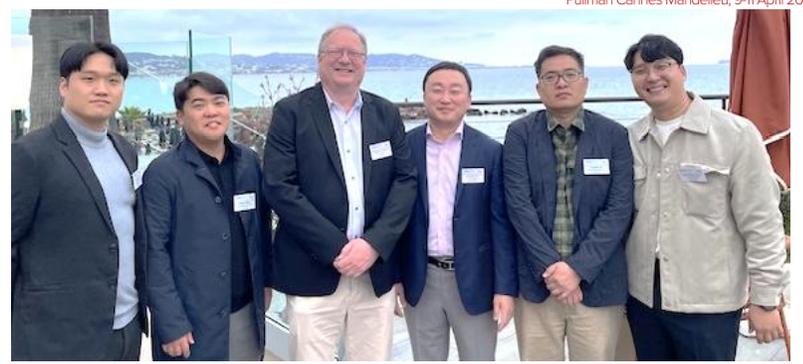
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Very good presentations, huge variety of businesses, nice hotel and setting, very well organised.

Jaco ter Steege, CEO, Rewaste Minerals BV, Netherlands

What stood out for me? Definitely the quality of discussions and the open, constructive exchange. Events like this bring together the right people, researchers, plant managers, commercial experts, young professionals, and the mix of perspectives really adds value. You can tell when an event is made by people who know the industry from the inside and who care.

Alexander Leitner, Head of Pioneer Research, RHI Magnesita, Austria

The move towards greener industrial minerals is picking up pace – and that shift was front and centre at this year's Mineral Recycling Forum 2025. One key takeaway stood out: making better, more economical use of industrial waste is becoming essential for a more sustainable future.

Metals Hub GmbH, Germany

Thanks again for this excellent organised conference! See you for sure next year.

Edwin Nijland, Managing Director, Euro-Rijn Deutschland GmbH, Netherlands

We're proud to share that Almatix was a sponsor of the Mineral Recycling Forum 2025. The forum brought together key players and innovators who are shaping the future of circular economy solutions in mineral recycling. A big thank you to the organisers and all participants for making this event a success. Let's keep the momentum going!

Osman Calisir, Head of New Business Development, Almatix, Germany

Wonderful place, very interesting and widely spread topics, perfectly organised.

Kerstin Reiner, Managing Partner, REF Minerals GmbH, Germany

Strong content, excellent venue.

Dan Devan, Director of Recycle & Reclaim, HWI - A Member of Calderys, USA

Concise and time-managed presentations were outstanding.

Eduard Llopart, Technical Assistant, CALUCEM by MOLINS, Spain

PROGRAMME

THURSDAY 10 APRIL

07:45 Registration

INTRODUCTION | CRITICAL MINERALS

09:00 **Opening Remarks & Introduction**
Mike O'Driscoll, Director, IMFORMED, UK09:30 **Recycling of Critical Raw Materials in the Nordics**
Bard Bergfald, CEO, Bergfald Environmental Consultants, Norway

10:00 COFFEE SPONSORED BY



MINERAL FILLERS | GLASS | SALTS | FLUORSPAR

11:00 **Producing high-quality, recycled mineral fillers derived from coarse mine tailings.**
Arnout Lugtmeijer, CEO, Trisector, Estonia11:30 **Challenges & progress in recycling of speciality glass & glass-ceramics**
Dr. Jörn Besinger, Project Lead Circular Economy, SCHOTT AG, Germany12:00 **Industrial recycling of sodium and magnesium salts**
Dr Stefan Schlag, Managing Director, Salt Market Information, Switzerland12:30 **The LIFE-SYNFLUOR project: High purity synthetic fluorspar and precipitated silica from hexafluorosilicic acid**
Dr Luca Pala, Director of Research & Development, Fluorsid SpA, Italy

13:00 LUNCH

PROGRAMME

THURSDAY 10 APRIL (CONTINUED)

REFRACTORIES 1: CRITICAL MINERALS | GLASS

- 14:30 **Remining, Recycling, & Reshoring of Critical Minerals for the Refractory Industry**
Ellis Sullivan, CEO and founder of ROC Minerals, USA
- 15:00 **REFCYCLE: Developments in glass refractories dismantling, recycling and waste management**
Werner Odreitz, CEO, REF Minerals GmbH, Germany

15:30 COFFEE

REFRACTORIES 2: MAGNESIA | ANDALUSITE

- 16:30 **MgO-C recycling: what are the key features of this material to replace primary MgO?**
Dr Helge Jansen, Managing Director, Refratechnik Steel, Germany
- 17:00 **Smart research strategies to boost secondary raw material use in refractories: andalusite-based refractories as a case study**
Dr. Kerstin Hauke, Research Associate, Forschungsgemeinschaft Feuerfest eV, Germany

17:30 DRINKS RECEPTION & CLOSE OF DAY 1



PROGRAMME

FRIDAY 11 APRIL

REFRACTORIES 3: SOUTH KOREA | TURKEY

- 09:00 **Update on graphite recycling in South Korea**
Yongdon Joo, CEO, Korea Material Co. Ltd, South Korea
- 09:30 **Recycling induction furnace refractory lining & other projects in Turkey**
Nafiz Özdemir, General Manager, SIMBIO REFCYCLE, Turkey

10:00 COFFEE SPONSORED BY

REFRACTORIES 4:
COMMUNITION | SORTING | CO2 EMISSION REDUCTION

- 11:00 **Refractory recycling: comparison on using conventional and alternate comminution processes**
Dr. Karl Friedrich, Research Associate, Dept. Mineral Resources Engineering, University of Leoben, Austria
- 11:30 **It's all about sorting: the future of refractory recycling**
Alexander Leitner, Head of Pioneer Research, RHI Magnesita, Austria & Lucas Zimmermann, Head of Project Management, MIRECO, Germany
- 12:00 **Recycling spent refractories: what shall we do to maximize CO2 emission saving?**
Marc Faverjon, Sales Engineer, Deref SpA, Italy

12:30 LUNCH & CLOSE OF CONFERENCE

The future for the industrial minerals industry?

“Going where the minerals are greener”

Missions of our time

- **Decarbonisation**
- **Recycling**



“Going where the industrial minerals are greener”

New era of mineral exploration,
sourcing, development...
...& RECYCLING!



“We need a paradigm shift on circular economy. To support this movement, we will present a Circular Economy Act. We have to keep critical raw materials waste in Europe and give it new life.”

EC President Ursula von der Leyen at Antwerp to present the Clean Industrial Deal at the European Industry Summit, 27 February 2025.

Entering a new era of mineral recycling

Primary drivers



1. **Environment:** saving the environment; drive for the “Circular Economy” gathering momentum; climate change; CO₂ reduction; sustainable development of raw materials
2. **Cost factors:** rising cost of primary minerals, energy, logistics, waste treatment, landfill. future penalties
3. **Limited primary sources:** shortage of commercially developed mineral resources and processing plants: “critical” + “strategic”; risky overreliance on supply/trade from limited overseas sources; logistics stress; vulnerability spotlighted by Covid-19 pandemic, Russia-Ukraine war, China-Taiwan? Trade wars? Geopolitics?
4. **China in change:** supply issues, wide range of factors; end of an era for low cost import reliance? Time to de-risk? Boost to alternative source development (incl. recycled materials).
5. **Emergence of hi-tech growth markets requiring “critical” raw materials:** to become more mainstream, particularly in the energy sector (eg. Li-ion batteries, EVs, solar, wind), and thus demand for respective critical minerals (eg. lithium, graphite, rare earths); minerals “gaining criticality”; = increasing government awareness/reaction/support/investment
6. **Recycling technology more economic/established:** evolved from esoteric, expensive sideshow, to mainstream processing line; advances in processing & sorting technology; opportunities sensed and sought after; primary mineral miners increasing mine waste recycling efforts.

The future for the industrial minerals industry?

“Going where the minerals are greener”

Tomorrow’s “mining” will in large part be efficient and economic utilisation of today’s industrial waste

Three key recycled waste streams for minerals

- **Mine waste**
- **End product manufacturing waste**
- **Spent end products**

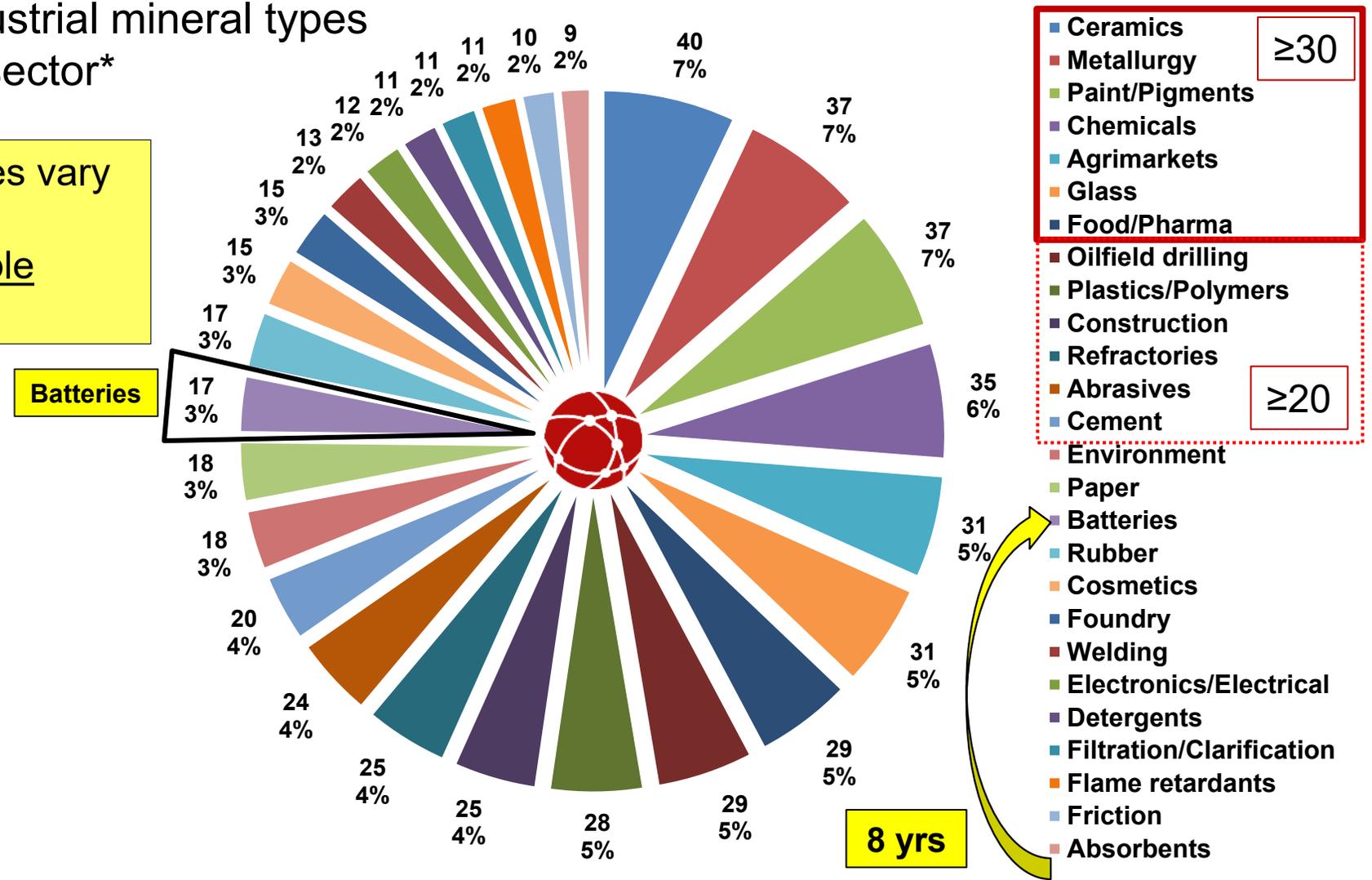


Industrial minerals' market context: importance, "criticality", "essentiality"

The industrial mineral/market "Kaleidoscope"!

Estimated total of industrial mineral types used in each market sector*

- Industrial mineral uses vary widely
- minerals serve multiple markets

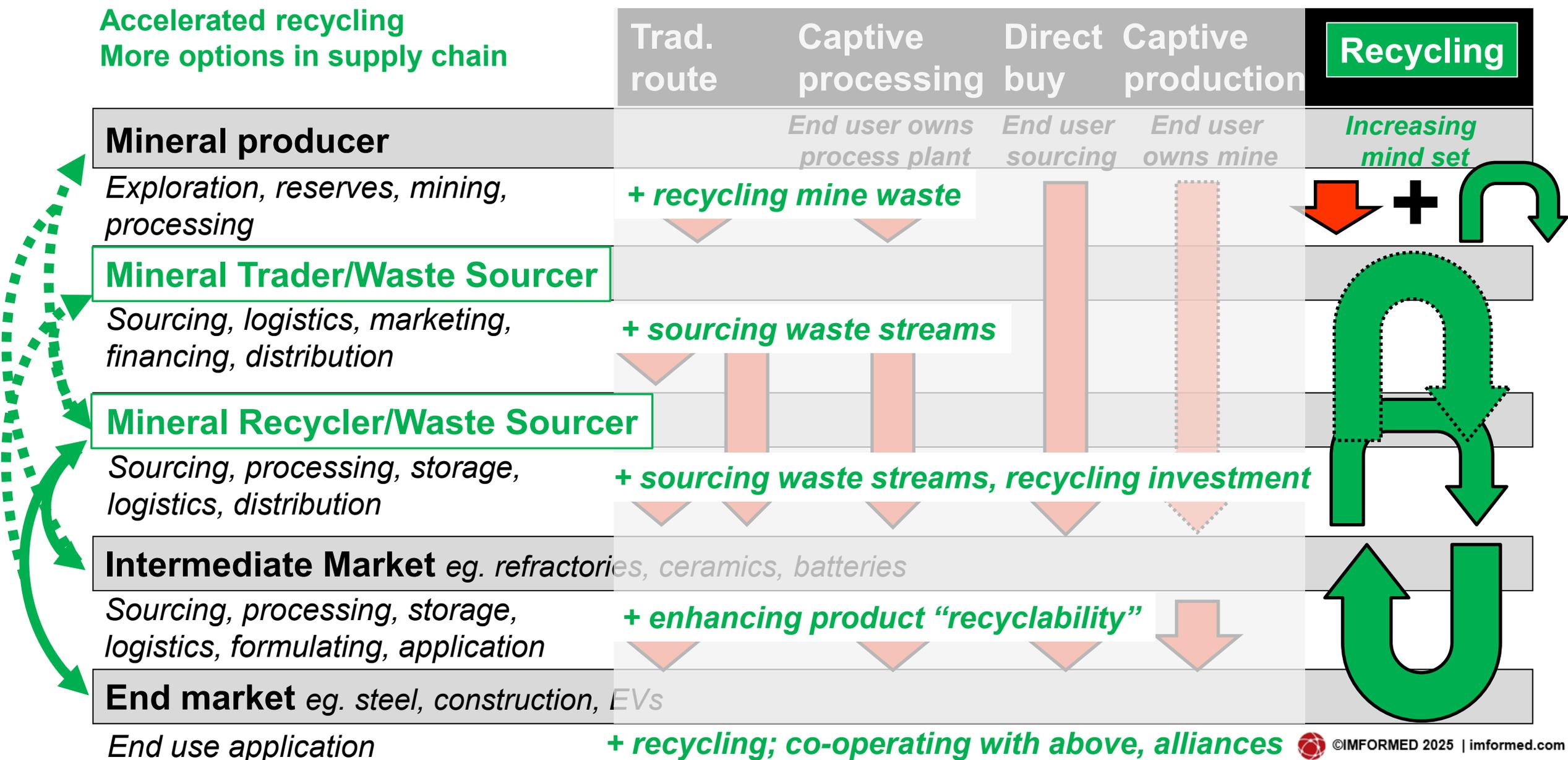


All market sectors targeting recycling

Industry having to learn how for each market

* Pie chart data compiled from:
IMFORMED
 Industrial Mineral Forums & Research
MINERAL MARKET MATRIX
 Wall Chart available from IMFORMED

Entering a new era of industrial mineral recycling – supply chain options



New era of mineral exploration, sourcing, development... ...& *RECYCLING!*

“Going where the minerals are greener”

Tomorrow’s “mining” will in large part be efficient and economic utilisation of today’s industrial waste.

- But how to go about getting involved in this sector?
- Whether to vertically integrate? Invest for an in-house business/plant?
- How much and how far to invest? What kind of processing/sorting technology required?
- Partner with an independent recycler? Join forces with same-sector end-use players?
- What kind of logistics are involved? Permits for handling/transport? Costs?
- Crucially: making grade acceptable, consistent, & economic for customers?

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Grand Hotel Dino, Baveno,
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22-24 October 2025



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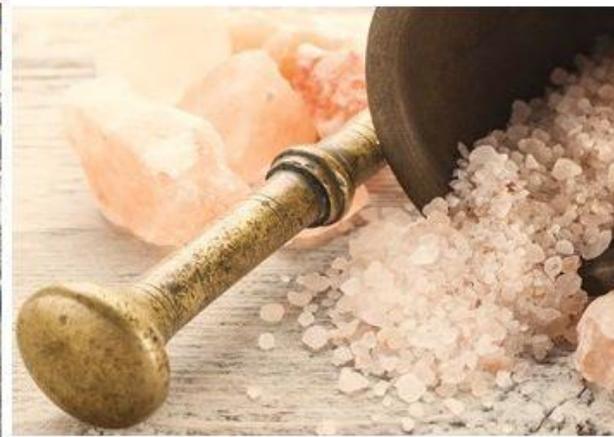
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Production Trends | Logistics | Processing Developments | Market Demand

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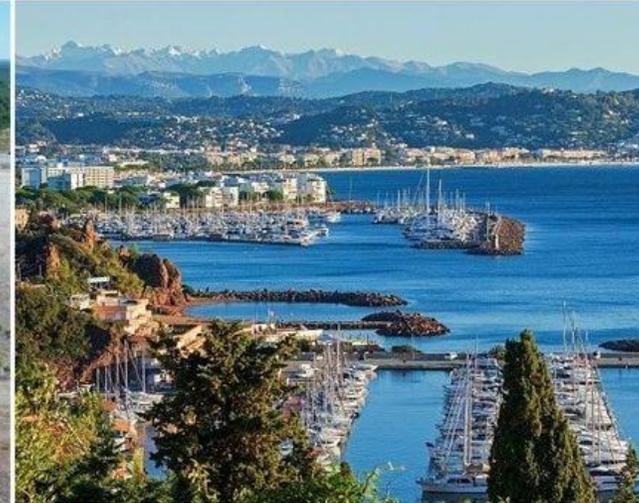
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Lake Maggiore (Milan)

18-20 May 2026



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AT A GLANCE A-Z GUIDE WHICH MINERALS FOR WHICH MARKETS

- Leading industrial minerals
- Main raw material feedstock
- Key specified chemical component
- World production
- Main source countries
- Leading consuming markets

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Ismene Clarke 1963-2024



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