

AUSTRALIA MINERALS

REALISE THE OPPORTUNITY

Australia's critical minerals advantage: Secure supply for strong partnerships

Marina Costelloe
Branch Head, Minerals Geoscience Branch
Geoscience Australia



Australian Government
Geoscience Australia

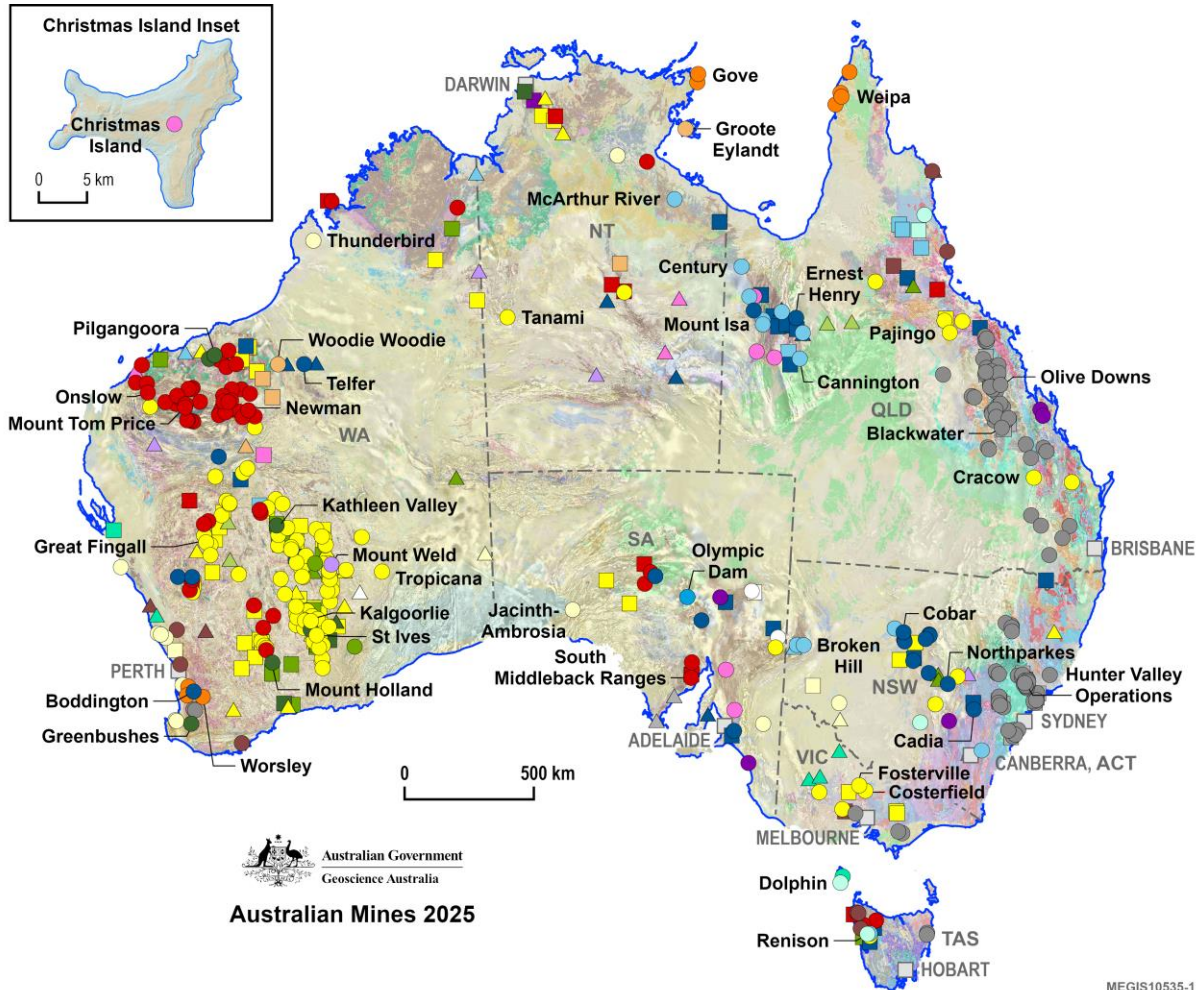
Australia Minerals



- Australia's eight geological surveys working together to attract investment into Australia's minerals sector
- Trade, investment and technical specialists who can connect you with the right people and projects
- Building on Australia's reputation for successful mineral discovery and mining

www.australiaminerals.gov.au

Australia's mining industry 2025



Commodity Type

- Base metals – Cu (Zn, Pb, Mo, Ag, Au)
- Base metals – Cu, Au, U, Ag
- Base metals – Zn, Pb (Cu, Ag)
- Battery/alloy metals – Li, Ta
- Battery/alloy metals – Ni (Co, Cu, PGE, Sc)
- Battery/alloy metals – V (Mo, Ti)
- Bauxite
- Coal
- Fertiliser elements – P, K
- Graphite
- Heavy mineral sands – Ti, Zr
- Heavy mineral sands – Ti, Zr, REE
- High-purity elements – Al, Si
- Iron ore
- Magnesium
- Manganese ore
- Precious metals – Au, Ag
- Rare earth elements
- Tin, Tungsten
- Uranium

Project Status

- Operating mine
- Developing mine
- Care and maintenance mine



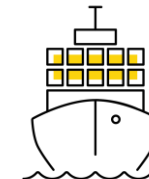
>340 operating mines



11% GDP



310k direct employment,
1.1m indirect

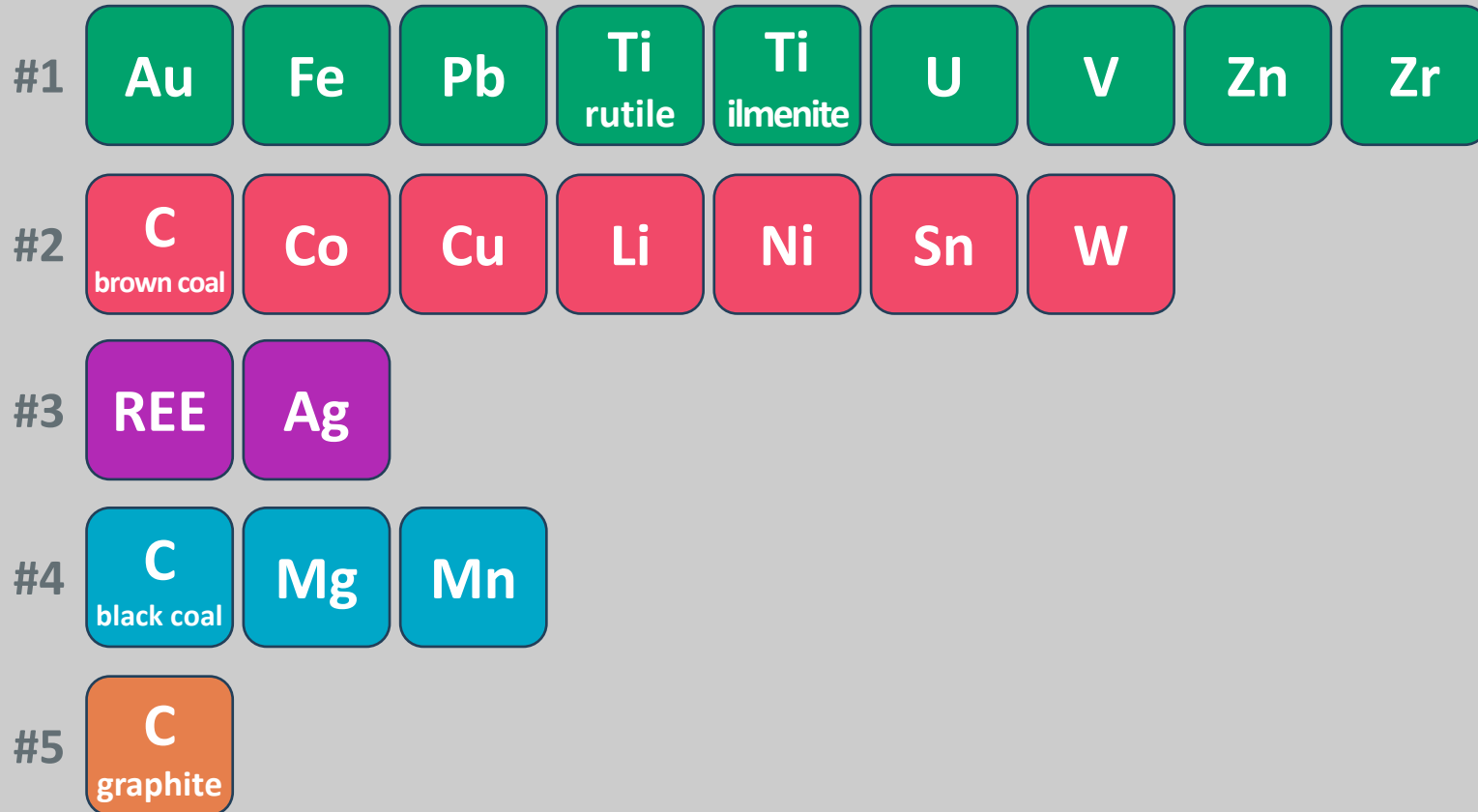


\$316b exports
(48% of total)

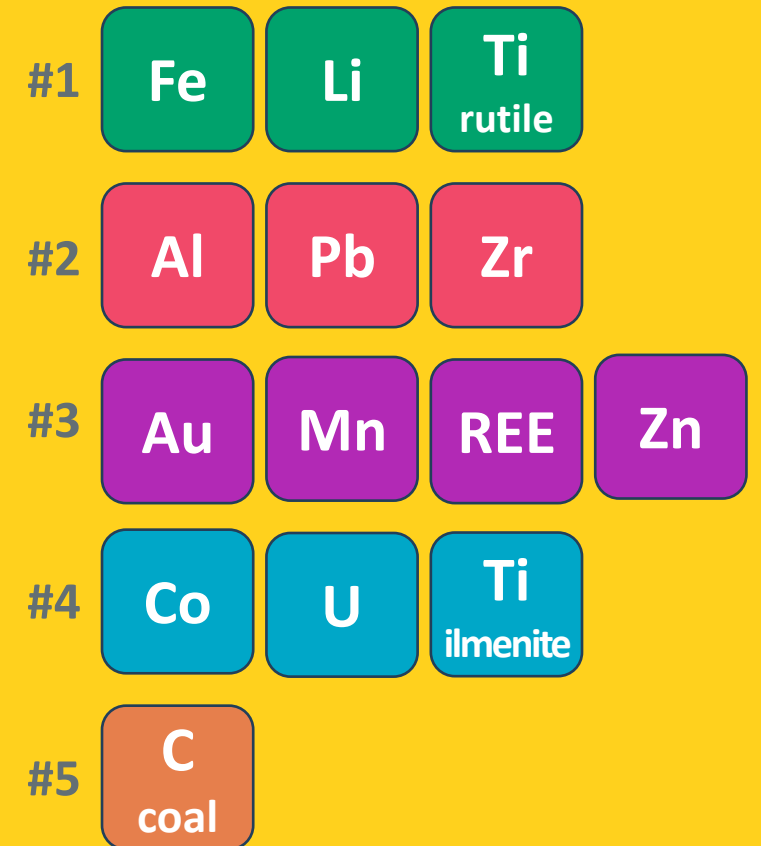
Sources: Resources and Energy Quarterly, June 2026; Australian Operating Mines Map 2025.

Australia's minerals endowment and production

Top 5 world resources



Top 5 world production



Sources: Resources and Energy Quarterly, June 2026; Australian Operating Mines Map 2025; Australia's Identified Minerals Resources 2026.

Japan's Critical Minerals List: what Australia can supply

 High potential	 Moderate potential	 Low potential	 Current production	 Potential production
 Antimony	 Gallium	 Nickel	 Strontium	
 Barium	 Germanium	 Niobium	 Tantalum	
 Beryllium	 Graphite	 Phosphorus	 Tellurium	
 Bismuth	 Hafnium	 Platinum Group Elements	 Thallium	
 Boron	 Indium	 Rare Earths	 Titanium	
 Caesium	 Lithium	 Rhenium	 Tungsten	
 Chromium	 Magnesium	 Rubidium	 Uranium	
 Cobalt	 Manganese	 Selenium	 Vanadium	
 Fluorine	 Molybdenum	 Silicon	 Zirconium	

Australia Minerals – strong government support for mining industry



Australian Government
Geoscience Australia

- Resourcing Australia's Prosperity
- Critical Minerals Production Tax Incentive
- Critical Minerals Facility
- Critical Minerals Strategic Reserve



- Critical minerals and high-tech metals exploration program
- Critical minerals royalty deferral scheme
- Critical Minerals Processing and Advanced Materials Innovation Program



- Resourcing the Territory
- Exploration Grants



Queensland Government
Australia

- Collaborative Exploration Initiative
- Collaborative Development Program
- Queensland Resources Industry Development Plan
 - Critical Minerals Strategy
- Critical Minerals Queensland Office



- PACE Minerals Exploration Co-funding
- SARIG Core Intelligence Program
- Eyre Peninsula Airborne EM Survey



Tasmanian Government

- Supporting Tasmania's Resource Sector
- Tasmanian Critical Minerals Initiative
- Exploration Drilling Grant Initiative



- State of Discovery—minerals strategy
- Victorian initiatives & projects
- Developing Victoria's Critical Minerals Program



**Department of Mines,
Petroleum and Exploration**

- Exploration Incentive Scheme
- Geoscience Data Transformation Program
- WA Array

Resourcing Australia's Prosperity

Mapping Australia's resources for a sustainable future

Resourcing Australia's Prosperity is the Australian Government's 35-year investment in precompetitive geoscience initiative, led by Geoscience Australia, to accelerate the discovery of critical minerals and other resources, support Australia's net zero transition and enable responsible management of all resources.



**Mapping
Australia's
resources for
a sustainable
future**

Delivery through 4 interrelated components:

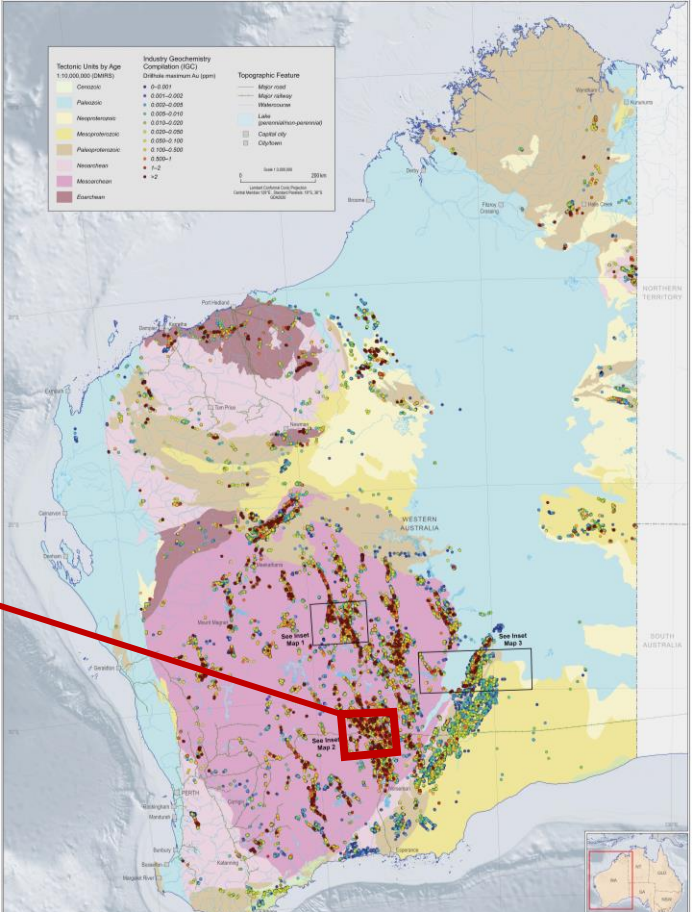
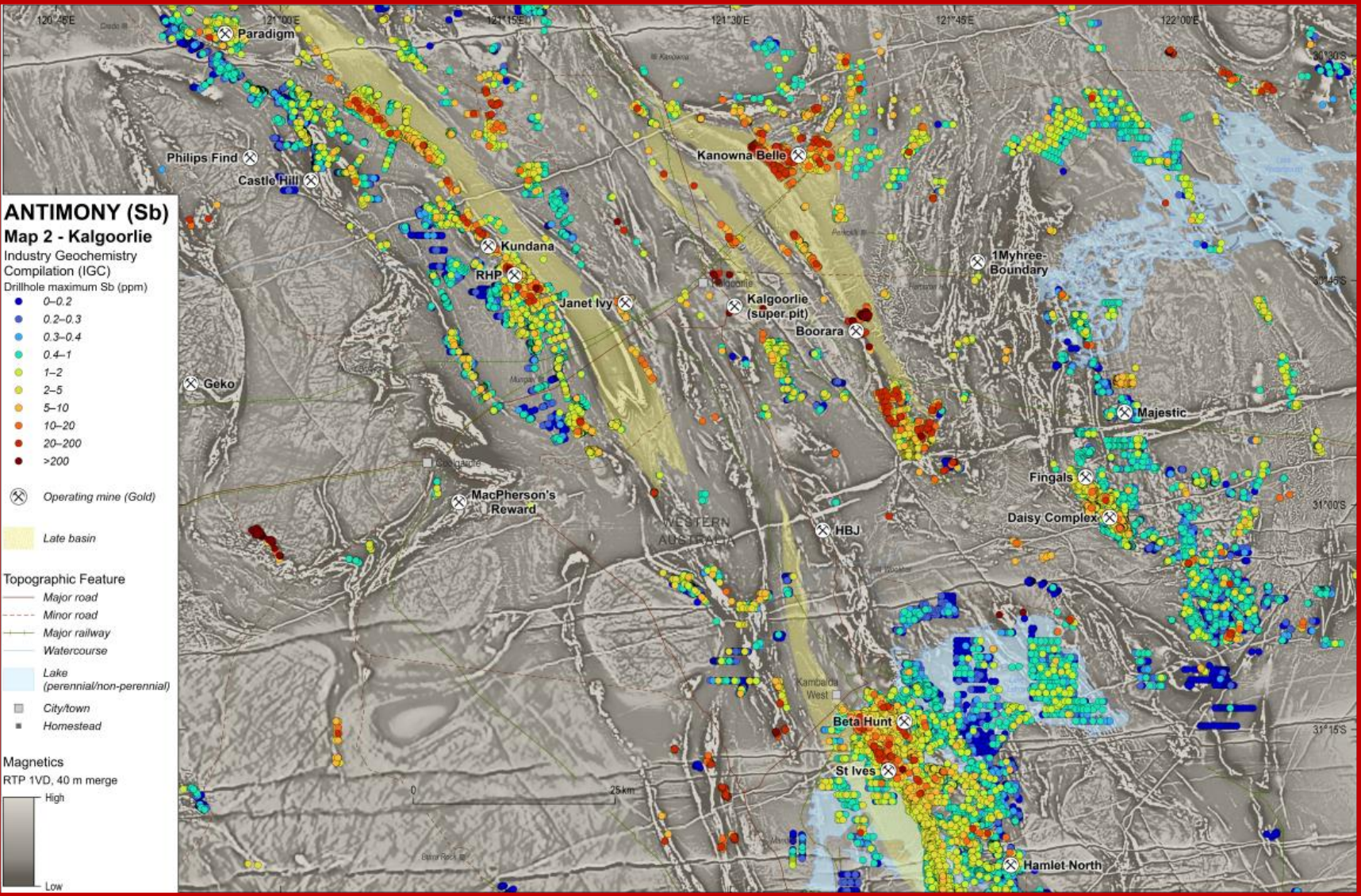
1. Australia-wide geoscience
2. National Resource Assessments
3. Deep Dives
4. Data and Engagement

**10 Year Roadmap providing
key deliverables under each
component was released.**

Outcomes

- Enabling a strong resources industry.
- Supporting the transition to net zero.
- Empowering First Nations peoples and local communities.
- Supporting continued innovation in the adoption of new technologies in mining and natural resources management.

Industry Geochemistry Compilation



Download the IGC Pilot
reports and dataset

Delamerian mineral systems and mineral potential

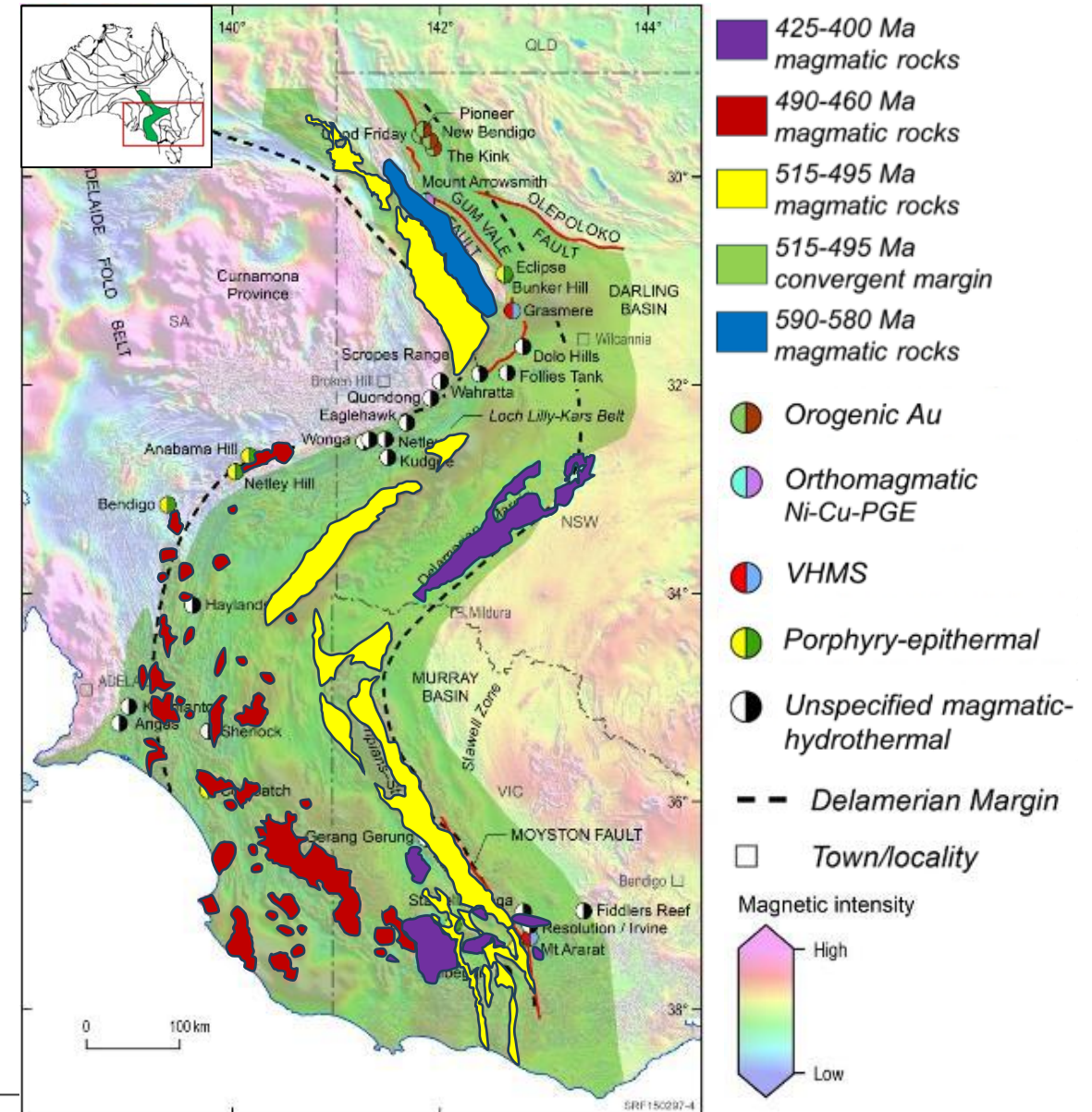
- New understanding of copper, gold and critical mineral potential.
- Join us online for the free seminar 18 September.

Register here:



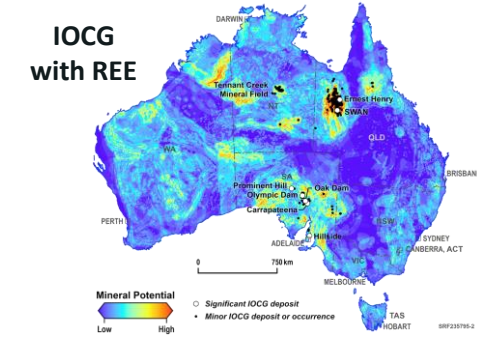
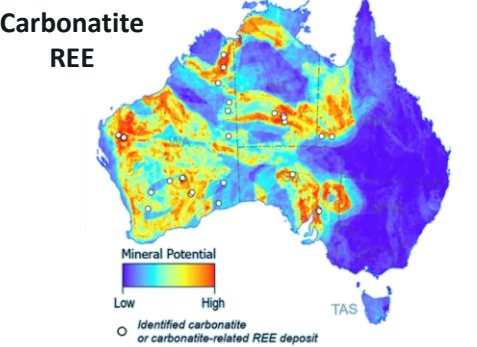
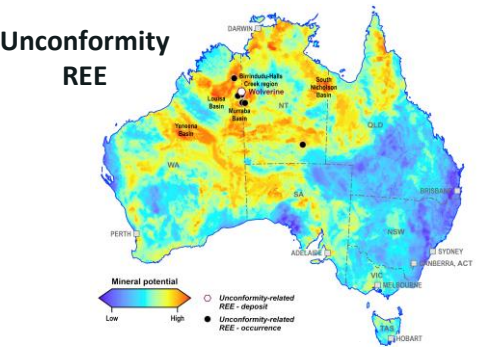
Commodities: **Cu, Au, Zn, Ni, Mo, Ag, Pb**

Mineral System	600-580 Ma	515-495 Ma	480-460 Ma	450-430 Ma	420-400 Ma
Porphyry-epithermal		✓	✓		✓
VHMS		✓			
Magmatic Ni-Cu-PGE	✓				
Orogenic Au				✓	
Unspecified magmatic-hydrothermal		✓			✓



National resource assessments

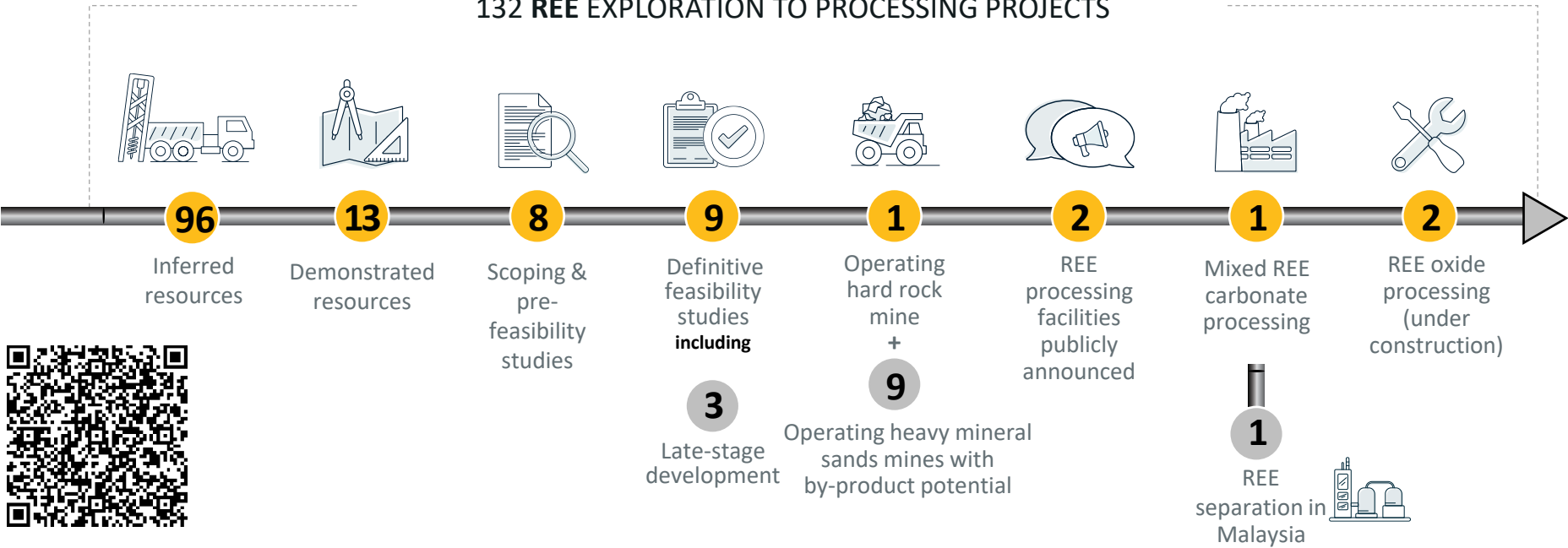
REE MINERAL POTENTIAL



Focus on identifying **critical minerals and strategic materials** supply chain opportunities.

From mapping exploration potential to by-product opportunities and attracting investment into projects from exploration to mining and processing and the net zero energy transition.

132 REE EXPLORATION TO PROCESSING PROJECTS



Planned major outputs

End of 2026: Holistic REE prospectus

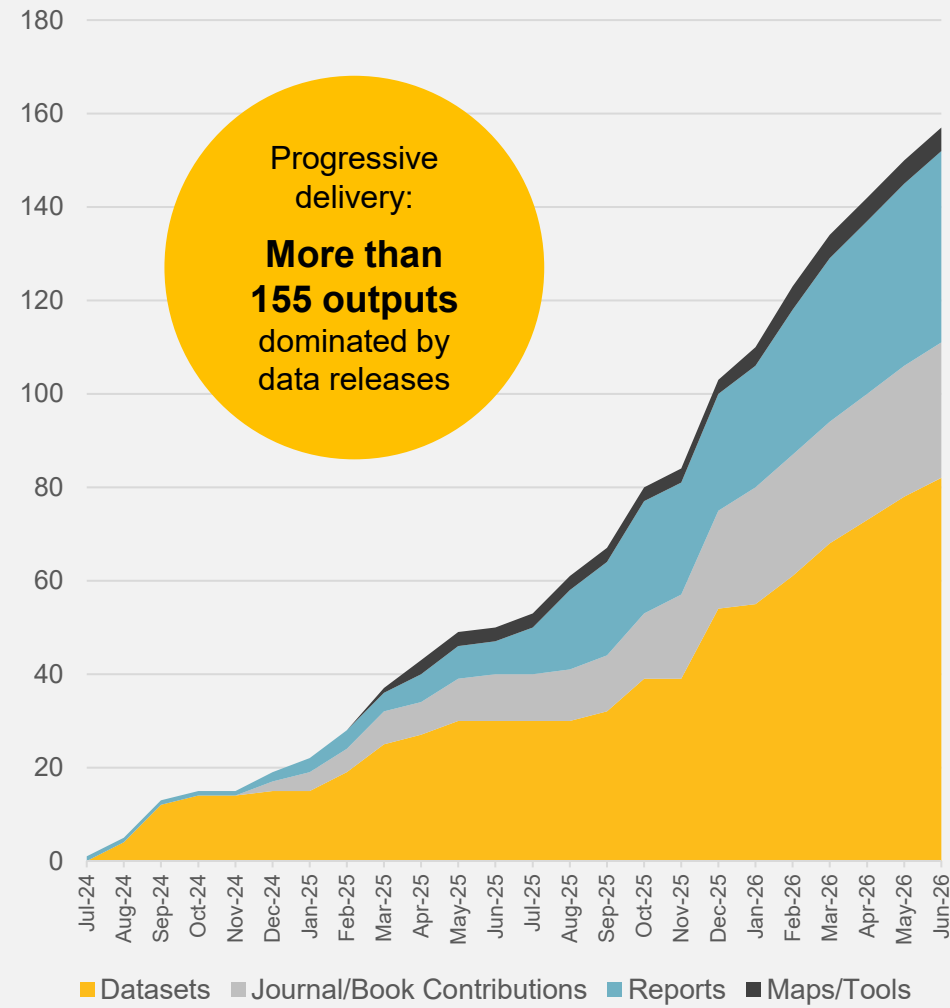
2027: Hydrogen hub storage assessment

2028: CO₂ storage atlas

~2028: Copper prospectus

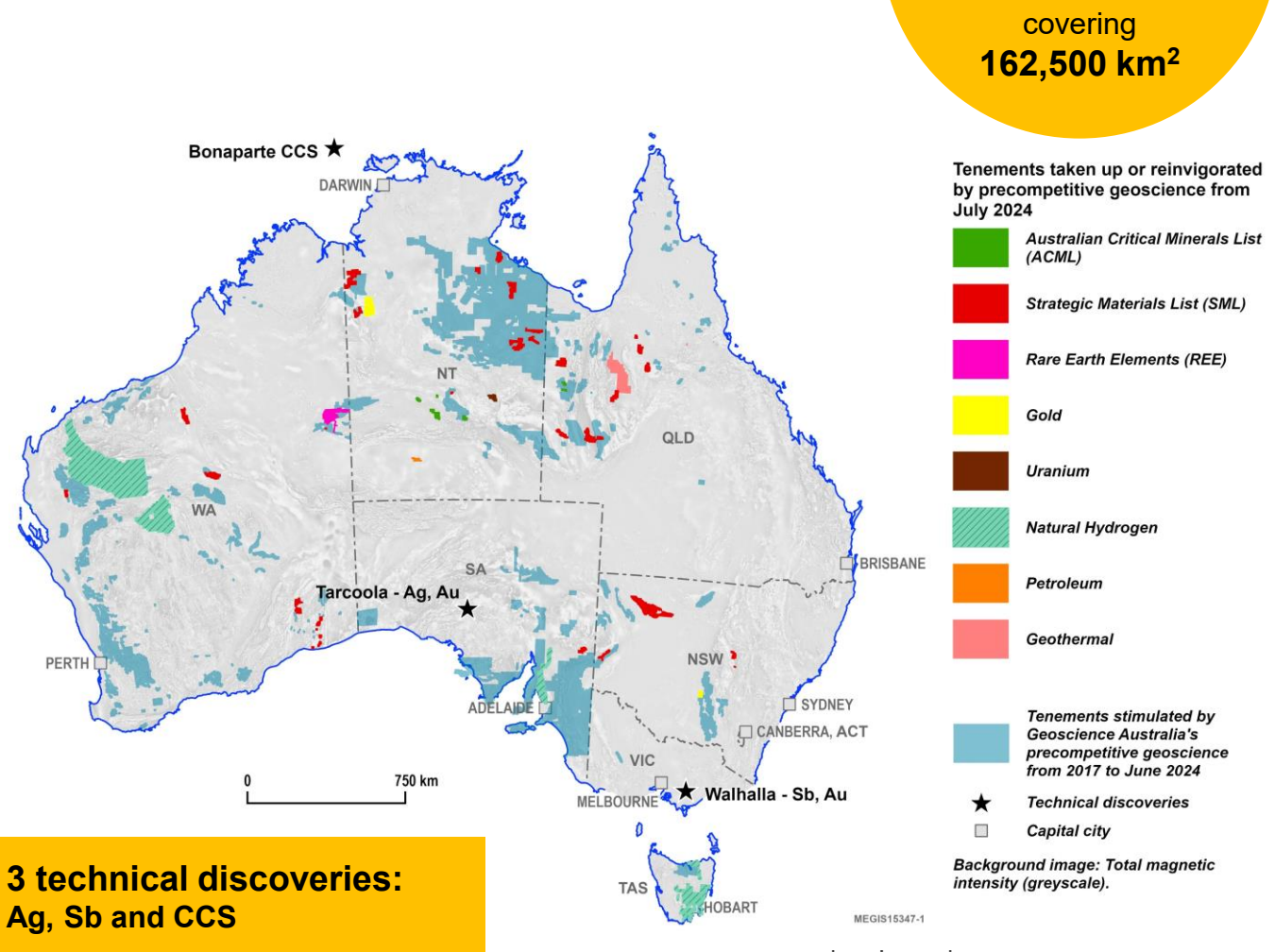
Resourcing Australia's Prosperity, achievements to date

Cumulative outputs



Over the last decade Geoscience Australia's precompetitive geoscience **supported exploration across ~1 million km²**

Stimulated industry activity



Geoscience Australia acquisition activities planned and in progress, August 2026



Australian Government

Geoscience Australia

Resourcing Australia's Prosperity

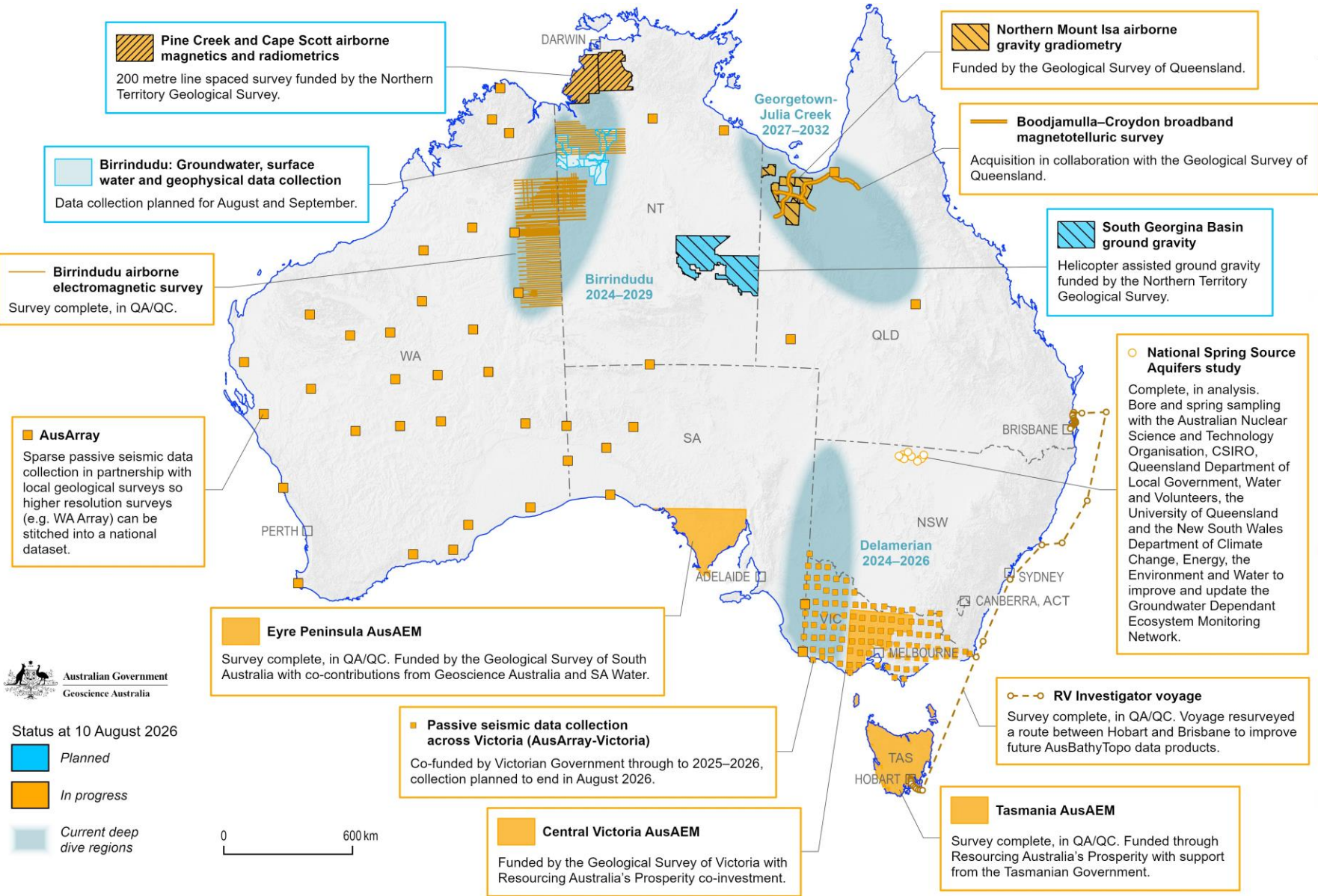


June - July 2026

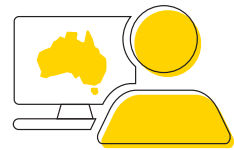
Resourcing Australia's Prosperity news

Precompetitive geoscience activities, data and insights

Subscribe here:



Further information



Data Discovery Portal
portal.ga.gov.au



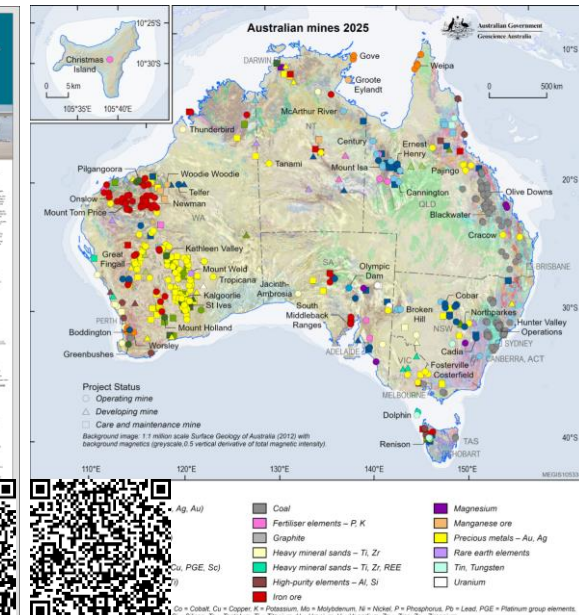
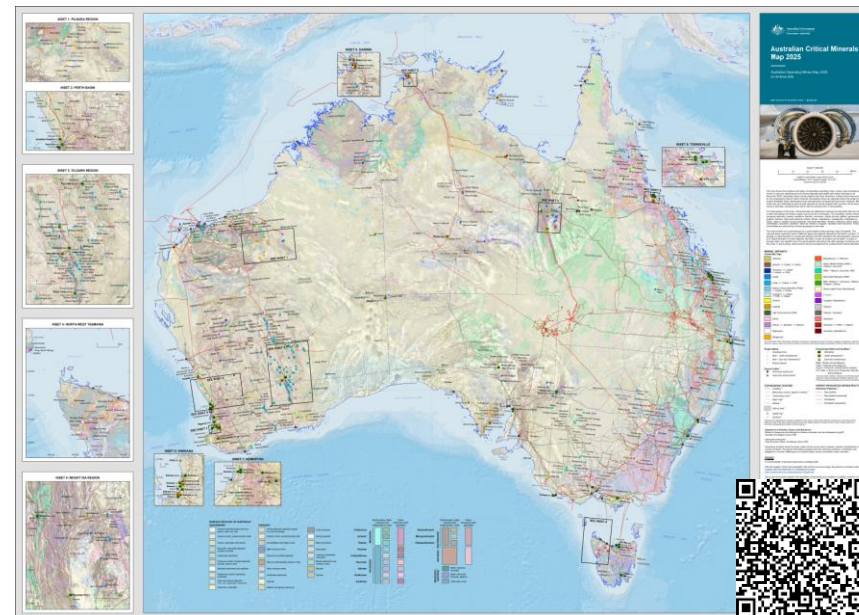
Websites

australiaminerals.gov.au
ga.gov.au/prosperity

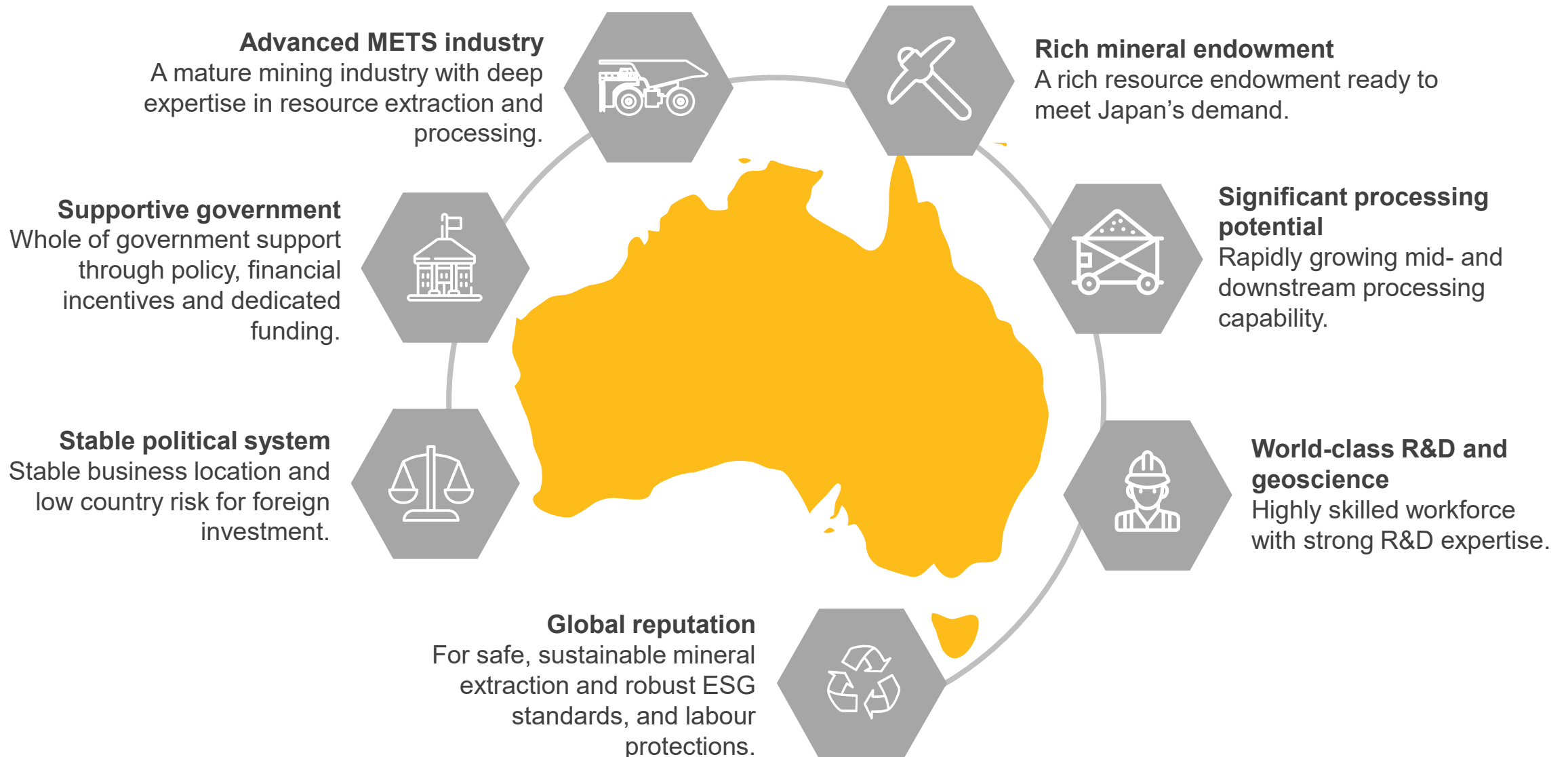


Contacts

mineral.promotions@ga.gov.au
RAP@ga.gov.au



A world leading mining destination



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Thank you

Marina Costelloe
Branch Head, Minerals Geoscience Branch
Geoscience Australia



Australian Government
Geoscience Australia

AUSTRALIA MINERALS

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Critical minerals opportunities in Australia's Northern Territory

Kate Mornane
A/Director Resources, Advice and Promotion
Northern Territory Geological Survey



Australia's Northern Territory



World class mineral deposits, including critical minerals



Record A\$6.1 billion in Mineral Production Value in 2025/26



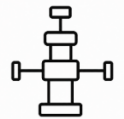
High quality pre-competitive geoscience data on mineral opportunities



Small jurisdiction – responsive and ready access to key decision makers



Deep water harbour in proximity to markets in East Asia



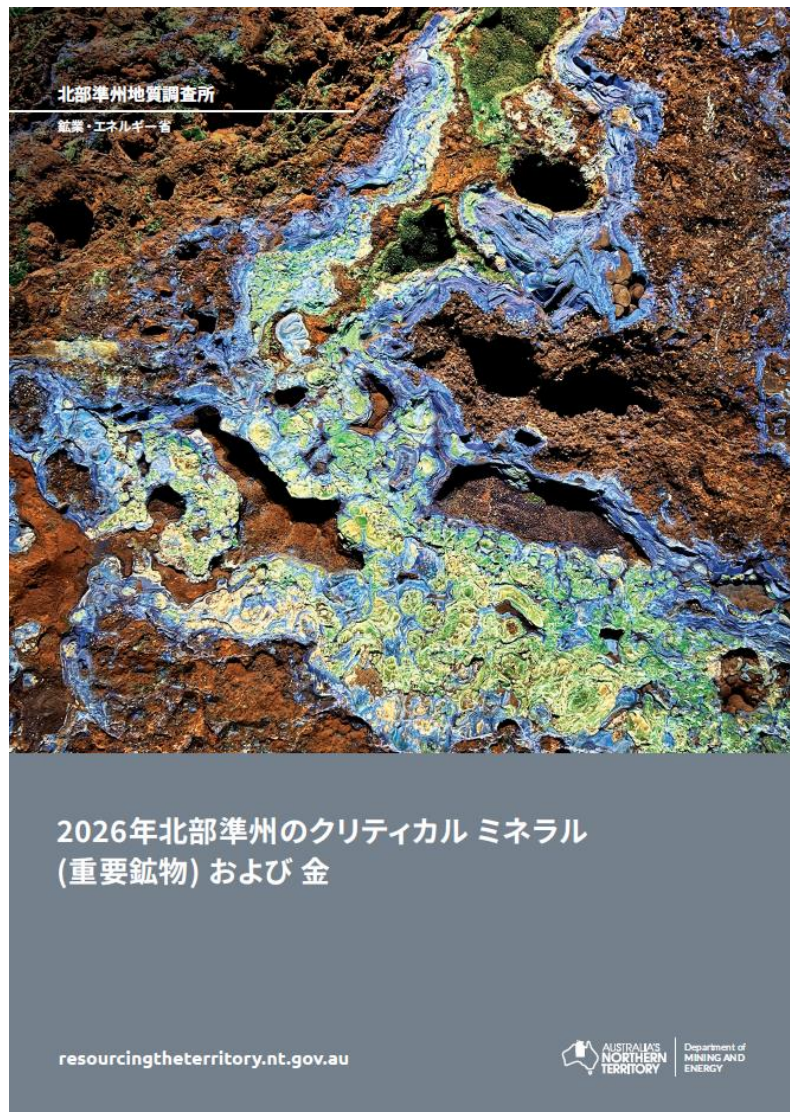
First gas flowing from the Beetaloo Sub-basin



Significant onshore gas resources and a high level of solar irradiance provide the potential to deliver long-term secure and cost competitive power generation



Critical minerals and gold in the NT 2026



北部準州のクリティカル ミネラル

アルミニウム (ボーキサイトとして)¹

ビスマス²

コバルト

銅¹

黒鉛

鉄鉱石³

鉛³

リチウム

マグネシウム

マンガン

モリブデン

ニッケル

リン酸塩¹

希土類元素

銀³

チタン (イルメナイトとして)

タングステン

ウラン³

バナジウム

亜鉛¹

ジルコニウム (ジルコンとして)

北部準州内の新興クリティカル ミネラル

アンチモン

ベリリウム²

フッ素

ガリウム

ゲルマニウム

高純度アルミナ

ニオブ

白金族元素

スカンジウム

セレン²

シリコン

タンタル

テルル

スズ²



Commodities Uranium, silver, bismuth, iron ore and gold newly added in 2026

Lithium

Core Lithium – Finniss Operations

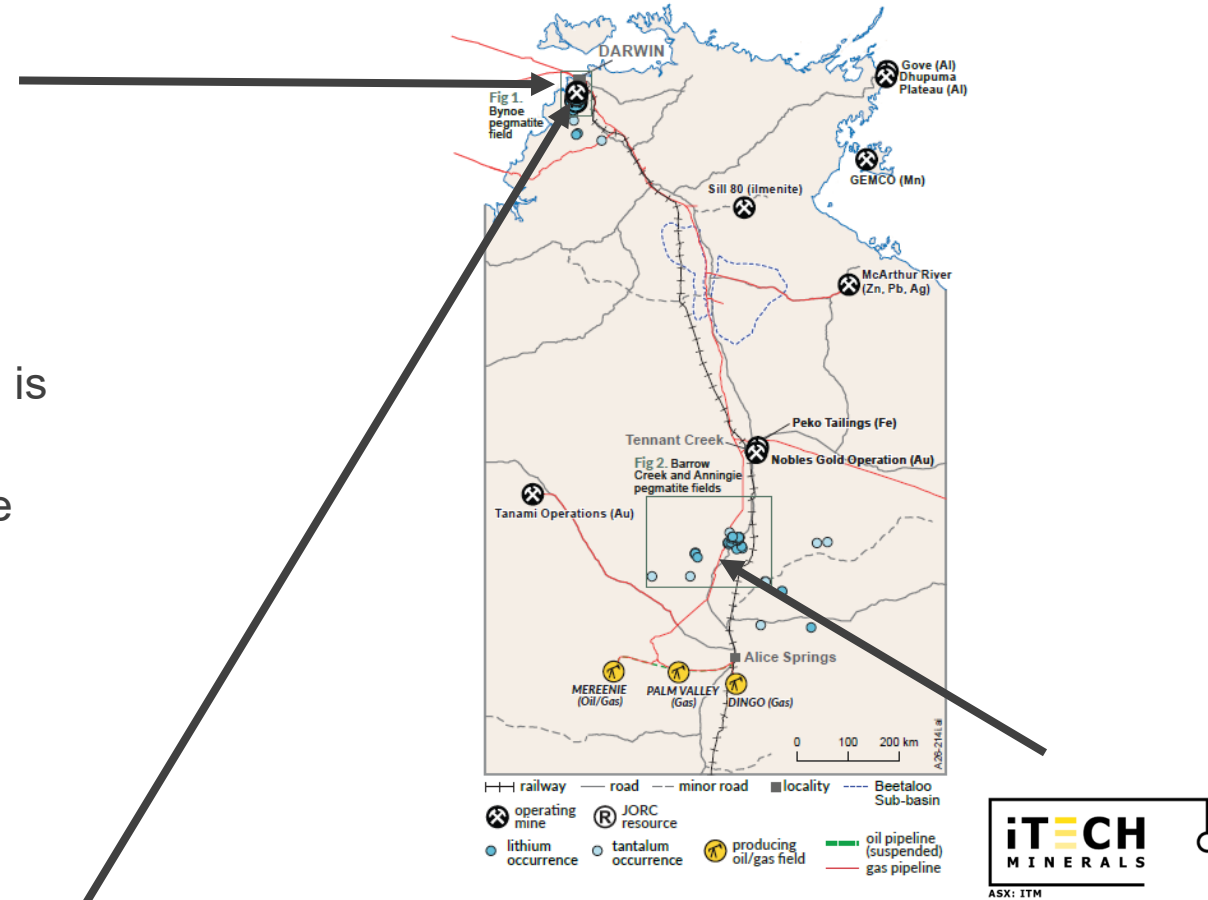


- Finniss Operations recommenced in May 2026
- Ore Reserves upgraded to **15.6 Mt @ 1.27% Li₂O**
- Mining re-starting at the Grants open pit and construction is progressing on the underground mine at BP33
- Proposed production of 214 ktpa spodumene concentrate from late 2026
- New results from extensional drilling at BP33
34.08 m @ 2.09% Li₂O and 5.28 m @ 2.80% Li₂O
- Glencore International AG managing the marketing and sale of spodumene concentrate

Lithium Plus Minerals – Lei



- Mineral Resource to **5.22 Mt @ 1.50% Li₂O**
- Progressing environmental and development approvals for an underground mine and initial direct-shipping ore operation



SQM – Reynolds Range lithium project

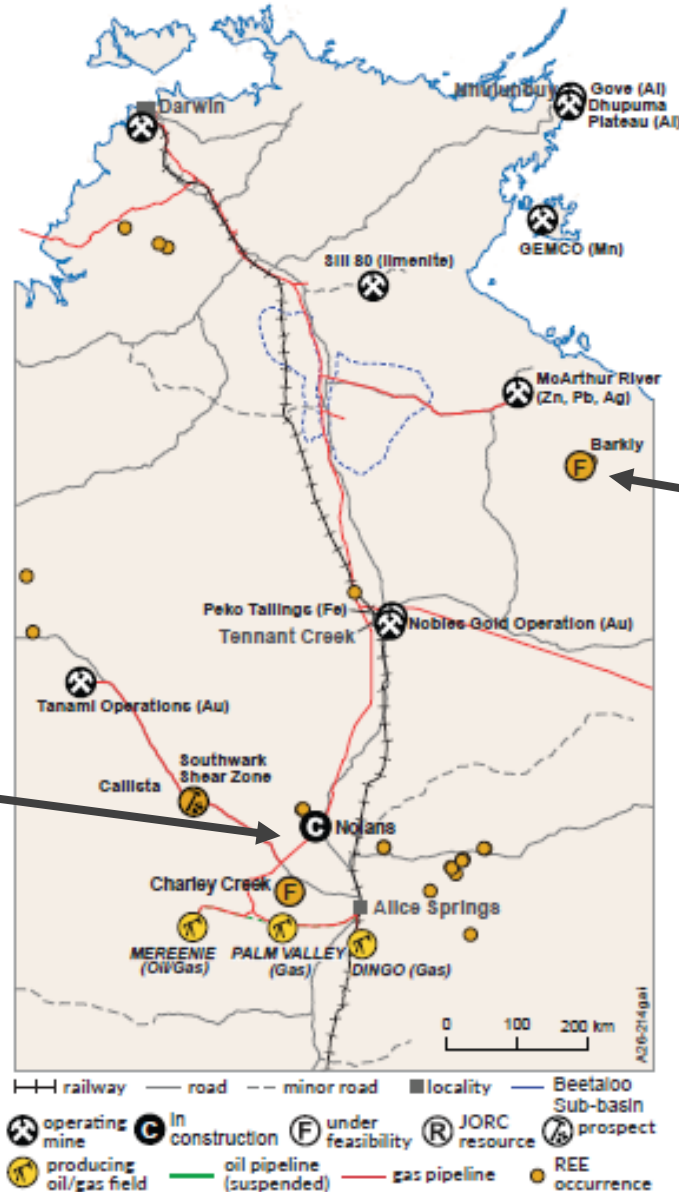
- Earn-in JV with iTech Minerals
- Spodumene pegmatites discovered at Mt Stafford tin field in 2024
- On-ground exploration commencing in 2026

Rare Earth Elements

• Arafura Rare Earths Ltd – Nolans



- World-class resource of magnet-feed rare earths (NdPr), 130 km north of Alice Springs near railway
- On-site downstream processing to produce separated rare earths (including NdPr oxide)
- Binding offtake agreements with South Korea, Europe and US, plus a non-binding Letter of Support for Australia's Critical Minerals Strategic Reserve
- FID was announced in May 2026
- Construction to commence in September 2026
- Phase 2 third-party processing under evaluation for light and heavy rare earth oxides



Barkly Rare Earths Ltd – Barkly project



- Recently discovered resource of NdPr-rich REE and V in regolith profile on Carpentaria Basin
- Discovered through NT Government co-funded drilling
- 40 Mt @ 0.21% TREO including 690 ppm NdPr

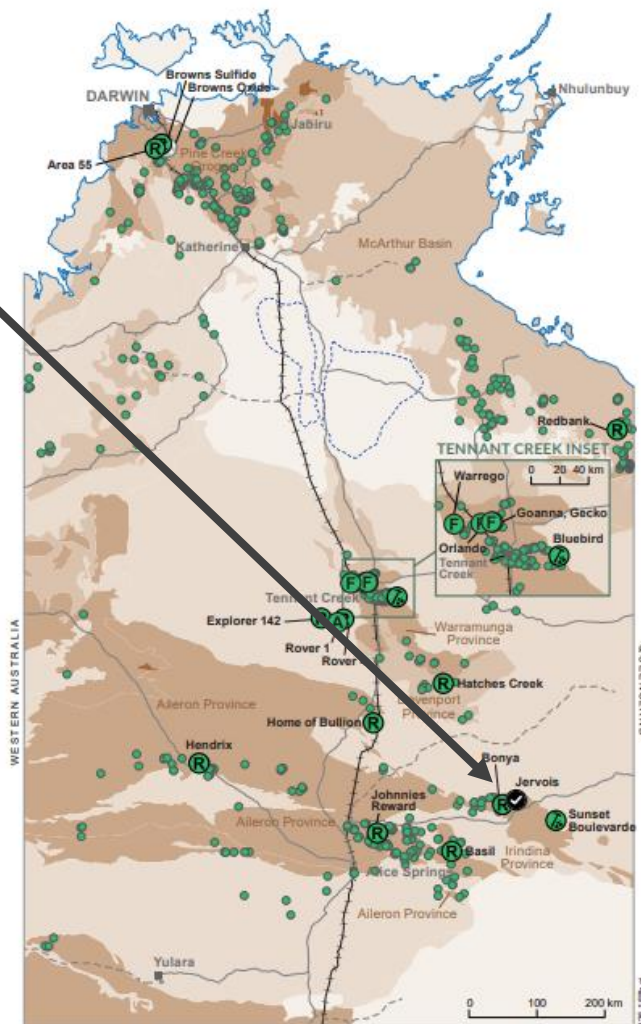
Copper



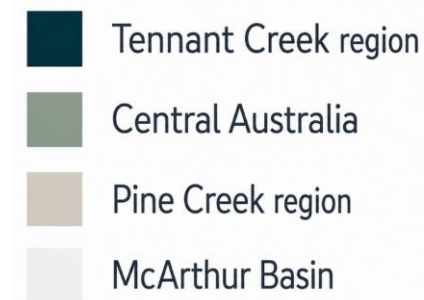
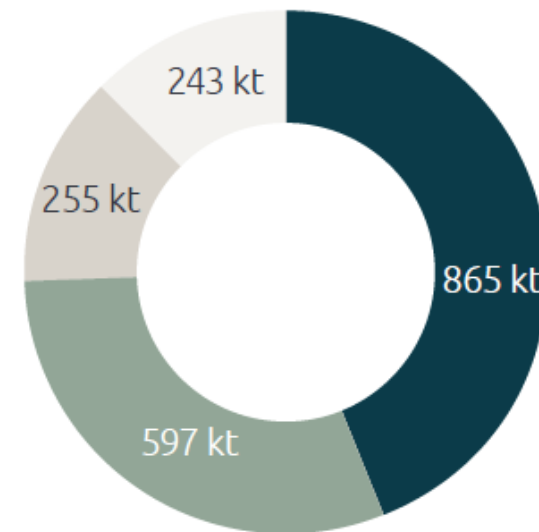
KGL Resources

KGL Resources – Jervois Copper Project

- NT's largest and most advanced copper project
- 27.45 Mt @ 1.87% Cu, 25.3 g/t Ag, 0.24 g/t Au
- Proposed 10+ year mine, producing 30,000 tpa copper concentrate, plus ~1015 koz silver and ~8.5 koz gold by-products
- Revised feasibility study released February 2025
- A\$300M streaming agreement with Wheaton Precious Metals International Ltd
- Completed A\$300M equity raise in August 2026
- Fully funded through to development (no debt)
- Copper offtake unencumbered
- Targeting FID in September 2026



Contained copper by region



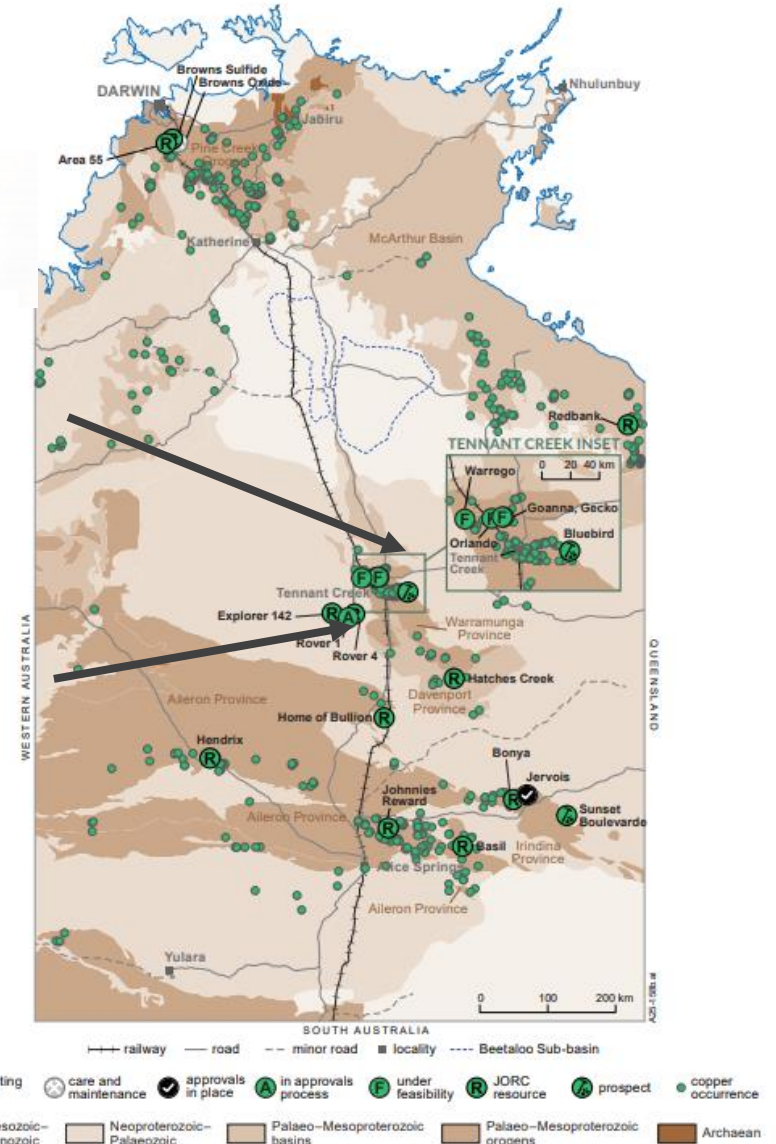
¹ Publicly announced JORC 2004, JORC 2012 or NI-4201 Inferred, Indicated and Measured Resources

Copper

- Tennant Creek and Rover mineral fields host > 800,000 t of contained copper, with strong future potential for copper, gold, cobalt and bismuth production
- Multiple companies assessing consolidation and shared processing of high-grade deposits
- Tennant Mines' Warrego: **16.5 Mt @ 1.3% Cu, 1.1 g/t Au**
- CuFe Ltd's Gecko–Orlando: **23.5 Mt @ 1.73% Cu, 0.72 g/t Au**
- Castile Resources' Rover 1 Cu-Au-Bi-Co-magnetite project progressing towards feasibility, with strong economics, an 11-year mine life and all production available for future strategic and offtake partners. Latest resource: **7.26 Mt @ 1.32 g/t Au, 1.05% Cu, 0.11% Bi, 0.06% Co, 22.9% Fe₃O₄**
- Further potential to the east in undercover extensions of the Warramunga Province.

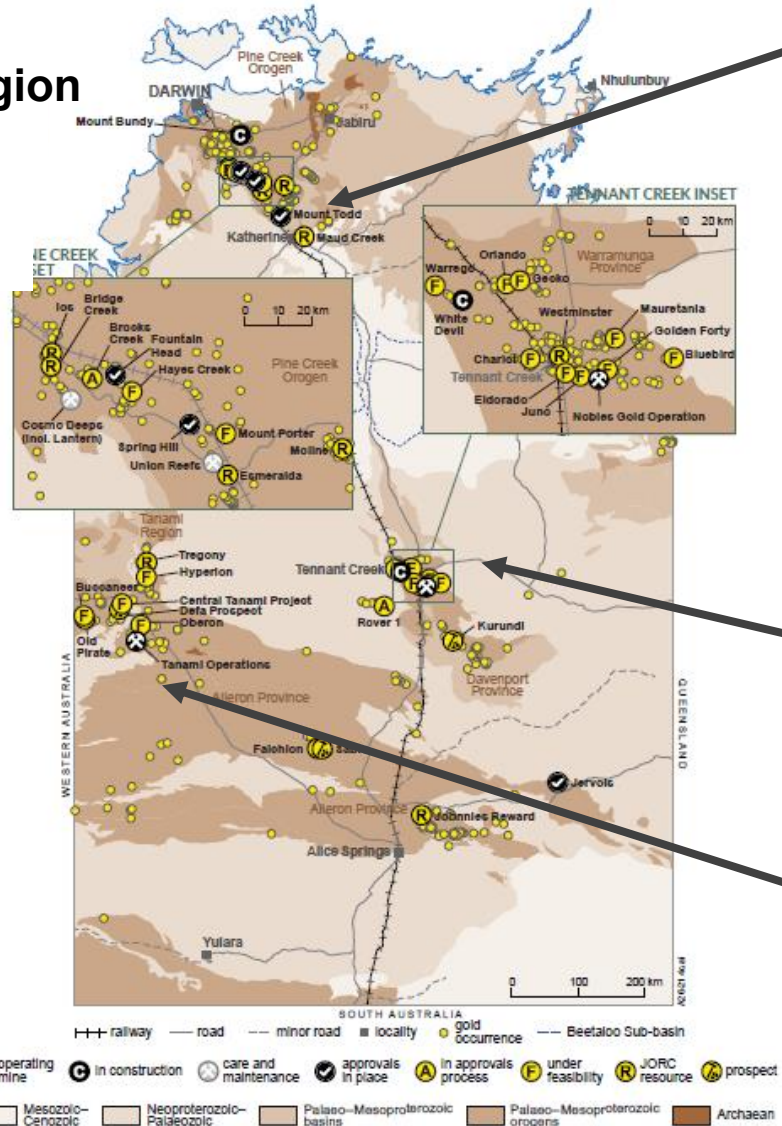
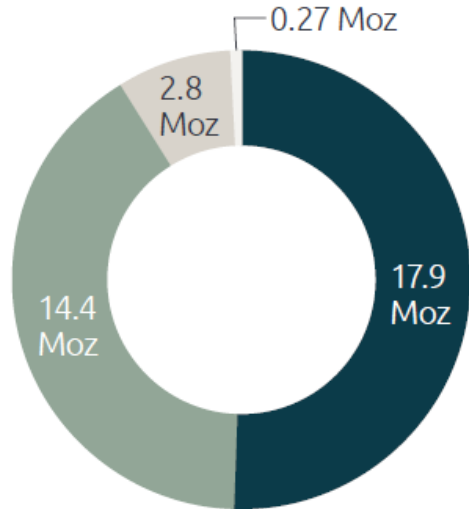
Exploration potential continues

- Broader exploration targeting large-scale sediment-hosted copper across the greater McArthur, South Nicholson and Amadeus basins, as well as the Lawn Hill Platform.



Gold

Contained gold by region



Pine Creek



AGNICO EAGLE



- Primary Gold's Mount Bundy: commenced construction, ~150 koz Au/year targeted
- PC Gold Spring Hill: Major resource upgrade 1.51 Moz Au resource, PFS underway
- Agnico Eagle's Pine Creek: ~3 Moz Au portfolio, major exploration program planned in 2026
- Vista Gold's Mount Todd: ~9 Moz Au development-ready gold project

Tennant Creek



- Tennant Mines' White Devil: ~620 koz gold, commenced construction

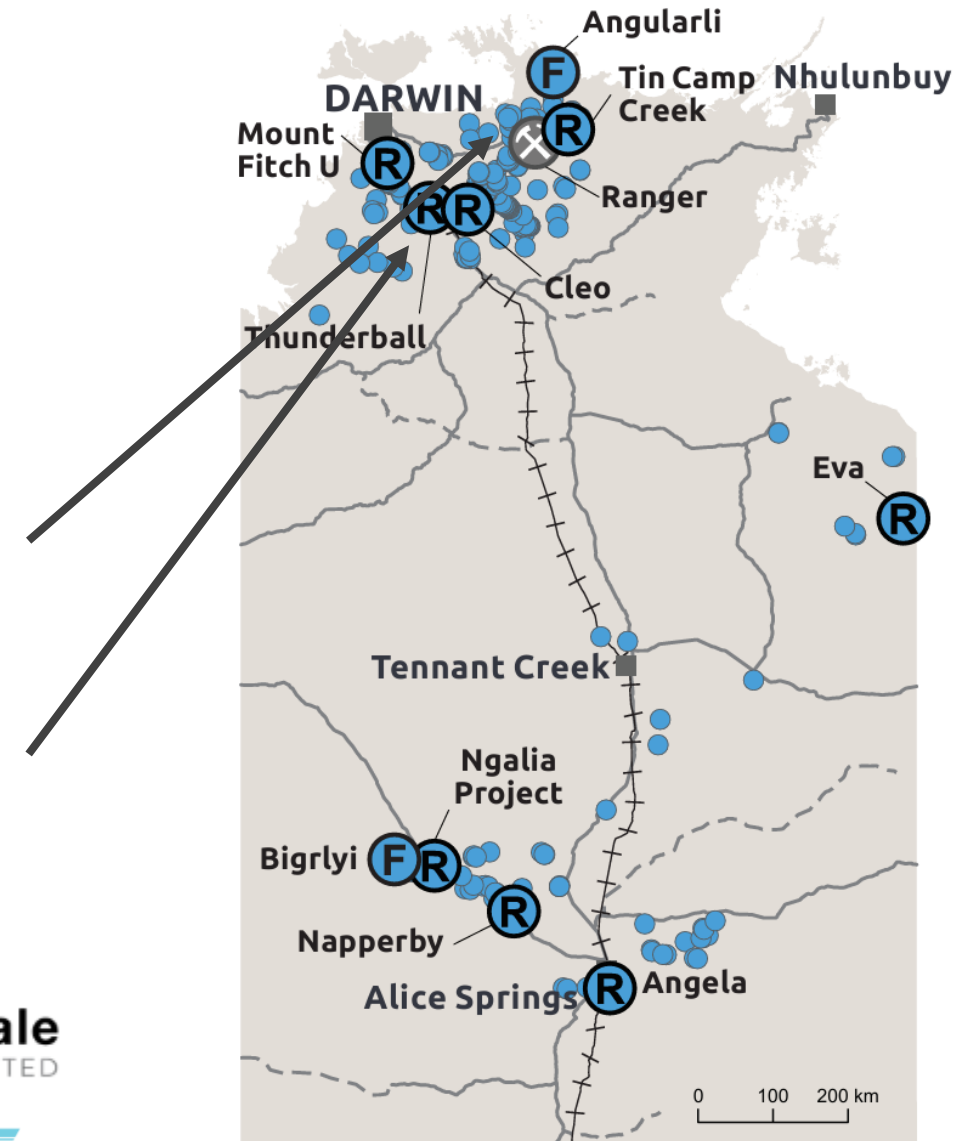
Tanami



- MGX Resources' Central Tanami JV: 2.8 Moz Au; Groundrush exploration decline advancing
- Junior explorer Prodigy Gold evaluating near-term potential for gold production at Old Pirate.

Uranium

- Rising global demand for low-emissions energy
- Only jurisdiction alongside South Australia that allows uranium mining
- Favourable geology and established regulatory frameworks to support mining
- Proven global producer with 132 000 t of U_3O_8 produced over more than 40-years from Ranger uranium, in the Alligator Rivers region
- Active exploration occurring in Pine Creek Orogen, McArthur Basin, Murphy Province and central Australia
- Recent high-grade uranium results from Thunderball in Pine Creek including **10.76m @ 2.95% U_3O_8**



+++ railway — road -- minor road
 ■ locality ● uranium occurrence
 (F) under feasibility (R) JORC resources (X) under rehabilitation

Other critical minerals

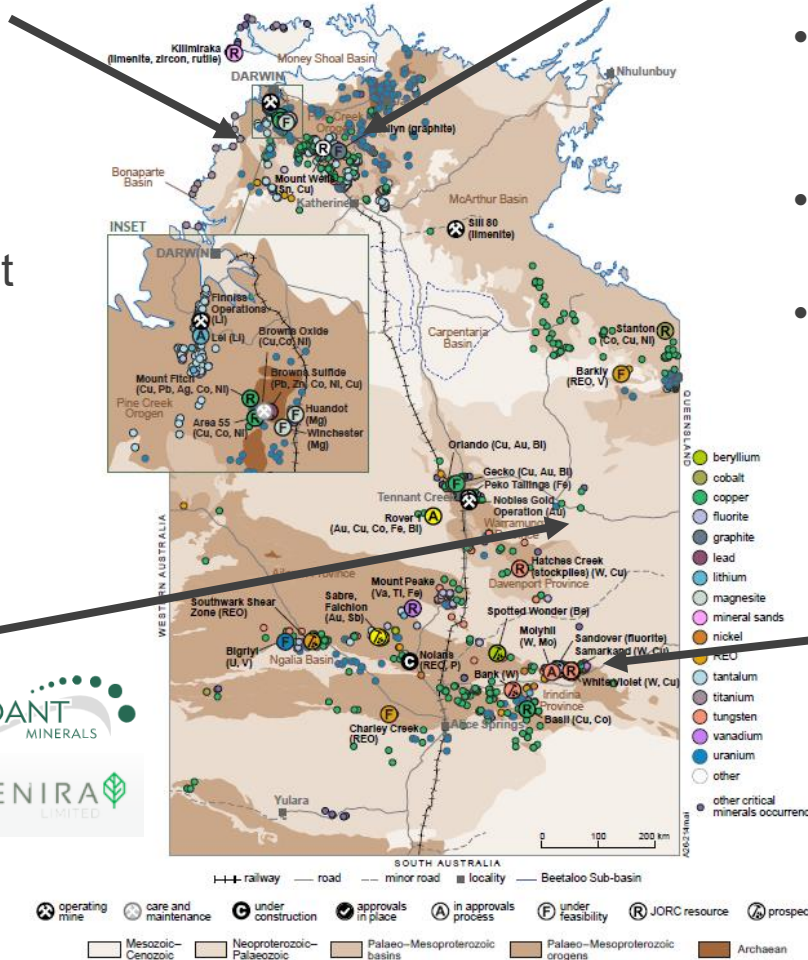
Magnesium



- Thessally Resources Huandot high-grade magnesite deposits located close to Darwin port
- Exported 14,000 t bulk samples for steel refining test work to Japan
- Successful pilot calcination test work completed in Australia

Phosphate

- Australia's largest undeveloped phosphate deposits (Avenira Ltd and Verdant Minerals Pty Ltd)



Graphite

- Kingsland Minerals' Leliyn Project one of Australia's largest graphite resource **192.5 Mt @ 7.3% TGC**
- PFS progressing and metallurgical test work demonstrating 99.97% purified spherical graphite suitable for battery anodes
- Potential for gallium as a recoverable by-product
- Downstream processing near Darwin with strategic partner Quinbrook



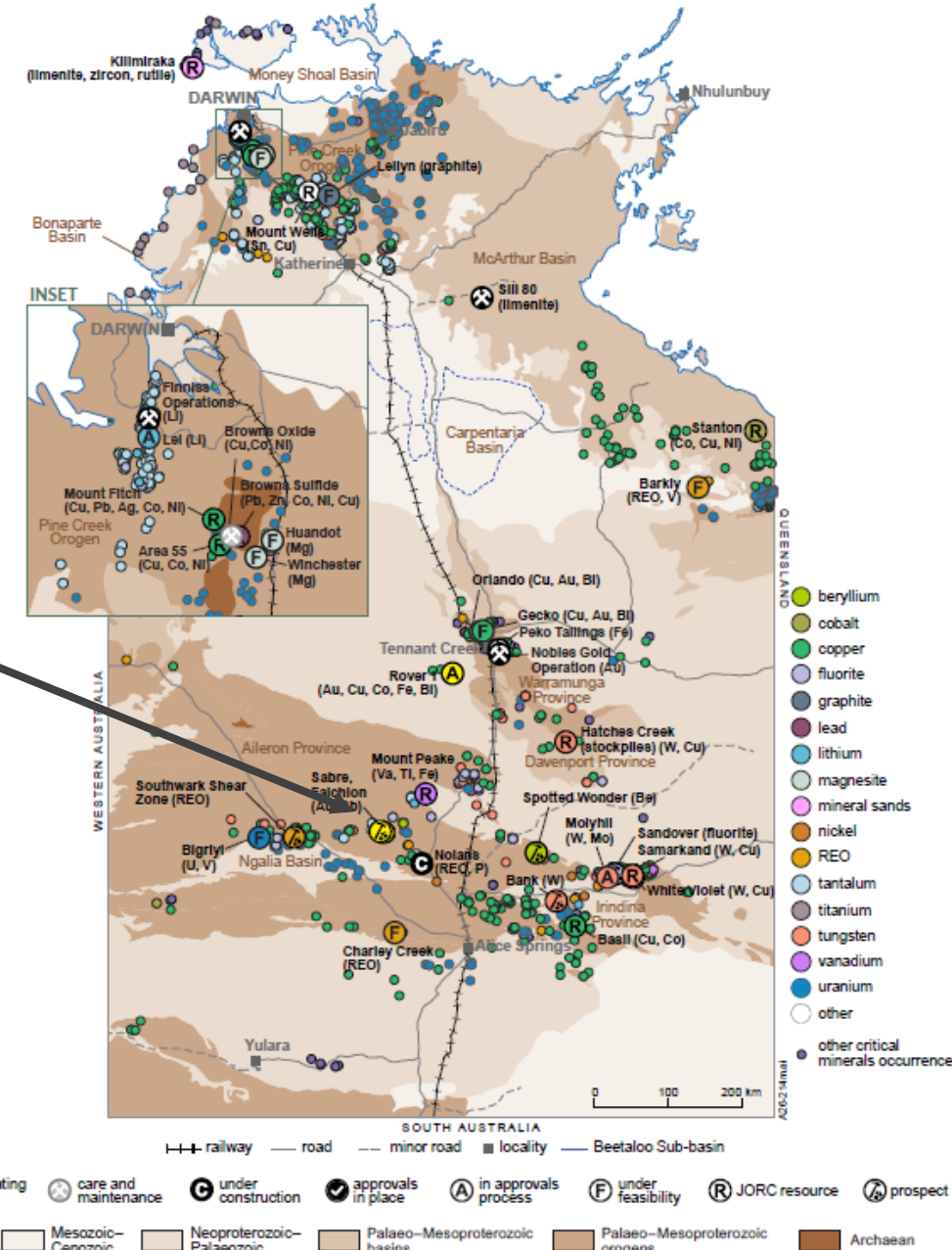
Tungsten-Molybdenum

- Tivan Ltd plans to rapidly advance Molyhil W-Mo project towards development
- Recent Scoping Study released, PFS underway, targeting FID in late 2027
- A\$50 million agreement with Sumitomo Corporation and MoU with JOGMEC



Emerging critical minerals

- iTech Minerals Reynolds Range - NT's first high-grade antimony-gold discovery at **36 m @ 5.60 g/t Au, 1.2% Sb** including **2 m @ 8.30 g/t Au and 7.8% Sb**
- Lithium Plus Minerals Spotted Wonder - identified near surface felsic intrusions, enriched in rubidium, lithium, beryllium, caesium and tantalum including **11 m @ 0.11% BeO and 19 m @ 0.27% Rb₂O**
- Tivan demonstrating emerging high-grade fluorite potential in Central Australia, including recent Sandover results: **18 m @ 25.1% CaF₂ (including 7 m @ 54.9% CaF₂ from 36 m)**
- Active exploration going on across the greenfields terrane for wide range of critical minerals including Cu, REE-Nb, Ni-PGE, Li, F, Sb, Sn-Ta



Northern Territory Government support

Northern Territory Geological Survey

- A\$9.5 million per year *Resourcing the Territory* program supports geoscience studies to improve the understanding of critical mineral potential, including three large regional-scale geophysical acquisition programs in 2026
- A\$4 million available annually for competitive exploration grants available to support and de-risk exploration
- Lead agency in the Northern Territory for progressing MOU with JOGMEC (signed April 2024)

Mineral royalties reform and Mineral Titles Act reform and Territory Coordinator legislation

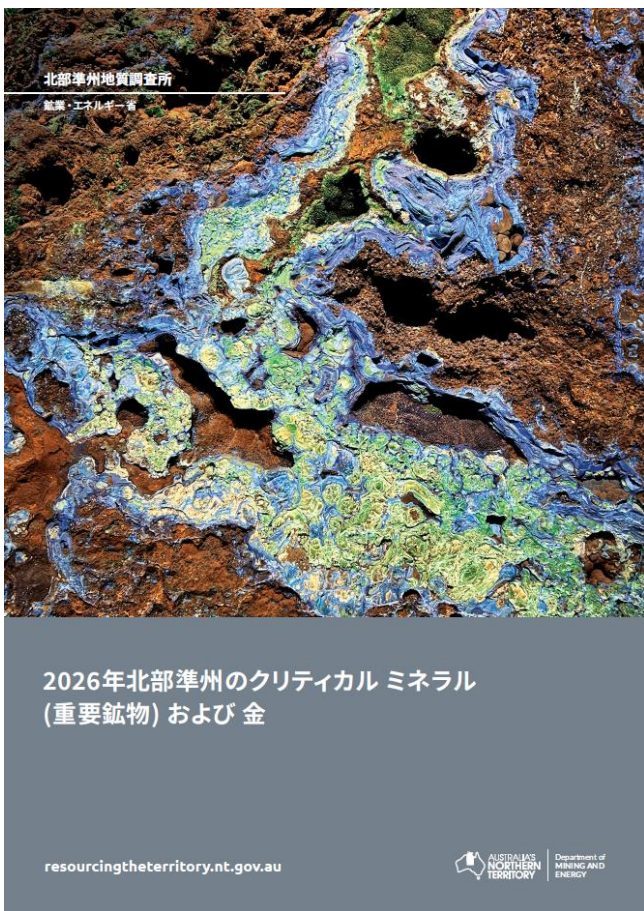
- Ad-valorem mineral royalty regime (5% for concentrates, 3.5% for processed materials, 2.5% end use products). Designated powers legislated to assist significant projects through approvals process

Onshore energy

- First pilot gas production from the Beetaloo Sub-basin flowing to Darwin (+7 TCF contingent gas resources)

Focus on downstream processing industries

- Potential for low emission hydrocarbons, advanced manufacturing, CCS and minerals processing close to Darwin at Middle Arm Precinct
- Territory Energy Link to connect more gas and renewables along the central infrastructure corridor



Critical minerals in the
Northern Territory
(Japanese version)



Mining developments in the
Northern Territory
August 2026



Northern Territory Geological Survey
Department of Mining and Energy



Mining
Developments in the
Northern Territory



Resourcing the Territory website
www.resourcingtheterritory.nt.gov.au

Geoscience data and products
gemis.nt.gov.au
Email: geoscience.info@nt.gov.au

Geoscience and titles web mapping
strike.nt.gov.au

Contact Ian Scrimgeour
ian.scrimgeour@nt.gov.au
+61 8 8999 5377

Contact Kate Mornane
Kate.mornane@nt.gov.au
+61 8 8999 5424

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Thank you

Kate Mornane
A/Director Resources, Advice and Promotion
Northern Territory Geological Survey



AUSTRALIA MINERALS

REALISE THE OPPORTUNITY

New South Wales

Mining investment opportunities

Tomohito Tanase
Associate Director
Investment NSW – North Asia



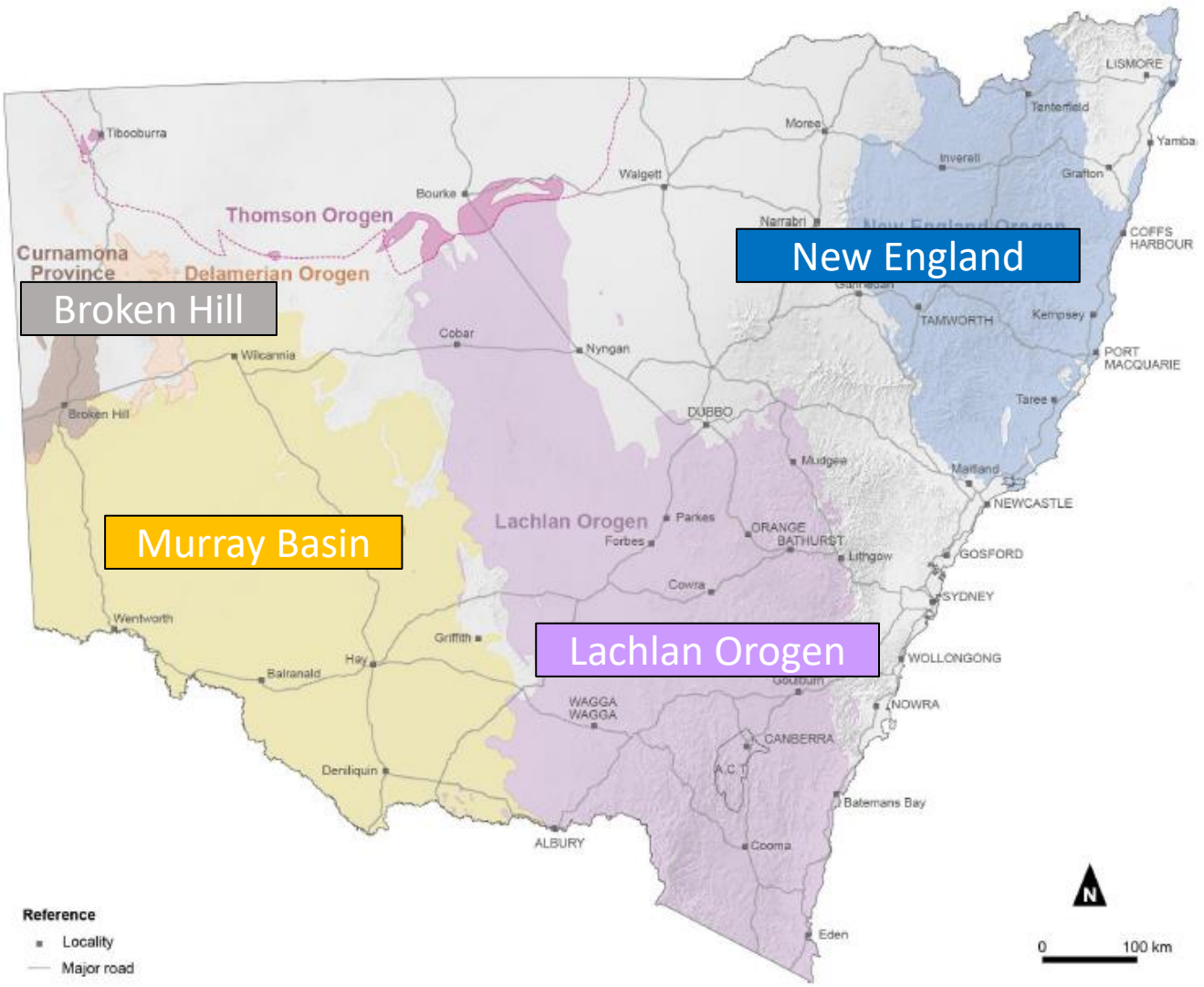
NSW outline

- State Capital: Sydney
- Population: 8.7 million
- Land: 800,000 km²
- GST: approx. A\$855 billion
 - More than 30% of AUS GDP
- Main Industry: Mining, Energy, Banking etc.
- Annual Export: A\$153 billion
- Annual Import: A\$243 billion
 - Japan is the largest trading partner for NSW
- The State's credit rating: AAA (Moody's)



***Biggest population & economy
in Australia***

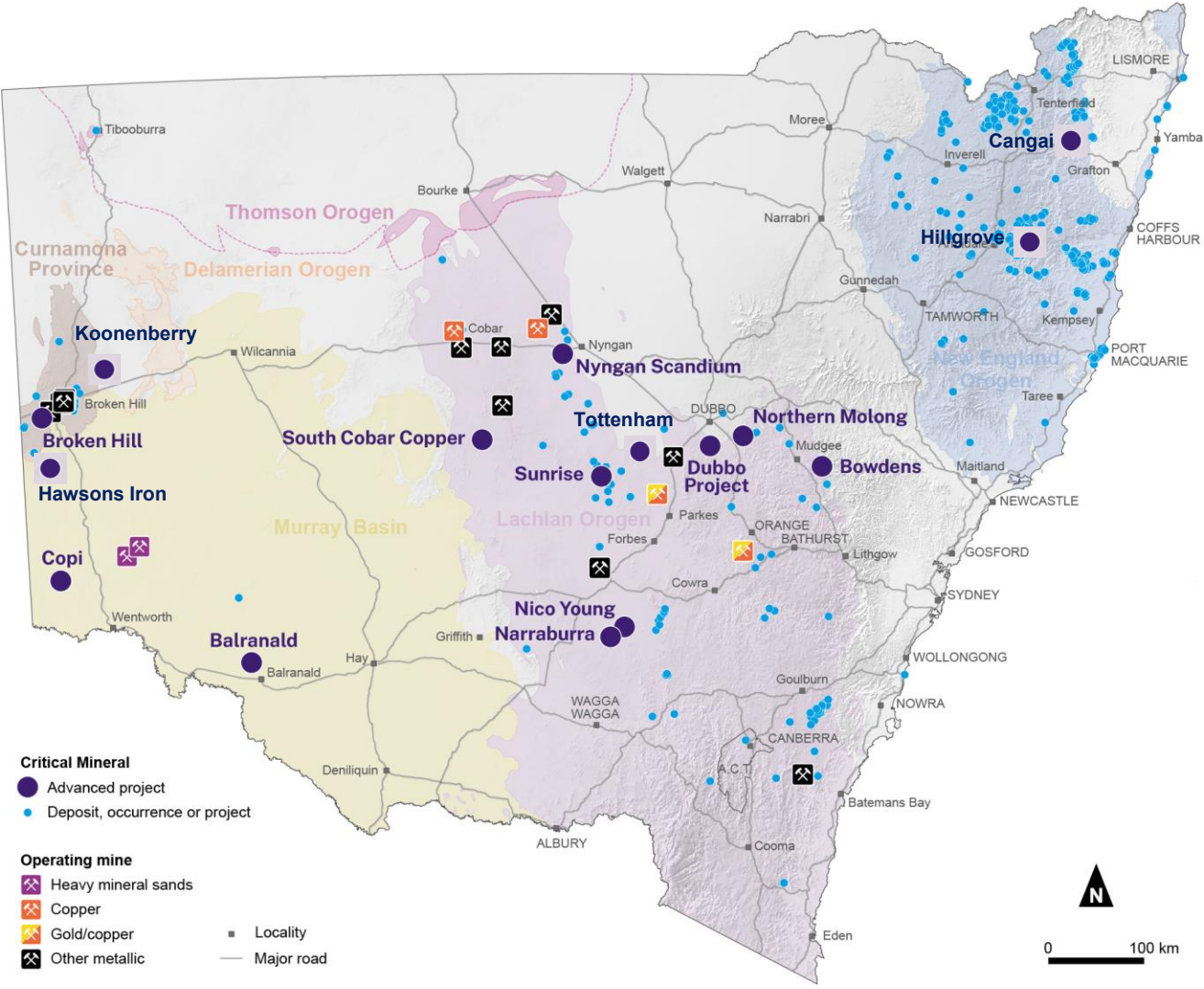
Mining regions in NSW



New England	Lachlan Orogen	Murray Basin	Broken Hill
<u>Cobalt</u> <u>Antimony</u> Scandium Tungsten Indium PGE High-purity Alumina Coal	<u>Nickel</u> <u>Cobalt</u> <u>Rare Earth</u> <u>Copper</u> Gold Silver Lead Zinc Molybdenum Niobium Hafnium Indium Bismuth Magnesium PGE Scandium Tantalum Tungsten Zirconium Alumina	<u>Rare Earth</u> Titanium Zirconium	<u>Cobalt</u> Tungsten PGE Silver Lead Zinc

Critical minerals projects

Project	Company	Stage	Minerals
Dubbo	Australian Strategic Materials	Development approved	<u>REE</u> , Zr, Nb, Hf, Ta
Narraburra	Godolphin Resources	Advanced exploration	<u>REE</u>
Copi	RZ Resources	FS	<u>REE</u> , Ti, Zr
Balranald	Iluka Resources	Production (Jan 2026)	<u>REE</u> , Ti, Zr
South Cobar Copper	Aeris Resources	FS	<u>Cu</u> , Au, Zn, Pb, Ag
Tottenham Copper-Gold	Locksley Resources	Advanced exploration	<u>Cu</u> , Au, Ag
Cangai Copper	Infinity Mining	Advanced exploration	<u>Cu</u> , Au, Zn, Ag
Koonenberry	G11 Resources	Advanced exploration	<u>Cu</u> , Au, Zn, Ag
Broken Hill Cobalt	Cobalt Blue	FS	<u>Co</u> , S
NiCo Young	Legacy Minerals	Advanced exploration	<u>Ni</u> , <u>Co</u>
Hillgrove	Larvotto Resources	Commence production (Q2 2026)	<u>Sb</u> , <u>W</u> , Au
Hawsons Iron	Hawsons Iron	FS	<u>Magnetite</u>



Projects to production (2024–2026)

1. Woodlawn Zinc-Copper Mine (restart)

Company: DEVELOP Global
Location: Goulburn
Commodities: Zn, Cu
Status: Operational (April 2025)

2. Federation Mine (NEW)

Company: Aurelia Metals
Location: Nymagee
Commodities: Zn, Pb, Au, Cu, Ag
Status: Operational (September 2024)

3. Endeavor Mine (restart)

Company: Polymetals Resources
Location: Cobar
Commodities: Ag, Zn, Pb
Status: Operational (June 2025)



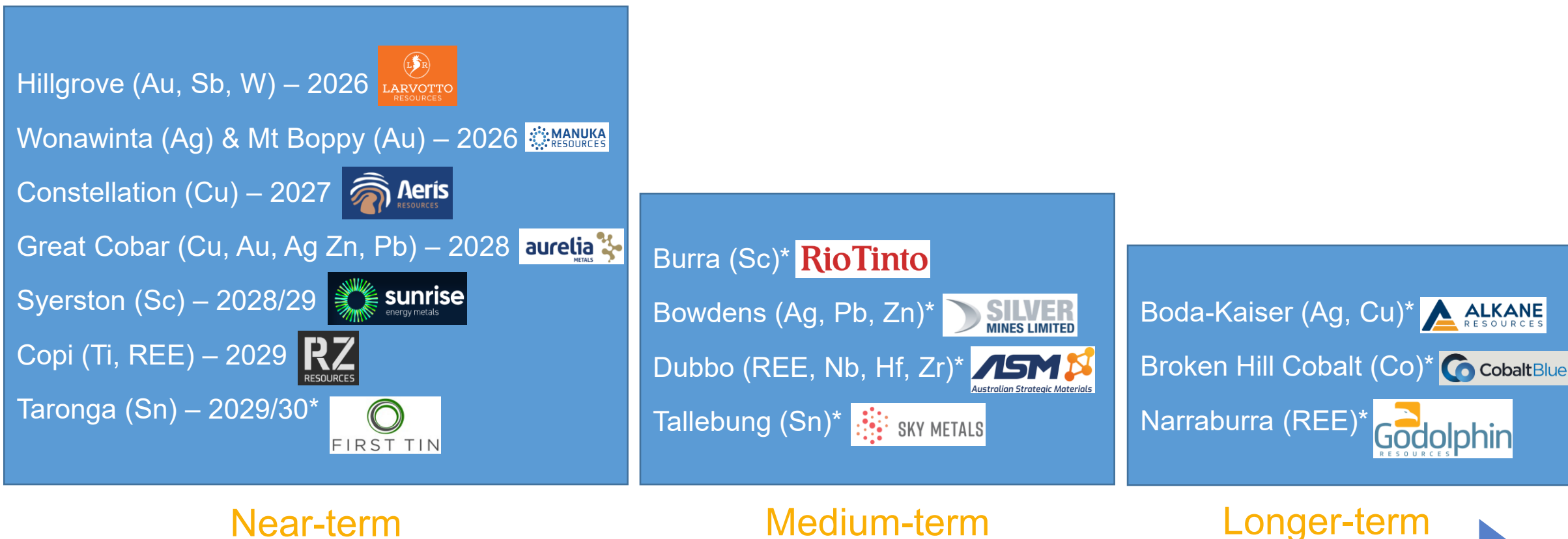
4. Balranald Mineral Sands Mine (NEW)

Company: Iluka Resources
Location: Balranald
Commodities: Ti, Zr, REE
Status: Operational (January 2026)

5. Pinnacles Mine (restart)

Company: Broken Hill Mines
Location: Broken Hill
Commodities: Ag, Pb, Zn
Status: Operational (May 2026)

Strong pipeline of future projects



*Subject to various factors including planning approvals, project financing, market conditions, M&A, geopolitics, available workforce, infrastructure costs etc.

Project List – 1

- Latest status of each project should be confirmed.
- Please contact us if you are interested in any projects. We will confirm project details and investment/offtake opportunities.

Project	Company	Listed	Project Status	Au	Cu	Ni	Co	REE	Ag	Zn	Pb	Zr	Mineral Sands	Others	Resources
Cangai Copper Project	Infinity Mining	IMI	FS Advanced exploration		☉ 2.45%										4.6Mt
Koonenberry Project	G11 Resources	G11	Resources development Advanced exploration	○ 0.05 g/t	☉ 1.03%				○ 2.3g/t	○ 0.35%					5.75Mt
South Cobar Project (Aeris) Mallee Bull & Wirlong	Aeris Resources (Aquired from Peel Minin)	AIS	PFS	○ 0.25 g/t	☉ 1.76%				○ 19.9 g/t	○ 0.35%	○ 0.33%				11.31Mt
Tottenham Project	Locksley Resources	LKY	Resources development Advanced exploration	☉ 0.22 g/t	☉ 0.73%				○ 1.73 g/t						9.86Mt
Dubbo Project	Australian Strategic Materials	ASM	Seeking finance & offtake Scoping					☉ 0.14% Y2O3 0.74% TREO				○ 1.89% (ZrO2)		0.04% (HfO2) 0.03% (Ta2O5) 0.44% (NbO5)	75.18Mt
Narraburra REE Project	Godolphin Resources	GRL	PFS/Scoping Advanced exploration					☉ 738.95 ppm TREO						☉ Dy, Tb 5.9wt% Y 36.9wt% etc	94.9Mt

Project List – 2

- Latest status of each project should be confirmed.
- Please contact us if you are interested in any projects. We will confirm project details and investment/offtake opportunities.

Project	Company	Listed	Project Status	Au	Cu	Ni	Co	REE	Ag	Zn	Pb	Zr	Mineral Sands	Others	Resources
Copi Mineral Sands Project	RZ Resources	-	PFS/Scoping									☉ 0.2%	☉ Ilmenite 0.63% Rutile 0.21%	Monazite 0.01% Xenotime 0.0002% Leucoxene 0.11%	3,000Mt
Hillgrove Project	Larvotto Resources	LRV	Resume production DFS	☉ 4.0 g/t										☉ Sb 1.1%	8.766Mt
Broken Hill Cobalt Project	Cobalt Blue Holdings	COB	PFS			○ 134 ppm	☉ 690 ppm							○ S 7.5%	126.5Mt
NiCo Young Project	Legacy Minerals Holdings	LGM	PFS/Scoping Advanced exploration			☉ 0.59%	○ 0.06%								167.8Mt
Sunrise Nickel-Cobalt Project	Sunrise Energy Metals	SRL	Construction planning DFS			☉ 0.53%	○ 0.10%								180Mt
Hawsons Iron Project	Hawsons Iron	HIO	PFS											☉ Fe (Magnetite) DTR 11.4% Fe Conc 68.4%	4,415Mt

NSW Critical Minerals Strategy

The 5 pillars below support the NSW critical minerals industry



<https://www.nsw.gov.au/sites/default/files/noindex/2024-10/nsw-critical-minerals-and-high-tech-metals-strategy-2024-35.pdf>



Encourage Exploration

- Co-invest in exploration
- Deliver pre-exploration data acquisition programs



Incentivise Production

- A\$250 million royalty deferral scheme for critical minerals projects that start production between July 2025 and June 2030 (First 5 years)
- Approval support, maintain Rapid Assessment Framework ([RAF](#))



Supply chain development

- Collaborate with ANSTO to investigate the potential for processing rare earth in NSW
- Promote reuse of mine tailings



Develop skilled workforce

- Encourage young people to consider future careers in critical minerals
- Develop a skills plan for the critical minerals sector



Engage communities

- Increase awareness of mining to foster stronger community engagement
- Ensure regional plans are aligned with the mining strategy

NSW Government support

- Mine development proposals must obtain approval under NSW legislation* before a mining lease can be granted to mine for mineral and coal resources in NSW
- All mine-related impacts need to be considered – economic, environmental, social, cultural
- Community consultation, including engagement with relevant Aboriginal/Indigenous groups is essential during the assessment process

NSW Government support to mine development proponents (includes, but not limited to)

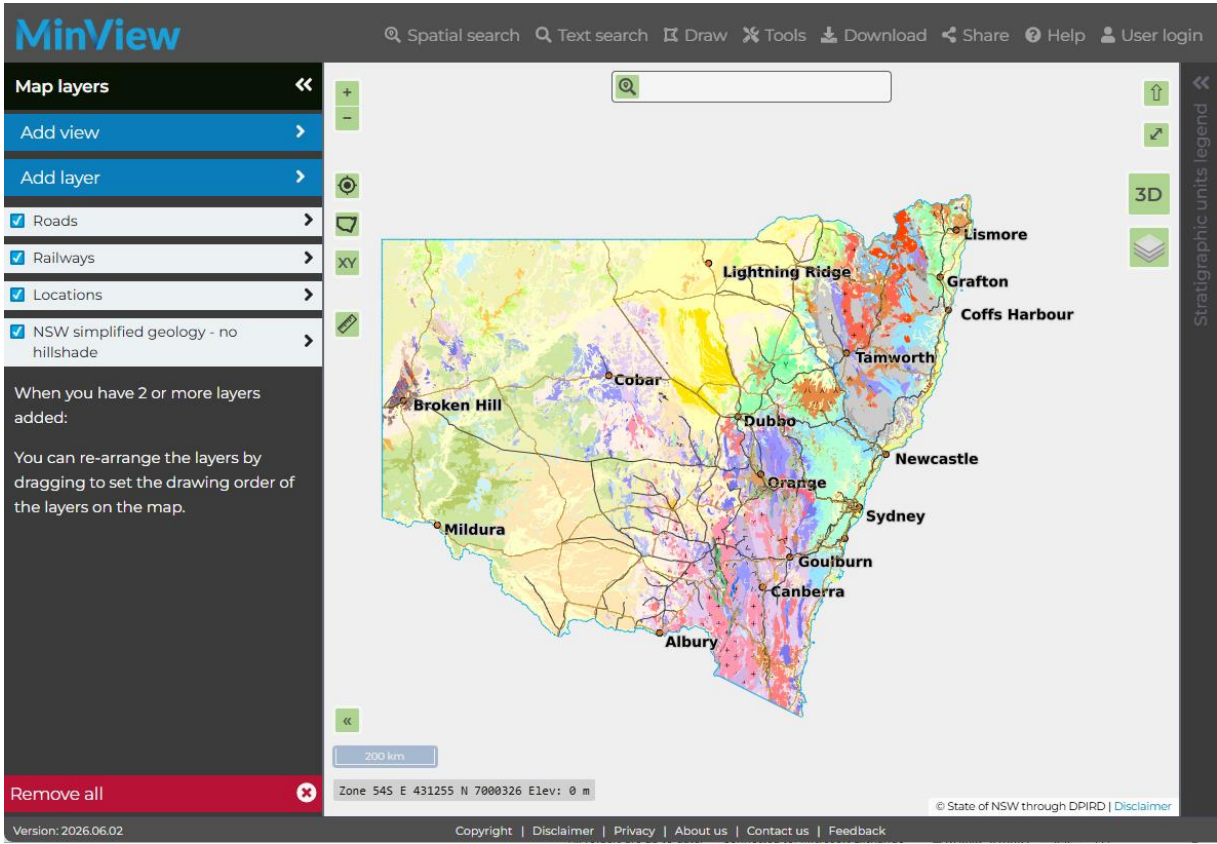
Dept. Planning, Housing & Infrastructure	NSW Resources (mines department)
Coordinates a whole-of-government (State, Commonwealth, Local) assessment of the impacts of mining projects Provides comprehensive and clear guidelines for proponents to improve their environmental assessments: • Engagement Guidelines • Cumulative Impact Assessment Guidelines • Social Impact Assessment Guidelines • How to engage with Indigenous/Aboriginal community groups and landowners' guidelines	NSW Mining Concierge • Inform exploration and mining companies of the various project approvals requirements and processes in NSW • Facilitate connections with NSW Government agencies, and between all tiers of government in Australia to address water, transport, biodiversity, Native Title claims Assessment & Titles • Assesses applications for exploration and mining permits – advising proponents on requirements • Specialised Native Title team – advises on land ownership and Right to Negotiate process

* Mine proposals may also require Commonwealth Government or Local Government approvals (subject to project size, value, significance/importance)

Mineral exploration data

MinView – Free Access

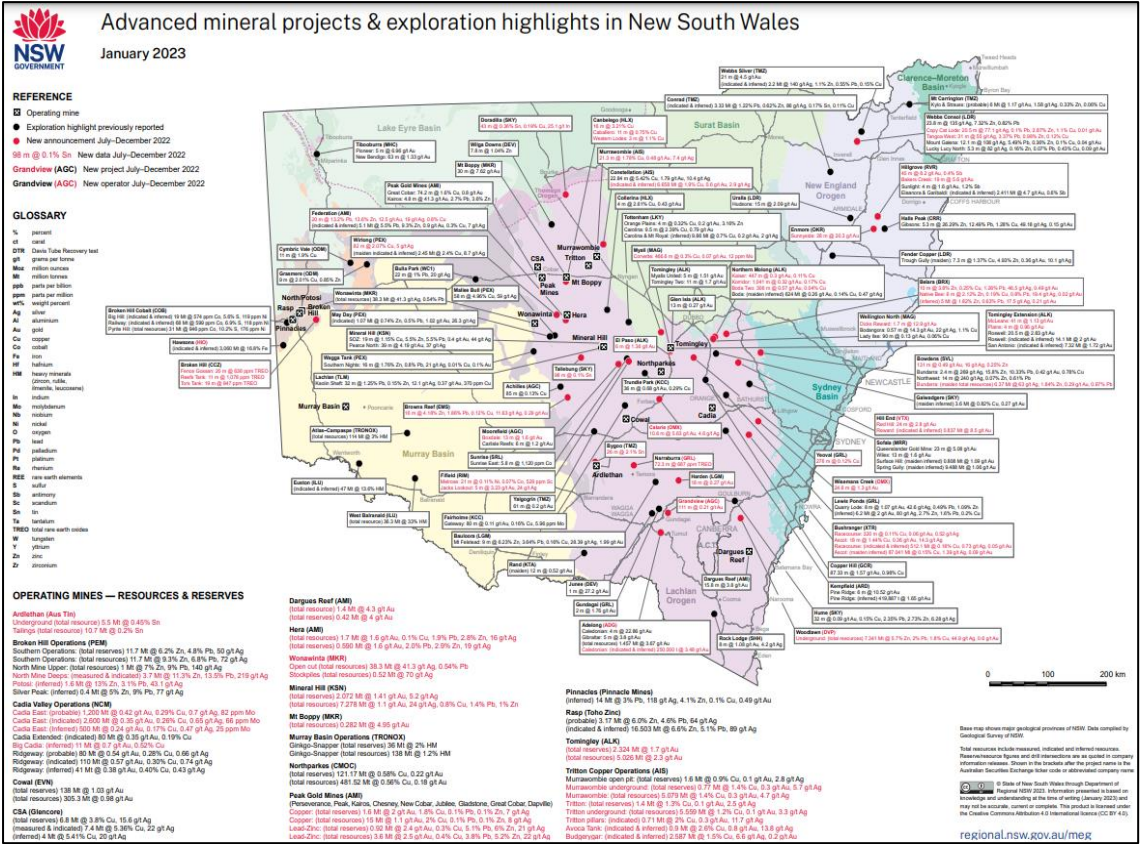
- ✓ Geoscientific data in NSW
- ✓ Infrastructure information (Road, Rail, Water etc)



Geological survey by NSW Government

DIGS – Free Access

- ✓ Geological document archives
- ✓ Update every 6 month (minerals, quantity, etc.)



Startups in critical mineral sector

Novalith
Li : innovated

Lithium refinery
(Low-cost & environmentally friendly)

- ✓ Refining process utilising CO₂
- ✓ Process spodumene ore, etc.
- ✓ Produce lithium carbonate etc
- ✓ Tech from University of Sydney
- ✓ Moving toward commercial production

Gega
Elements

Gallium refinery
(Low-cost & new supply chain)

- ✓ Supply chain diversification
- ✓ Partnership with mining companies for feedstock
- ✓ Produce high purity gallium metals
- ✓ Environmentally friendly
- ✓ Moving toward pilot production



The NSW Government invites investors to Sydney for IMARC week 2026

- **NSW Critical Minerals Investment Showcase event**
 - Monday 26 October, 9:30 am – 2:00 pm @ NSW Parliament, Sydney CBD
 - NSW Government and industry presentations, and networking
- **IMARC 2026**
 - Tuesday 27 – Thursday 29 October @ ICC Sydney
 - Australia's largest and most influential mining event
 - 3 days of networking opportunities, collaboration and deal making



REGISTRATION OF INTEREST

NSW Critical Minerals Investment Showcase (invitation only event)

IMARC (complimentary 3-day investor pass)

Email: Tomohito.Tanase@global.investment.nsw.gov.au



12,000 +

Registrants



120 +

Countries



500 +

Exhibitors & sponsors



20,000 sqm

Exhibition floor



500 +

Speakers



100 +

Mining juniors

For further information

Tomohito Tanase

Associate Director

Investment NSW – North Asia

9F Kyobashi Trust Tower, 2-1-3 Kyobashi, Chuo-ku, Tokyo, 104-0031 JAPAN

E: Tomohito.Tanase@global.investment.nsw.gov.au

W: <https://www.investment.nsw.gov.au/> / www.regional.nsw.gov.au/meg

AUSTRALIA MINERALS

REALISE THE OPPORTUNITY

Thank you

Tomohito Tanase
Associate Director
Investment NSW – North Asia



Disclaimer

The information contained in this publication is based on knowledge and understanding at the time of writing and may not be accurate, current or complete.

The State of New South Wales (the entire New South Wales Government), the author and the publisher take no responsibility, and will accept no liability, for the accuracy, currency, reliability or correctness of any information included in the document (including material provided by third parties). Readers should make their own inquiries and rely on their own advice when making decisions related to material contained in this publication.

The NSW Government does not specifically endorse any particular project, rather these are a range of projects located in the State of New South Wales.

AUSTRALIA MINERALS

REALISE THE OPPORTUNITY

Queensland

Delivering our critical minerals future

Melissa Inooka
Queensland Trade and Investment Commissioner – Japan
Trade and Investment Queensland



**Queensland
Government**
Australia



Queensland's critical minerals advantage

Queensland's world-class resource endowment

Precious Metals

- Gold • Silver

Base Metals

- Copper • Lead • Zinc • Bauxite / Aluminium

Non-metals

- Silica • Phosphate • Magnesium

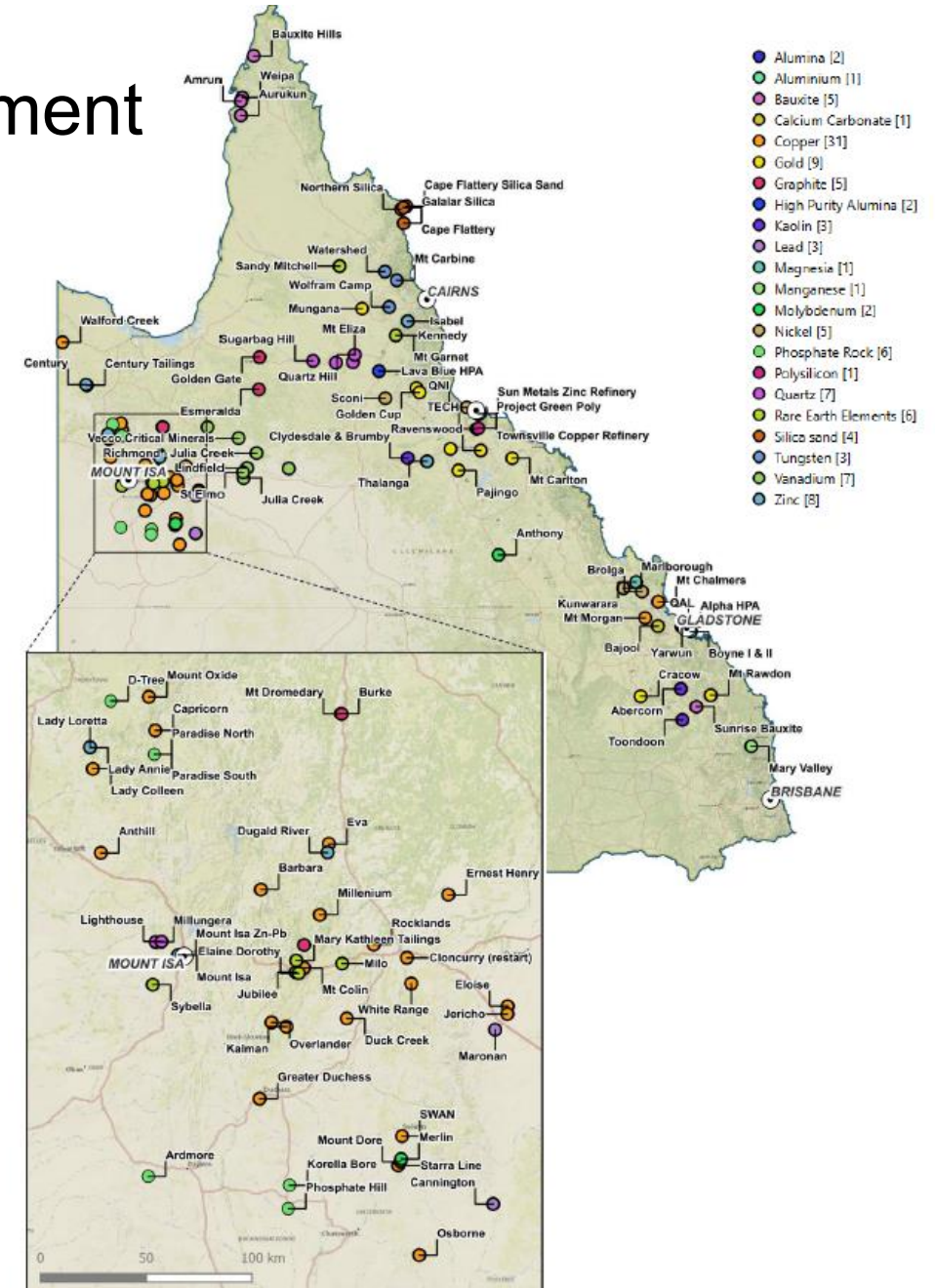
Critical Minerals

Industrial

- Titanium • Tungsten • Vanadium • Manganese • Nickel
- Molybdenum • Tin

High-Performance / Defence

- Rare earth elements • Cobalt • Antimony • Germanium
- Gallium • Beryllium



Queensland: A mining powerhouse

Queensland's minerals wealth statement

Queensland's economic demonstrated resources (EDR) for major minerals, estimated by Geoscience Australia as of 31 December 2024, represent extraordinary value for the state and nation.



Delivering Queensland's Critical Minerals Future 2026–2030

The plan outlines a coordinated approach to strengthening Queensland's role in global critical minerals supply chains.



- » Accelerating projects, from discovery to delivery, getting products to market sooner
- » growing processing capability and integrated value chains
- » promoting opportunities to global investors
- » investing in regional infrastructure and capability

Queensland's critical minerals advantage

Queensland's competitive advantage is no longer defined by resources in the ground alone. It lies in our ability to convert those resources into secure products, value-added industries and reliable supply chains.

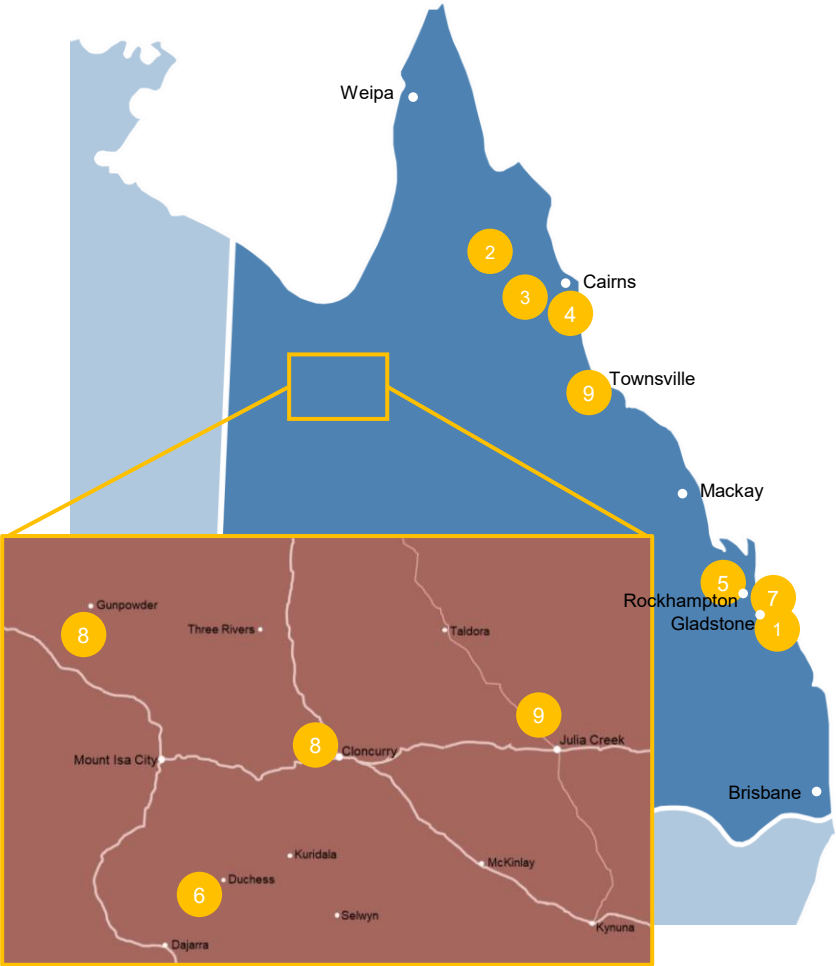
Key focus areas include:

- Advancing research and development
- Scaling midstream processing
- Queensland Resources Common User Facility



Queensland critical minerals fund

Queensland Asset Highlight



- A\$155 m committed
- 9 investments (debt, equity, royalties)
- Over 1,500 jobs expected to be created
- Supporting critical minerals mining and refining

Hybrid Assets

Company	Location	Instrument	Critical Mineral	Project	Stage
1 Alpha HPA	Yarwun, Gladstone	Royalty	High Purity Alumina (HPA)	HPA First Alpha Sapphire	Construction / Production
2 Ark Mines	Mount Mulgrave	Royalty + Listed Equity	Rare Earth Elements	Sandy Mitchell Project	Pre-DFS
3 Iltani Resources	Herberton	Royalty + Listed Equity	Silver (Ag), Indium (In), Zinc (Zn), Antimony (Sb)	Herberton Project (Orient East, Orient West)	Pre Scoping Study
4 Silica Resources Australia	Mourilyan	Royalty + Debt	Silica (Si)	Mourilyan Silica Sands Project	Construction / Production
5 QMines	Rockhampton	Royalty + Listed Equity	Copper (Cu), Silver (Ag)	Mt Chalmers, Develin Creek, Mt Mackenzie	Pre-DFS

Pure Equity Assets

Company	Location	Instrument	Critical Mineral	Project	Stage
6 Carnaby Resources	Duchess	Listed equity	Copper (Cu)	Greater Duchess Copper-Gold Project (Trekellano, Nil Desperandum, Mt Hope, Lady Fanny)	Pre-DFS
7 Grenof Water Technologies	Yarwun, Gladstone	Private equity	Chemical Reagents (Chlor Alkali, Caustic Soda, NaOH)	Project Halogen	Pre-PFS
8 Austral Resources	Mt Isa & Cloncurry	Listed equity	Copper (Cu)	Rocklands, Mt Kelly, Lady Annie	Operating

Pure Debt Assets

Company	Location	Instrument	Critical Mineral	Project	Stage
9 Vecco	Julia Creek (Mining) Townsville (Electrolyte)	Debt	Vanadium (V), Vanadium Electrolyte	Vecco Critical Minerals Project	Pre-DFS

As at 20/04/2026. The information describes specific investment opportunities that QIC has previously pursued. Such investments are described for informational and illustrative purposes only and there is no guarantee that QIC will pursue similar investments in the future or that such similar investments will continue to be available.



Minerals Acceleration Program

- A\$19.9M to accelerate Queensland's resources pipeline
- Unlock new discoveries and exploration opportunities
- Help priority projects progress towards development

Queensland's Critical Minerals Prospectus



- Queensland offers investment-ready critical minerals opportunities backed by strong government support.
- Focus on growing processing capability and integrated value chains
- Promoting opportunities to global investors
- Investing in regional infrastructure and capability
- Investment-ready critical minerals projects

www.qld.gov.au/resourcesinvestment

AUSTRALIA MINERALS

REALISE THE OPPORTUNITY

Thank you

Melissa Inooka
Queensland Trade and Investment Commissioner – Japan
Trade and Investment Queensland



Scan to
connect with
our team



**Queensland
Government**
Australia

AUSTRALIA MINERALS

REALISE THE OPPORTUNITY

South Australia: The Copper State

Critical minerals & strategic materials | copper,
magnetite, uranium, natural hydrogen

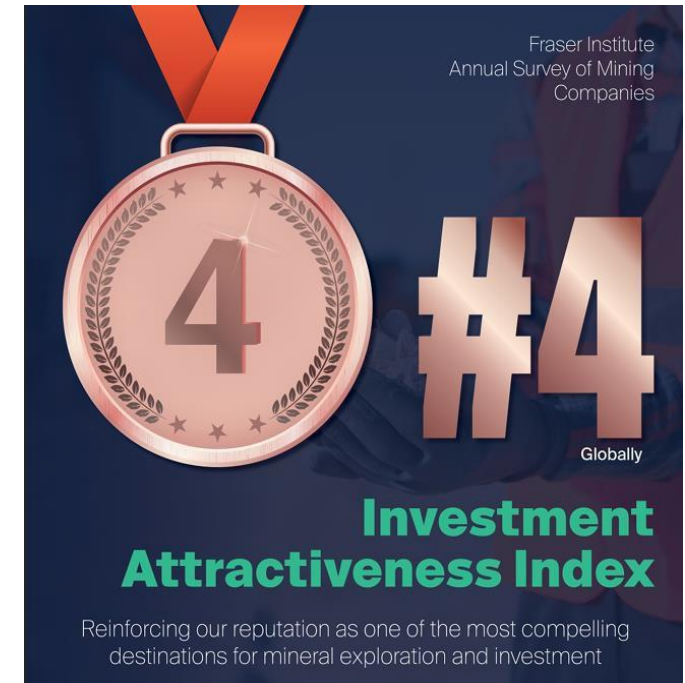
Dr Suzanne Hunt

Department for Energy and Mining
Geological Survey of South Australia

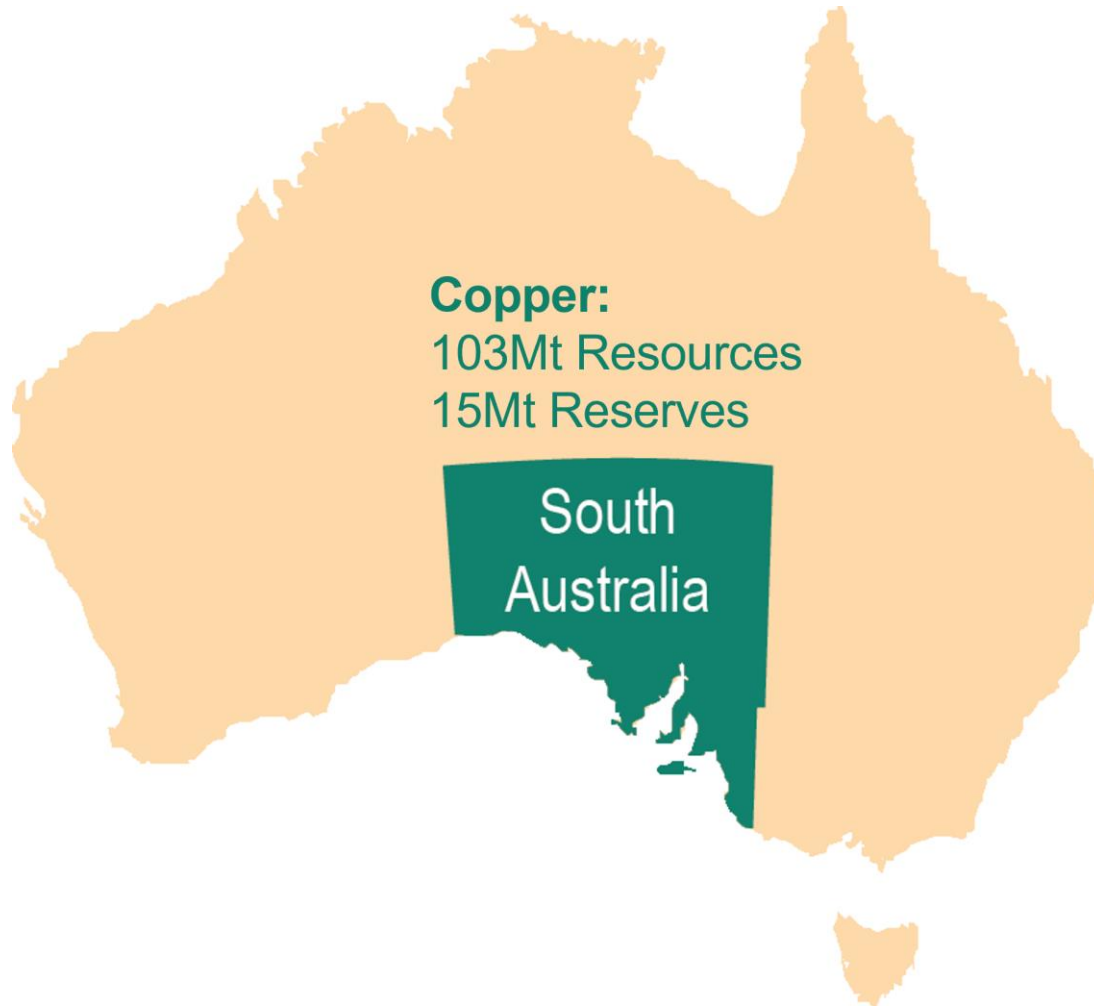


Fraser Institute 2025

South Australia posted in the Annual Survey of Mining Companies – Global Ranking

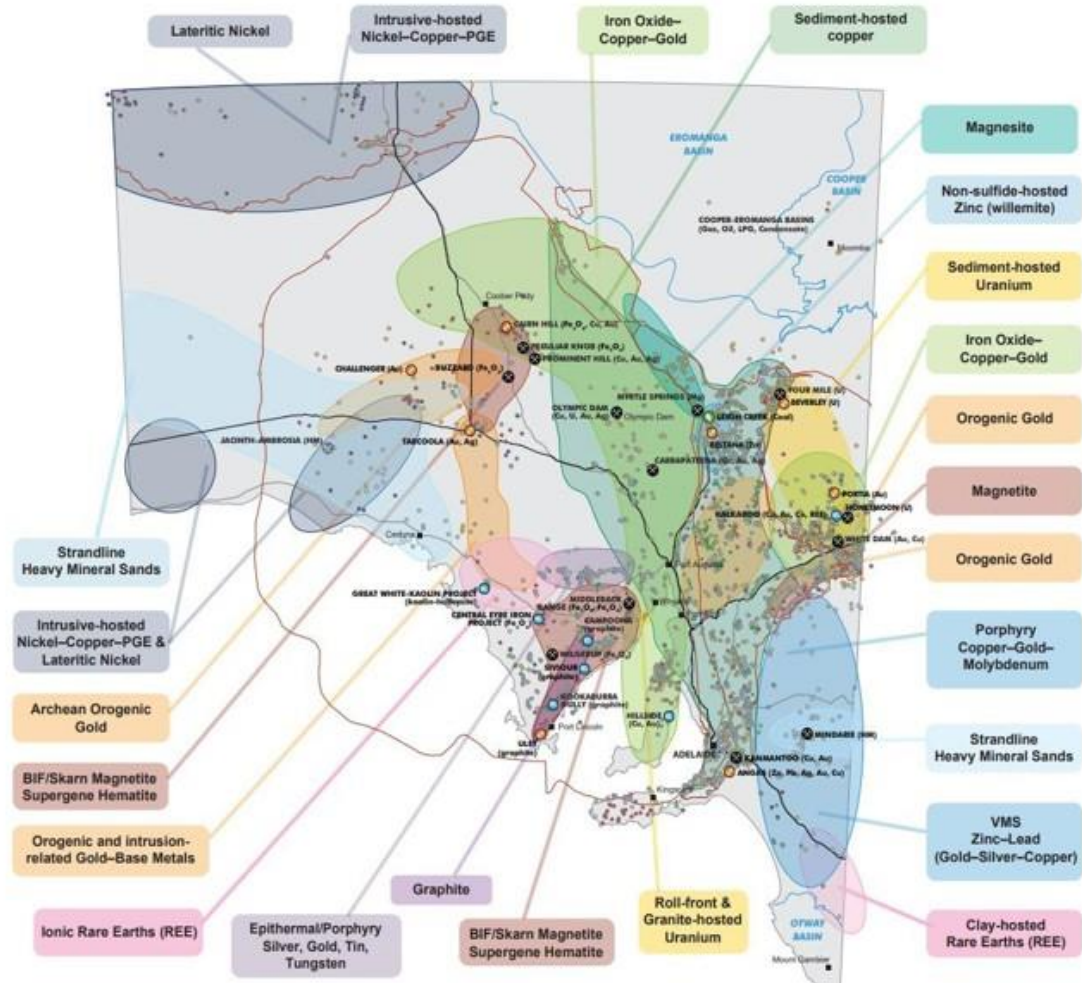


South Australia: The Copper State ++

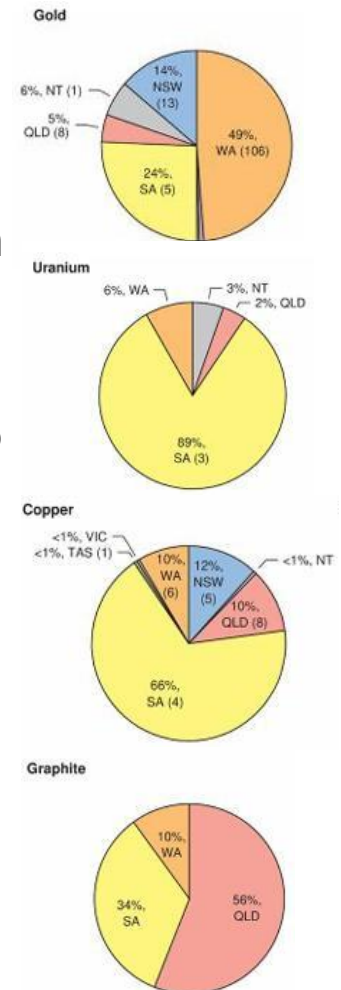


- Globally competitive resources investment destination with stable regulation and strong government support.
- Australia's leading copper province, hosting **two-thirds of known copper reserves**.
- Global transition to lower-emissions energy.
- Home to **89% of Australia's known uranium resources**, including the world's largest known single uranium deposit. Over **37 years of trusted regulatory oversight**, providing certainty for long-term investment.
- More than **19 billion tonnes of magnetite resources** with potential to supply green iron and low-emissions steelmaking.

South Australia: Copper | Graphite | Magnetite | Uranium | Critical Minerals



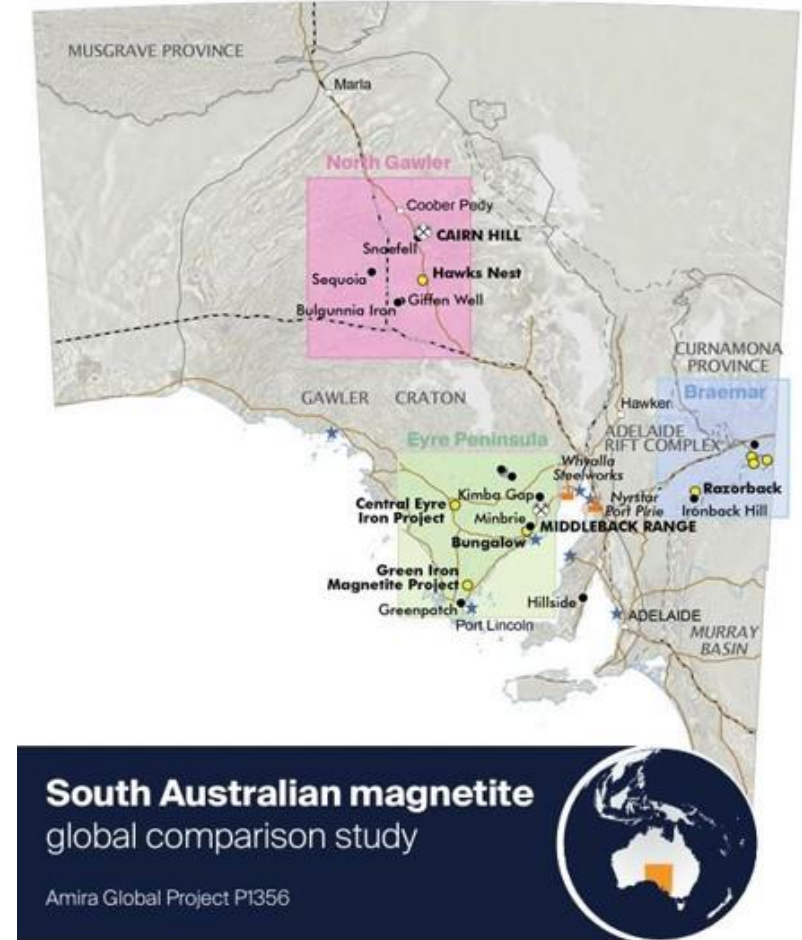
- Significant gold, silver and critical mineral resources, including graphite, halloysite-kaolin and high-purity alumina.
- Highly prospective for nickel, cobalt, rare earth elements, lithium, manganese, magnesium and platinum group elements.
- Home to **66% of Australia's copper** and **34% of Australia's graphite resources**.
- Emerging leader in battery materials, renewable energy, low-carbon fuels and green industrial development.
- At the forefront of Australia's natural hydrogen and helium exploration sector.
- Strong government support with streamlined project facilitation and access to industry, infrastructure and research networks.



* [Australia's Identified Mineral Resources 2025 Economic Demonstrated Resources \(EDR\)](#) | [Geoscience Australia](#)

World-class magnetite

- South Australia has a total of **19.6 billion tonnes** of JORC compliant **magnetite ore**, including **8.3 billion tonnes of Economic Demonstrated Resources**.
- South Australia's magnetite deposits are situated in three regions; the North Gawler, Eyre Peninsula and Braemar iron regions.
- BIF-hosted magnetite deposits in South Australia similar in style to some currently exploited deposits in Western Australia, Canada, and in the USA.
- South Australia, by magnetite tonnage* **ranks third globally** following Canada and Western Australia.
- Based on head and concentrate grades, magnetite recovery rates in South Australian deposits are comparable to those seen in economically viable mines currently operating in Western Australia and Canada.
- Grinding size is variable across the deposits with some allowing for coarse grinding ($>100\text{ }\mu\text{m}$), representing a significant advantage compared to many competitors globally.
- Bond work demonstrates that some South Australian deposits host less abrasive magnetite ores compared to other regions.
- Potential source rock for natural hydrogen accumulations



* from publicly available data

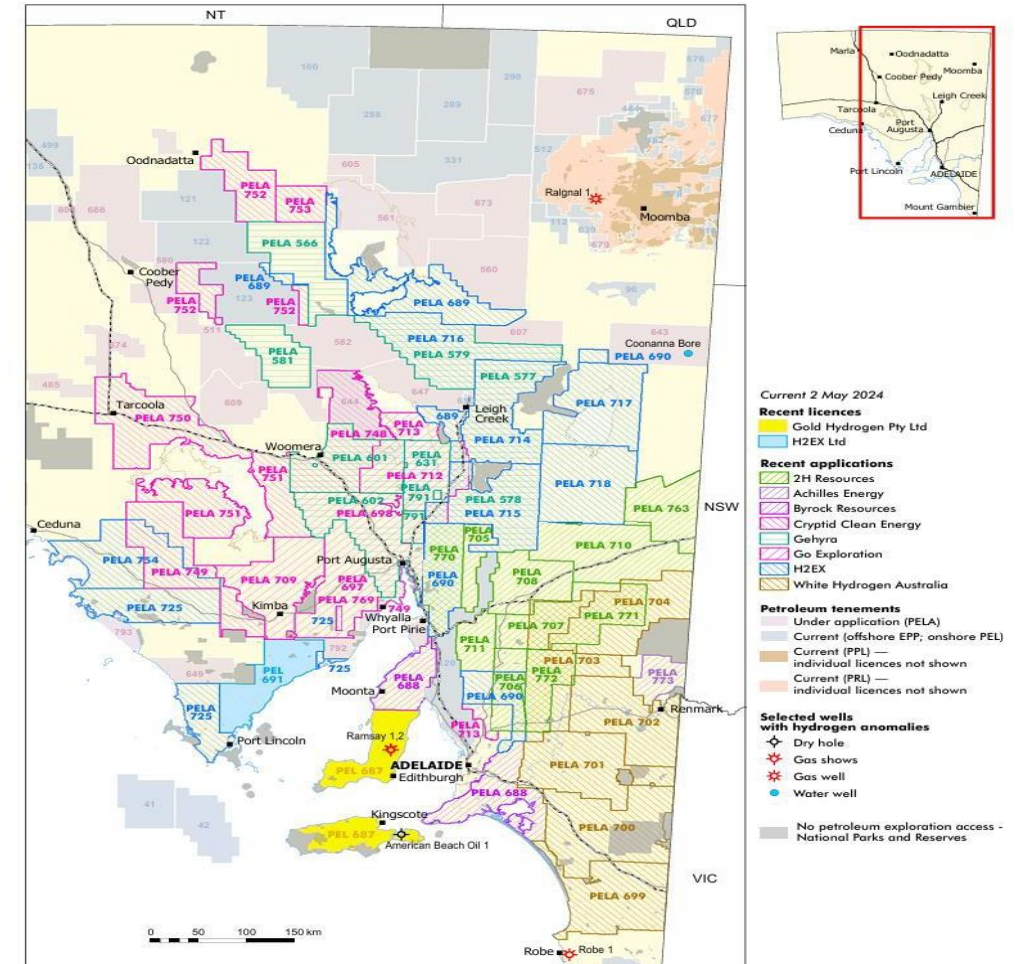
Natural hydrogen – positioning South Australia as a global leader

Why South Australia?

- **Geological Advantage:** Iron-rich and uranium-rich basement rocks, deep faults, and salt lakes.
- **Historic Evidence:** Drillholes from 1930s showed hydrogen concentrations up to 84%.
- **Regulatory Support:** SA amended its Energy Resource Act and Regulations to include hydrogen.

Key Projects

- **Gold Hydrogen – Ramsay Project (Yorke Peninsula)**
 - exploring for natural hydrogen with the acquisition of 600 km of 2D seismic data and the drilling of two wells, Ramsay-1 and Ramsay-2.
 - A gravity-magnetic-digital terrain geophysical survey was also acquired 10,529-line km, in 2023, along with soil gas surveys in conjunction with the CSIRO.
 - Testing of Ramsay-1 and Ramsay-2 wells recorded hydrogen
- concentration of 95.8%, along with a new discovery of helium (36.9%). Ramsay 2 well, released 27th August Replicated Ramsay 1 results, flowed, separated and captured Helium
- **H2EX – Eyre Peninsula** – signed MOU with carbon 280 for use of Hyrilyte
- **2H Resources – Adelaide Fold Belt**

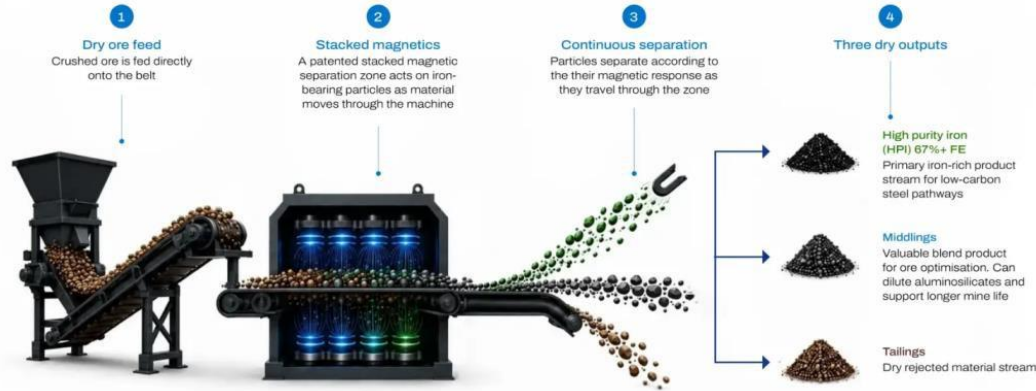


- ✓ Over **35 exploration licence applications** since 2021
- ✓ Active hydrogen systems confirmed
- ✓ SA's regulatory framework supports rapid development and investment

Mining technology innovation in South Australia

How the DryFlow technology works

Patented stacked magnetics separate iron-bearing particles on-belt into three dry streams



Nyrstar's Port Pirie smelter in South Australia achieved a major milestone by producing and making its first commercial shipment of critical mineral antimony metal in early 2026.

- **Milestone**: First antimony metal cast in late 2025 and initial commercial shipment delivered in February 2026.
- **Capacity**: Potential to produce up to 5,000 tonnes of antimony metal annually (about 15% of the global market).
- **Funding**: Backed by joint multi-million dollar support from the Australian, South Australian, and Tasmanian governments, alongside investments by Nyrstar and its parent company Trafigura

Why Partner with Andromeda

Australian company

- Geopolitically low risk jurisdiction
- Proprietary process and flexible forms
- Vertically integrated - secure, scalable kaolin feedstock
- Designed for long term supply

Strategic partnership

- Supply chain diversification - outside traditional geographically concentrated suppliers
- Ground floor opportunity to unlock a new source in market facing supply deficit
- Potential for shared value creation – scalable supply solutions aligned to customer needs
- Focus on consistency, quality assurance and long-term supply partnership
- Purpose-built products tailored to your requirements

Product benefits

- Ultra high purity HPA (99.99%)
- Multiple crystalline forms (alpha, gamma, beta, and amorphous HPA).
- Avoids aluminium metal feedstock - less exposure to aluminium price volatility
- Lower environmental impact
 - No use of acid at high temperatures and high pressures
 - Lower energy and carbon intensity than traditional processes

Next Steps - Collaborative Product Development

- Confidential engagement
 - Discussions on technical requirements
 - Sample evaluation
 - Shared learnings to deliver a customer specific HPA solution

Premium HPA for Cleaner Technology Value Chains

Andromeda is developing an ultra high purity alumina product range to support the diversification and decarbonisation of the supply chains

Nyrstar marks Port Pirie's first shipment of Australian-produced Antimony metal

Tuesday February 17, 2026

South Australia | Geoscience innovation

HyLogger™



5900

metres scanned since delivery

1681

drillholes available online

488,827

metres scanned since 2013

SA Geodata Standardisation

Onsite Core Digitisation

SA Geodata Ready

Virtual Core Collection

SA Core Library Digitisation

Future Data

Project Drillholes7

Total Drilling Depth(m)2.309

Completion DateTuesday, 25 February 2025

Project progress: The 7th drillhole has been submitted to Core Library

Project start ▶ Drilling ▶ DH Core Extracted ▶ Site Recovered ▶ GSSA Review ▶ Data Audit ▶ Data Released ▶ New Publications

NDI NG Drillhole Locations

Drillhole NameNDING_01NDING_02NDING_03

Site Images

Image SelectionWET

Depth Metre SelectionAll

Northern Gawler NDI Tray Image

Scroll up or down for more images

Drillhole NameNDING_01

Drilling MethodCOILED TUBING

Method from Depth0.00

Method to Depth482.95

Commencing in October 2024, the Northern Gawler NDI provides new insights into the geological history of the Eromanga and Arkaranga basin sediments through to the crystalline basement.

This project will provide constraints to the geological events which have shaped northern South Australia and will provide critical context for determining the mineral potential of the region.

Drillhole Name	Maximum Depth (m)	Elevation	Method1	Method2	Core Length	Lithology	Stratigraphy	Year	Month	Day
NDING_01	352.95	250	COILED TUBING	DIAMOND	2.95	Y	Y	2024	October	13
NDING_02	313.10	250	COILED TUBING	DIAMOND	3.1	Y	Y	2024	October	26
NDING_03	266.00	250	COILED TUBING	DIAMOND	Y	Y	Y	2024	November	14
NDING_04	482.95	263	COILED TUBING	DIAMOND	3.1	Y	Y	2024	December	10

SARIG catalogue

HomeSearch RecordsFAQsVocabulariesSARIG map

SOUTH AUSTRALIAN RESOURCES INFORMATION GATEWAY

A place to find, access, share and connect to geoscientific information

Search catalogue

Search 30K records by keyword

BROWSE BY TYPE OF RECORD

Service34Model33Map71Document29.96Dataset871Application5

EXPLORE BY CATEGORY

ExplorationEnergyGeologyGeophysicsEnvironmentSpatial

EXPLORE BY COLLECTION

Departmental publications

Mineral exploration company reports

Mineral mining reports

Legislation and guidance

Exploration initiatives

Geoscience reports and publications

AUSTRALIA MINERALS | SOUTH AUSTRALIA

Japan—Australia Mineral Resources Investment Seminar | Sep '26 | #AustraliaMinerals

Useful links and contacts | South Australia



Government
of South Australia

Department for
Energy and Mining

Dr Suzanne Hunt:

Director, Geological Survey South Australia, Department for Energy
and Mining
Suzanne.hunt@sa.gov.au

Sally Townsend:

Regional Director South Australia – Japan & Korea, Department of
State Development
Sally.Townsend@austrade.gov.au



Government of South Australia
Department of State Development

Website links:

Department for Energy and Mining

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Minerals and Mining [Minerals and mining | Energy & Mining](#)
Green Iron and Steel [Green iron and steel | Energy & Mining](#)
Regulation [Regulatory services | Energy & Mining](#)
Energy Resources [Energy resources | Energy & Mining](#)

Department for State Development

[Invest In Prosperity Projects SA](#)

AUSTRALIA MINERALS

REALISE THE OPPORTUNITY

Tasmania's minerals advantage

Opportunities for Japanese investment

Joe Gayton
Tasmanian Trade and Investment Advocate – Japan
Trade Tasmania



Lutruwita/Tasmania

The 'Island State'

- 0.9% of Australia's landmass
- Incredibly diverse geology and rich mineral endowment
- Highest critical mineral 'deposit' density in Australia (25 per 100,000 km²)
- Products of mining and mineral processing constitute >65% per cent of mercantile exports



Tasmania – Mining-Friendly Jurisdiction

- **Supportive Government:** The government actively promotes mining through policies, legislation and initiatives designed to minimize sovereign risk
- **Established approvals processes:** Predefined authorisation workflows
- **Sustainable Energy:** Net zero in emissions, powered by hydroelectricity and wind farms – sets us apart from the rest of Australia
- **Robust Infrastructure:** The region boasts well-developed infrastructure tailored to support mining activities with upgrades to rail and port facilities
- **Geological Framework:** High-quality, freely available pre-competitive geoscience datasets to minimize exploration risks
- **Skilled Workforce:** With over 100 years of mining history, the region has a highly experienced local workforce



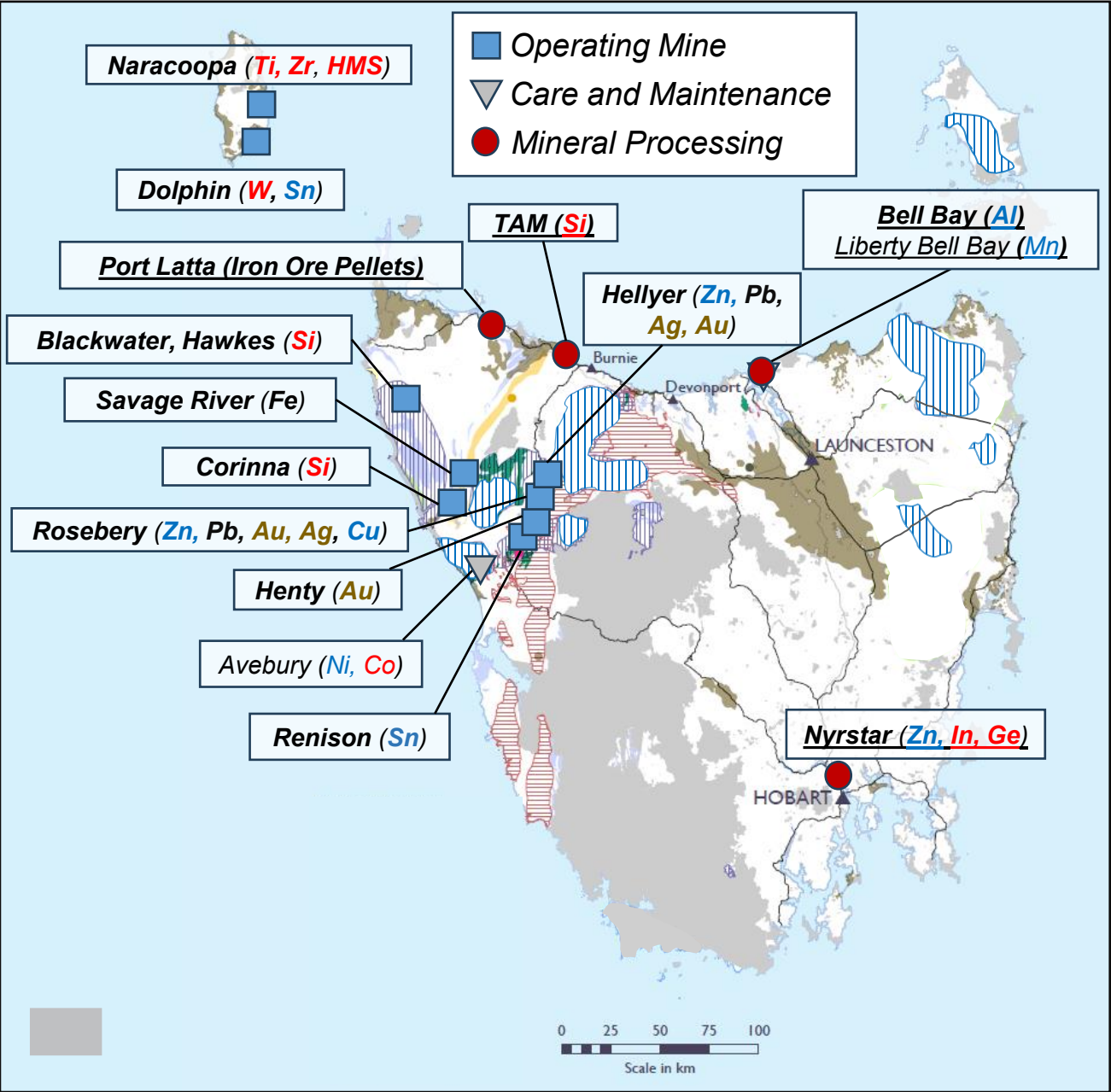
Current production and processing

Prospective Belts

-  **Cu, Zn, Pb, Au, In, Ge, Sb**
-  **Sn, W, F, Sb, Cu, As, Ag**
-  **Fe (magnetite), REE, Cu, Au, Mg**
-  **Ni, Co, Cu, PGE, Cr**
-  **Si (silica flour)**
-  **REE, Ti, Zr**

Production
Processing

Strategic minerals
Critical minerals
Precious metals

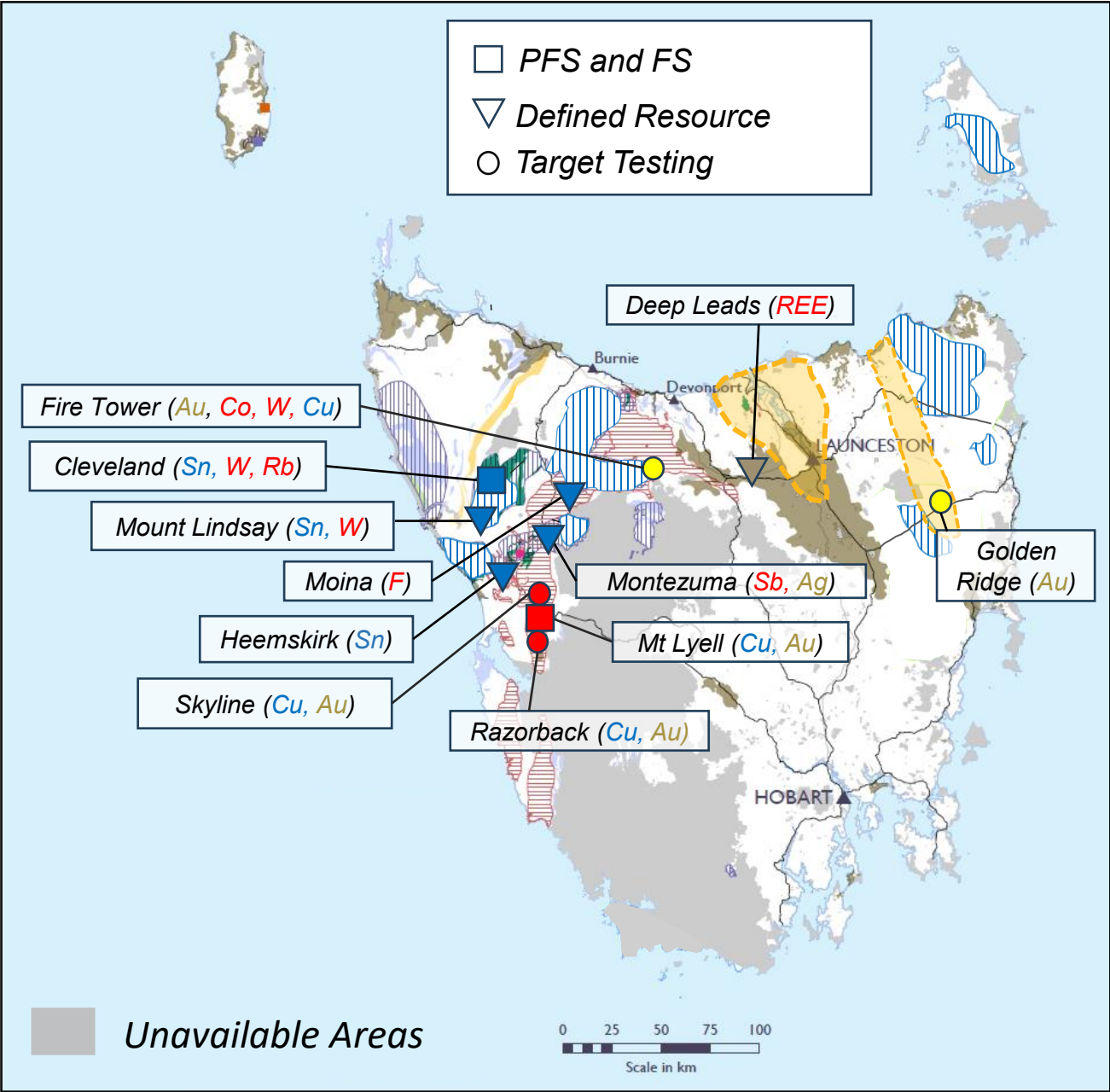


A pipeline of opportunities

Prospective Belts

-  **Cu, Zn, Pb, Au, In, Ge, Sb**
-  **Sn, W, F, Sb, Cu, As, Ag**
-  **Fe (magnetite), REE, Cu, Au, Mg**
-  **Ni, Co, Cu, PGE, Cr**
-  **Si (silica flour)**
-  **REE, Ti, Zr**

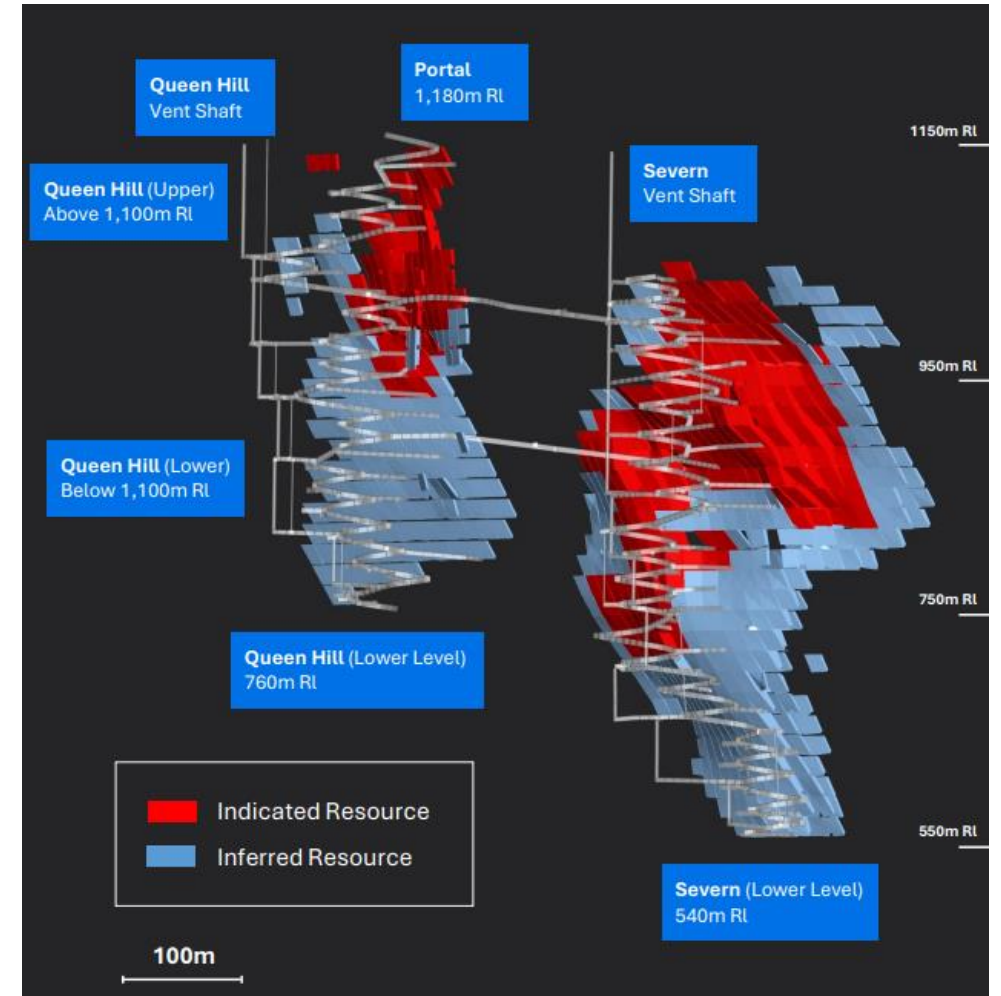
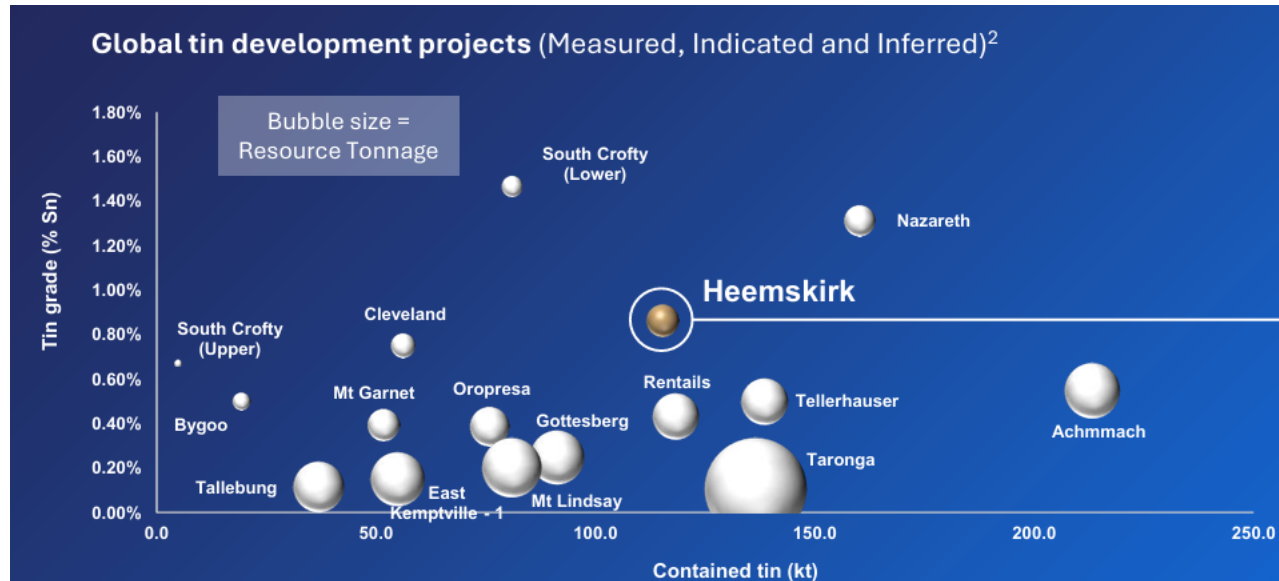
- Production**
- Processing**
- Strategic minerals**
- Critical minerals**
- Precious metals**



Project Pipeline – Heemskirk

Tin

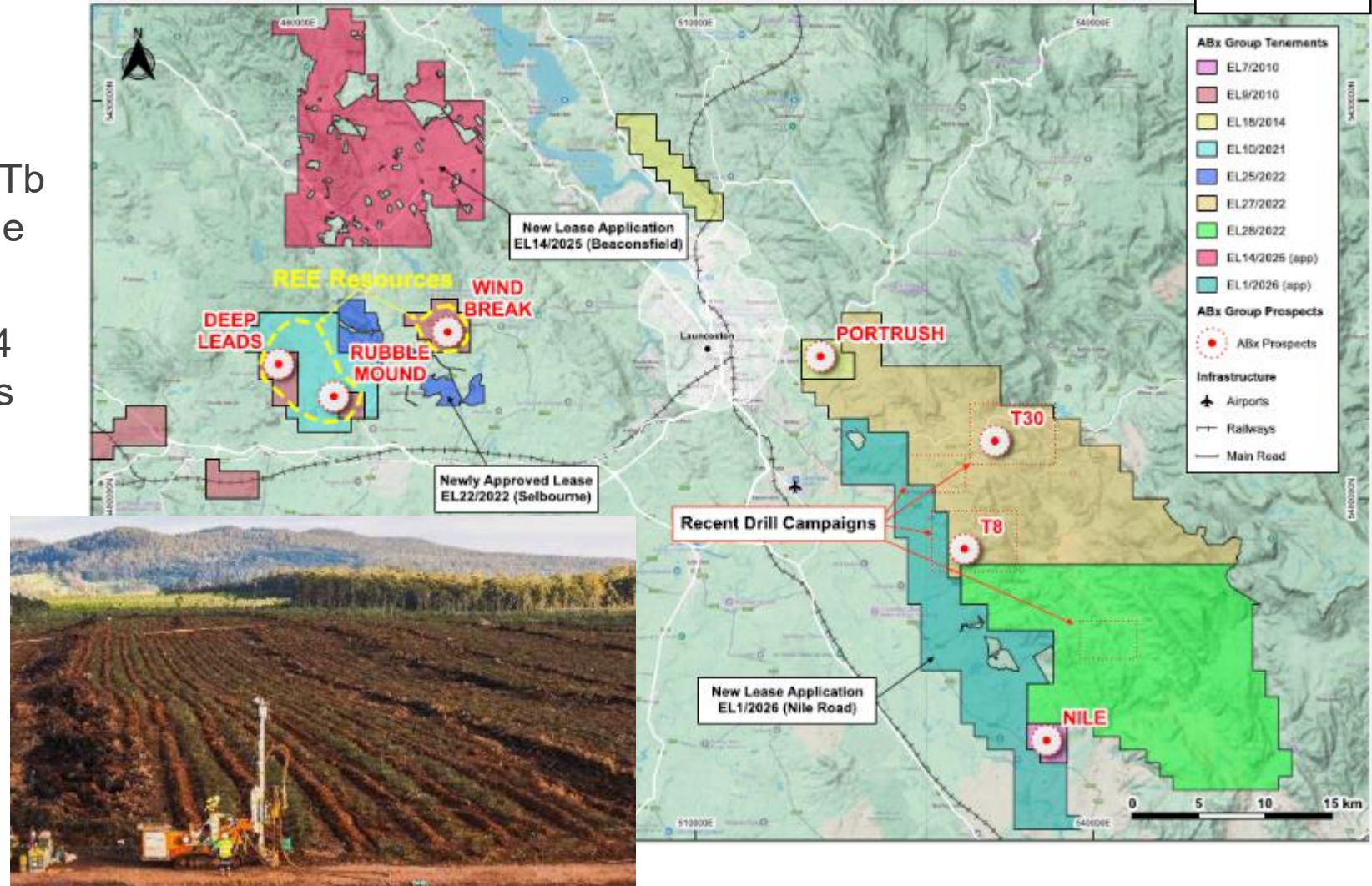
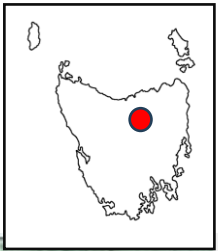
- Total resource of 13.4 Mt @ 0.86% Sn (115 kt contained Sn)
- Highest-grade undeveloped tin project in Australia and third highest globally
- Favourable metallurgy – 98% tin in cassiterite
- Imminent pre-feasibility studies
- Off-take unencumbered



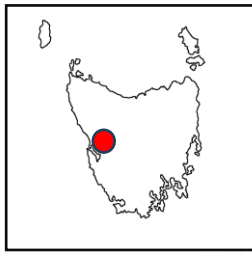
Project Pipeline – Deep Leads

Rare earth elements

- 89 Mt at 844 ppm TREO
- Ionic adsorption clay (IAC) type with among the highest Dy and Tb proportions of any IAC worldwide
- Highly favourable test work with high rare earth extraction at pH4 or above in less than 30 minutes
 - Lower reagent costs, lower impurity removal cost and lower rare earth losses
- ABx Deep Leads MREC (mixed rare earth carbonate) has 2.8 to 4.7 times the proportion of Dy+Tb compared to peer MRECs

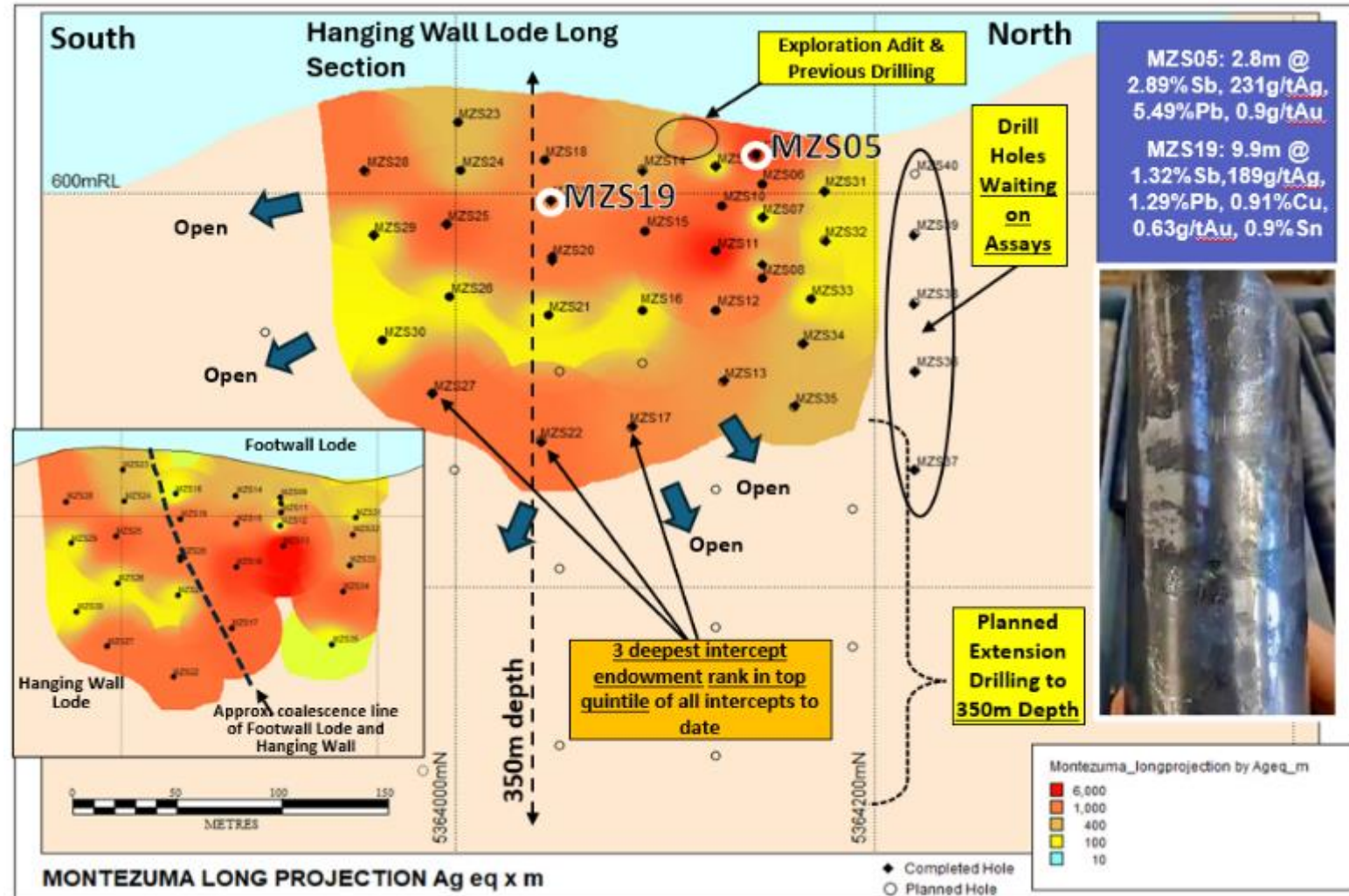


Project Pipeline – Montezuma



Antimony and silver

- Surface, exploration drive and drilling results indicate high grade Sb and Ag deposit
- New drilling shows the deposit extends to 220 m depth with upcoming drilled planned to 350 m depth
- Deposit open in multiple directions
- Initial MRE: 480 kt @ 533 g/t AgEq for 8.2 Moz AgEq (includes Ag, Au, Cu, Pb, Sb, Sn, S, As)
- Initial test work shows strong ore-sorting performance, with favourable flotation and leaching recoveries

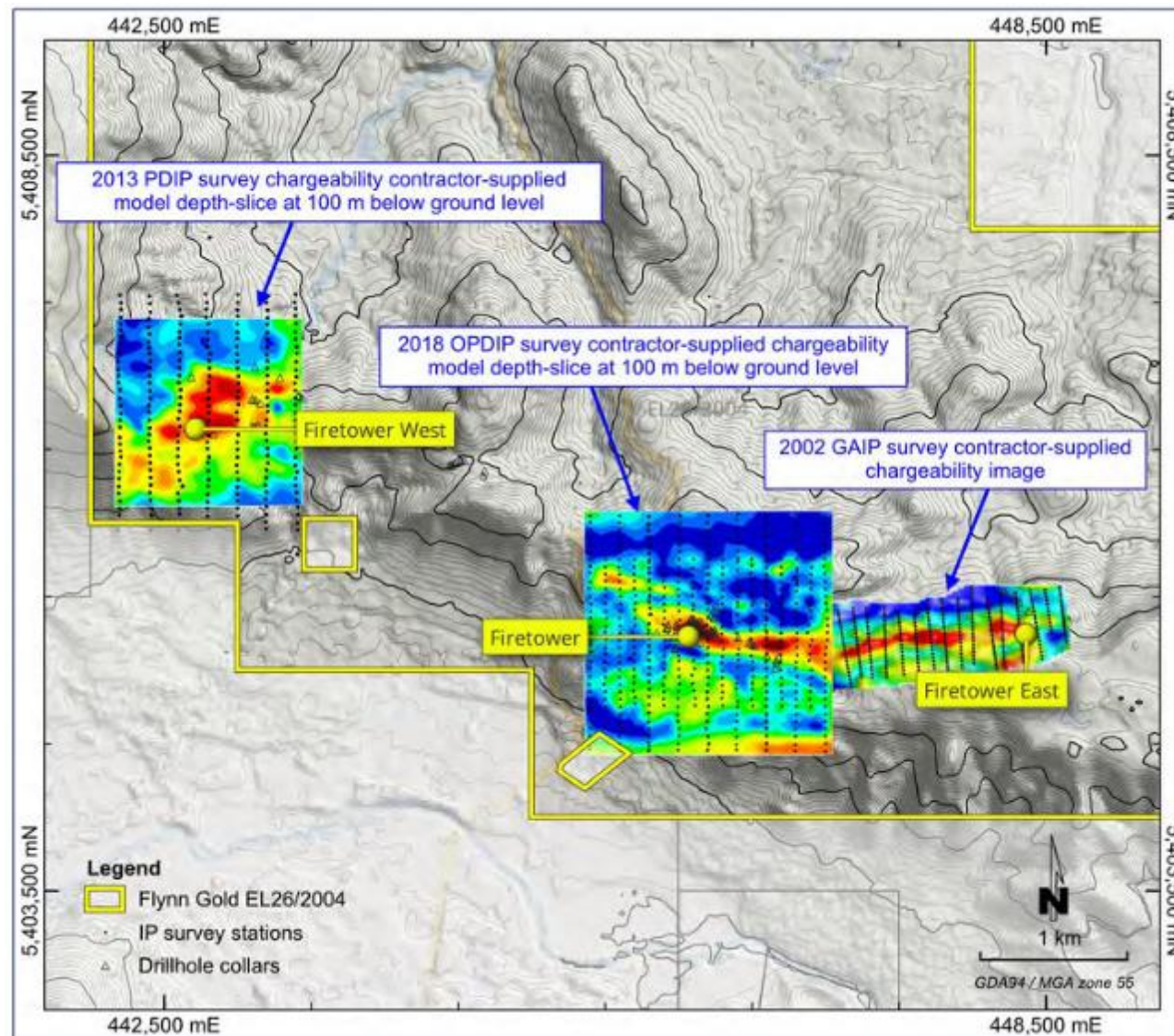
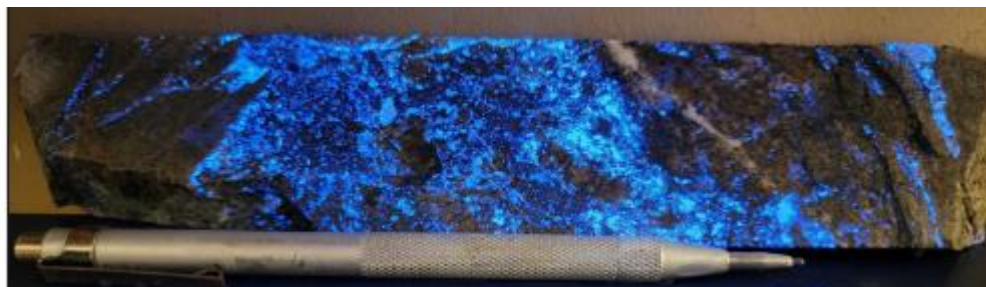


Project Pipeline – Firetower Au-Co-W-Cu



Tungsten

- High grade gold and tungsten
- Target testing
- Intersections:
 - 17 m (121–138 m) @ 2.31g/t Au, 0.51% WO₃
 - 9.64 m (200.13–209.77 m) @ 2.49g/t Au, 0.29% WO₃ and 0.52% Cu



Project Pipeline – Cleveland

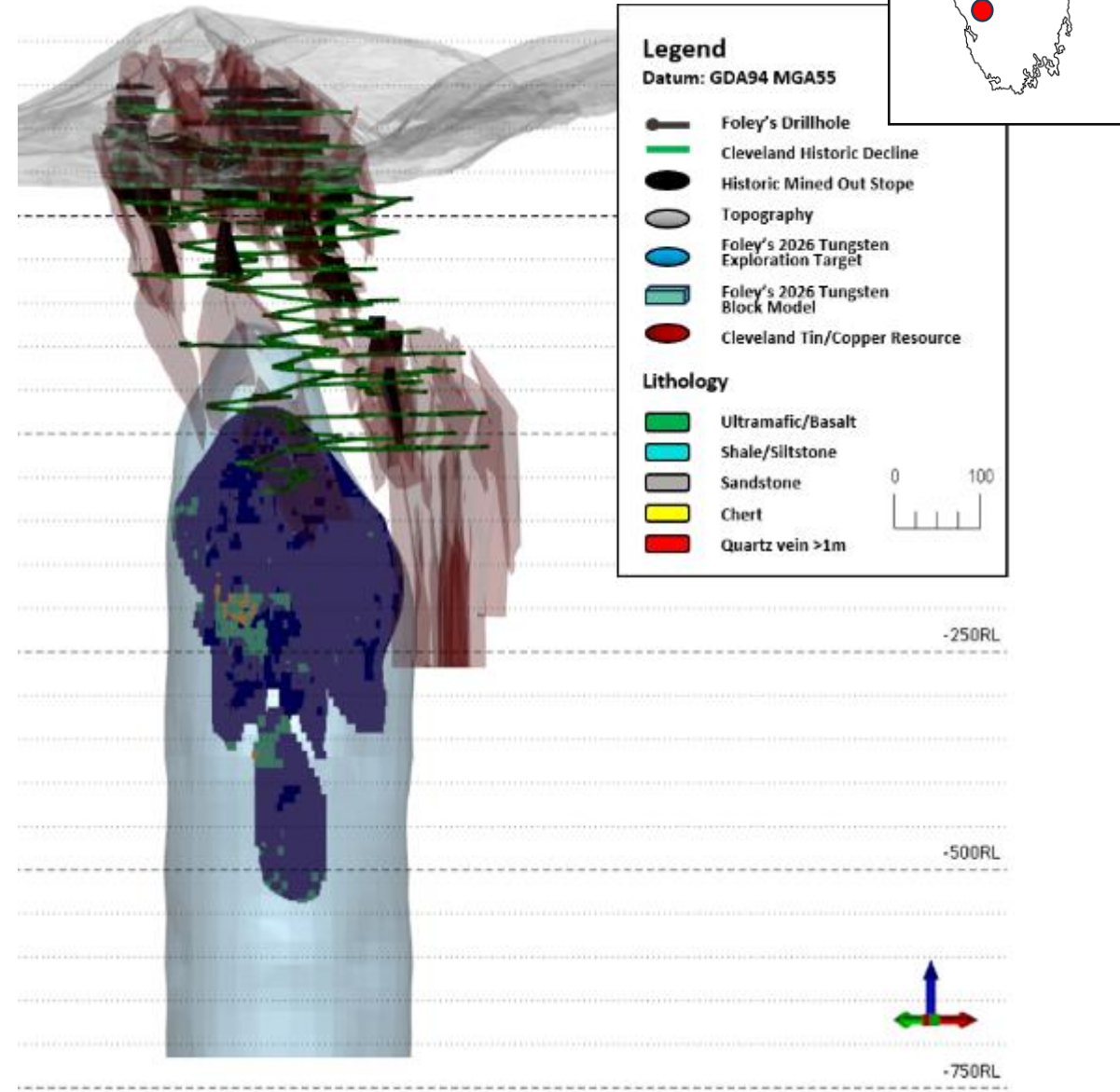
Tin, copper and tungsten

- **Total UG JORC Resources:**
 - 7.47 Mt @ 0.75% Sn (and 0.30% Cu)
 - 8.49 Mt @ 0.24% WO₃
- **Tailings JORC Ore Reserve (historic tailings)**
 - 3.70 Mt @ 0.29% Sn (and 0.13% Cu)
- **Exploration target**
 - 32 Mt @ 0.24%WO₃ – 90 Mt 0.17%WO₃
- Resource open at depth with new intercepts
- Critical minerals co-mineralised in tungsten
 - Rubidium (Rb), fluorspar (F), molybdenum (Mo)
- Ore Sorting (tungsten ore) upgrades 411–680%



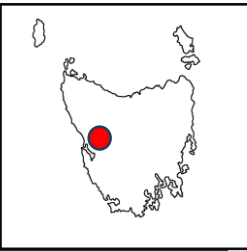
Tungsten (Wolframite) (ELT ASX release 03 October 2024)

ELEMENTOS



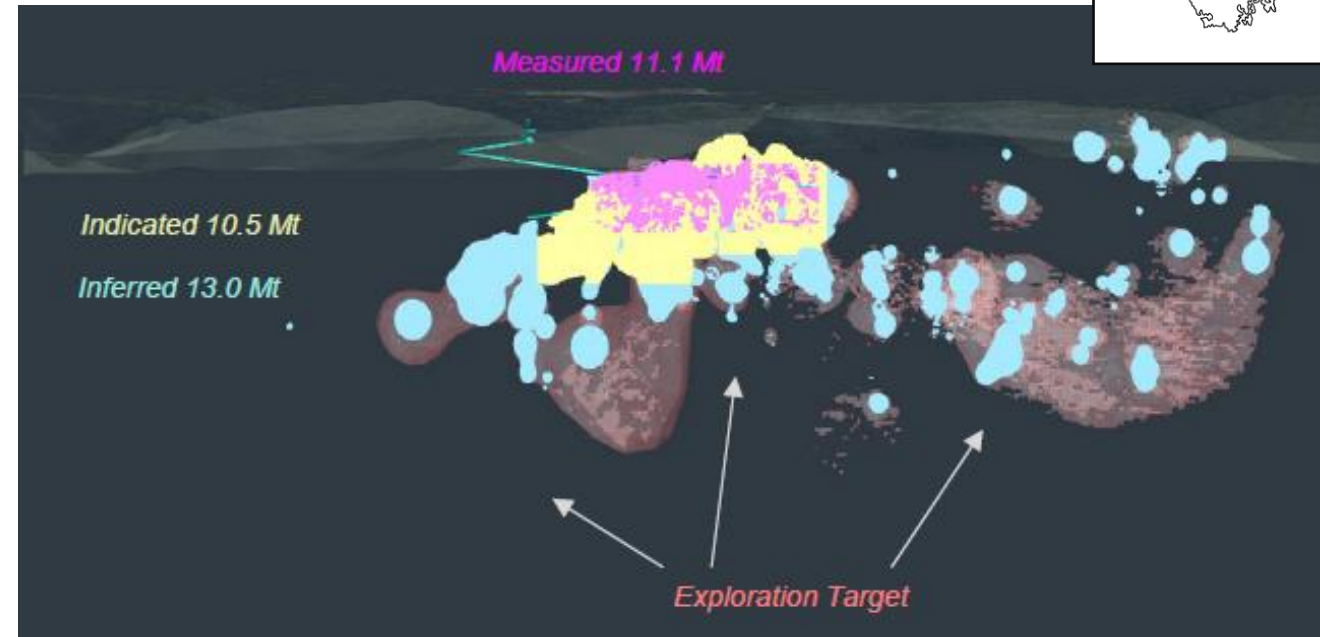
Care and maintenance – Avebury

Hartree



Nickel and cobalt

- Restart-ready operation
- High-quality, modern underground nickel sulfide mine with 6,000 tpa Ni in concentrate
- 20-year Mining Lease, 30 Mt JORC Resource with significant upside
- Processing facility with capacity 900 ktpa expandable to 1.2 mtpa



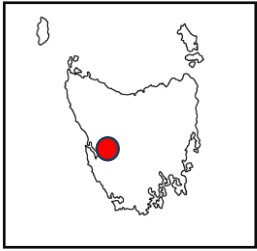
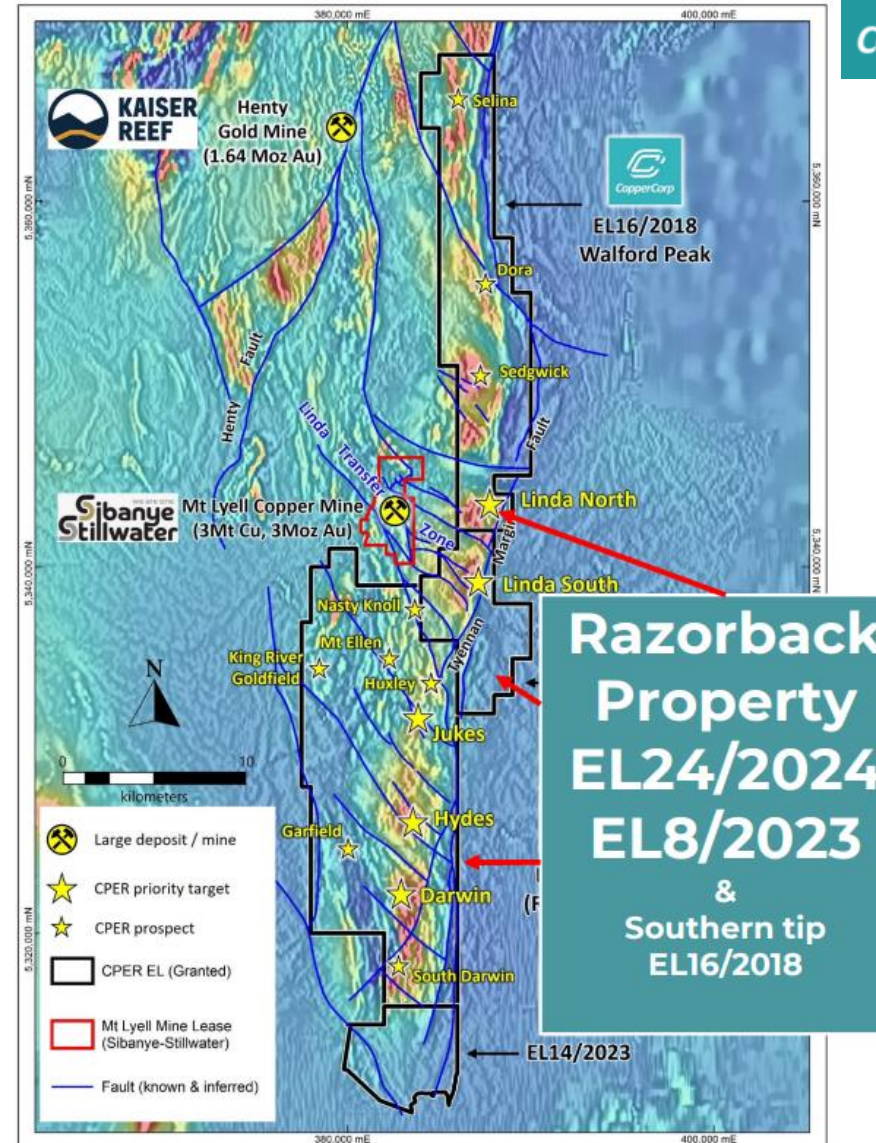
Avebury Nickel Mine



Project pipeline – CopperCorp

Copper, gold and silver

- Skyline and Razorback projects along trend of world class Mt Lyell Cu-Au deposit (nearing FID)
- 23 km of strike length
- Early exploration stage
- Highest priority targets at Jukes and Hydes
 - Jukes drilling
 - 132 m @ 0.35% Cu & 0.19 g/t Au
 - 50 m @ 0.66% Cu & 0.27 g/t Au
 - 12.6 m @ 0.78% Cu, 0.15 g/t Au
 - Hydes channel sampling
 - 24 m @ 0.74% Cu & 0.36 g/t Au



Jukes high grade



Tasmania's Minerals Advantage

Joe Gayton
Tasmanian Trade and Investment Advocate – Japan
Trade Tasmania



AUSTRALIA MINERALS

REALISE THE OPPORTUNITY

Victoria's golden opportunity

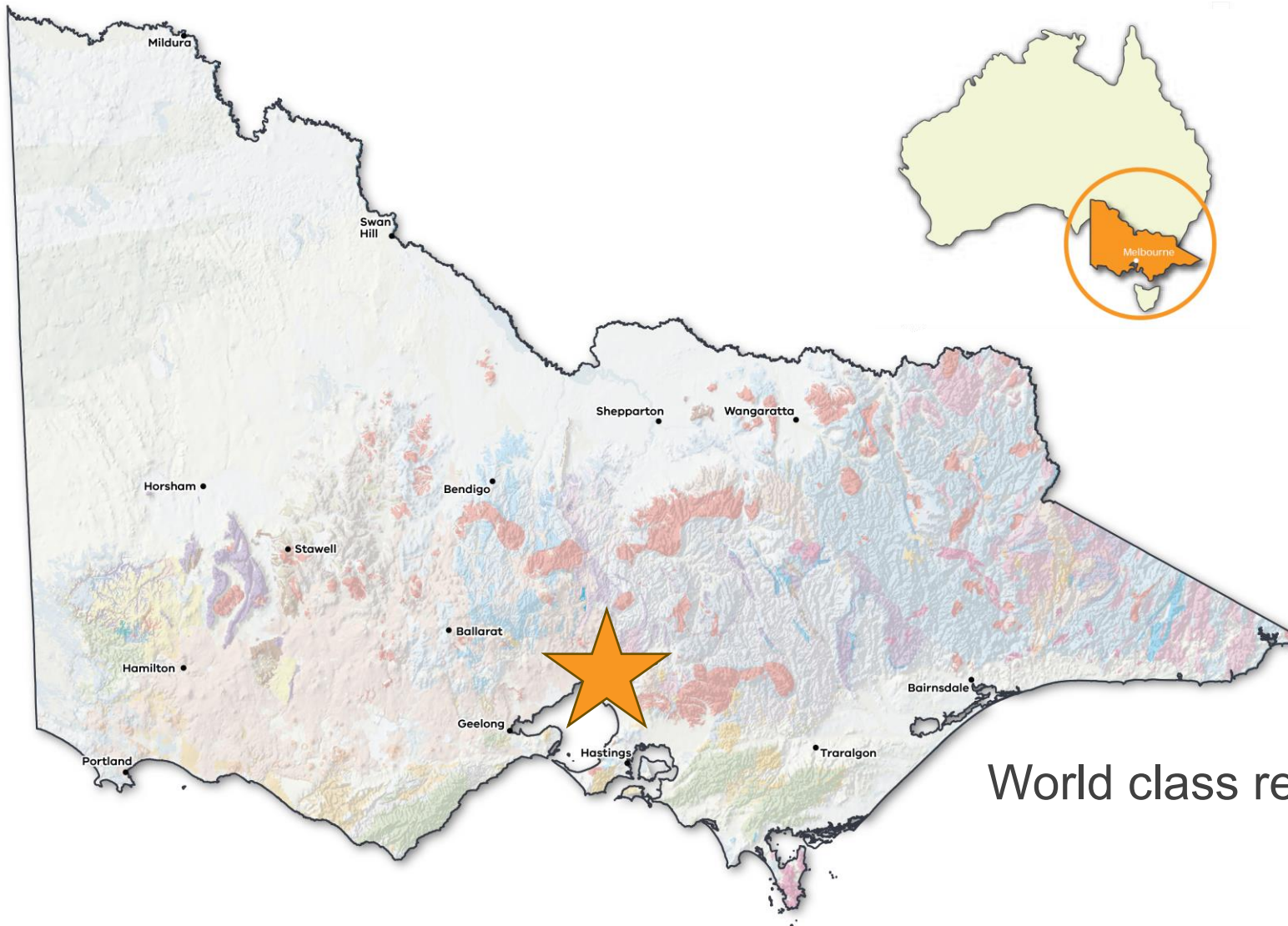
REEs, antimony and more

Shannon.Brown@deeca.vic.gov.au

Manager – Resources Development and Investment
Resources Victoria



Victoria: a world-renowned jurisdiction



Capital: Melbourne

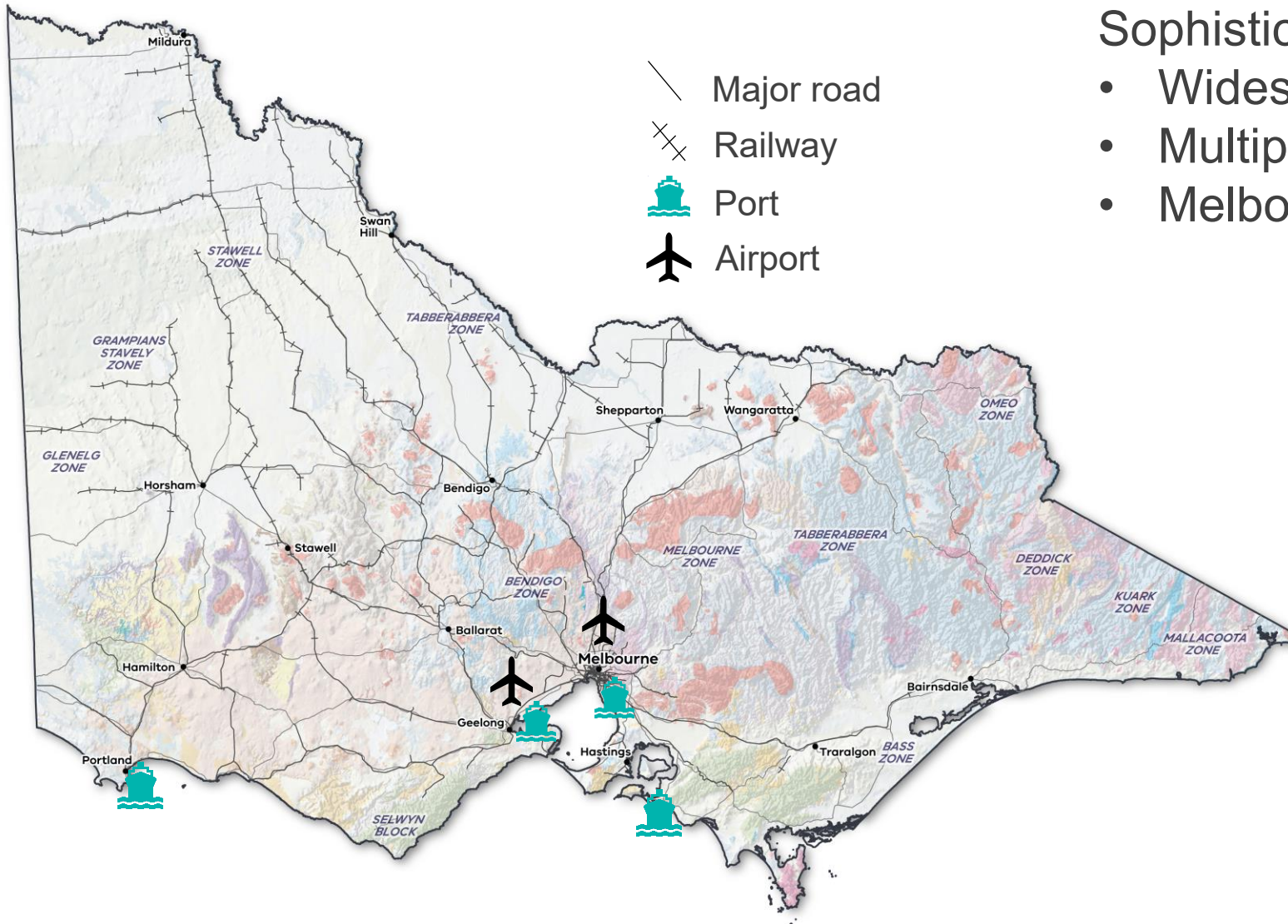
Victorian population: 7.1 million

Highly skilled residential workforce

World class research institutions and universities

Thriving METS sector

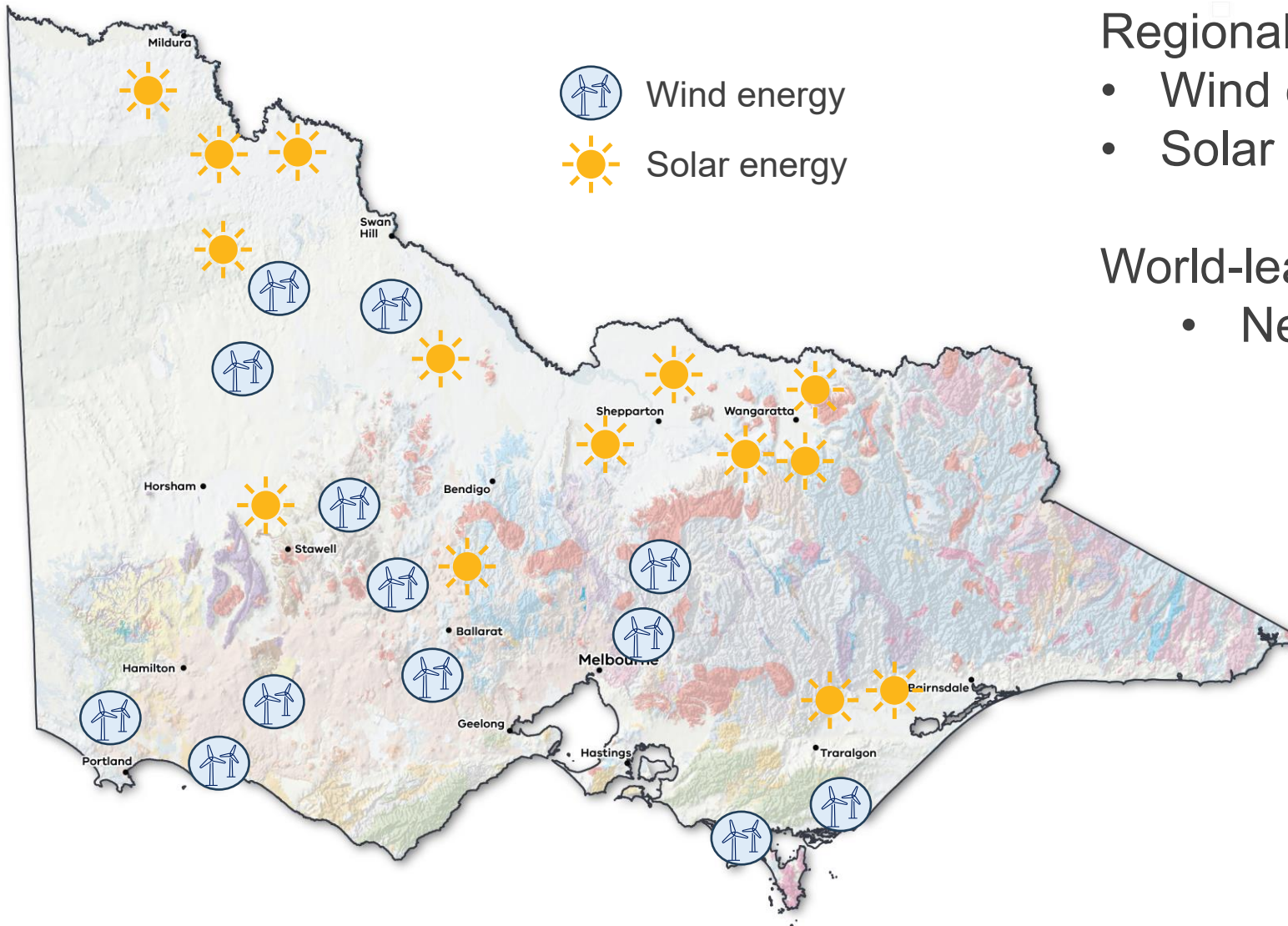
Transport linkages



Sophisticated infrastructure, including:

- Widespread rail & roads
- Multiple ports
- Melbourne and Avalon Airport

Renewable energy



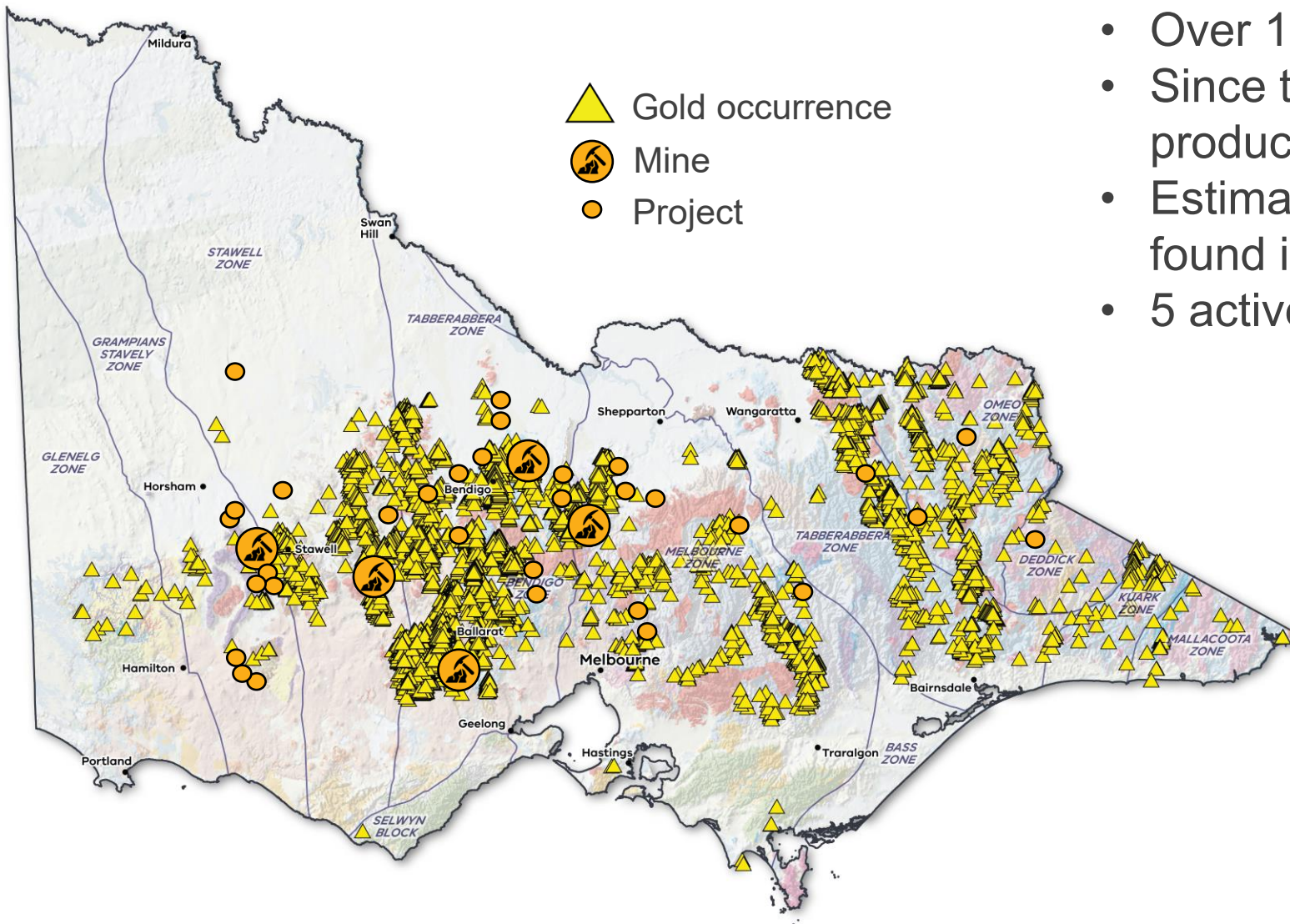
Regional access to renewable energy

- Wind energy
- Solar energy

World-leading emission reduction targets

- Net zero emissions by 2045

Gold



- Over 150 years of gold mining experience
- Since the 1850s gold rush, Victoria has produced over 80 million oz of gold
- Estimated 75 million oz of gold still to be found in northern Victoria
- 5 active gold mines

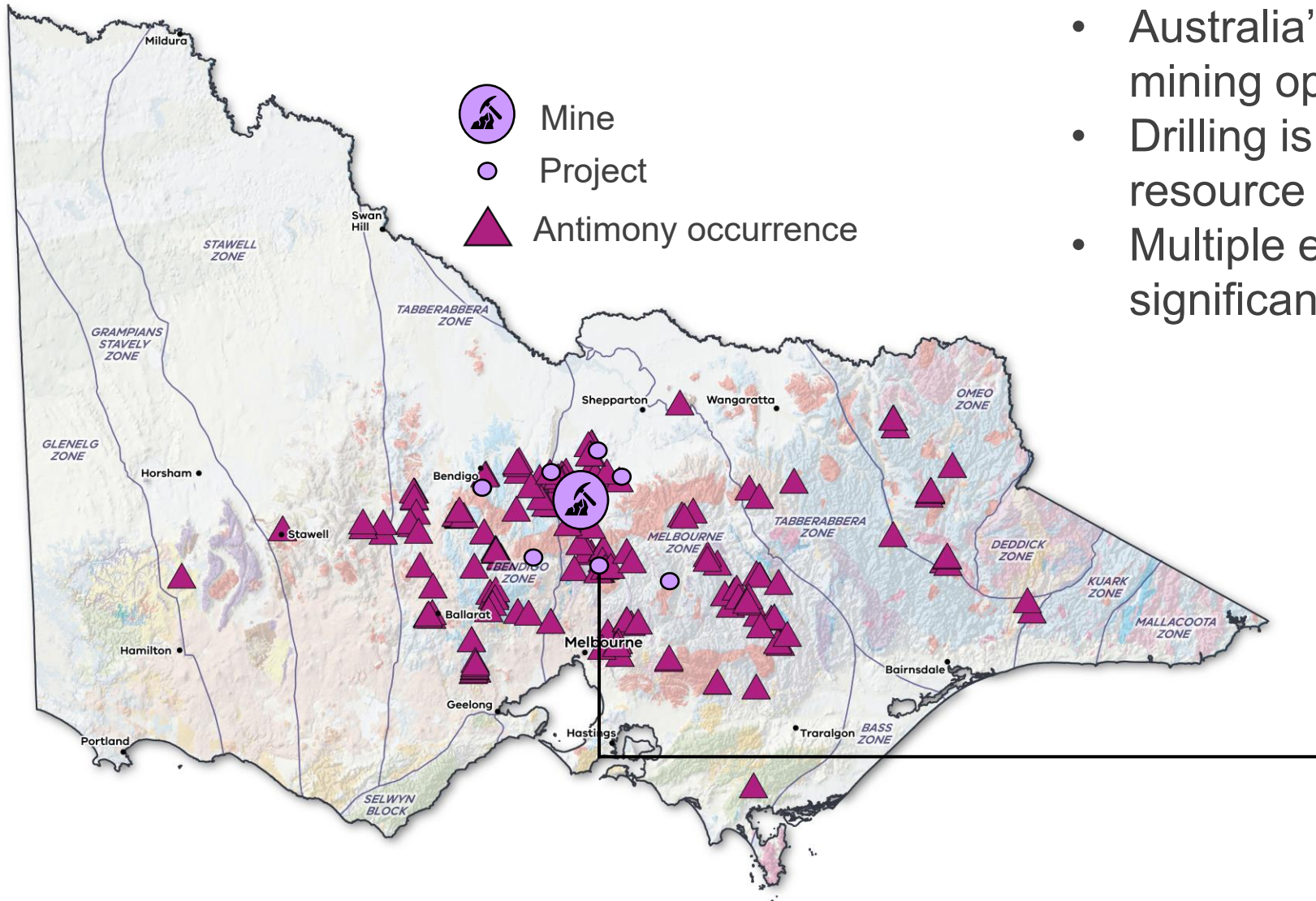


Fosterville Gold Mine
Alkane Resources
Average of 58.8 g/t Au in the 'Swan Zone'



Blue Moon Project
Falcon Metals
1.2 m at 543 g/t Au

Antimony



- Australia's longest running antimony-gold mining operation
- Drilling is uncovering new areas for resource extension and production
- Multiple exploration projects with significant potential in Central Victoria

Sunday Creek Project
Southern Cross Gold
Decline construction, 2026



The Victorian gold-antimony advantage

Antimony commonly occurs with gold in Victoria, providing a unique economic advantage that can enhance project viability

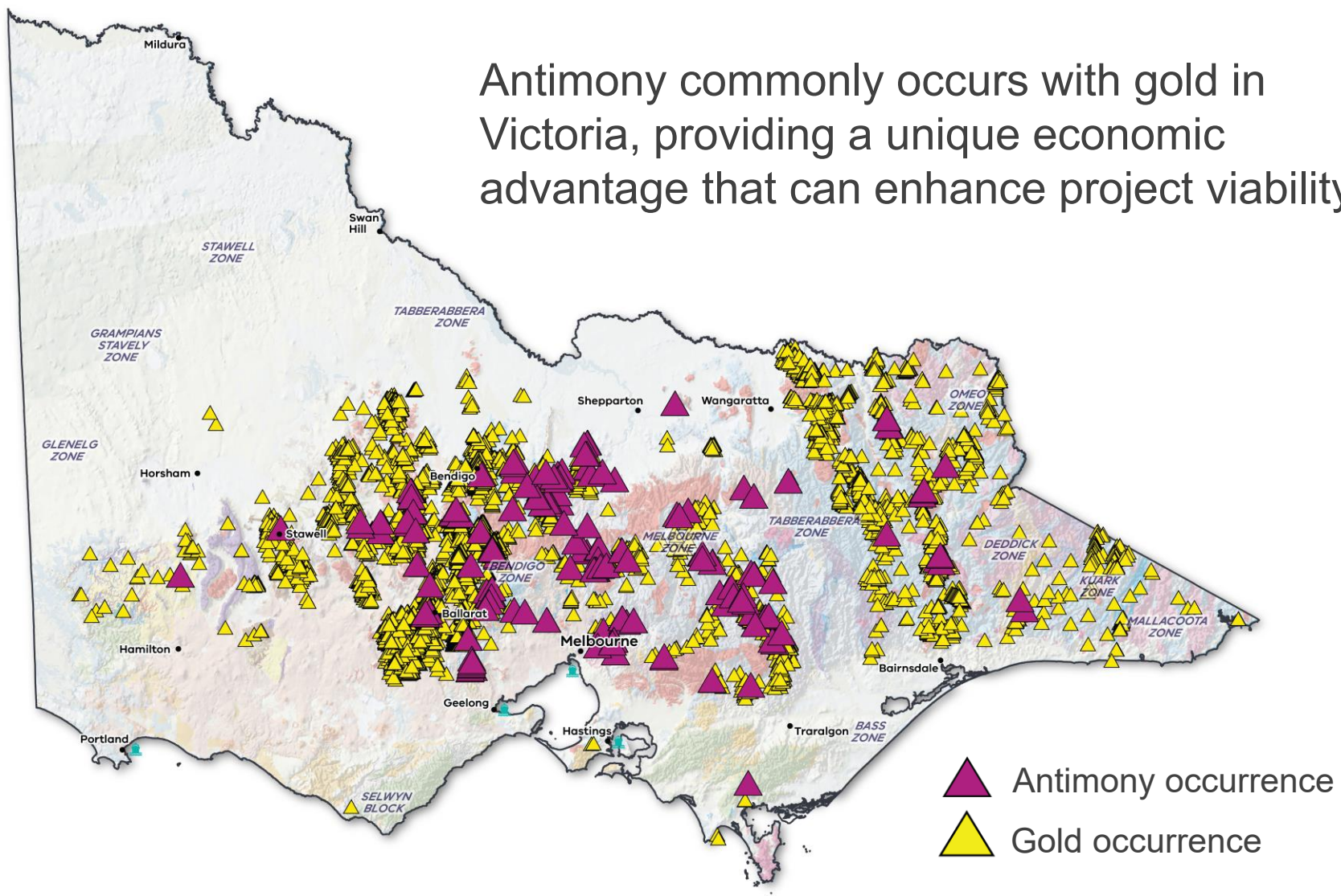
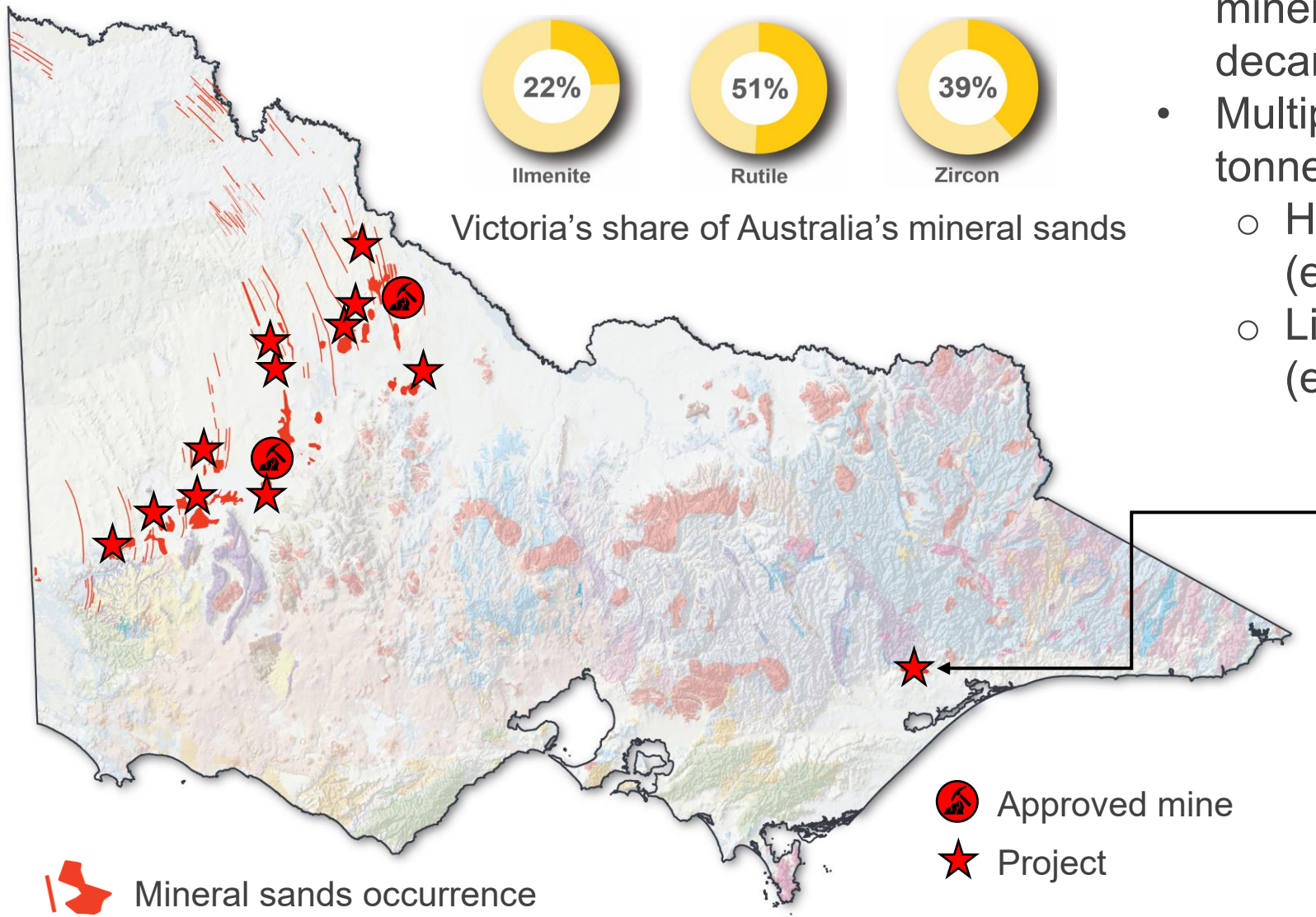


Photo courtesy of Southern Cross Gold
0.2 m @ 4,700 g/t Au and 0.26% Sb

Mineral sands



- Northwest Victoria is home to the critical minerals required for electrification and decarbonisation.
- Multiple long-life deposits, billions of tonnes each.
 - Heavy Rare Earth Elements (e.g. dysprosium, terbium)
 - Light Rare Earth Elements (e.g. neodymium, praseodymium)



Fingerboards Project Demonstration Pit, Gippsland Critical Minerals 2026

Copper

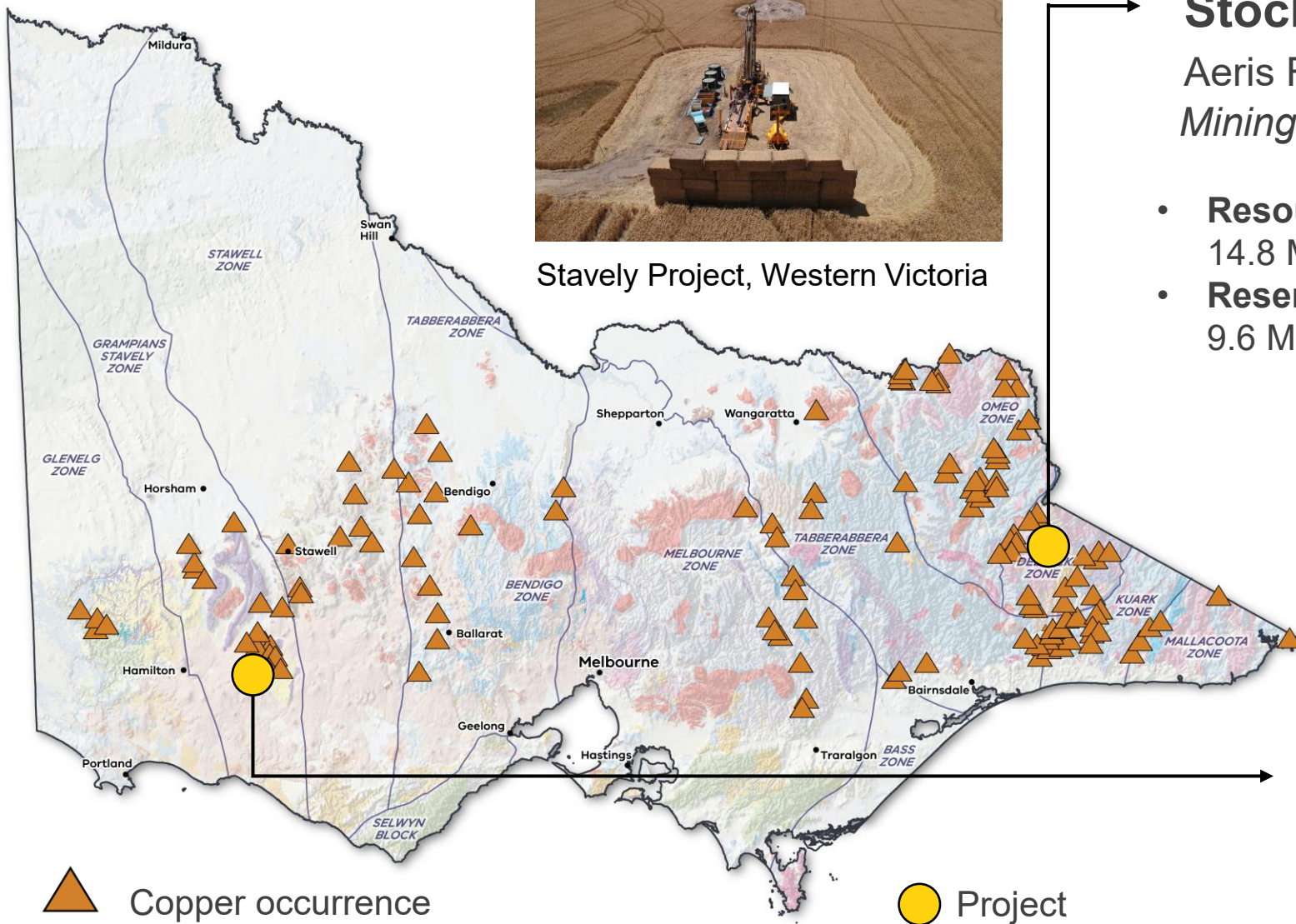


Stavely Project, Western Victoria

Stockman Project

Aeris Resources
Mining Licence

- **Resource:**
14.8 Mt @ 2.09% Cu, 4.0% Zn, 0.94 g/t, 36 g/t Ag
- **Reserve:**
9.6 Mt @ 1.9% Cu, 4.3% Zn, 1.0 g/t Au, 36 g/t Ag

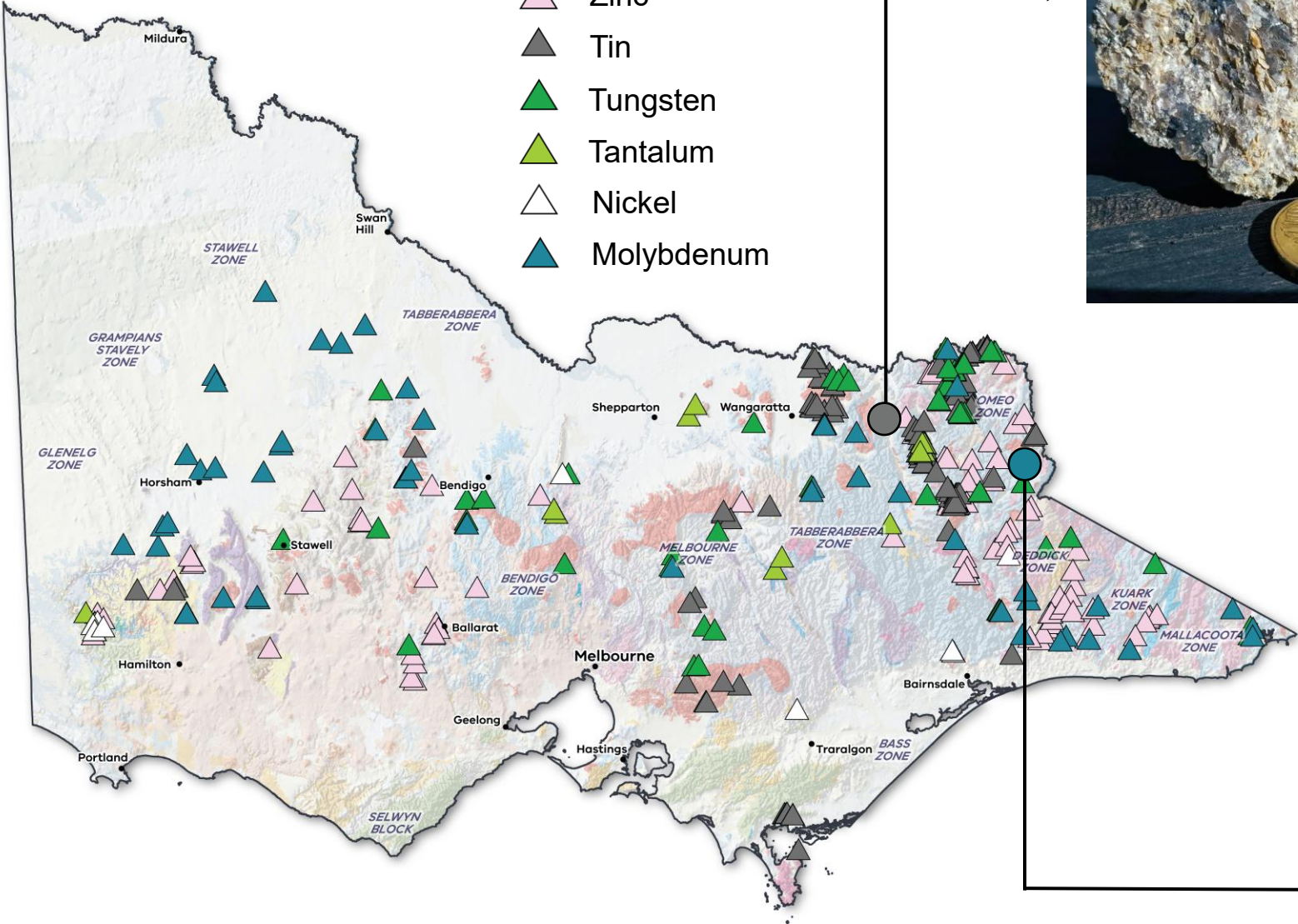


Stavely Project Stavely Minerals

- Scoping study completed August 2026
- **Resource:**
60 Mt @ 0.46% Cu, 0.09 g/t Au and 2.8 g/t Ag

Other critical minerals

- △ Zinc
- ▲ Tin
- ▲ Tungsten
- ▲ Tantalum
- △ Nickel
- ▲ Molybdenum



Southern Lachlan Project
Kali Metals
Tin-bearing hand sample

Indigo Metals
Unicorn Project
Molybdenum-bearing hand sample



The Victorian Critical Minerals Roadmap



Theme 1: Mapping the opportunities

Identify and promote new critical minerals opportunities



Theme 2: A modern regulatory regime

Establish a Victorian Approvals Coordinator to reduce approvals timelines



Theme 3: Critical minerals production and processing

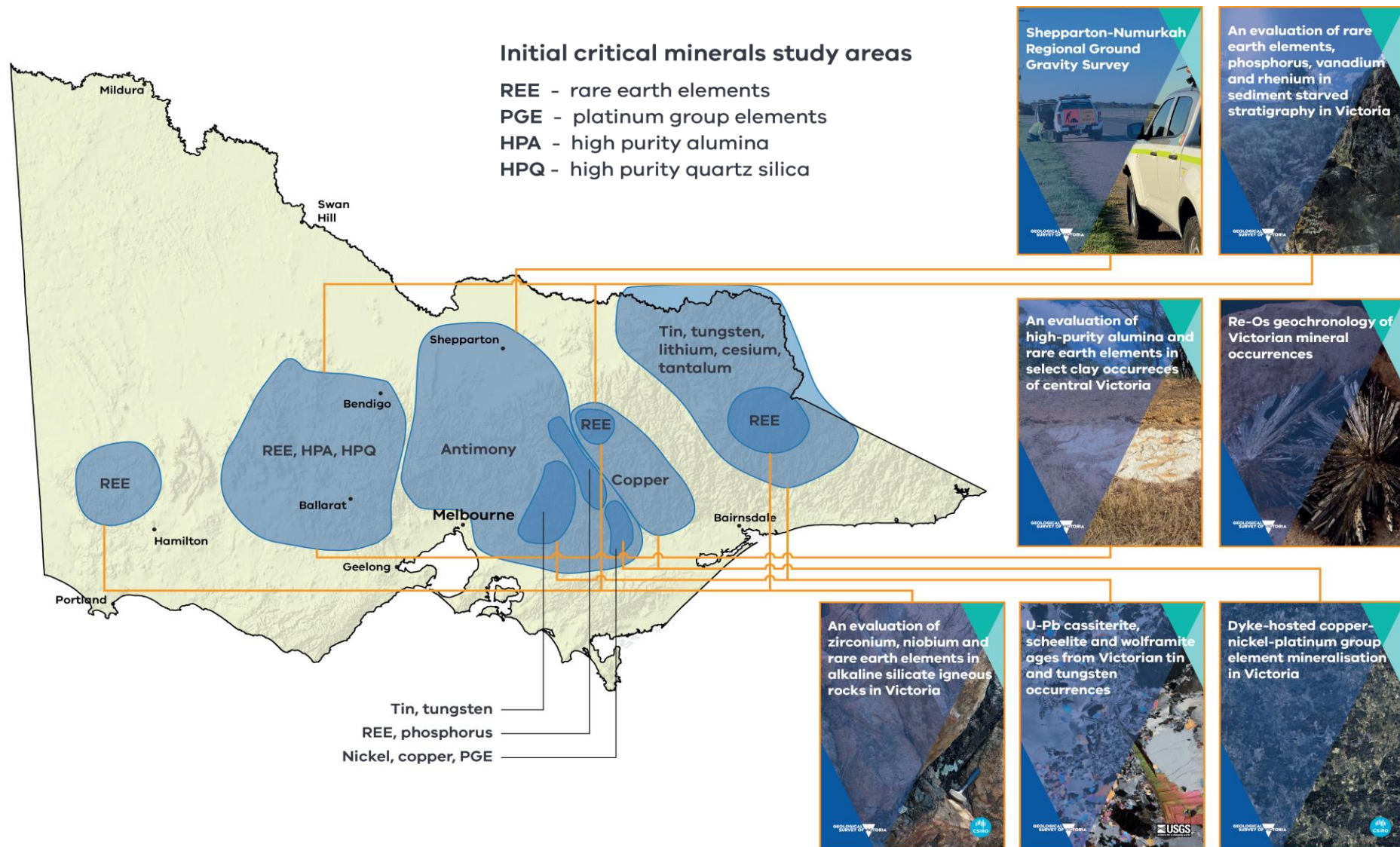
Investigate potential economic and national supply security benefits from downstream processing facilities



Theme 4: Sharing the benefits of Victoria's minerals

Investigate benefit sharing models for local communities and Traditional Owners

Theme 1: Mapping the opportunities



Theme 1: Mapping the opportunities

- **New** antimony report available via QR code
- 10 additional reports exploring critical and strategic mineral potential across Victoria

Further studies underway:

- Platinum group elements
- Lithium
- High purity quartz silica

Download the reports here:
[*earthresources.efirst.com.au*](https://earthresources.efirst.com.au)



Theme 2: Approvals certainty for industry and investors

- Implemented the Resources Victoria Approvals Coordination Office
- Direct engagement with proponents to support smooth approvals process
- Approval timelines reduced by **40%**
- In the past 18 months:
 - Two new mines fully approved: construction commenced
 - Two new exploration declines
 - Victoria's largest gold mine extended for an extra 10 years

VHM secures federal approval for Goschen project



Astron Corporation's Donald Project given green light by Victorian government

By Angus Verley ABC Rural Mineral Sands

Posted 25 Jun 2025 at 6:53pm, updated 28 Jun 2025 at 11:55am



Federal government approves expansion of Victoria's largest gold mine near Bendigo

By Anna McGuinness, Sarah Lawrence and Emile Pavlich

ABC Central Victoria Mining Environmental Issues

Posted 6 Nov 2025 at 5:23pm, updated 6 Nov 2025 at 5:24pm



Critical minerals project pipeline

Project name	Ownership	Resource	Scoping or DFS	Environmental Effects Statement	Mining Licence	Work Plan (final approval)
Donald Mineral Sands	Astron Corporation	2,634 Mt @ 4.6% HM	✓	✓	✓	✓
Goschen	VHM Limited	684 Mt @ 2.9% HM	✓	✓	✓	✓
Avonbank	WIM Resource	311.8 Mt @ 4.3% HM	✓	✓	 Under assessment	
Fingerboards	Gippsland Critical Minerals	1,170 Mt @ 0.5% Zr, 1% TiO ₂ , 0.05% TREO + Y ₂ O ₃	 Underway	 Underway		
Wimmera	Iluka Resources	2,272 Mt @ 5.6% HM	 Underway	 Underway		
Goschen Central	ACDC Metals	620 Mt @ 2.2% HM, 1.7% TREO	 Scoping Study completed 2025			
Stavely Project	Stavely Minerals		 Scoping Study completed 2026			

Theme 3: Critical minerals production and processing

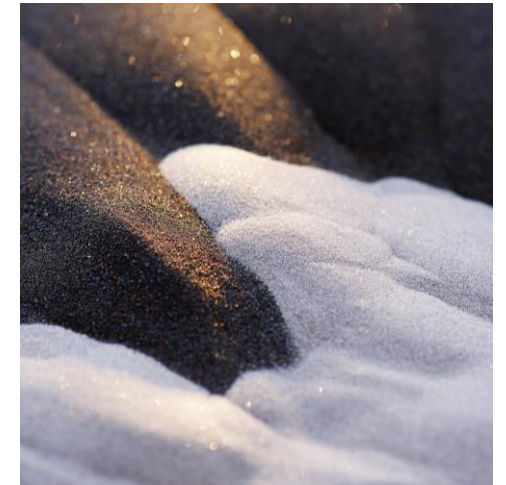
Antimony processing scoping study

- Demonstrated the economic viability of producing higher-value antimony products in Victoria, including antimony trioxide and ingots
- Informed a A\$1 million Antimony Processing Grants Program to support investment-ready projects and strengthen sovereign supply chains



Rare Earth Element (REE) metallisation study

- Examined opportunities for Victoria to support a fully integrated Australian rare earth supply chain
- Identified strong feedstock potential and pathways for downstream rare earth processing using advanced, sustainable technologies



Let's collaborate

Our vision is to be a world-leading, responsible critical minerals sector that:

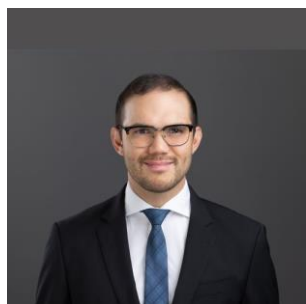
- ✓ Has timely approvals for development
- ✓ Delivers significant economic benefits for regional communities
- ✓ Is environmentally responsible
- ✓ Creates opportunities for future downstream industries
- ✓ Forms strong and lasting partnerships with local communities and Traditional Owners



Connect with us

Tokyo Office

Victorian Government Trade and Investment
Level 12, Fukoku Seimei Building
2-2-2 Uchisaiwai-cho, Chiyoda-ku
Tokyo 100-0011, Japan



Mr Josh Riley
Commissioner for Victoria to North Asia

Email: josh.riley@global.vic.gov.au

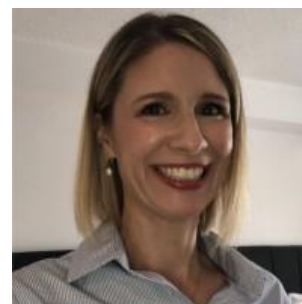


Ms Kiyoko Ozawa
Senior Investment Director

Email: kiyoko.ozawa@global.vic.gov.au

Melbourne Office

Resources Victoria
Level 8 & 9, 8 Nicholson St
East Melbourne, 3001
Australia



Ms Jacqueline Leahy
Director, Critical Minerals

Email: jacqueline.leahy@deeca.vic.gov.au



Ms Shannon Brown
Manager, Resources Development
and Investment

Email: shannon.brown@deeca.vic.gov.au

Thank you

shannon.brown@deeca.vic.gov.au

Manager – Resources Development and Investment

Resources Victoria

resources.vic.gov.au



AUSTRALIA MINERALS

REALISE THE OPPORTUNITY

Western Australia: The destination of choice

World-class rare earth and niobium

Dr Phil Gorey
Trade Commissioner – North East Asia
Invest and Trade Western Australia



Invest & Trade
WESTERN AUSTRALIA



**Department of Mines,
Petroleum and Exploration**

World-class rare earth and niobium

OPERATIONAL

to

ADVANCED PROJECTS

to

NEW FRONTIERS

Western Australia: The destination of choice

Western Australia REE statistics data (2024–25 financial year)

33,850 t
Tonnes sold



830
Full-time
employees



3rd
Production
world ranking



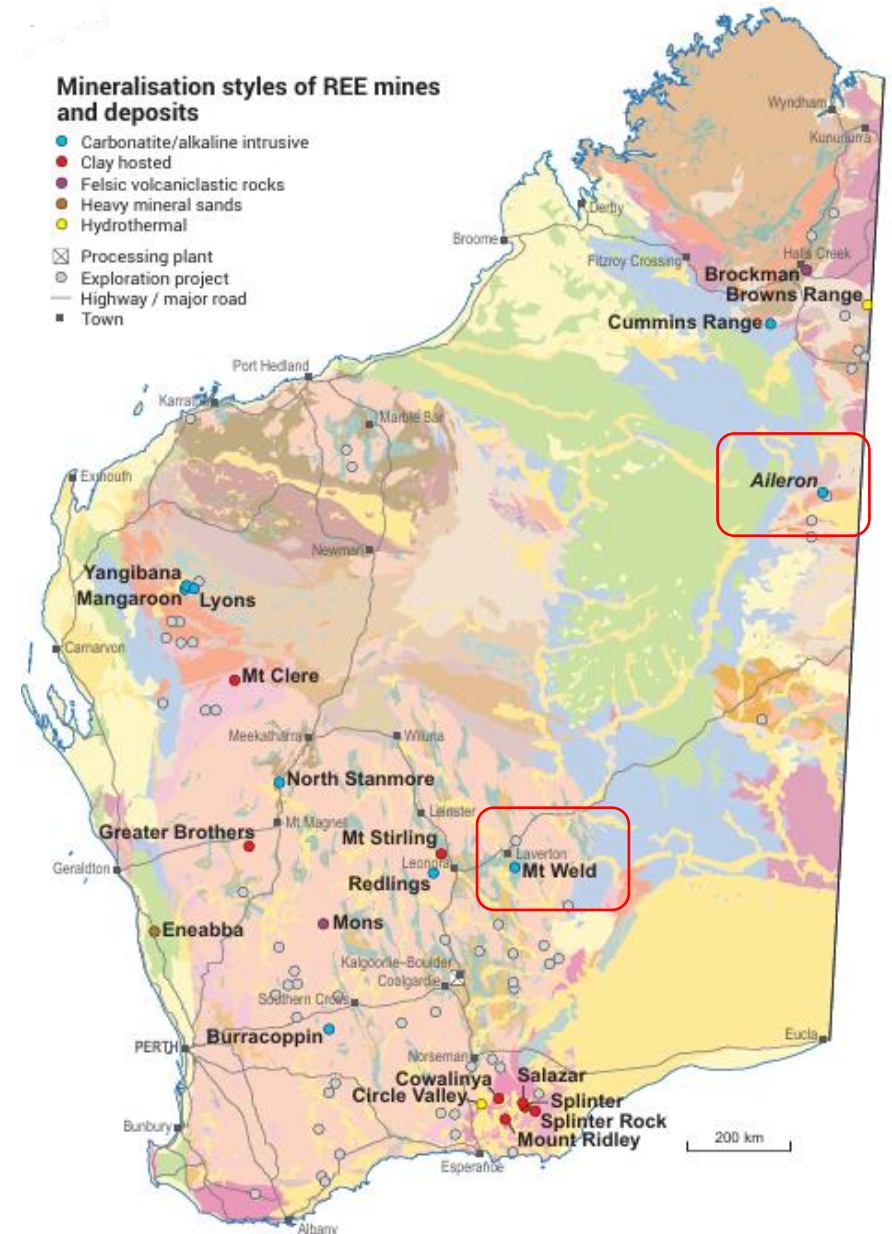
\$4,527 m[†]
Investment
projects



2.5%
Royalty
rate

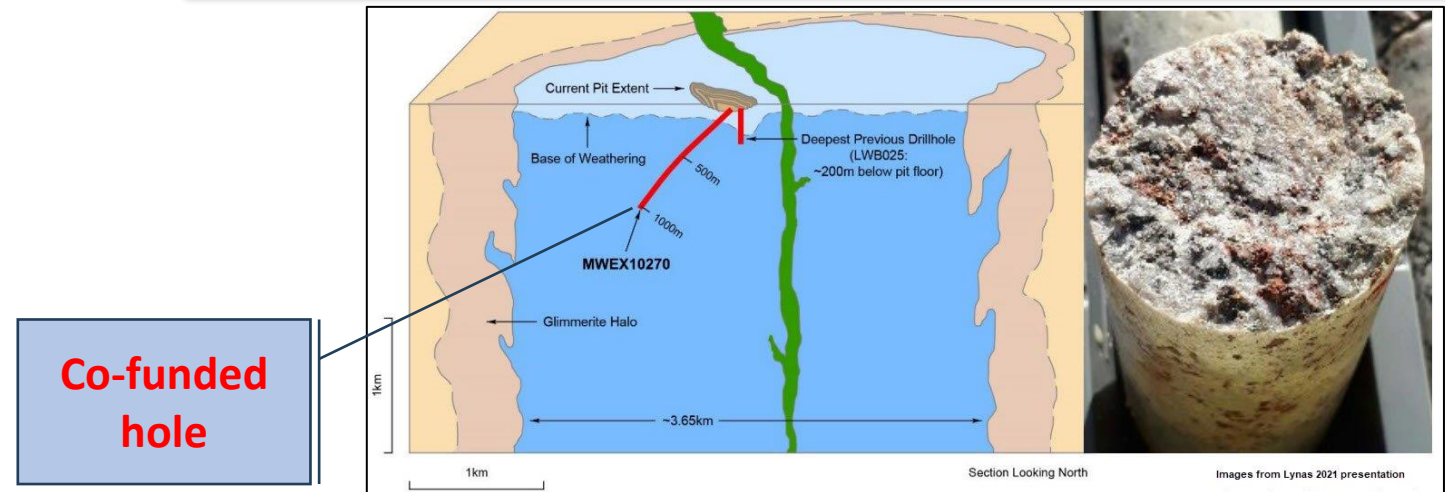


[†] Includes projects planned, possible, committed or under construction as of September 2025



OPERATIONAL – Lynas Rare Earths (Mt Weld deposit)

- Tier 1, high-grade rare earths deposit
- >20-year mine life
- Light and heavy rare earths, including neodymium and praseodymium
- 65 MW hybrid power solution: 4 wind turbines, 7 MW solar and 12 MW/12 MWh battery storage
- A fraction of what is available from the pipe



OPERATIONAL – Lynas Rare Earths

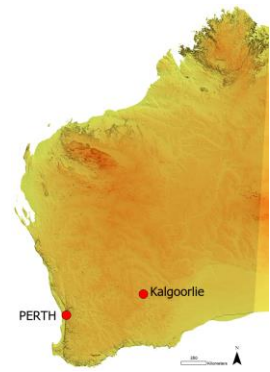
Full construction approvals granted in
early 2022

to

First Mixed Rare Earth Carbonate(MREC)
produced in June 2024

MREC goes to Malaysia for final
separation into rare earth products

Kalgoorlie Rare Earth Processing Facility



Kalgoorlie Rare Earths Processing Facility

Image from Lynas Website

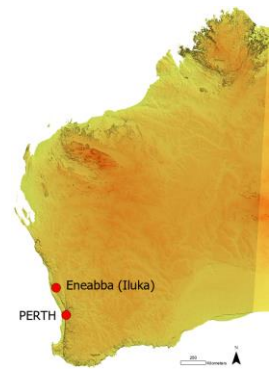
Advanced projects – Building the next wave

Iluka Resources

Downstream processing

2027 commissioning

- Supported by the Australian Government's Critical Mineral Facility fund
- Secured A\$1.65 billion non-recourse loan
- Risk sharing provides robust platform
- Neodymium, dysprosium, terbium and praseodymium



Eneabba refinery construction



Image from Iluka Website

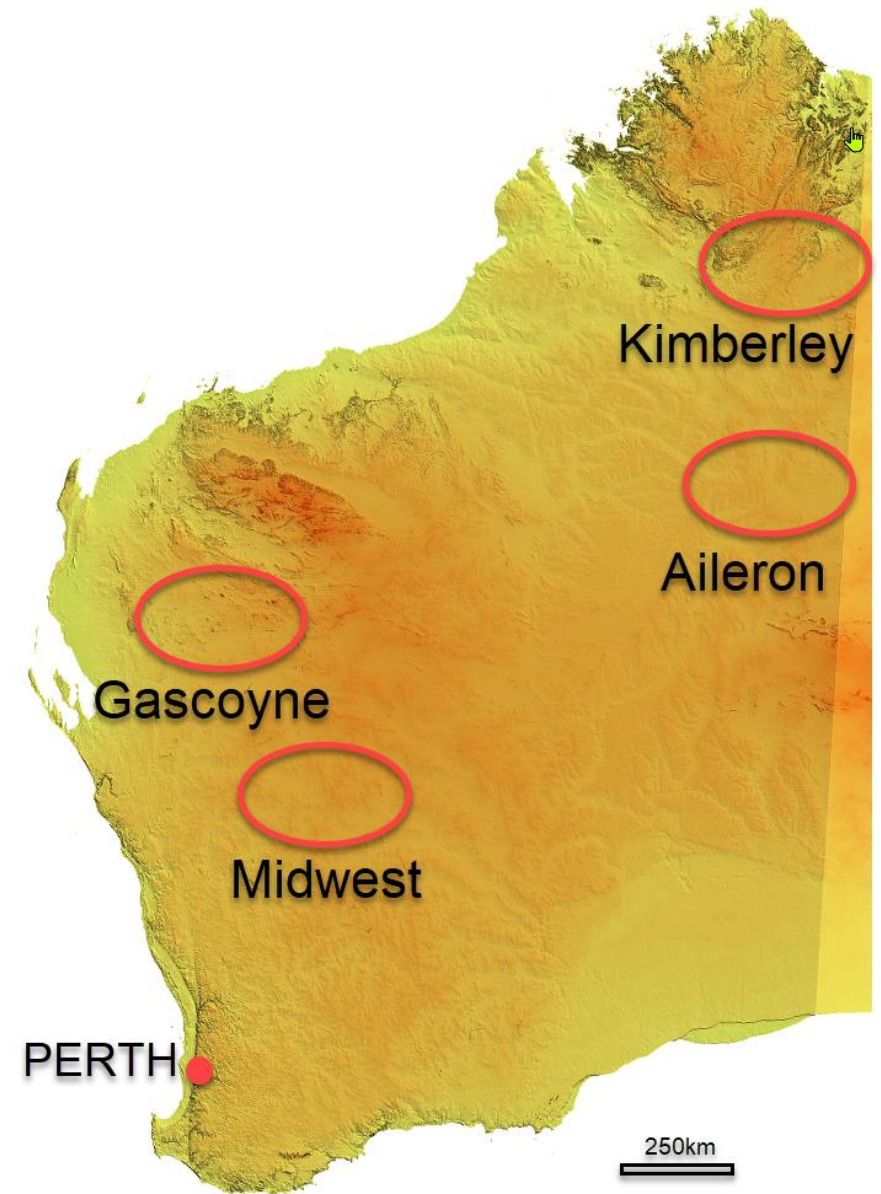
New Frontiers – Early mover opportunities

Overlooked

Considered un-prospective

Searching for another commodity

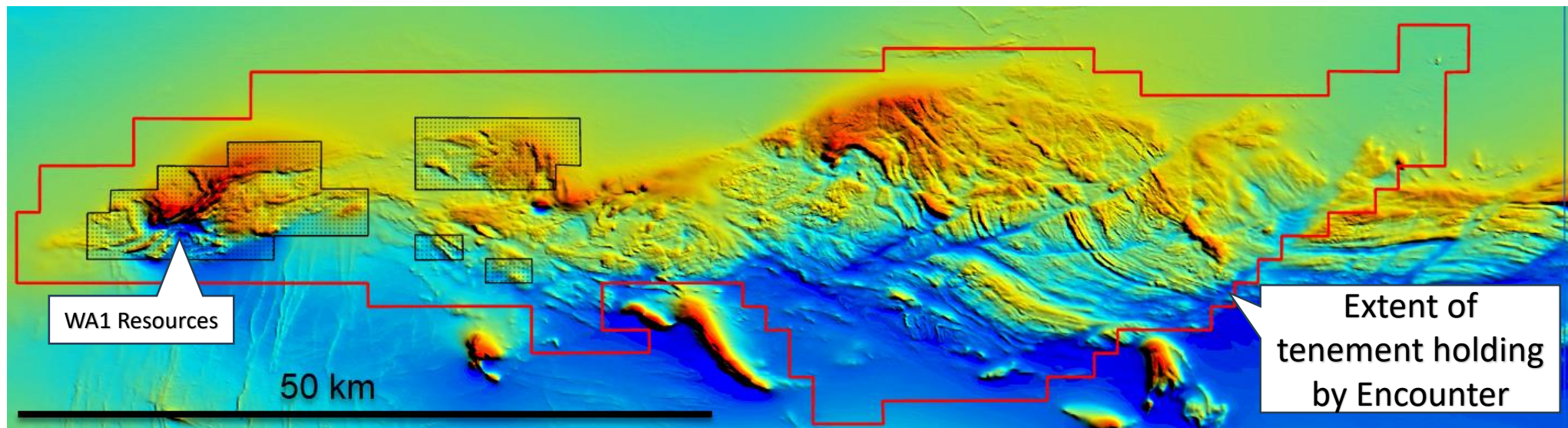
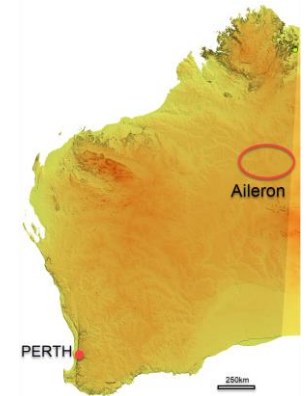
HOT PROPERTY



Went looking for Gold – Found Niobium and Rare Earths

Encounter Resources

From a blank canvas in 2019



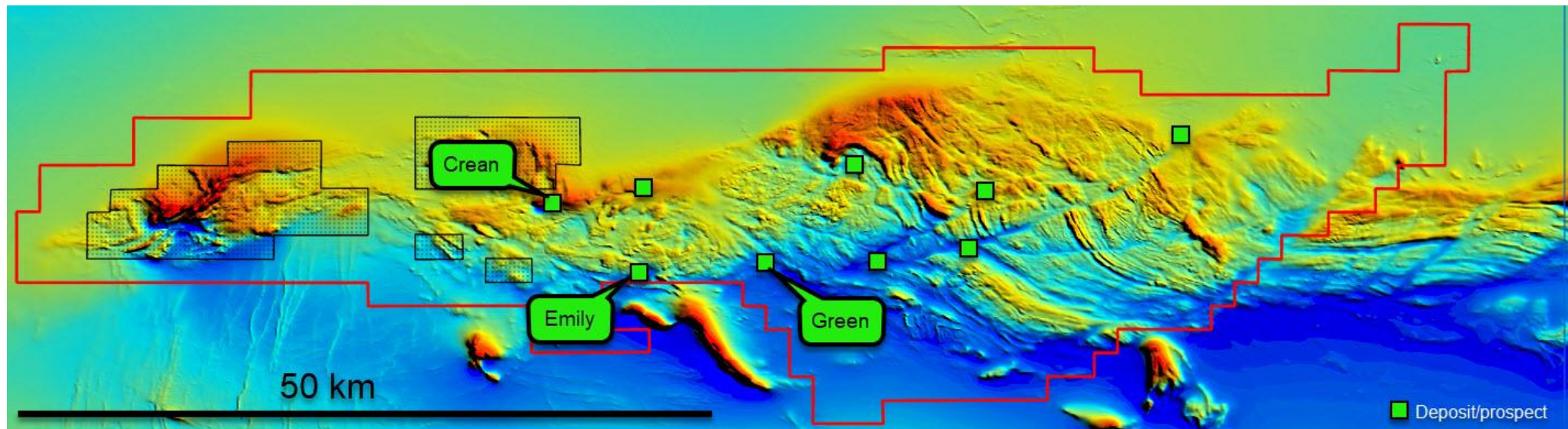
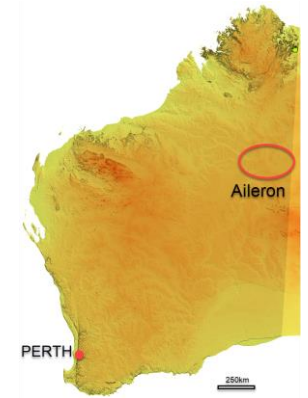
Went looking for Gold – Found Niobium and Rare Earths

Encounter Resources

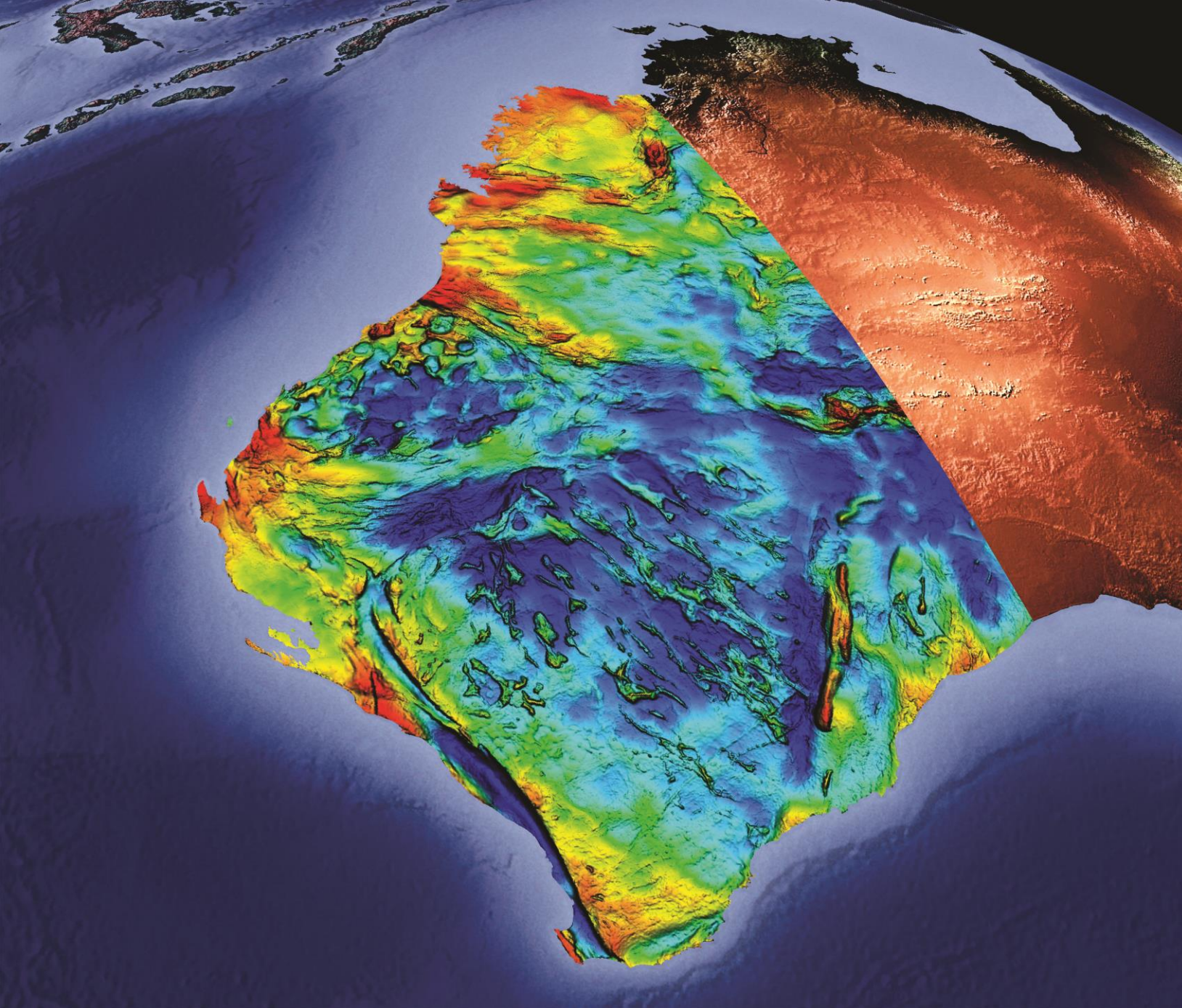
From a blank canvas in 2019

to

Multiple deposits and emerging prospects in 2026



Combined resource of 19.2 Mt at 1.74% Nb_2O_5 above a 1.0% cut-off



Information on commodities



Email:

Minerals.Investors@dmpe.wa.gov.au

AUSTRALIA MINERALS

REALISE THE OPPORTUNITY

Thank you

Dr Phil Gorey
Trade Commissioner – North East Asia
Invest and Trade Western Australia



Invest & Trade
WESTERN AUSTRALIA



Department of **Mines,**
Petroleum and Exploration