Ambassador Alfred Hoffman, Jr.

Center for Critical Minerals Strategy

May 2022

SAFE

Center for Critical Minerals Strategy

A Project of Commanding Heights



WHO WE ARE

SAFE is a non-partisan, non-profit organization that enhances the nation's energy security and supports its economic resurgence and resiliency by advancing transformative transportation and mobility technologies and ensuring that the United States secures key aspects of the technology supply chain to achieve and maintain its strategic advantage.

The Center for Critical Minerals Strategy aims to develop policies that ensure rare earth and critical mineral supply chains – from mining and processing to manufacturing and recycling – support the foreign and military policy of the United States, reflect our interests and values, and continue to strengthen American competitiveness.

OUR WORK

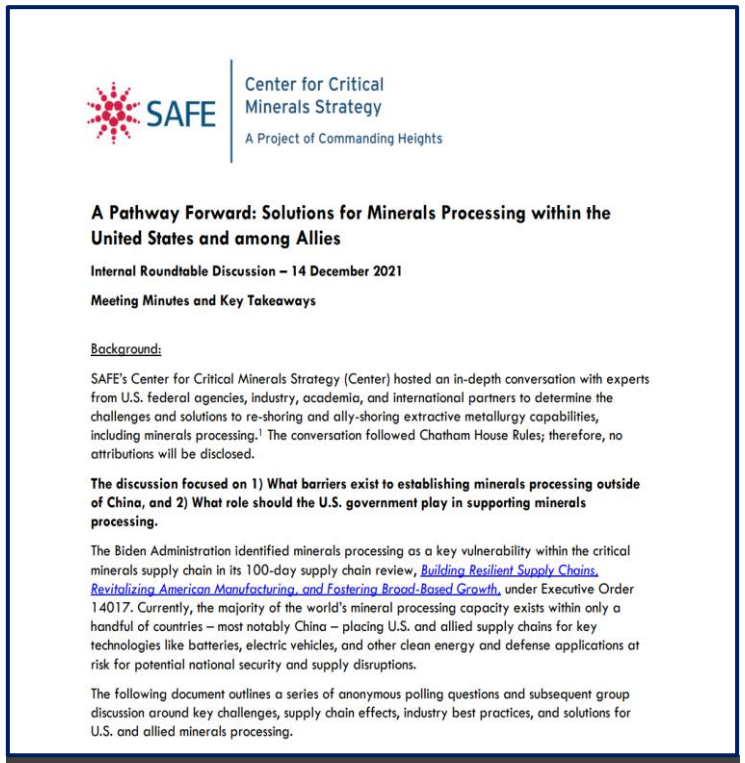
The Center seeks to break down silos and spur grand compromises to achieve a just transition to a critical minerals-based economy necessary for the transportation, defense, energy, and technology innovations of the future.







OUR WORK CONTINUED



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A Pathway Forward: Solutions for Minerals Processing within the United States and among Allies

Internal Roundtable Discussion – 14 December 2021

Meeting Minutes and Key Takeaways

Background:

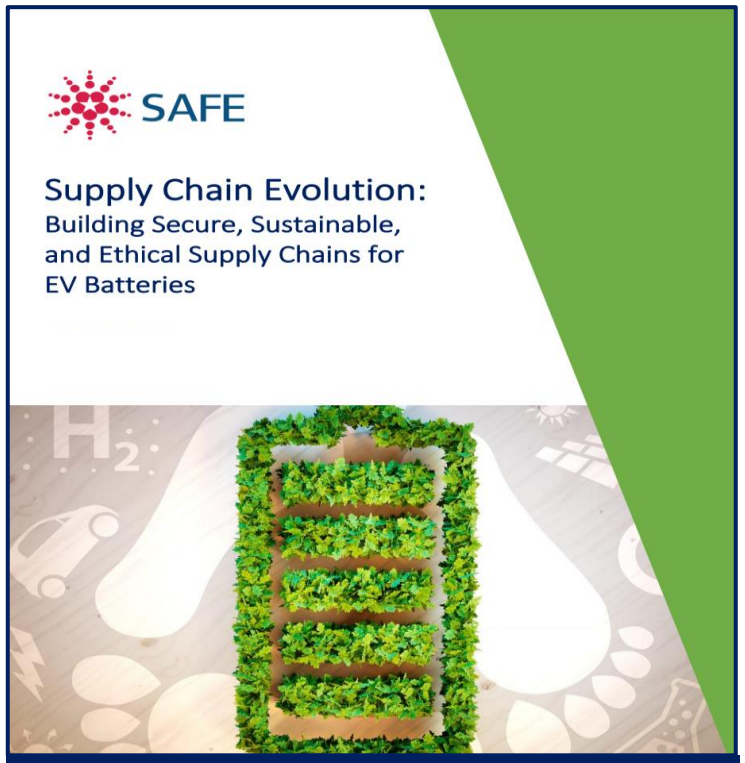
SAFE's Center for Critical Minerals Strategy (Center) hosted an in-depth conversation with experts from U.S. federal agencies, industry, academia, and international partners to determine the challenges and solutions to re-shoring and ally-shoring extractive metallurgy capabilities, including minerals processing.[1] The conversation followed Chatham House Rules; therefore, no attributions will be disclosed.

The discussion focused on 1) What barriers exist to establishing minerals processing outside of China, and 2) What role should the U.S. government play in supporting minerals processing.

The Biden Administration identified minerals processing as a key vulnerability within the critical minerals supply chain in its 100-day supply chain review, *Building Resilient Supply Chains, Revitalizing American Manufacturing, and Fostering Broad-Based Growth*, under Executive Order 14017. Currently, the majority of the world's mineral processing capacity exists within only a handful of countries – most notably China – placing U.S. and allied supply chains for key technologies like batteries, electric vehicles, and other clean energy and defense applications at risk for potential national security and supply disruptions.

The following document outlines a series of anonymous polling questions and subsequent group discussion around key challenges, supply chain effects, industry best practices, and solutions for U.S. and allied minerals processing.

HOST EXCLUSIVE ROUNDTABLES



AUTHOR IN-DEPTH REPORTS



TESTIFY BEFORE CONGRESS

POLICY RESEARCH OBJECTIVES

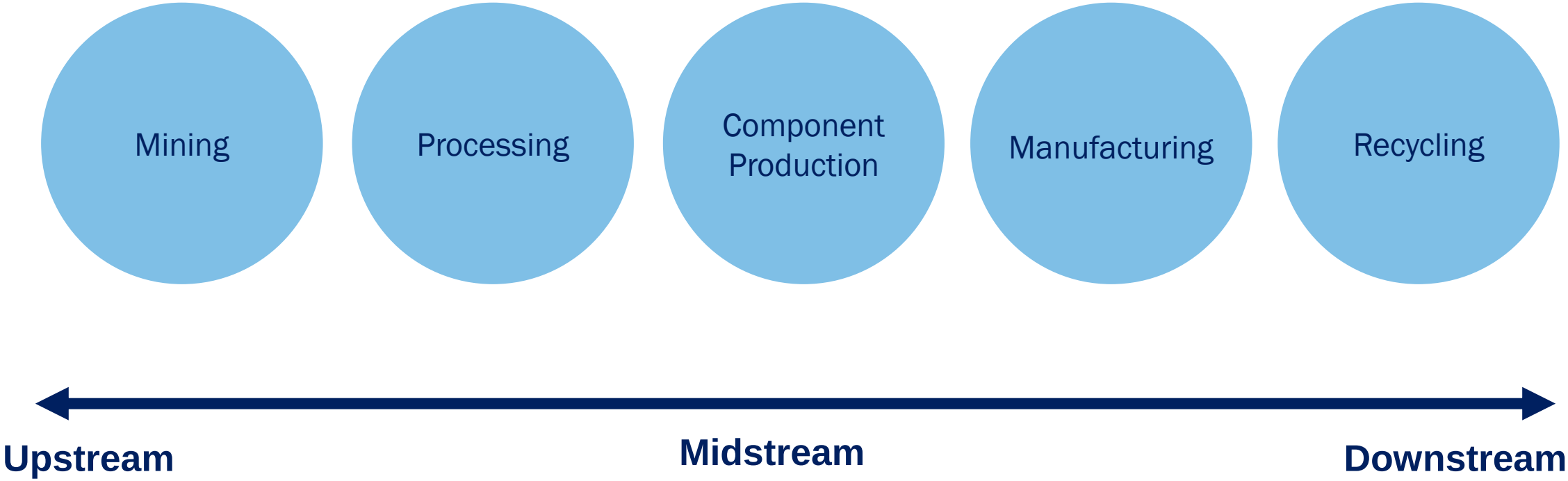
1. **Secure ethical, responsible supplies of critical minerals** at home and among our allies

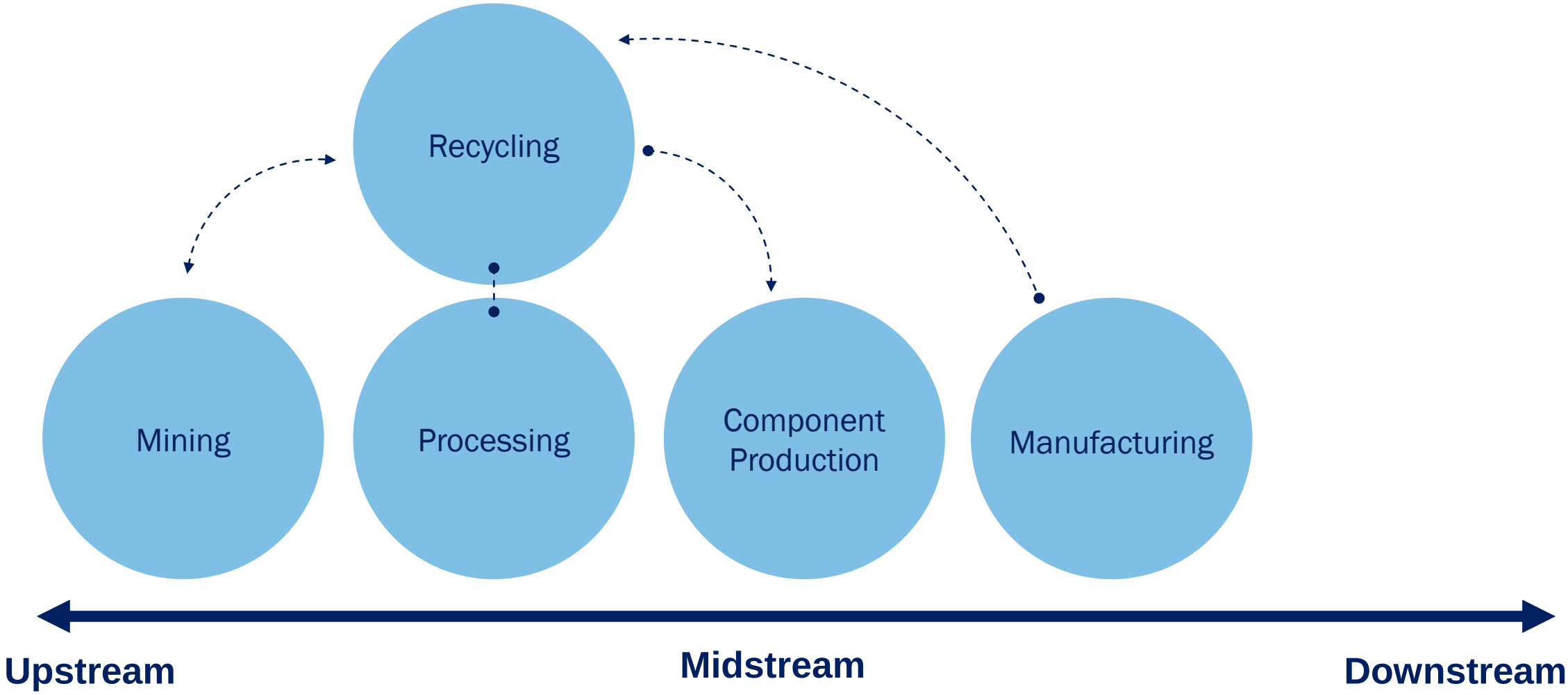
2. **Support the entire critical mineral lifecycle:** not just mining and recycling, but also processing and battery component production

3. **Work with likeminded nations to level the playing field** and establish a market for sustainably sourced goods



THE MINERALS VALUE CHAIN

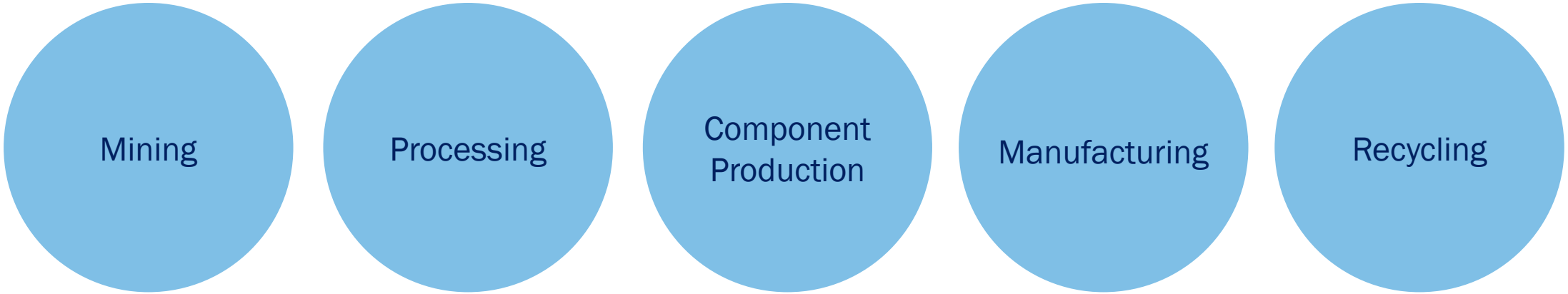



Recycling
Mining
Processing
Component Production
Manufacturing
Upstream
Midstream
Downstream

- Trade Deals with Likeminded Allies / CFIUS
- Stockpiling
- International Mining Standards
- Domestic Mining Laws / Permitting
- Community and Tribal Engagement

- Incentives for Domestic Production
- Economic Opportunity Zones
- Bolstering Allies
- Innovation in Battery Chemistries

- Overcoming Economic Hurdles
- Collection and Transportation
- Innovation, Research, and Development



- Incentivizing Private Capital
- Access to Cheap, Clean Energy
- Innovation, Research, and Development
- Workforce Expertise

- Transparency in Supply Chains
- Update Monroney Label
- Incentives, Trade Deals, and Offtake Agreements

RESEARCH FOCUS AREAS

The Center researches and promotes policy solutions across the entire minerals value chain.



Supply Chain Transparency



Bolstering Midstream Production



21st Century Mining

IN GOOD COMPANY

The Center is partnering with world-class organizations and ramping up quickly.













Government of Canada













IN GOOD COMPANY

The SAFE Alliance includes connections to several influential organizations, companies, and individuals to strengthen our message and support our work.







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For more information, please contact the Center Director, Abigail Wulf (awulf@secureenergy.org)

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