

THE LITHIUM VOICE

 INTERNATIONAL LITHIUM ASSOCIATION (ILiA)

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Lithium 1817-1917

The benefits of membership

In conversation with
André Majdalani

VERIFIED!

Product carbon footprints for lithium come of age



ILiA Connections



Roland Chavasse represented ILiA at the LevertonHELM New Chloride Plant unveiling on April 15th. Seen here with Stephen Elgueta-Wallis and Axel Viering from the company. (Image: LevertonHELM)



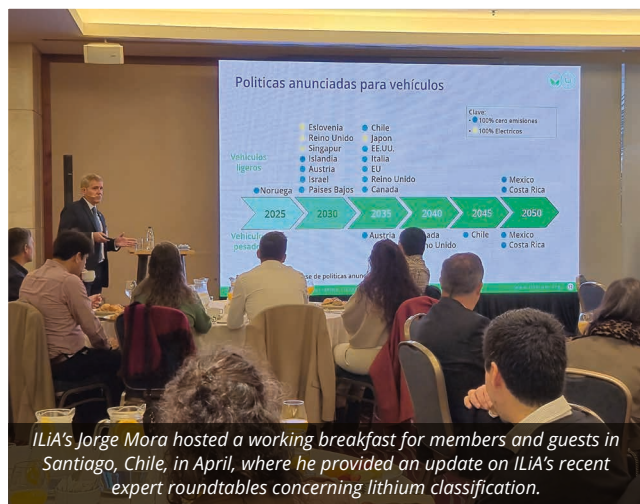
In February ILiA's Astrid Karamira and Conor Finchem visited Chengxin Lithium's Sabi Star Lithium-Tantalum Mine project, located in Eastern Masvingo Province, Zimbabwe.



ILiA's Founding Chairman, Anand Sheth, caught up with old friends and pioneers of Australian lithium production John Linden, Dudley J Kingsnorth and David Bale.



Martin Ma held a productive meeting with Mr. Yang Yong and Mr. Liu Wenwen from Myande during the China Minmetals / Fastmarkets Battery Raw Materials Conference 2025 held in Shanghai.



ILiA's Jorge Mora hosted a working breakfast for members and guests in Santiago, Chile, in April, where he provided an update on ILiA's recent expert roundtables concerning lithium classification.



In March ILiA hosted a networking dinner for members and guests in Brussels, Belgium. It was held to coincide with the Benchmark Mineral Intelligence GIGA Europe 2025 conference.

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May 2025

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Chair's WELCOME



Welcome to the 10th edition of *The Lithium Voice*, which marks something of a landmark for the lithium industry.

Two years ago we started discussing how to standardise the carbon footprint assessments of lithium products; a year ago we published our guidelines on the subject (see *Lithium Voice* #5); and today we are able to confirm that four leading facilities have had their product carbon footprints independently verified to be in line with our guidelines.

On behalf of the Executive Committee I'd like to thank ILiA's Sustainable Lithium Subcommittee (SLS) for all their efforts to create and roll-out this groundbreaking work. The team, led by Mark de Boer, PhD (Albemarle Corporation) was supported by a global team of 45 organisations from across the lithium industry and I think the fact that the guidelines have been picked up globally is a testament to the quality of their work.

In this edition we also welcome Maria Ma from SMM who has provided the first "View from China" article that we have published. China is central to global lithium-ion battery production and the largest consumer of lithium. I'm very pleased that *The Lithium Voice* will now include news and views from the Middle Kingdom.

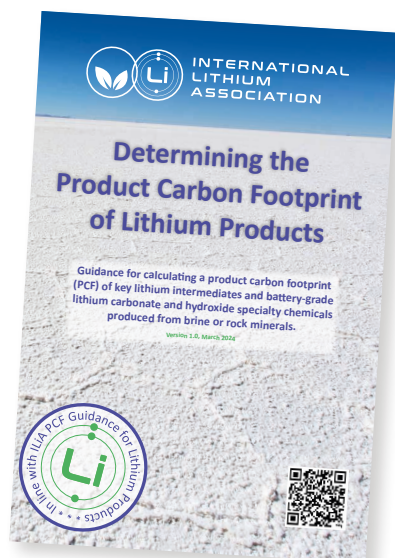
Please look out for the new report "Lithium 2040" which we will be publishing very soon. We received a lot of requests from our members for a paper exploring the future demand of lithium, and this is the result. After a competitive tender we selected Project Blue to write it for us. We will be holding public webinars about it, too. Our aim is to highlight the critical importance of lithium in the transition towards renewable energy and net zero carbon economy, and the strong long-term demand this will generate for lithium for years to come. After all, it's the lithium century!

Anand Sheth
Founding Chairman

THE FRAMEWORK AND VERIFICATION PROCESS FOR ILiA'S PRODUCT CARBON FOOTPRINT STAMP

ILiA's landmark "Determining the Product Carbon Footprint (PCF) of Lithium Products" (the Guidance) was published in March 2024 as the first globally standardised way to measure the carbon dioxide generated during the production of the lithium that is used in electric vehicles (EVs) and other applications.

Addressing this was an urgent challenge for the industry, not only because of the rapid growth of lithium production, but also because of the demands from regulators and the automotive industry to report the greenhouse gas (GHG) emissions of all the raw materials used in the batteries of EVs (see *Lithium Voice* #5).



The Guidance was published after extensive consultation with a wide range of stakeholders and it allows practitioners to create a PCF assessment for key lithium intermediates and battery-grade

lithium carbonate and hydroxide specialty chemicals produced from brine or rock minerals in a standardized way as part of their PCF, whether it is stand-alone or part of a Life Cycle Assessment (LCA).

The Guidance is well received

Over the last 14 months it has been well received by industry and regulators alike. The Guidance has even formed the foundations of two proposals for new ISO standards. This positive reception was testament to all the hard work which went into making it.

Mark de Boer, Chair of the Sustainable Lithium Subcommittee and Vice President Sustainability at Albemarle Corporation, said, "It is great to see such a large interest in applying the Guidance. Not only by ILiA members, as we had hoped for, but also by non-ILiA members too."

In recent months ILiA has been approached by several leading lithium facilities which reported using the Guidance to determine the PCF of their lithium products. This raised the question of how to differentiate Guidance-compliant PCFs and prevent someone falsely claiming compliance.

It was decided that to recognise a PCF (or LCA) which has been created in compliance with the Guidance ILiA will award a unique, non-transferable, numbered ILiA PCF Stamp ("Stamp") that states "In line with ILiA PCF Guidance of Lithium Products".

The Stamps have been welcomed by the industry, but as a consequence,



also raised the demand for ILiA developing a verification procedure to confirm that the Guidance has been adhered to, prior to awarding a Stamp for a PCF.

The challenge of verification

This challenge was taken up by ILiA's Sustainable Lithium Subcommittee (SLS). The task was to create a verification mechanism that was transparent, consistent and efficient. It needed to be rigorous, but not unnecessarily complex since a high cost could discourage use of the Stamp. The end goal was to allow all PCFs that are awarded a Stamp to be meaningfully comparable, regardless of when, where and by whom they are created.

Verification in practice

To assure the correct application of the Guidance, the SLS decided that prior to ILiA awarding a Stamp to a PCF, an independent review of that PCF would be required. However, since ILiA was not well-placed to do this in-house, so the SLS developed criteria for approved independent experts. Using third parties had the additional benefit of preventing ILiA from seeing confidential PCF data, which is a perennial concern for an association.

The team initially developed a set of competence criteria for independent verifiers based on the guidelines of the International Environmental Product Declaration (EPD) System but tailored them to meet the specificities of the lithium industry.

The competence criteria for an independent verifier are listed on ILiA's website, www.lithium.org, and include:

- Performing at least 10 PCFs/LCAs within the five years prior to the application.
- Having a thorough knowledge of the ISO Standards for LCA 14040, 14044 and 14049.
- Demonstrating knowledge of PCFs/LCAs for metals and mining products.
- Having high proficiency in English or Spanish or Chinese.

Individuals who fulfil the criteria can become an ILiA-approved verifier, empowered to verify lithium PCFs for compliance with the Guidance. A list of approved verifiers is available at www.lithium.org and if you are interested in applying to become a verifier please contact the Association.

Verification starts!

In May 2025 the initial approved independent verifiers are:

- Lorraine Amponsah (Loram Consulting)
- Sophie Myers (Minviro Ltd)
- Rob Rouwette (start2see Pty Ltd)
- Joris Šimatis (Minviro Ltd)
- Sébastien Taillemite (Ecovamed)
- Phoebe Whattoff (Minviro Ltd)

The list of verifiers is maintained by ILiA's Sustainable Lithium Subcommittee and once a verifier has been approved their status will be valid for three years, after which they will be considered for renewal.

Verifying a PCF

An organisation requesting the PCF and/or LCA for one of its operations

to be verified as compliant with the Guidance can contact any approved verifier directly and contract them to undertake an independent review. The agreement will be between the approved verifier and the contracting organisation, not ILiA, and the cost of verification will be covered by the organisation in full.

Once the approved verifier has checked the PCF for compliance with the Guidance, and assuming it does comply, the verifier will submit a brief summary to ILiA and the contracting organization can request a unique Stamp to be awarded to the confirmed PCF.

Each Stamp is numbered and is only applicable to a specific PCF. Stamps are not transferable to another company, facility or PCF, which means that a large organisation with multiple PCFs for its various facilities will need to have each PCF verified in turn and will be awarded a unique Stamp for each one.

The record of Stamps

ILiA's website carries a record of every Stamp which is awarded, so that third parties can check if a PCF which claims to be verified, really is.

The record shows:

- the company that owns the facility that was analysed by the verified PCF/LCA (and the group to which that company belongs)
- the location of that facility
- the date of the independently verified PCF/LCA
- the verifier name and company
- the date of the verification

ILiA aims to publish this information within six months of a Stamp being issued to provide a clear record to the public and to prevent false claims or the use of invalid Stamps.

Organisations may decide to provide further information about their PCF, but this is on a voluntary basis.

The first Stamps are awarded

At time of print, four PCFs have already been confirmed and awarded ILiA Stamps:

Stamp 1.0 - **Tesla:**

Battery-grade lithium hydroxide monohydrate at its lithium refinery in Corpus Christi, Texas, USA.

Stamp 2.0 - **Talison Lithium Pty Ltd:**

Spodumene concentrate from the Greenbushes mine in Western Australia, Australia.

Stamp 3.0 - **Albemarle Corporation:**

Lithium hydroxide monohydrate 99.5% production at its Xinyu plant, China.

Stamp 4.0 - **Albemarle Corporation:**

Lithium hydroxide monohydrate 99.5% production at its Qinzhou plant, China.

On receiving Stamp 2.0, Rob Telford, Chief Executive Officer, Talison Lithium, said "Talison Greenbushes Operation is very proud to be the first mine site in the world, and the first lithium operation in Australia, to receive the ILiA Stamp. Completion of a life cycle assessment in line with the ILiA PCF Guidance means we have a solid, credible and independently verified baseline from which to understand our impacts and opportunities to improve as we expand our operations for a cleaner energy future."

Astrid Karamira, ILiA's Sustainability & Governance Manager said "With the accreditation process having started, we expect many more organisations to undertake their LCAs and PCFs in accordance with the ILiA Guidance".

If you are currently performing an LCA or PCF for any of your lithium operations and would like confirmation that it is compliant with the Guidance, or if you have any related questions please email ILiA at ILiA@lithium.org

We look forward to seeing more lithium facilities' PCFs to be certified against the ILiA Guidance and to issuing many more Stamps in the future. 

THE MATURATION OF LITHIUM

1817-1917

When lithium was first identified in 1817 it was thought to be a rare element. However, over the next 100 years advances in chemistry allowed scientists to identify it in many minerals, natural waters and other sources, which in turn led to a range of applications to be developed.

In September last year *The Lithium Voice* (vol. 7) told the fascinating story of how lithium was discovered. But what happened next?

Well, although the years through the nineteenth century up to 1917 may appear to have been somewhat uneventful for lithium, they were, in fact, rather important. A good way to think of this period is as years of “maturation” - like with a fine wine! It was a period of both experimentation and discovery, which established the scientific foundations on which later developments would build.

The early years

When Johan August Arfvedson identified a previously unknown substance in the mineral petalite in 1817 there was a lot of interest about what it might be. As early as January 1818, Swedish chemist and physicist Wilhelm Hisinger had also analysed petalite and achieved similar results to Arfvedson. Supporting the theory that this was a previously unidentified element was the assertion by the German chemist Christian Gottlob Gmelin, who observed that the new element burned with an intense crimson-red flame, a colour which had never been seen before in laboratory flame tests (see *The Lithium Voice*, vol.9).

And in March 1818 the Reverend Edward Daniel Clarke (clergyman, chemist and Professor of Minerology at the University of Cambridge, UK) published his “Description and analysis of a

substance called petalite, from Sweden”. In this paper Clarke puzzled over the “loss” he detected, but he stopped short of identifying what that loss was.

As we know, Arfvedson, together with his mentor Baron Jöns Jacob Berzelius, would go on to name the mysterious new substance “lithium”.



Image: Geoscience Australia

Lithium's middle years are perhaps most notably marked by discovery and experimentation, not least involving its sources, which were readily identified, and its properties,

which took considerably longer.

By 1824 petalite had been found not only on the Swedish island of Utö, the source of Arfvedson's test sample, but also on the Italian island of Elba and in North America.

The Dutch-American doctor, mineralogist and naturalist Gerard Troost identified a mineral specimen that had been collected from York, on the north shore of Lake Ontario, Canada, as petalite based on the observation that it “burned with a red flame of a more dense colour than that of Strontian” [sic, i.e. strontium]. However, before applying to mine petalite in York, note that Troost states that the sample came from a boulder deposited by a glacier, so the host rock would have far to the north.

At about the same time the British botanist and zoologist Thomas Nuttall discovered the lithium-rich mineral spodumene



Kreuzbrunn Spring at Marienbad, Czechia, where the natural spring water contains lithium.

in the US for the first time on a farm near Sterling, Massachusetts owned by a Mr Putnam. Further spodumene specimens were found in Massachusetts near Deerfield, Goshen and Conway.



Robert Bunsen.

Clearly lithium-bearing minerals were not as rare as it had been assumed, and discoveries of lithium's presence were not just restricted to those in hard rock.

As early as 1825-26, Berzelius discovered that lithium was dissolved in the mineral waters of a number of locations in Bohemia, in modern Czechia. Indeed, he had "found as much as a centigram of lithium carbonate 'in every bottle' of the water from the Kreuzbrunn Spring at Marienbad" (a spa town also known as Mariánské Lázně in Czech).

However, while lithium was being detected in more and more locations, there was still very little known about the element itself. The only pure lithium metal had been produced in 1821 by William Thomas Brande and Humphry Davy, and they were only able to isolate a few tiny beads of pure lithium metal "which burnt in air within seconds".

"Bunsen years"

Producing enough lithium metal for its properties to be studied in detail took a further 34 years and was only possible by the pioneering use of electrolysis by the German chemist Robert Bunsen, working in parallel with English chemist Augustus Matthiessen.

Bunsen and Matthiessen produced pure lithium metal in 1855 by the electrolysis of lithium chloride and it is worth noting that they were successful only because they were able to use four to six carbon-zinc elements (or Bunsen cells) to create a current. This was a far more powerful bank of batteries than the equipment which Davy and Brande had used. (Today it is well known that lithium is one of the most electropositive elements, so we can appreciate the difficulty which these early pioneers had using simple batteries to reduce lithium salts to obtain the metal.)

Only a few years later, Bunsen teamed up with the German chemist, mathematician and physicist, Gustav Robert Kirchhoff, to do groundbreaking work in spectroscopy, the study of the absorption and emission of light and other radiation by matter.

In a letter that Bunsen wrote to his friend, the British chemist Sir Henry Roscoe in November 1859, he explained how his work on spectroscopy with Kirchhoff "gives us sleepless nights," and not only that he has been "able to detect lithium in twenty grams of sea water," but also that: "it is possible to detect five one-thousandths of a milligram of lithium with the greatest ease and certainty". As if this wasn't achievement enough, he added that "I have discovered the presence of this metal in almost every sample of potashes."



Sir Henry Roscoe.

Lithium not only occurs in very many minerals, but also in the juice of plants,... in tea, coffee, and even in milk [and] in human blood.

Sir Henry Roscoe, 1868

Using spectroscopy, Bunsen, Kirchhoff and others were able to demonstrate that lithium was not especially rare, and could in fact be found in many rocks and waters. From then on, the scientific and geological understanding of lithium expanded rapidly.

At a lecture given in 1868 Roscoe summarized the situation after 50 years of exploration for and experimentation with lithium. He said that while it was "until lately only known to exist in three or in four comparatively rare minerals ... We now learn that this substance supposed to be so rare is found to be most widely distributed - not, it is true, in very large quantities, but still that it is one of the most widely diffused of the elementary bodies."

Roscoe continued, "Lithium not only occurs in very many minerals, but also in the juice of plants, in the ashes of the grape, in tea, coffee, and even in milk, in human blood, and in muscular tissue ... It is present in the ashes of tobacco, and, if we hold the

The emission spectra of lithium



continued from page 7

end of a cigar in the colourless flame, we may always notice the red lithium line when the light is examined with a spectroscope."

"Dr. W. Allen Miller found lithium in very large quantities in the water of a spring in the Wheal Clifford Mine in Cornwall [UK]. This water contains 26 grains of lithium chloride in one gallon, and the spring flows at such a rate as to pour forth 800 lbs (336 kg) of this salt every twenty-four hours!"

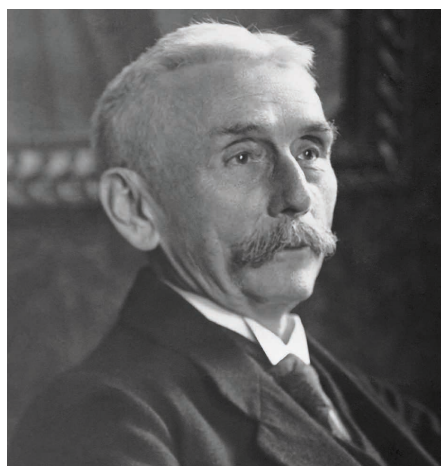
Roscoe concluded that: "(lithium) is now found by spectrum analysis to be one of the most widely distributed elements."

Armed with the tools of spectroscopy, the more people looked for lithium, the more it was found to be widespread geographically, including "on the granitic soil in the Odenwald" in Germany, in "Russian and other commercial potashes", and in both the Rhine Valley, Germany and modern day Kaliningrad, Russia.

Some early uses of lithium

Whilst some people were investigating where and in what lithium could be found, others were exploring how it might be used, including medicine, speciality glass and the refining of aluminium.

In the field of medicine, as early as 1859 a British doctor, Alfred Baring Garrod was recommending lithium as a treatment for gout (a treatment



Otto Schott.



An old mine in Cornwall, UK, similar to Wheal Clifford.

since disproven). While in 1870, lithium bromide was recommended as an anticonvulsant and a hypnotic by Philadelphia neurologist Silas Weir Mitchell, and, in 1871, the former US Surgeon General, William Alexander Hammond, was reported to be using the same compound to successfully treat acute mania.

A few years later, in 1886, the Danish doctor Carl Lange provided "the first account of the systematic use of lithium in the acute treatment and prophylaxis of periodical depression." However, despite this early support, it would be more than half a century before medical use of lithium became mainstream through the work of Dr John Cade, a psychiatrist working in Victoria, Australia (see *The Lithium Voice* vol.4).

Arguably the first industrial application of lithium was in speciality glass, pioneered by Otto Schott. In 1879, he successfully formulated a lithium-based glass and subsequently went into business with Carl Zeiss and Ernst Abbe to form Schott and Associates Glass Technology Laboratory, in Jena, Germany. Today SCHOTT AG is still a world leader in glass, and its website describes lithium "as an essential ingredient to every glass-ceramic".

A second industrial application was pioneered in July 1886 by the American Charles Martin Hall, the founder of Alcoa Corporation, a major aluminium producer.

Hall was awarded two patents for reducing aluminium by electrolysis (US Patents 400664 and 400766)

which included a description of the benefits of adding lithium fluoride: "The combination of the fluorides of aluminium and potassium may be rendered more fusible and its capacity for dissolving alumina may be increased by the addition of lithium fluoride", (US Patent

400,664). Lithium salts were used by aluminium producers for many decades following Hall's discovery.

One final important application for lithium arrived at the end of lithium's first century of use, in 1917 with the development of organolithium compounds by the German chemist Wilhelm Johann Schlenk. These compounds are important reagents that are still used today in a number of organic and organometallic reactions and essential applications.



Charles Martin Hall.

We close this chapter about the history of lithium at the threshold of true industrial production. By 1917 the chemistry and geology of lithium was well established, and it was used in some small but important applications. But it was still fundamentally a niche product, produced ad hoc and without any large-scale applications.

This was about to change in dramatically, and it was all due to the German railways.



(To be continued in *Lithium Voice* vol. 11)

View from EUROPE

From David Merriman of Project Blue

With the current geopolitical environment dividing the global market into increasingly more regionalised supply chains, the European Commission (EC) has taken steps to accelerate the development of its lithium industry throughout the supply chain.

As part of the European Critical Raw Materials Act (CRMA), the EC announced a list of 47 approved 'strategic projects' in March. For a project to be deemed 'strategic', the EC agreed that the project must be technically feasible, can be developed within a reasonable timeframe and will be capable of operating within a sustainable fashion.

The list of strategic projects included fifteen lithium-related projects, with five mining operations, four integrated extraction and refining projects, three specialist refining projects and three battery recycling facilities targeting the recovery of lithium related products.

The strategic projects will benefit from co-ordinated support from the EC, EU member states and associated financial institutions, which will assist in accessing finance and connecting companies with relevant off-takers. In addition, permitting of the strategic projects will be 'streamlined', which is expected to accelerate conclusions of the permitting process further than the 27-month limit for extractive projects and 15-month limit for all other projects under the CRMA. The EC will look to expand the Strategic Project list, with a new round of applications expected to be opened in mid-2025.

Lithium related projects in Strategic Project list – EC, March 2025

Project	Owner	Extraction	Processing	Recycling	Country	Targeted Products
Zero Carbon Lithium	Vulcan Energy Ressources				Germany	Li
Barroso Lithium	Savannah Lithium Unipessoal				Portugal	Li
Romano	Lusorecursos Portugal Lithium				Portugal	Li
Las Navas	Lithium Iberia				Spain	Li
Mina Doade	Recursos Minerales De Galicia				Spain	Li
Cínovec Lithium	Geomet				Czech Republic	Li
Keliber Lithium	Keliber Technology				Finland	Li
Ageli	Eramet				France	Li
Emili	Imerys Ceramics France				France	Li
Viridian Lithium	Viridian Lithium				France	Li
LiOH Converter Guben	Rock Tech Gubem				Germany	Li
Lift One	Liflithium Energy				Portugal	Li
Portovesme Crm Hub	Portovesme				Italy	Li
Project Fortum Hydromet	Fortum Battery Recycling				Finland	Li; Cu; Ni; Co
Hydrometallurgy	Orano Batteries				France	Li; Cu; Ni; Co; Mn; Graphite

In addition to the CRMA and Strategic Project announcements, the EC has classified black mass (shredded battery waste) as a hazardous waste material, which will enable the use of further controls under the Basel Convention and the Waste Shipments Regulation to restrict exports. The classification is aimed at ensuring black mass materials remain within the EU, allowing EU based recyclers to better secure feedstocks and recover nickel, manganese and cobalt, along with lithium compounds. Recycled lithium compounds remain a key feedstock in the EC's plans to improve sustainability and circularity of the European battery industry by 2050.

Away from the EC, private development of lithium operations in Europe continue to progress. In Germany, Rock Tech Lithium, developing the Guben lithium conversion facility, and Switzerland-based Arcore developing the Lopare project in Bosnia-Herzegovina, announced the formation of a 75:25 joint venture company to combine their efforts in establishing an integrated lithium supply chain.

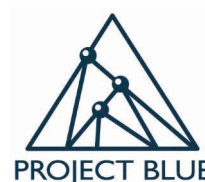
Vulcan Energy announced that it will delay the financing timeline for its Phase One Lionheart project in Germany to allow for the German government to undertake due diligence and potentially participate

in the project financing. The updated deadline for Phase One Lionheart project financing is the second half of 2025. In addition to the financing timeline delay, Vulcan Energy announced it has completed the acquisition of Geox, which owned geothermal wells and licenses to produce geothermal energy and extract lithium around Landau, Germany. The Geox assets will be incorporated into Vulcan Energy's Phase One Lionheart Project. In the UK, both Cornish Lithium and Weardale Lithium received approvals from local government to proceed with their respective lithium extraction and refining projects.

Overall, the start of 2025 has seen a refocussing of regional and national European governments on securing critical mineral supply chains as the geopolitical status quo has unravelled. Developing lithium production and refining facilities remains centre stage, though the fallout from new trade barriers and tariffs could see further slowing of lithium demand growth in the EU.



View from Europe represents the opinions of Project Blue and does not reflect the opinions of ILIA.



View from AUSTRALIA

From Allan Pedersen of Wood Mackenzie

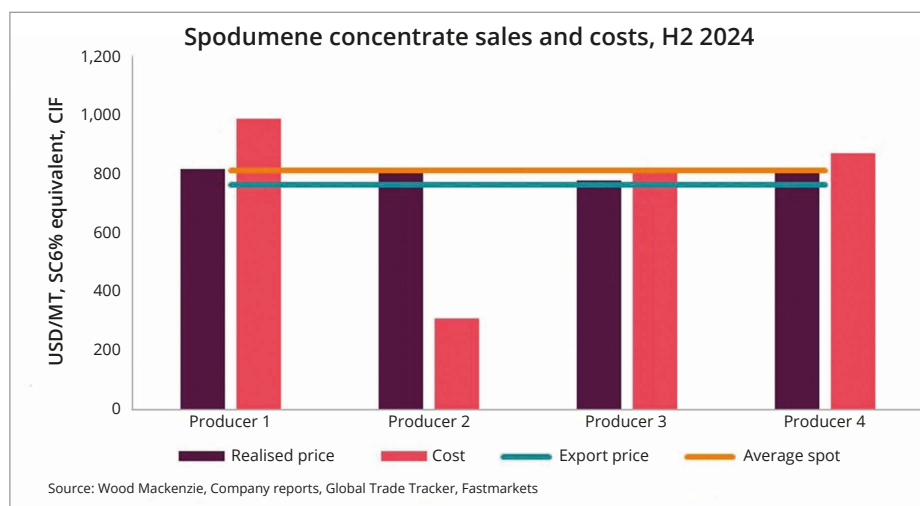
The margin challenge

The lithium industry's challenges continue, with all lithium prices under pressure as supply growth continued to outpace demand in the first quarter. The depressed prices in the lithium chemical market have translated into the spodumene concentrate market, where most Australian producers see price pressure creating a necessity to control costs and manage offtake agreements.

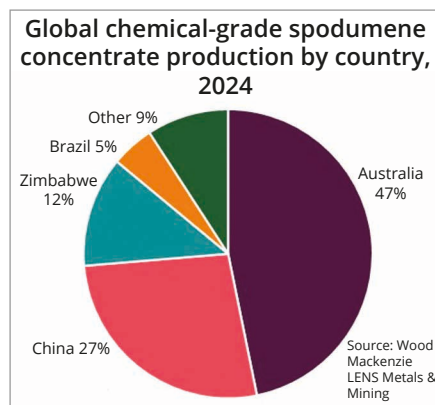
Various company reports show that the realised prices in the second half of 2024 were broadly aligned with the reported spot prices and the export prices¹ for many Australian producers. The reports show that the cost of production was marginally higher than sales prices in the period for most Australian producers.

The negative margin has meant that many producers will consume cash from reserves to continue operating. A similar situation was seen in 2020 when spodumene concentrate prices dipped below USD500/MT. The price pressure will undoubtedly require all producers to implement strategies to control and decrease costs to continue operations through the market downturn. Many producers will have a considerable 'war chest' to draw upon following the super margins realised in the last few years, ensuring survival through a challenging period.

While Australia is not the only producer of spodumene concentrate globally, it is by far the largest. The continuation of the Australian producers will be critical not only to sustain the current lithium market but also to allow the production



of lithium chemicals necessary to support the ongoing decarbonisation efforts on a global level.



Australia's market share will decline over the years as new entrants from other countries emerge. However, over a third of the global chemical-grade spodumene concentrate will still originate from Australia, making the survival of Australian lithium mines crucial to the industry's future.

The Australian producers' survival and health will remain vital, and navigating the current market turmoil will be challenging for them.

Spodumene concentrate prices are determined not only by the market balance of itself but also heavily

influenced by the market balance and the prices of lithium chemicals. A lithium chemical market with continued downward pressure on prices will negatively influence the spodumene concentrate price.

Other factors than those in the current market are likely to influence the future of Australian producers. Continued geopolitical challenges and sabre-rattling about tariffs and retaliatory tariffs create both uncertainty and opportunity. How will demand for chemical-grade spodumene concentrate develop outside of China? When and how will prices be structured? Australian producers have significant resources, reserves, expertise, and infrastructure to capitalise on this in the long term. However, the near-term challenges remain substantial. 

¹ Adjusted to SC6 and includes standardised freight cost from Australia to China.

View from
Australia



represents the opinions of Wood Mackenzie and does not reflect the opinions of ILiA. ILiA member benefits include exclusive quarterly webinars with Allan regarding the lithium market. Contact ILiA for details.



Simplify the complex with a single view across the energy value chain.

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View from NORTH AMERICA

From Adriana Carvalho, Senior Managing Editor, Metals
S&P Global Commodity Insights

Tariffs & trade uncertainty chill US battery supply chain investments

US President Donald Trump has made tariffs a core part of his economic and trade strategy. He has levied individual import fees on China, Canada, and Mexico, aluminum and steel, and a broad 10% tariff on products from much of the rest of the world.

But about a third of US imports of metals by value escaped what Trump calls "reciprocal" tariffs, including the 125% duty on Chinese imports launched April 9th as a modification to an April 2nd executive order. Among the exempted materials is processed lithium.

While these metals currently enjoy tariff exemptions, they may still face future import levies as the Trump administration conducts sector-by-sector national security investigations through the US Department of Commerce.

Increased costs and tariff uncertainty have been cited in the cancellation or delay of some domestic battery manufacturing projects, even as efforts are underway to boost US production and reduce dependence on Chinese imports of battery materials.

Trade tensions surrounding lithium have affected market sentiment, with existing surpluses also pressuring prices. The Platts-assessed lithium carbonate CIF Asia price fell 6% from April 1st to April 29th, reaching USD8,800 per MT, the lowest it has been since February 2021.

Upstream & downstream perspectives differ

In the midst of tariff and trade uncertainty, upstream mining and refining sectors have been,

for the most part, optimistic due to President Trump's support for domestic mining, highlighted by an executive order issued on March 20th to enhance mineral production by addressing financing, permitting, and federal land use.

In contrast, the downstream battery manufacturing sector has pointed to significant challenges, including funding freezes, rising costs, and what they contend is demand destruction due to tariffs. T1 Energy Inc. abandoned plans for a USD2.6 billion battery plant in Georgia, and KORE Power Inc. canceled a USD1.25 billion facility in Arizona—both initially supported by former President Joe Biden's climate and infrastructure investment policies, since suspended by the Trump administration.

US automakers, including those producing electric vehicles, have also been tested on their ability to increase domestic production while managing rising costs. General Motors said it will ramp up US production at the expense of operations in Mexico, while Nissan has halted US orders for certain models built in Mexico and is considering shifting production to the US. Stellantis has paused production in Mexico and Canada.

Hyundai Motor has pledged to keep new auto prices steady over the next two months, while Ford and Stellantis have increased incentives by offering employee-specific discounts to the public to capitalize on opportunities and expand market share.

Additionally, some industry leaders question the ability of the US to

independently advance battery production, without relying on imports. One executive characterized its trade approach as "sleepwalking into a natural resource crisis."

Emilie Bodoïn, President and CEO of Pure Lithium Corp. [an ILiA member company] said during a presentation at the CERAWEEK by S&P Global conference that aspirations for a self-sufficient battery supply chain are unlikely to be realized without adopting new technologies to remain competitive.

Canada's response

Canada has actively sought to enhance its position as a critical minerals hub.

The proposed "Protect Ontario by Unleashing our Economy Act" aims to cut permitting times for mining projects by half. Ontario's Energy Minister, Stephen Lecce, recently stated that the bill would significantly reduce review times for advanced exploration and mine development.

Ontario also plans to leverage its mineral resources as "soft power" in ongoing US tariff negotiations. Its government also has been engaging with countries in East Asia and Europe, seeking dependable trading partners should relations break down with its southern neighbour and showcasing Canada's capacity to expand its own global trade. 

View from North America represents the opinions of S&P Global Commodity Insights and does not reflect the opinions of ILiA.

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View from

SOUTH AMERICA

From Daniel Jiménez of iLiMarkets

South America's lithium industry has started 2025 with significant project developments.

In Chile, Argentina, and Brazil, companies are moving steadily to expand production capacity and secure future supply, although some delays have also occurred.

Chile has made some advancements on its National Lithium Strategy. The Ministry of Mining accepted proposals for simplified processes of Special Lithium Operation Contracts (CEOLs) awards for the Agua Amarga (Eramet), Ascotán (JV Eramet, Quiborax, Codelco), and Coipasa (Caliche Kairos consortium) salars. Final contracts, pending Indigenous consultations and supreme decrees, are expected to be formalized later this year. Also, Chile extended the application deadline for lithium deposits in Hilaricos and Quillagua Norte. Meanwhile, state-owned Enami Litio continues to advance its Altoandinos project.

Finally, in the SQM/Codelco agreements, Chile's antitrust authority approved the formation of a partnership between Codelco and SQM to operate in the Salar de Atacama, contingent on measures to protect market competition and avoid information-sharing risks. Additionally, the Chilean Nuclear Energy Commission approved an increase of the existing production quota by 300,000 MT LCE until 2030, without increasing the extraction of brine. Under the agreement, SQM will manage operations until 2030, after which Codelco will take over.

Argentina's lithium production base continued to grow with major milestones across key projects. Ganfeng Lithium officially commenced operations at its Mariana project, producing lithium chloride, inaugurating a new processing plant in General Güemes, Salta, with a capacity of 20,000 MT per year, boosting the country's midstream capabilities. French group Eramet marked a significant achievement with the first export of lithium carbonate from its Centenario-Ratones project, which uses direct lithium extraction (DLE) technology. Phase 1 production is set at 24,000 MT per year, and Eramet has plans for a second plant to expand capacity.

Meanwhile, Rio Tinto strengthened its lithium presence by integrating the Rincon project into its newly created Rio Tinto Lithium division, following after the acquisition of Arcadium Lithium. Additionally, Galan Lithium secured an offtake and funding agreement for its Hombre Muerto West project. The deal ensures a sales pathway for upcoming production, with commissioning targeted for the first half of 2026. On the other hand, while POSCO is steadily producing lithium hydroxide of its Phase 1, it has delayed to early 2026 the completion of Phase 2 of the project at Hombre Muerto for the production of lithium carbonate.

Brazil's lithium industry saw a mix of cautious optimism and notable project progress. While some investment plans were delayed due to market conditions, several projects continue to move forward. Lithium Ionic Corp.

updated its resource estimate for the Baixa Grande project in Minas Gerais, strengthening its capabilities. Atlas Lithium achieved an important milestone with the arrival of its modular dense media separation (DMS) plant. The facility is aiming to produce up to 150,000 MT per year of SC6 mineral concentrates. Finally, PLS (until recently known as Pilbara Minerals) completed the acquisition of Latin Resources, taking control of the Colina Lithium Project, also in Minas Gerais. This marks PLS's first major international upstream expansion.

The **Bolivian** lithium sector saw little movement, except for a new international call to attract companies. However, serious concerns emerged over transparency, lack of public information, and no prior consultation with affected communities. Environmental and indigenous groups continue demanding clarity on agreements, water use, and project impacts making very difficult to assess the near future of the Bolivian lithium industry.

In summary, the South American lithium sector continues to move forwards, with Chile, Argentina, and Brazil advancing key projects despite market challenges and communities challenges. Regulatory actions, new partnerships, and steadily growing capacity highlight the region's state in general, although Bolivia's outlook remains uncertain.



View from South America represents the opinions of iLiMarkets and does not reflect the opinions of iLiA.



In conversation with **ANDRÉ MAJDALANI**

Global Director Sales & Marketing at AMG Lithium GmbH and member of ILiA's Executive Committee

Please tell our readers about how you became involved with lithium mining?

I've been working for the lithium industry for 28 years, most of the time on the highly reactive organolithium products, so lithium metal was as far as it took me upstream.

It is only after joining AMG Lithium early in 2021 that I started taking a closer look at resources, whether from hard rock or from brines, principally scouting for new projects globally to feed into our lithium refinery, the first one in Europe.

AMG has a lithium mine in Brazil and a plant in Germany; what is the company's vision for its long-term lithium business?

AMG Lithium intends to become a major player for lithium-related battery products in Europe. It has just finalised the construction of the first module to produce battery-grade lithium hydroxide (LiOH); with a nameplate capacity of 20,000 MT/year of LiOH it will start its first commercial scale production in the coming weeks.

The site in Bitterfeld, in south-eastern Germany, can host up to four additional modules with similar capacity. While AMG's Mibra-mine in Brazil will make up for most of the raw material needed for the first module, we are already assessing other resource projects to secure additional raw materials to support our growth ambitions.



Our long term vision is to build a fully integrated supply chain, to start backwards-integrating Europe and reduce its full dependence from overseas supplies. As such, the next step consists in building the missing link, the conversion of spodumene into technical grade lithium salts, close to the mine, to avoid shipping large quantities of non-lithium material.

How does AMG engage with the local community near the Brazilian mine? What initiatives are in place?

AMG's Mibra-mine has been operating since 1945, initially mining tin, and later tantalum. With the growing importance of lithium globally, and well aware of the high spodumene content of its deposit, AMG changed the process around 2018, to produce spodumene concentrate as well as tin and tantalum ores.

This mine has been an integral part of the local communities for generations. AMG is committed to environmental sustainability, circular economy and waste recovery, always seeking to rationalise the consumption of natural resources. All of this would not have been possible without mutual support and cooperation.

AMG Brasil has a strong commitment towards the local communities, prioritising the local culture, striving to build a relationship of confidence, exchange and mutual respect and always working to improve not only the employees' quality of life, but also that of their families and communities.

AMG Brasil constantly invests into education through supporting local schools, training programs, environmental education, for which it received numerous awards.

Europe is on its way to becoming the second largest electric vehicle (EV) manufacturing region, but it has yet to build its own infrastructure along the entire value chain.

What are your thoughts on the future of lithium mining in Europe?

Europe is on its way to becoming the second largest electric vehicle (EV) manufacturing region, but it has yet to build its own infrastructure along the entire value chain. It has ambitious targets to quickly transition its highly developed automotive



sector from manufacturing internal combustion engine (ICE) vehicles to manufacturing EVs, but to succeed Europe needs to build up its own safe and sustainable regional supply chain, from assembling EVs, passed lithium-ion batteries and cathode manufacturers, all the way upstream to converting hard rock into technical-grade lithium carbonate (LCE) material and then refining it into battery-grade lithium hydroxide or carbonate, close to its customers. While the downstream part is building up the

essential upstream part - European mining and conversion of hard rock minerals - is years behind.

AMG Lithium will support the development of regional mining and conversion, ultimately targeting a fully integrated European supply chain to partially cover the growing demand. To close the loop and avoid raw materials from being shipped outside of Europe we are working closely with recyclers to align activities and enable us to upgrade the technical-grade lithium salts that they extract from black mass.

Do you have any advice for new lithium developers?

I personally feel that a lot of new projects are artificially inflated to make them look more attractive. The primary effect is that it makes them require huge investment, the secondary effect is that they aim too high, adding complexity and causing delays.

As for Europe specifically, junior miners involve local communities into their projects and decisions at an early stage, and yet, there is always resistance. We are major consumers so we need to overcome this “Not In My BackYard” (NIMBY)-attitude, for which the

miners will need strong support from the governments.

What is your vision for electromobility and battery storage in 2050?

Even though electromobility and battery storage are growing at a lower pace than we initially expected, both are set to grow further and faster. While electromobility will undoubtedly grow, we need to make sure Europe has its significant share. Battery energy storage systems (BESS) are expected to grow at a faster pace, as the growing energy consumption will require buffer capacity to better align demand and availability of electricity from different energy sources and cover periods of reduced sunshine or wind.

We will see a growing variety of solutions and hybrids thereof, just like AMG's LiVA-battery, a combination of a powerful lithium-ion-battery and a vanadium redox flow battery, using artificial intelligence routines for optimisation purposes.

AMG was one of the very first founding members of ILiA. How do you see the Association's role in the lithium industry developing in the future and what message do you have for its members?

Since its creation, ILiA has grown to become a respected organisation and has taken the role of being “the global voice of the lithium industry” very seriously. ILiA is ensuring that the relevant stakeholders in our growing industry are connected. It has also helped industry to streamline and speed up efforts and take decisions on different key topics, a prominent and resistant example currently being the RMOA (risk management) project.



Credit: AMG Brasil



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View from CHINA

From Maria Ma of SMM Information & Technology Co., Ltd

Key changes in China's lithium market: policy shifts, geopolitical pressures, and supply-demand dislocation

The Chinese lithium carbonate market experienced rollercoaster price fluctuations in Q1 2025. Before the Chinese Spring Festival, concentrated stockpiling by cathode producers and production line maintenance at lithium producers drove a temporary rebound in spot prices.

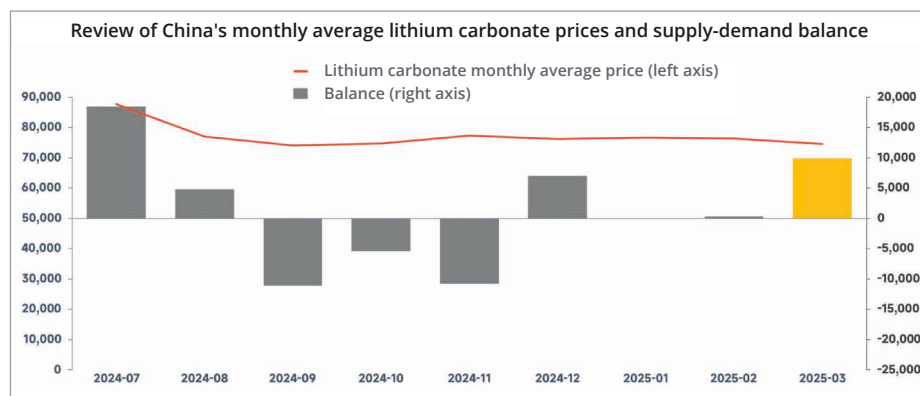
After the holiday, rapid production resumption shifted market to oversupply, sustaining a downward price trend for lithium carbonate. Besides, the new global tariffs and China's cancellation of mandatory energy storage policy also will significantly increase the uncertainty of further lithium demand.

Lithium carbonate supply-demand balance and recent price history

In January and February, before the Spring Festival, Chinese lithium carbonate market saw tight supply-demand balance driven by downstream material manufacturers' inventory build-up and reduced lithium salt production due to seasonal maintenance. This temporarily pushed spot prices upwards. Then, after the holiday, the market situation reversed dramatically with accelerated production resumption at lithium salt plants and slower-than-expected demand recovery. The market shifted to significant oversupply. Frequent inventory sell-offs by traders at discounted prices have also driven downward price adjustments in spot transactions during March and early April.

Policy Shift: Cancellation of China's Mandatory Energy Storage Policy

On February 9th 2025, China's



NDRC (National Development and Reform Commission) and NEA (National Energy Administration) jointly announced the cancellation of mandatory energy storage requirements for new renewable energy projects, effective June 1st 2025. This eliminates energy storage configuration as a prerequisite for project approval, grid connection, and power distribution. According to SMM data, China accounted for 43% of global energy storage demand in 2024. While the policy change may trigger short-term market contraction and industry consolidation, it is projected to foster healthier long-term development.

Geopolitical shock: US energy storage system demand uncertainty under the tariff conflict

Following US President Trump's inauguration in January 2025, renewed tariff measures against China have substantially compromised the profitability of US energy storage projects that were relying on direct Chinese imports. The insufficient economic viability of energy storage projects will directly impact demand in the US

energy storage market. Statistics indicate that over 50% of US energy storage batteries relied on Chinese supply chains in 2024. Despite lower tariffs on Japan and South Korea, their current production capacity constraints make them unlikely to replace Chinese products in the short term. Meanwhile, the US has imposed steep tariffs on southeast Asian countries, effectively blocking Chinese manufacturers' circumvention export routes. Although recent social media signals suggest potential tariff reductions, policy volatility continues to amplify market uncertainty at time of writing.

Conclusion

The lithium industry faces multidimensional challenges and pressure from policy-driven demand fluctuations and geopolitical tensions at present. Market participants must enhance supply chain flexibility while monitoring policy evolution in major markets.

View from China represents the opinions of SMM and does not reflect the opinions of ILiA.

ILiA member benefits include exclusive quarterly webinars with SMM regarding the Chinese lithium market. Contact ILiA for details.

SMM
Shanghai Metals Market

SPOTLIGHT ON SUSTAINABILITY

Responsible management of tailings at lithium hard-rock mines

In this issue we spoke to Clair Wilson, Head of Sustainability, Strategy & Compliance at Liontown Resources Ltd ('Liontown') to learn more about how a mining company can responsibly and sustainably process the waste rock tailings it generates during mining and processing operations.

As Wilson explained to *The Lithium Voice*, "At Liontown, we are committed to the responsible management of resources at all stages of our Kathleen Valley Lithium Operation, from exploration to design and construction, and throughout extraction, processing and distribution". Part of the company's philosophy is to capitalise on sustainability opportunities and this includes constructing an advanced tailings storage facility (TSF) at the mine, to safely handle the waste rock which is separated from the valuable lithium minerals during mining and ore processing activities.

At the Kathleen Valley Lithium Operation, tailings are either processed at the paste plant or disposed of in the tailings storage facility (TSF).



Image: Liontown Resources Ltd

The paste plant blends dry stacked tailings with approximately 3-4% cement to create a paste, which is then carefully pumped into the underground mine workings to backfill open stopes. Stopes are the excavated spaces from where ore has been extracted and filling them with paste greatly increases the long-term stability of the mine. During this process water is reclaimed, recycled and can be reused by the plant.

Liontown's tailings storage facility (TSF) embankments are constructed from bulk mine waste generated by excavation mining activities on site (see top photo). The TSF has been designed and constructed to the highest standards in accordance with the Code of Practice for Tailings Storage Facilities in Western Australia and

the ANCOLD Guidelines on Tailings Dam Planning, Design, Construction, Operation and Closure.

The TSF tailings are classified as non-acid forming, with no hazardous materials or substances present. To maximise water recovery efforts from the TSF its design includes an impermeable high-density polythene (HDPE) liner.

With production at Kathleen Valley progressing, Liontown is raising the internal embankments of cell one at the TSF to generate additional storage capacity and has also commenced construction of cell two.

Liontown found that filtered tailings generated at the paste plant can be used as subgrade material for the HDPE liner at the TSF, providing a smooth and firm base to build on. This allows the company to use a significant volume of tailings material for construction. The environmental and economic benefits are significant: costs associated with removing gravel from rocky oxide for that lining were minimised, while water usage has also been reduced. Additionally, repurposing process tailings and redirecting them away from the TSF increases the storage capacity required per tonne of lithium produced, lowering the overall footprint over the life of the mine. 



Image: Liontown Resources Ltd

A Special Report on the Expert Roundtable

In March 2025, ILiA hosted an expert roundtable in London, bringing together leading toxicologists, epidemiologists, and psychiatrists to evaluate the evidence underlying the proposed classifications of lithium compounds as alleged reproductive toxicants. This project reflects ILiA's commitment to ensure that regulatory decisions affecting lithium are based on transparent, science-based discussions.

This program was generously supported by eight leading lithium companies: Albemarle Corporation, Arcadium Lithium (prior to the acquisition by Rio Tinto), Ganfeng Lithium, Imerys Lithium France, LevertonHELM Ltd, Rio Tinto, Sibanye Stillwater Ltd, and SQM. The Association greatly appreciates their involvement in this project.

The roundtables focused in particular on a proposal by the European Chemicals Agency's Risk Assessment Committee (RAC) to classify lithium carbonate, hydroxide, and chloride as Category 1A/1B reproductive toxicants. Experts examined the available data on fertility and developmental toxicity and raised concerns about the robustness of the evidence underpinning the proposal.

Key findings

1. Fertility

Experts identified major shortcomings in key studies, including:

- Excessive dosing leading to systemic toxicity, confounding

reproductive effects.

- Missing or implausible animal data (age, weight, maturity).
- Methodological flaws like poor tissue handling, unsuitable animal strains, and inconsistent dosing.
- Failure to account for systemic toxicity's influence on fertility outcomes.
- The study with the most reliability and relevancy was discussed by the RAC, but was not reflected with the appropriate weight in the RAC's final conclusion.

Based on a full review, experts agreed that the evidence might support a Category 2 classification (suspected human reproductive toxicant), but not Category 1B, which requires "clear evidence."

2. Developmental toxicity

experts concluded that existing human data do not demonstrate a causal link between lithium exposure and developmental harm.

Specifically:

- Studies linking lithium to congenital heart defects (CHD) lacked adequate controls for confounding variables.
- Bipolar disorder patients face multiple co-occurring CHD risks (e.g. medications, obesity, alcohol/drug abuse).
- Small sample sizes and rare outcomes reduced statistical power.
- Surveillance bias may skew outcomes, as lithium-exposed pregnancies receive more monitoring.

The experts also discussed considerations related to medical uses and emphasised

that therapeutic lithium use involves much higher doses than environmental or occupational exposure. Benefits for bipolar disorder outweigh potential reproductive risks, and misclassification could stigmatise essential treatment and hamper the development of green technologies.

Recommendations

Experts advised a more scientifically grounded and balanced approach, including:

- Additional animal studies on fertility.
- Improved meta-analyses and pharmacoepidemiologic studies controlling for confounders.
- Better transparency and data quality in human studies.
- Applying a weight-of-evidence methodology, prioritising study quality and context.
- Engaging regulators to ensure proper use of available evidence.
- Advocating for classification decisions that reflect actual risk, not theoretical concern.

Conclusion

The panels concluded that current evidence does not support classifying lithium compounds as Category 1A/1B reproductive toxicants.

Concerns primarily relate to high-dose medical use, not environmental exposure. An overly cautious classification would risk undermining patient care and clean energy goals while providing limited real-world benefit. Experts outlined the need for a more proportionate, evidence-based regulatory approach.



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