

HOW DEFENCE SPENDING IS DRIVING OPPORTUNITIES FOR CRITICAL MINERALS

CRITICAL MINERALS for **DEFENCE**

JUNE 9-10 2026, TORONTO

ORGANISED BY **ENERGYANDMINES**

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EVENT BACKGROUND

Rising geopolitical risk, NATO commitments, and supply-chain vulnerability are accelerating defence-aligned demand for critical minerals with strategic applications, elevating their role as essential inputs to secure and resilient allied supply chains. This is a structural, long-term shift which is becoming a dominant driver of policy, capital and procurement for critical minerals.

Critical Minerals for Defence, June 9–10 at the Marriott Downtown CF Toronto Eaton Centre, will provide a unique Forum for mining leaders, investors, defence suppliers, and government to explore how defence demand is unlocking new opportunities for critical minerals and redefining Canada's role in allied defence supply chains.

This two-day conference will deliver key policy updates and actionable insights on how projects can be financed, qualified, and connected to long-term offtake with defence and industrial buyers. It will also examine the strategic, commercial, and industrial forces reshaping demand for defence-critical minerals — from geopolitics and government policy to processing, financing, and procurement.

Organized by Energy and Mines, this Forum is part of a Canadian series that also includes the Ontario Critical Minerals Forum and the BC Critical Minerals Forum, addressing the opportunities, barriers and urgency shaping Canada's role in global supply chains.

KEY TOPICS TO BE COVERED:

- ✔ **Defence Driving Demand for Critical Minerals**
- ✔ **Allied Cooperation and Investment**
- ✔ **Progressing Canada's Defence-Critical Minerals Strategy**
- ✔ **Defence Supply Chain Resilience and OEM Strategies**
- ✔ **Financing Defence-Critical Minerals**
- ✔ **Mobilizing Public-Private Capital for Defence-Critical Minerals**
- ✔ **Defence as a Market Maker for Critical Minerals**
- ✔ **The Defence Shift: Opportunities and Challenges for Mining**
- ✔ **First Nations Partnerships and Defence-Aligned Critical Minerals**
- ✔ **Processing Critical Minerals for Defence Supply Chains**
- ✔ **Recycling, Refining and By-Product Recovery for Defence Supply Chains**
- ✔ **Next Steps for Critical Minerals Miners in the Defence Supply Chain**

CRITICAL MINERALS for DEFENCE

JUNE 9-10
TORONTO

From Security Demand to Bankable Critical Mineral Supply Chains



DEFENCE DEMAND SIGNALS FOR CRITICAL MINERALS
Defence rearmament, NATO targets, and allied security commitments



ALLIED COOPERATION AND INVESTMENT
How are allied defence strategies translating into direct investment for critical minerals?



CANADA'S DEFENCE-CRITICAL MINERALS STRATEGY
The Defence Industrial Strategy, critical minerals and industrial policy updates



DEFENCE PRIMES AND MIDSTREAM SUPPLIERS
How are defence suppliers thinking about supply chain resilience and critical minerals?



DEFENCE CHANGING MINE FINANCE AND COMMERCIALIZATION
Government guarantees, stockpiling, strategic investments, public-private partnerships



THE DEFENCE SHIFT: WHAT DOES THIS MEAN FOR MINING?
Assessing and qualifying for defence; strategic opportunities; funding; risks



FIRST NATIONS PARTNERSHIPS
Partnering across the defence supply chain: critical minerals, infrastructure and processing



THE PROCESSING GAP
Building trusted processing capacity for critical minerals with defence applications



RECYCLING, REFINING & BY-PRODUCT RECOVERY
Building circularity into defence critical-minerals supply chains

AGENDA-AT-A-GLANCE

DAY 1: JUNE 9, 2026	DAY 2: JUNE 10, 2026
DEFENCE DEMAND SIGNALS FOR CRITICAL MINERALS	THE DEFENCE SHIFT: OPPORTUNITIES AND CHALLENGES FOR MINING
ALLIED COOPERATION AND INVESTMENT	FIRST NATIONS PARTNERSHIPS AND DEFENCE-ALIGNED CRITICAL MINERALS
DEFENCE SUPPLY CHAIN RESILIENCE AND OEM STRATEGIES	PROCESSING CRITICAL MINERALS FOR DEFENCE SUPPLY CHAINS
FINANCING DEFENCE-CRITICAL MINERALS	RECYCLING, REFINING & BY-PRODUCT RECOVERY
MOBILIZING PUBLIC-PRIVATE CAPITAL FOR DEFENCE-CRITICAL MINERALS	ALIGNING WITH DEFENCE SUPPLY CHAINS
DEFENCE AS A MARKET MAKER FOR CRITICAL MINERALS	WRAP-UP DRINKS
NETWORKING DRINKS	

THOUGHT LEADER SPONSOR:



HEAR FROM DEFENCE, GOVERNMENT, FINANCE AND MINING LEADERS INCLUDING:



Kevin Reed
President and
Chief Operations
Officer **Defence,
Security &
Resilience
Bank (DSRB)
Development
Group**



Jody Thomas
Former National
Security and
Intelligence Advisor
and Senior Advisor
Counsel Public Affairs



Kendal Hembroff
Associate Assistant
Deputy Minister,
Industry Sector,
**Innovation, Science
and Economic
Development
Canada (ISED)**



Eric Desaulniers
Founder,
President & Chief
Executive Officer
**Nouveau Monde
Graphite**



Tomasz Husak
Directorate-
General for
Defence Industry
and Space
(DG DEFIS)
EU Commission



Erik Eschen
CEO
VAC



Drew Horn
CEO
GreenMet



Isabella Chan
Senior Assistant
Deputy Minister,
Lands and Minerals
Sector
**Natural Resources
Canada**



Margaret Sault
Chief
**Mississaugas
of the Credit
First Nation**



Yves Leduc
CEO
Torngat Metals



Soon-Won Kan
Chief Representative
Officer
**Korea Mine
Rehabilitation and
Mineral Resources
Corp.(KOMIR)**



Christopher
Hernandez- Roy
Deputy Director
and Senior Fellow,
Americas Program
**Centre for Strategic
& International
Studies (CSIS)**



Abigail Hunter
Executive
Director
**Center for
Critical Minerals
Strategy, SAFE**



Gordana Slepcev
CEO and Director
Lomiko Metals



Eric Miller
CEO
**Global Battery
Materials**



Peter Suma
Senior Advisor,
StrongNorth Fund
BDC Capital



Ian Gibbs
President and CEO
Fireweed Metals



Robin Goad
CEO
**Fortune
Minerals**



Dawn Wellman
Manager -
Research and
Development
Rio Tinto



Jeff Gaulin
Vice President of
Corporate Affairs
Vale Base Metals

HEAR FROM DEFENCE, GOVERNMENT, FINANCE AND MINING LEADERS INCLUDING:



Hank Holland
CEO
**Amaero Advanced
Materials**



Brian Gabriel
EVP, Partnerships and
Market Strategy
Principal Mineral



David Anonychuk
Global Vice
President,
Metallurgy and
Consulting
SGS



Henri van Rooyen
CEO
Talon Metals



Jan Klasen
First Vice President
KfW



Nicolas Todd
Head of the Canadian
delegation,
**NATO Industrial
Advisory Group**
and Vice-President,
**Government Relations
and Communications,
Canadian Association
of Defence and Security
Industries (CADSI)**



Christian Spano
Director, Circularity
Vale Base Metals



Nathan Cardinell
Senior Staff
Materials Engineer
Lockheed Martin



Joseph Spocisak
Senior Policy Advisor
Holland & Knigh



Jeff Tasseron
Director Strategy
& Innovation
CAE



Scott Monteith
President and
CEO
**Avalon
Advanced
Materials**



Max Yerrill
Vice President
BMO Capital Markets



Justin Reid
President and CEO
Troilus Mining



Trent Mell
CEO
**Electra Battery
Materials**



Gillian Holcroft
CEO and Co-Founder
**Green Graphite
Technologies**



Anton Sestritys
Principal
VOSAVIS



Ashley Glen
Director of Structured
and Project Finance
**Export Development
Canada (EDC)**



Christopher Baker
Senior Director
**Canada Growth
Fund Investment
Management (CGFIM)**

SUPPORTING ORGANIZATIONS:



DAY 1: JUNE 9, 2026

8:30-8:40 **WELCOME TO TERRITORY**
Margaret Sault, Chief, **Mississaugas of the Credit First Nation**

8:40-8:45 **CHAIR'S OPENING REMARKS**

8:45-9:00 **MINISTERIAL ADDRESS:**

DEFENCE DEMAND SIGNALS FOR CRITICAL MINERALS

9:00-9:50 **KEYNOTE PANEL: DEFENCE DRIVING DEMAND FOR CRITICAL MINERALS**



Defence rearmament, NATO production targets, and allied security commitments are now directly influencing where capital, industrial capacity, and supply chains are being built. This panel brings together defence, mining, and industrial-security experts to explain how military readiness goals are being translated into real investments, funding programs, and strategic sourcing decisions for critical minerals — and what that means for Canadian and allied producers.

- How are NATO and allied defence targets reshaping demand for critical minerals, and which materials are now most strategically critical?
- How are defence readiness goals being converted into funding programs, stockpiling strategies, and long-term procurement commitments?
- Which parts of the defence value chain—defence platforms, aerospace, electronics, and energy systems—are driving the strongest new demand signals for specific minerals?
- What types of projects and jurisdictions are allied governments actively seeking to accelerate to secure supply?
- How does secure access to critical minerals underpin military readiness, essential defence technologies, and broader strategic resilience?
- How is Canada positioning itself to supply NATO and allied defence partners with strategic minerals—and which materials are emerging as the highest priority?

Kevin Reed, President and Chief Operations Officer, **Defence, Security & Resilience Bank (DSRB) Development Group**

Jody Thomas, Former National Security and Intelligence Advisor and Senior Advisor, **Counsel Public Affairs**

Scott Monteith, President and CEO, **Avalon Advanced Materials**

Nicolas Todd, Head of the Canadian delegation, **NATO Industrial Advisory Group** and Vice-President, **Government Relations and Communications, Canadian Association of Defence and Security Industries (CADSI)**

9:50-10:20 **NETWORKING BREAK**

DAY 1: JUNE 9, 2026

ALLIED COOPERATION AND INVESTMENT

10:20-10:40

EUROPE'S INVESTMENT STRATEGY FOR DEFENCE-CRITICAL MINERALS

- How Europe is co-investing in upstream and midstream
- How Canadian projects fit into European defence and industrial strategies
- What European buyers and funds are actively looking for

Tomasz Husak, Directorate-General for Defence Industry and Space (DG DEFIS), **EU Commission**

10:40-11:00

STRATEGIES AND OPPORTUNITIES FROM THE GERMAN RAW MATERIALS FUND

Jan Klasen, First Vice President, **KfW**

11:00-11:20

U.S. DEFENCE POLICY SIGNALS AND INVESTMENT PATHWAYS FOR CRITICAL MINERALS

Joseph Spocisak, Senior Policy Advisor, **Holland & Knight**

11:20-11:40

STRATEGIC INVESTMENTS AND PARTNERSHIPS IN DEFENCE AND CRITICAL MINERALS

- What KOMIR looks for in allied mining and processing projects — jurisdiction, processing pathways, by-product recovery, and security of supply
- Where Canadian projects fit into the Republic of Korea's long-term critical minerals and defence-aligned supply strategy

Soon-Won Kang, Chief Representative Officer, Director, **Korea Mine Rehabilitation and Mineral Resources Corp.(KOMIR)**

CANADA'S DEFENCE-CRITICAL MINERALS STRATEGY

11:40-12:20

ALIGNING DEFENCE, INDUSTRIAL POLICY, AND CRITICAL MINERALS

As allied governments elevate critical minerals to defence and industrial priorities, Canada is rapidly aligning its defence, industrial, and critical minerals strategies to support allied supply chains. This session brings together the leaders shaping defence procurement, minerals policy, and industrial strategy to provide an update on key policy developments to support critical minerals for allied defence supply chains.

- What are the latest updates on the implementation of Canada's Defence Industrial Strategy (DIS)?
- How are DND, NRCan, and ISED working together to ensure Canada's critical minerals strategy aligns with allied defence and industrial needs?
- How are defence procurement and industrial policy shaping which minerals, projects, and regions get prioritized?
- Where will government policy most directly affect project timelines, approvals, and offtake opportunities?
- What should miners and investors be doing now to align with Canada's defence-aligned supply chain priorities?

Kendal Hembroff, Associate Assistant Deputy Minister, Industry Sector, **Innovation, Science and Economic Development Canada (ISED)**

Isabella Chan, Senior Assistant Deputy Minister, **Lands and Minerals Sector, Natural Resources Canada**

12:20-1:30

NETWORKING LUNCH

DAY 1: JUNE 9, 2026

DEFENCE SUPPLY CHAIN RESILIENCE AND OEM STRATEGIES

1:30–1:50

OPERATIONALIZING CANADA'S MINERAL ADVANTAGE IN NATO SUPPLY CHAINS

Christopher Hernandez-Roy, Deputy Director and Senior Fellow, Americas Program, **Centre for Strategic & International Studies**

1:50–2:40

PANEL: DEFENCE SUPPLY CHAIN RESILIENCE AND OEM STRATEGIES

As allied defence production accelerates, critical minerals are moving from a background input to a strategic constraint shaping procurement, production timelines, and industrial policy. This panel brings together defence and aerospace primes to discuss evolving approaches to supply chain resilience and how critical minerals align with long-term defence sourcing strategies.

- Where do critical minerals actually sit within today's defence supply chains — and what is changing inside OEM sourcing, qualification, and long-term planning as defence demand accelerates?
- How is the conversation inside defence and aerospace OEMs evolving around critical minerals sourcing?
- What role do defence primes expect to play in catalyzing secure supply — through partnerships, long-term commitments, or closer engagement with mining and processing?
- What policy signals, procurement frameworks, or government tools would make it easier for OEMs to engage directly in defence-aligned minerals supply chains?
- What practical steps can Canadian miners and processors take to qualify as “trusted suppliers” within allied defence and aerospace ecosystems?

Chair: **Anton Sestritys**, Principal, **VOSAVIS**

Jeff Tasseron, Director Strategy & Innovation, **CAE**

Nathan Cardinell, Senior Staff Materials Engineer, **Lockheed Martin**



FINANCING DEFENCE-CRITICAL MINERALS

2:40-3:50

FINANCING DEFENCE-CRITICAL MINERALS

As defence demands begin to play a larger role in critical minerals markets, new forms of credit support, offtake, and public-private risk sharing are starting to shape how projects are financed. This session explores how emerging defence-linked procurement, government guarantees, stockpiling and strategic investment is impacting mine finance, commercializing, midstream developments and public-private partnerships.



DAY 1: JUNE 9, 2026

2:40–3:00

HOW DEFENCE DEMAND IS CHANGING MINING FINANCE

- How defence-linked offtake, government guarantees, and stockpiling are reducing credit risk and lowering the cost of capital
- Why midstream and defence-qualified materials are enabling new financing structures and long-term contracts
- How defence-aligned projects are being priced differently from EV or battery metals projects

Drew Horn, CEO, **GreenMet**

3:00–3:20

DEFENCE DEMAND DRIVING MINE COMMERCIALIZATION



- How government offtake, price support, and strategic investment have accelerated commercialization of a defence-critical minerals project
- Using long-term customer commitments to reduce risk and unlock project financing
- Building a secure North American supply chain that supports defence readiness, battery manufacturing, and advanced technologies

Eric Desaulniers, Founder, President & Chief Executive Officer, **Nouveau Monde Graphite**

3:20–3:50

FROM MINE TO MARKET: A DEFENCE-ALIGNED RARE EARTH PARTNERSHIP

- How this strategic North American–European rare earth supply and processing collaboration is strengthening defence-aligned permanent magnet value chains
- Securing fully traceable rare earth oxide supply from Canada (Strange Lake) to advanced magnet manufacturing and downstream markets
- Creating bankable long-term offtake and processing pathways that enable miners, midstream processors, and allied industries to scale together

Yves Leduc, CEO, **Torngat Metals**

Erik Eschen, CEO, **VAC**

3:50–4:20

NETWORKING BREAK

MOBILIZING PUBLIC-PRIVATE CAPITAL FOR DEFENCE-CRITICAL MINERALS

4:20–5:00



MOBILIZING PUBLIC-PRIVATE CAPITAL FOR DEFENCE-CRITICAL MINERALS

Canada is deploying a powerful set of financial, procurement, and project-acceleration tools to match allied defence demand with domestic mining and processing projects. This panel brings together Canada's key public financing institutions to explain how defence and industrial priorities are being converted into capital, guarantees, and project support.

- How are defence and allied security priorities reshaping where public capital is being deployed?
- How do Canada Growth Fund, EDC, BDC, and CIB work together to support defence-critical minerals projects?
- What makes a project eligible for defence-aligned funding and guarantees?
- How should miners and investors position their projects to access this capital?

Chair: **Jeff Gaulin**, Vice President of Corporate Affairs, **Vale Base Metals**

Peter Suma, Senior Advisor, StrongNorth Fund, **BDC Capital**

Ashley Glen, Director of Structured and Project Finance, **Export Development Canada (EDC)**

Christopher Baker, Senior Director, **Canada Growth Fund Investment Management (CGFIM)**

DEFENCE AS A MARKET MAKER FOR CRITICAL MINERALS

5:00–5:45



PANEL: DEFENCE AS A MARKET MAKER FOR CRITICAL MINERALS

As defence and allied governments shift from open markets to strategically managed supply chains, security demand is becoming a powerful new market signal for critical minerals. This panel will examine how defence-driven offtake, public capital, and industrial policy are reshaping project risk, investment decisions, and commercial pathways for critical minerals.

- How is defence-driven demand changing how banks, investors, and OEMs evaluate mining projects compared with traditional commodity or EV-focused markets?
- What defence-aligned signals (offtake commitments, stockpiling, loan guarantees, qualification requirements) are most influential in determining which projects can raise capital?
- How does defence demand change project risk, timelines, and development decisions for miners and their financial partners?
- Is security the new ESG? How might investors quantify geopolitical and supply-chain risk—and how could that reshape project valuation and cost of capital?
- Where are defence OEMs and allied buyers most likely to engage — upstream mining, midstream processing, or materials qualification and integration?
- What role should government tools (offtake, price floors, guarantees, strategic investment) play in making projects bankable — and are there any risks to over-reliance on public backing?

Brian Gabriel, EVP, Partnerships and Market Strategy, **Principal Mineral**

Eric Miller, CEO, **Global Battery Materials**

Max Yerrill, Vice President, **BMO Capital Markets**

5:45–6:30

NETWORKING DRINKS

DAY 2: JUNE 10, 2026

8:20-8:25 **CHAIR'S REMARKS**

8:30-8:45 **GEOPOLITICS, INDUSTRIAL STRATEGY, AND THE DEFENCE-CRITICAL MINERALS SHIFT**

Abigail Hunter, Executive Director, Center for Critical Minerals Strategy, **SAFE**

THE DEFENCE SHIFT: OPPORTUNITIES AND CHALLENGES FOR MINING

8:45-9:50 **THE DEFENCE SHIFT: OPPORTUNITIES AND CHALLENGES FOR MINING**

As defence spending and allied procurement accelerate, critical minerals are moving from long-term strategic ambitions into bankable projects. This session examines how defence and security demand is already underpinning critical minerals mining through offtake agreements, government support, and defence-linked financing.

8:45-9:00 **HOW DEFENCE IS RESHAPING THE CRITICAL MINERALS LANDSCAPE**



- Why NATO, G7, and allied governments are shifting from energy-driven minerals policy to defence-led industrial strategy
- How stockpiling, sovereign offtake, and security-driven procurement are changing project economics and investment risk
- What this shift means for miners, processors, and investors seeking to qualify for allied defence supply chains

David Anonychuk, Global Vice President, Metallurgy and Consulting, **SGS**

9:00-9:15 **CASE STUDY: THE DEFENCE SHIFT AND STRATEGIC COPPER SUPPLY**

- Positioning the Troilus project in Québec's Frotet-Evans Greenstone Belt as a secure, responsible supply of copper and gold for allied defence and industrial markets

Justin Reid, President and CEO, **Troilus Mining**

9:15-9:45 **FIRESIDE CHAT: FROM EXPLORATION TO DEFENCE VALUE CHAIN**

- What does it mean for exploration companies to think "mine-to-market" from day one and link geology, downstream processing, and defence demand?
- How are private equity, banks, and allied government programs beginning to support companies building defence-aligned critical minerals strategies?
- What new opportunities and risks are emerging for early-stage companies positioning themselves within the defence supply chain?

DAY 2: JUNE 10, 2026

9:45-10:30

PANEL: STRATEGIC OPPORTUNITIES AND RISKS FOR MINING IN THE DEFENCE SUPPLY CHAIN

As defence demand begins to open new pathways to market, critical minerals producers are assessing the opportunities and challenges for defence offtakes, funding and partnerships. This panel provides insight into key considerations for critical minerals miners as the defence-critical minerals shift opens up new possibilities and risks.

- What are miners trying to understand about accessing defence markets and qualifying for defence end customers?
- What do early signals or interactions (with governments, OEMs, processors) indicate about defence as a potential market?
- What are the strategic opportunities and risks for becoming part of the defence value chain - and how does this differ from traditional industrial, EV, or commodity markets?
- How are global trade dynamics, tariffs, and geopolitical shifts influencing the opportunities for critical minerals in the defence sector?
- How are current regulatory and funding mechanisms supporting defence-critical minerals projects — and where are they falling short?

Gordana Slepeev, Chief Executive Officer, **Lomiko Metals**

Ian Gibbs, President and CEO, **Fireweed Metals**

Henri van Rooyen, CEO, **Talon Metals**

10:30-11:00

NETWORKING BREAK

FIRST NATIONS PARTNERSHIPS AND DEFENCE-ALIGNED CRITICAL MINERALS

11:00-11:40

PANEL: FIRST NATIONS PARTNERSHIPS AND DEFENCE-ALIGNED CRITICAL MINERALS

As critical minerals increasingly support defence supply chains, First Nations are being asked to engage with new types of projects across mining, infrastructure, and processing. This panel explores what opportunities First Nations see emerging from this shift, where concerns or challenges may exist, and what conditions are needed for Nations to partner in ways that align with community priorities and long-term stewardship.



- What opportunities do First Nations see emerging to partner on critical minerals projects, infrastructure, and processing as defence demand grows?
- Are there areas of the value chain where Nations see stronger alignment — or greater caution — when projects may support defence or security end uses?
- What concerns or challenges do First Nations consider when deciding whether and how to support or partner on these projects?
- What conditions, partnership models, or examples, best demonstrate how critical minerals projects can align with First Nations priorities around consent, stewardship, and long-term economic benefit?

DAY 2: JUNE 10, 2026

PROCESSING CRITICAL MINERALS FOR DEFENCE SUPPLY CHAINS

11:40-1:00



PROCESSING CRITICAL MINERALS FOR DEFENCE SUPPLY CHAINS

Defence supply chains are only as secure as their processing and refining capacity — and today, most of that capacity still sits in non-trusted jurisdictions. This session examines how allied governments and defence industries are beginning to confront the processing gap, and what types of funding, offtake and industrial policy tools are emerging to make defence-critical processing viable in allied jurisdictions. It will also explore how this shift is creating new commercial opportunities for miners and mid-stream developers and how advanced processing is enabling a shift from raw materials supply toward defence-ready manufacturing capability across allied jurisdictions.

11:40-12:00

CASE STUDY: BUILDING A DEFENCE-READY COBALT REFINERY

- Demonstrating how defence demand can accelerate midstream investment and qualification for battery, aerospace, and defence applications
- Linking mining, refining, and end-users across allied defence and industrial value chains

Trent Mell, CEO, **Electra Battery Materials**

12:00-12:20



CASE STUDY: FROM PROCESSING TO DEFENCE MANUFACTURING CAPABILITY

- Why titanium, niobium, and refractory alloy powders are emerging as strategic defence materials
- Building sovereign advanced materials capacity through atomization, PM-HIP, and integrated processing
- What defence procurement signals mean for miners and processors moving downstream into defence manufacturing

Hank Holland, CEO, **Amaero Advanced Materials**



DAY 2: JUNE 10, 2026

12:20-1:00



PANEL: SCALING AND FINANCING DEFENCE-READY PROCESSING CAPACITY

As defence demand moves from strategy into procurement, there is increasing pressure to build and scale processing and refining capacity outside non-trusted jurisdictions. This panel examines the challenges of building defence-ready midstream projects — including capital, energy, permitting, and offtake — where commercial and strategic opportunities are emerging and how advanced materials manufacturing is becoming the new strategic layer between processing and defence OEM procurement.

- Where are the biggest opportunities right now to build defence-critical processing and refining capacity — and which minerals are most attractive for new projects?
- What are the biggest barriers to building processing capacity — power, permitting, technology, or financing — and how are they being addressed?
- How are allied governments and defence OEMs using offtake, guarantees, and industrial policy to make midstream projects investable?
- How does defence demand change the economics of midstream projects compared to battery, EV, or commercial industrial markets?
- What new kinds of partnerships are emerging between miners, processors, and defence buyers to accelerate project development?

Robin Goad, President & CEO, **Fortune Minerals**

1:00-2:00

NETWORKING LUNCH

RECYCLING, REFINING & BY-PRODUCT RECOVERY

2:00-3:15



RECYCLING, REFINING & BY-PRODUCT RECOVERY FOR DEFENCE SUPPLY CHAINS

This session examines how recycling, by-product recovery, and secondary refining are becoming essential pillars of allied defence supply chains — reducing geopolitical risk, lowering environmental impact, and creating new sources of strategic metals alongside primary mining.

2:00-2:20

TURNING MINE WASTE INTO DEFENCE METALS

- Challenges and opportunities for critical mineral coproduction
- How downstream processing in Alberta can convert under-utilized material into strategic North American supply
- Why feedstock and refining partnerships are becoming essential to secure defence-grade metals

Robin Goad, President & CEO, **Fortune Minerals**

Dawn Wellman, Manager – Research & Development, **Rio Tinto**

2:20-2:35

WHY CIRCULARITY IS CENTRAL FOR DEFENCE AND CRITICAL MINERALS

- The role recycling and circularity in Canada's critical minerals and defence strategies

Christian Spano, Director, Circularity, **Vale Base Metals**

DAY 2: JUNE 10, 2026

2:35-3:15



PANEL: RECYCLING, REFINING & BY-PRODUCT RECOVERY FOR DEFENCE

As defence demand grows and geopolitical risks persist, recycling, secondary refining, and by-product recovery will play an essential role in defence supply chains. This panel will explore how circular supply chains can enhance security, lower environmental impact, and create new commercial pathways for defence-critical minerals.

- Where are the most promising opportunities for recycling and by-product recovery to meaningfully contribute to defence-critical minerals supply in the near to medium term?
- What are the biggest technical, regulatory, and economic barriers to scaling recycling of defence-critical metals like gallium, niobium, tungsten, and rare earths?
- How should governments structure funding, procurement, or incentives to make recycling and by-product recovery commercially viable?
- What role should defence OEMs play in designing products and systems that make critical metals easier to recover at end-of-life?
- How can Canada position itself as a leader in circular defence supply chains — and what partnerships are needed between miners, refiners, recyclers, and government to get there?

Christian Spano, Director, Circularity, **Vale Base Metals**

Gillian Holcroft, CEO and Co-Founder, **Green Graphite Technologies**

ALIGNING WITH DEFENCE SUPPLY CHAINS

3:15-4:00

PANEL: NEXT STEPS FOR CRITICAL MINERALS MINERS IN THE DEFENCE SUPPLY CHAIN

- As defence demand for critical minerals moves from policy to procurement, how should critical minerals miners position themselves to align with allied defence supply chains? This panel explores the strategic choices facing miners as defence becomes a more influential — but still evolving — market.
- As defence becomes a stronger demand signal, how should miners think about their role in the defence-industrial ecosystem — as raw material suppliers, strategic partners, or something more integrated?
- How should mining companies balance diversified markets (EVs, energy transition, traditional metals) with a defence-driven pathway, and what does that mean for capital allocation and project design?
- What capabilities and partnerships are now essential to qualify for defence supply chains — across governance, compliance, traceability, processing, and engagement with OEMs and governments?
- As defence demand accelerates, what actions are most urgent — not easiest — to unlock defence-aligned supply, and who needs to lead on regulatory reform, investment gaps, priority minerals, or enabling technologies?

4:00-4:05

CHAIR'S REMARKS

4:05-5:00

WRAP-UP DRINKS

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