

Critical Minerals – Thoughts and Musings

Bob Loeffler

Research Professor of Public Policy

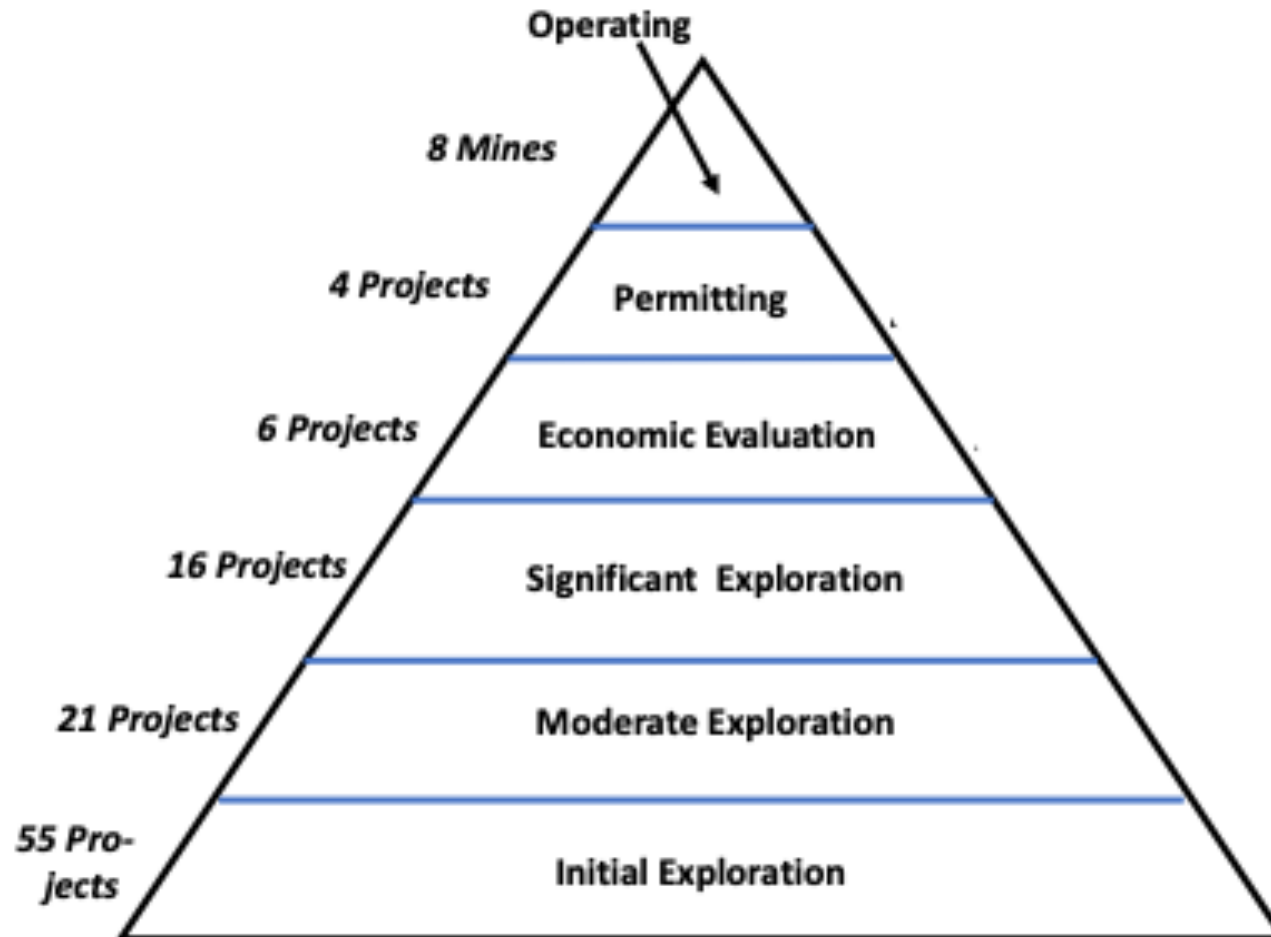


UAA Institute of Social
and Economic Research
UNIVERSITY of ALASKA ANCHORAGE



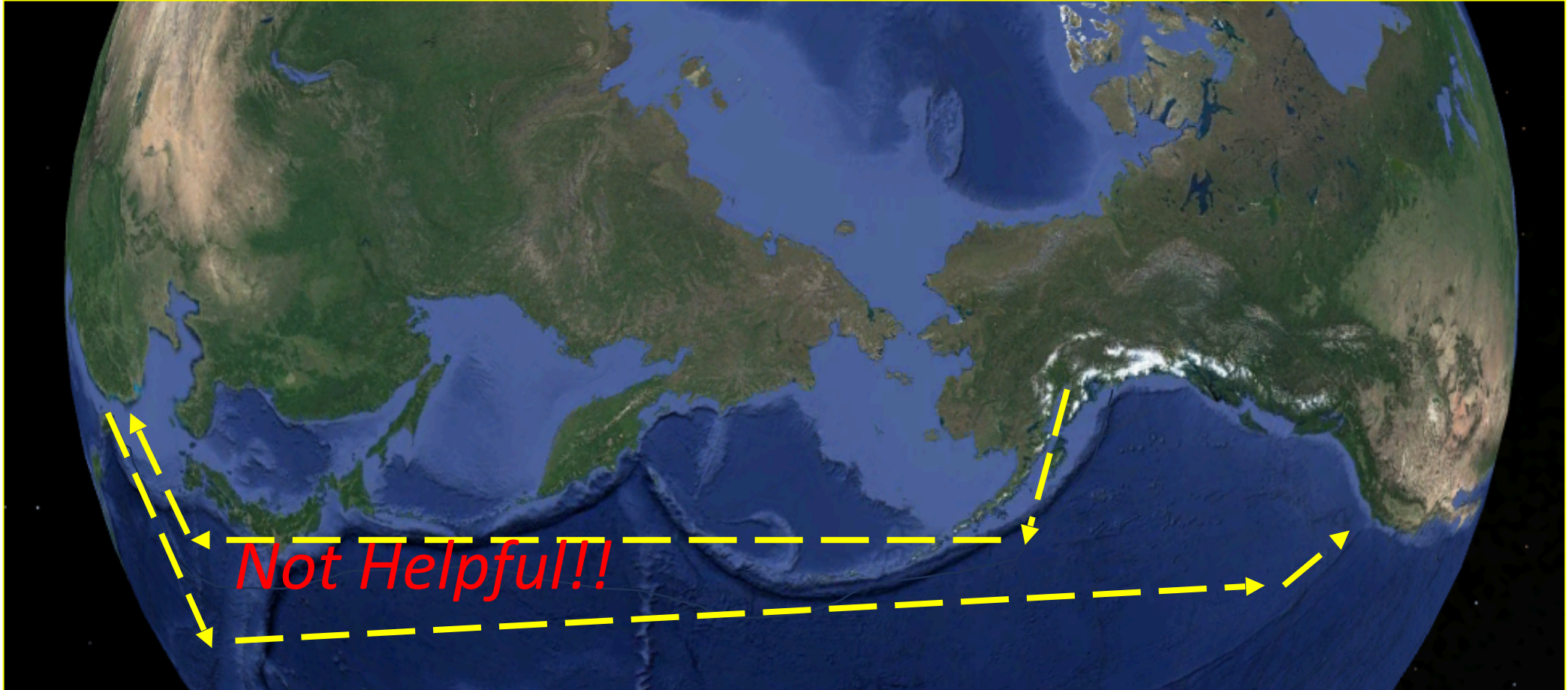
New Mines?

- *Today's exploration projects are tomorrow's mines.*
 - *Discoveries, while important, are for the future*
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Supply chains matter:

- *Processing in China does not make the US more secure*
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Markets matter:

- *Minerals without a market price are difficult for investors*
- *Some minerals require manufacturer involvement*
- *Low-volume markets are subject to price volatility*

