Mineral Sands Conference

Australia’s key meeting place for the mineral sands industry

18 – 19 March 2020  |  The Westin, Perth

HEAR FROM THE INDUSTRY REPRESENTATIVES:

Reg Adams, Managing Director, ARTIKOL UK
Steve Forrest, General Manager, Tronox
Tim Carstens, Managing Director, Base Resources
Cameron Perks, Consultant, TZ Minerals International Pty Ltd
Hugh Stackpool, Director, Petra Capital
Peter Malpas, Director, Braemar
Paul Gibson Roy, Manager Ecological Restoration, Kalbar Resources
Peter Ross, Executive Director – Origination, Northern Australia Infrastructure Fund
Bruce McFadzean, Managing Director, Sheffield Resources Ltd

Patrick Mutz, Managing Director, Image Resources
Greg Jones, Geological Services Manager, IHC ROBBINS
Graham Howard, Managing Director, VHM Limited
Sean Molloy, CEO, Avertana
Dudley Kingsnorth, Adjunct Professor, Western Australia School of Mining
Murray Lines, Director, Stratum Resources
Carolyn Balint, Senior Principal ESIA, Coffey
Damian Connelly, Principal Consulting Engineer, METS Engineering
Alister MacDonald, General Manager - Marketing, Alkane Resources

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### Day 1 - Mineral Sands Conference

**8.30** Registration and Morning Coffee

**9.00** OPENING | Opening remarks from the Chair  
Reg Adams, Managing Director, ARTIKOL UK

### Industry Outlook

**9.10** Mineral Sands – Will there be Enough to Satisfy Demand?  
- Economic overview: world trade & GDP, energy prices, commodity cycles & investment climate  
- Supply/demand & prices for TiO2 pigment  
- Supply/demand & prices for mineral sand products  
- Dwinding ore grades & cost implications  
- Changing regional dynamics  
- Mergers, demergers & acquisitions throughout the value-chain  
- Addressing the issues of price volatility  
- Health & safety concerns  
- Carbon footprint & other environmental concerns  
- Key factors affecting the industry over the next 25 years  
Reg Adams, Managing Director, ARTIKOL UK

**9.50** Tronox – impact on the Australian and global TiO2 industry  
Steve Forrest, General Manager, Tronox

### Operation Updates

**10.30** Thunderbird – A globally dominant zircon project  
- Thunderbird is one of the largest undeveloped zircon rich deposits globally  
- Thunderbird will be a globally dominant zircon producing project for 37 years  
- Australia is a very stable mining jurisdiction  
- Thunderbird is fully permitted  
- Global zircon supply issues will emerge from 2020  
- Global high grade TiO2 feedstock supply issues are already emerging  
Bruce McFadzean, Managing Director, Sheffield Resources Ltd

**11.00** Refreshment break

**11.40** Building a Unique Mineral Sands Company  
- The next phase of Kwale Operations and mine life extension  
- Toliara Project DFS outcomes and progress report  
Tim Carstens, Managing Director, Base Resources

**12.10** Securing Critical Minerals for the Future  
Graham Howard, Managing Director, VHM Limited

### Investment Perspective

**2.20** Financing and markets perception of mineral sands  
Hugh Stackpool, Director, Petra Capital

**3.00** Investing in the mineral sands industry – NAIF perspective  
Peter Ross, Executive Director – Origination, Northern Australia Infrastructure Fund

**3.30** Refreshment break

### Projects update

**4.00** Australia’s Newest Mineral Sands Miner  
- Boonanarring Mineral Sands Project; 100%-owned, high-grade, zircon-rich  
- Located 80km north of Perth in infrastructure-rich North Perth Basin in WA  
- Construction and commissioning completed ‘on-time’ and ‘on-budget’  
- Ramped up to full production in 2nd month of operation (Jan 2019)  
- Profitable in Q1 2019; cashflow positive in Q2  
- Beat expectations for 3 QTRs through Sep 2019  
- 2020 forecast to be a banner year Image Resources NL  
Patrick Mutz, Managing Director, Image Resources

**4.30** Developing the Thule Black Sands Project in Greenland  
Greg Jones, Geological Services Manager, IHC ROBBINS

**5.00** Open discussion and closing remarks from the Chair

**5.30** Networking drinks
8:30  Registration and Morning Coffee

9:00  OPENING | Opening remarks from the Chair

9.10  Titanium feedstocks: a return to growth in 2020 and beyond
— Demand weakness in 2019, followed by a recovery in 2020 and 2021
— Decline in global sulfate feedstock supply offset by an increase in ilmenite output from China
— What does an increase in chloride slag output mean for ilmenite supply, and what does it mean for metals and welding segments?
— What new supply is likely to come online in 2020 and beyond?
Cameron Perks, Consultant, TZMI

9.40  Developing a new process for treating low-TiO2 slags and tailings
Sean Molloy, CEO, Avertana

10:10  Restoring species-rich native grassy woodland to a post-mine landscape in Eastern Gippsland, Victoria
— Local/regional and national rarity of grassy woodland communities
— Current landscape use
— Securing seed supplies for restoration - seed production approaches
— Approaches to re-establishing complex functional grassy communities
— Integrating fauna into rehab
— Examples of early success using planned techniques
Paul Gibson Roy, Manager Ecological Restoration, Kalbar Resources

10:40  Refreshment break

RARE EARTHS

11.10  Australia and the Rare Earths Market: Uniquely Placed to Provide the Diversity required for Sustainability
Dudley Kingsnorth, Adjunct Professor, Western Australia School of Mining

11.40  Monazite - Economic source of rare earth elements or fuel for the future?
Murray Lines, Director, Stratum Resources

12.10  Review of the EPBC Act – what does that mean for the mineral sands industry?
— Review of the EPBC Act occurs every 10 years, setting the Commonwealth environmental regulatory framework for the next decade
— The nuclear trigger will be one of the aspects examined which will impact the mineral sands industry
— How can the mineral sands industry engage with the Commonwealth over regulatory reform
Carolyn Balint, Senior Principal ESIA, Coffey

12.40  Lunch

TECHNICAL PERSPECTIVES

1.40  Processing Options For Mineral Sands With A High Slimes Content
Damian Connelly, Principal Consulting Engineer, METS Engineering

PROJECTS UPDATE

2.10  Alkane Dubbo Project – An update
Alister MacDonald, General Manager - Marketing, Alkane Resources

2.40  Session to be advised

3.10  CLOSE | Closing remarks from the Chair
Afternoon break and close of Conference

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VENUE DETAILS
The Westin Perth, 480 Hay St, Perth WA 6000
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