



MINERALS &
INVESTMENT WEEK *Presents the 21st annual*

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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MINERALS & INVESTMENT WEEK

The Minerals & Investment Week is the key industry gathering providing expert insights for Australia's iron ore and mineral sands industries. These 2 major events will run concurrently and delegates can select sessions and plan a unique track to suit their individual needs.

Don't miss this exceptional opportunity to hear exclusive market updates and network with leaders from across the resources industry.

Please join us on 18-19 March 2020 at the Westin Perth.

One registration gives the delegate access to either the **Global Iron Ore** or **Mineral Sands Conference**.

Mineral Sands Conference

Wednesday 18 March 2020

DAY 1

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
- Dwindling 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*

12.40 Lunch

1.50 **Dry Bulk Shipping: Outlook for Mineral Sand Freight Costs**

- Dry Bulk Supply and Demand Fundamentals
- The Impact on Shipping Freight Rates for Mineral Sand Exporters

Peter Malpas, *Director, Braemar*

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



Mineral Sands Conference

Thursday 19 March 2020

DAY 2

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

SPONSORSHIP AND EXHIBITION OPPORTUNITIES

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MINERALS & INVESTMENT WEEK

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Register Early & Save	Standard Rate				Full Rate		
	Book & pay by 1 March 2020				Book & pay from 2 March 2020		
Conference Package	PRICE	GST	TOTAL	SAVE	PRICE	GST	TOTAL
Two day conference	\$3,095	\$309.50	\$3,404.50	\$100	\$3195	\$319.50	\$3514.50

VENUE DETAILS

The Westin Perth, 480 Hay St, Perth WA 6000
Phone: (08) 6559 1888, www.marriott.com.au

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