

RARE EARTH METALS ARE A FAILED INDUSTRY

Silicon Valley Oligarchs Are Pumping An Impossible Resource
To Promote Their Own Stocks



I
Is An Industry Based On Child Labor Good For America?

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Forward

Silicon Valley tech oligarchs control politics, politicians and public policy decisions in order to control ideologies and treasury money distributions. Their bribes pay to keep their monopolies going.

Fuel Cells like those used in the Honda, Toyota, Kia, Hundai, and all other non-Detroit controlled cars, work perfectly but the tech cartel hates them because they beat lithium batteries by miles. Steam, capacitors, air pressure, and hundreds of other energy solutions do not cause the genocides, child labor camps, explosions, self-generating fires, cancer-causing smoke and other evils that lithium batteries cause. All alternatives to lithium batteries can be entirely produced domestically. Lithium requires invasions and CIA covert actions in foreign nations that already hate the USA. China, Chile, Afghanistan and other nations have already plotted dog-leash restrictions on U.S. access to rare earth minerals.

Risking the entire fate of America, these tech oligarchs and their surrogates, have spent billions of dollars to nay say every other technology, particularly fuel cells (which they fear most).

China promoted Joe Biden and Barack Obama for President because China knew that they would push electric cars..and China controls the electric car materials resources. Quite a scheme. It is not a question of "If" China will hold the U.S. hostage. It already has.

U.S. Identifies Vast Mineral Riches in Afghanistan



Tyler Hicks/The New York Times

A bleak Ghazni Province seems to offer little, but a Pentagon study says it may have among the world's largest deposits of lithium.

By JAMES RISEN

Published: June 13, 2010

WASHINGTON — The United States has discovered nearly \$1 trillion in untapped mineral deposits in [Afghanistan](#), far beyond any previously known reserves and enough to fundamentally alter the Afghan economy and perhaps the Afghan war itself, according to senior American government officials.

At War

Notes from Afghanistan, Pakistan, Iraq and other areas of conflict in the post-9/11 era.

[Go to the Blog »](#)

Multimedia

The previously unknown deposits — including huge veins of iron, copper, cobalt, gold and critical industrial metals like [lithium](#) — are so big and include so many minerals that are essential to modern industry that Afghanistan could eventually be

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In Theaters

In February 2021, President Biden issued Executive Order 14017, “[Executive Order on America’s Supply Chains](#)” (discussed [here](#)), requiring (among other things) a report within 100-days requiring key government agencies to assess vulnerabilities and consider potential improvements to supply chains in four critical industries – (i) semiconductor manufacturing; (ii) high capacity batteries; (iii) rare earth elements; and (iv) pharmaceuticals. He demanded this report because a ton of his staff were telling him that Jennifer Granholm, newly appointed Secretary of Energy, was “full of shit” promoting electric cars that could never be built because of resources constraints.

On June 8, 2021, the White House released its [100-day Supply Chain Review Report](#) and accompanying [fact sheet](#). This article does not attempt to relay all of the information from the 250-page Report (the Report’s Executive Summary alone is 6 pages). Instead, we have attempted to summarize some of the Report’s most salient points and suggest how the risks, challenges, and recommendations discussed in the Report may impact companies that do business in these four critical industries.

The bottom line: Rare Earth metals are an ALREADY FAILED EFFORT because they all exist in places that require cold, or hot, war to get them. There are many other options for energy storage.

Summary of the 100-day Supply Chain Review

As a reminder, the Executive Order asked for a quick-turn report within 100 days discussing four “critical” industries and the associated supply chain. Specific government agencies were assigned to lead the quick-turn review as follows:

Industry/Supply Chain Issues	Responsible Agency
Semiconductor manufacturing	Department of Commerce
High-capacity batteries (including those for electric vehicles)	Department of Energy
Rare earth elements	Department of Defense
Pharmaceuticals	Department of Health and Human Services

Our summary, below, focuses on what we see as the key risk areas and challenges, as well as certain of the resulting recommendations identified by each reviewing agency.

I. Semiconductor Manufacturing and Advanced Packaging (Department of Commerce)

Key Risks and Challenges

1. **Fragile supply chains.** Semiconductor supply chains are immense, and require vast inputs and resources to function properly. Because the industry is highly specialized and geographically concentrated (in Asia), a natural or human-made disaster has the potential to cause a massive disruption in the industry.
2. **Malicious supply chain disruptions.** As microchips become more complex and outsourced, the risk of malicious interference or disruptions increases dramatically. In particular, this includes insertions of malicious vulnerabilities (*e.g.*, “back doors” that can allow malicious actors to target a system using the chip). Counterfeiting and re-use of compromised semiconductors presents an additional risk, including revenue loss and early or catastrophic failure of end systems.
3. **Dependence on China.** U.S. equipment companies are nearly entirely dependent on foreign suppliers, with purchases from China accounting for an increasingly large percentage of the market. Semiconductor companies would be significantly impacted by trade restrictions, embargos, or conflicts involving China. In short, the need to rely so heavily on a non-U.S. ally for an essential component of nearly every modern technology product puts the U.S. at significant risk.

Key Recommendations

1. **Fully fund the “Creating Helpful Incentives for Production of Semiconductors (CHIPS) for America” program.** The 2021 National Defense Authorization Act, Pub. L. No. 116-283 §§ 9901-9908, incentivizes domestic investment in semiconductor production. The Department of Commerce recommends these programs be fully funded to incentivize semiconductor manufacturing and research and development (R&D) to promote long-term U.S. leadership in the industry.
2. **Strengthen the domestic semiconductor manufacturing ecosystem.** This recommendation suggests legislative action, incentives, and investment to “support key upstream—including semiconductor manufacturing equipment, materials, and gases—and downstream industries to offset high operational costs in the United States.” Specifically, the government may leverage programs like the International Trade Administration’s “SelectUSA” program and the Department of Commerce National Institute of Standards and Technology (NIST) Manufacturing USA Institute, both of which have been requested in President Biden’s 2022 Budget.
3. **Support manufacturers, particularly small and medium-size businesses.** To enhance innovation, the Department of Commerce recommends the U.S. Government invest R&D

resources in small and medium-sized business, as well as disadvantaged firms along the supply chain. This kind of diversification will reap benefits both in terms of innovation and also jobs.

4. **Protect U.S. technological advantage.** To address national security and foreign policy concerns, the Department of Commerce recommends that export control policies align with policy actions related to the supply chain. Additionally, the Department of Commerce recommends that reviews by the Committee on Foreign Investment in the U.S. (CFIUS) consider the national security concerns related specifically to the semiconductor supply chain before approving foreign investment in U.S. companies.

II. Large Capacity Batteries And Electric Vehicles (EVs) (Department of Energy)

Key Risks and Challenges

1. **Weak domestic production/foreign dependence.** Global production of the minerals that are essential to producing high-capacity batteries – including lithium, cobalt, nickel, and graphite – each are primarily dependent on a single nation, China. Additionally, the business of refining these minerals is dominated by China and Russia. Dependence on potential adversaries is a huge supply chain risk, as these countries can use market control to restrict access to necessary materials to build long-lasting batteries.
2. **Geopolitical issues.** This includes a host of different issues including restriction of access to resources by China; substandard materials being offered to U.S. makers of the battery cells; and human rights violations (including forced labor) or other types of corruption in countries in the supply chain.
3. **Market/economic shocks.** As demand increases, and supply struggles to keep pace, it is likely that battery prices may spike in the future. Additionally, any tax or penalties on products whose production and delivery require large CO₂ emissions could lead to secondary market related disruptions. If such policies become widespread, the price of Chinese products, in particular, could rise sharply, placing U.S. EV manufacturers at a severe disadvantage.

Key Recommendations

1. **Stimulate demand for end products using domestically manufactured high-capacity batteries.** This recommendation focuses on supporting U.S.-based demand in two sectors: (1) transportation and (2) utilities. For transportation, the Department of Energy recommends: (a) transitioning the entire federal government vehicle fleets, as well as other school and transit buses, to EVs; (b) providing rebates and tax credits for consumers (with a “Buy America” preference for U.S. content); and (c) supporting the EV charging infrastructure across the country. Likewise, for utilities, the Department of Energy recommends: (i) accelerating federal procurement of battery storage; (ii) expanding tax credits to include stationary storage as a stand-alone resource; and (iii) reforming power transmission regulations to support renewable power and stationary energy storage.

2. **Strengthen responsibly-sourced supplies for key advanced battery minerals.** The Department of Energy recommends: (a) that the U.S. invest in targeted, mineral-specific strategies, including supporting sustainable domestic extraction of lithium; (b) recovering nickel and cobalt from recycled or unconventional sources; and (c) working with global allies to expand global production and increase access to supplies.
3. **Promote sustainable domestic battery materials, battery cell, and battery pack production.** This recommendation centers around financial support and investment from the U.S. government in the form of grant programs, tax credits, and federal procurement contracts. It specifically mentions leveraging the Department of Energy's Advanced Technology Vehicle Management Loan program and reviving and expanding Section 1603 of the American Recovery and Reinvestment Tax Act (ARRTA) program to support small manufacturers in the batteries, battery cells, and related material processing supply chain.

III. Critical Minerals and Materials (Department of Defense)

Key Risks and Challenges

1. **Concentration of supply.** Strategic and critical minerals are any materials that are needed to supply the military, industrial, and essential civilian needs of the United States during a national emergency, and that are not found or produced in the U.S. in sufficient quantities to meet such need. These materials can be found in nearly every electronic device, and they support high value-added manufacturing and high-wage jobs, in sectors such as automotive and aerospace. Similar to the materials needed for high-capacity batteries, a significant portion of global production for strategic and critical minerals is concentrated in only one or a few countries (predominantly China). The lack of diversity in suppliers creates a single point of disruption for a large portion of the global supply. In some instances, the concentration of supply is so extreme that production is limited to a single source (often China).
2. **Price shocks.** The markets for critical minerals are often small and the production efforts are complex, which leads to a relatively inelastic supply. Such markets are particularly susceptible to massive price spikes and volatility.
3. **Human rights and related issues.** Production and trade of critical minerals often involve a host of concerns, including forced and child labor, violence related to conflict minerals, profiteering by non-state actors, environmental pollution, organized crime, and corruption.

Key Recommendations

1. **Expanding sustainable domestic production and processing capacity.** The Department of Defense recommends the U.S. Government work with key stakeholders from the private sector, labor, and nongovernmental organizations (NGOs) to develop sustainability metrics for critical materials. Additionally, the Department of Defense recommends the U.S. government adopt a sustainability requirement (*g.*, a “sustainably produced” standard) for its purchasing, and

develop a related Federal Acquisition Regulation (FAR) rule to establish a preference or requirement for the selection of products with higher sustainably-produced content.

2. **Deploy the Defense Production Act (DPA) and other programs to incentivize production.** The Department of Defense recommends that multiple agencies use the DPA and other existing authorities and funding to incentivize production across the critical materials supply chain, including downstream, high value-added manufacturing such as new magnet capabilities and advanced electric motor designs. The Department of Defense recommends using similar programs to support R&D efforts, such as those focused on rare earth magnet recycling capabilities.
3. **Convene industry stakeholders to expand production.** This recommendation also is related to the DPA, which authorizes the U.S. government to convene industry groups (with protection from civil and criminal anti-trust law) to coordinate business activities and form plans of action that satisfy a national need. The Department of Defense suggests convening such a group to identify opportunities to expand sustainable domestic production, and explore opportunities to create consortia or public-private partnerships for sustainable domestic processing of key strategic and critical materials.

IV. Pharmaceuticals and Active Pharmaceutical Ingredients (API) (Department of Health and Human Services)

Key Risks and Challenges

1. **Foreign dependence/lack of domestic manufacturing.** As with the other supply chain areas, dependence on foreign nations has been cited as a key vulnerability for the U.S. pharmaceutical supply chain. The need to acquire pharmaceutical products at the lowest cost possible has led to a consolidation of production in foreign, low-cost countries (such as India). This potentially allows foreign governments to leverage such dependency by interrupting U.S. access to these supply chains.
2. **Limited resilience.** Because of the cost and complexity of pharmaceutical manufacturing, the supply chain is particularly susceptible to disruptions. For example, shifting from an unreliable third-party source and expanding manufacturing can take significant time and require costly investment and time to obtain regulatory approvals.
3. **Limited redundancy.** Most production of the active pharmaceutical ingredients occurs outside of the U.S., and sometimes from a single source. As such, the supply chain is particularly vulnerable to changes in natural disasters or other disruptions that could occur in one country, but affect the entire supply chain. Additionally, there are a limited number of drug manufacturers per unique drug, such that the markets are highly concentrated, which can lead to increased costs.

Key Recommendations

1. **Improve supply chain transparency and incentivize resilience.** The Department of Health and Human Services recommends that any new policies seek to provide increased transparency related to the sources of drug manufacturing and the quality of the facilities that make them. This will incentivize purchasers to rely on more resilient suppliers with higher quality production and a more robust supply chain.
2. **Increase the economic sustainability of U.S. and allied drug manufacturing and distribution.** The U.S. market is often undercut by cheaper options, particularly from India and China. To increase domestic capacity for production of key drugs, the U.S. should focus on: (a) increasing the economic sustainability of U.S. and allied drug manufacturing; (b) increasing government and private sector flexibility in contracting and sourcing of finished drugs and raw materials; and (c) studying whether the current market for finished drugs supports a diversification of supply instead of relying on one or two suppliers through preferred contractual arrangements.
3. **Boost domestic production and foster international cooperation.** The Department of Health and Human Services recommends boosting domestic production with a mix of: (a) targeted investments and financial incentives (including through use of the DPA); (b) R&D to create new manufacturing technologies; (c) greater supply chain transparency; and (d) improved data collection to better understand the economics and supply chain realities.
4. **Build emergency capacity.** In addition to bolstering domestic production and creating additional supply chains with U.S. allies, the Department of Health and Human Services recommends creating a virtual stockpile of active pharmaceutical ingredients and other critical materials necessary to produce critical drugs during times of crisis.

Conclusion

What does all of this likely mean for you and U.S. industry? Well, it's hard to say, especially given that this is a quick-turn 100-day report. But here's our initial "in a nutshell" takeaway of what we expect to see:

- More business in these four industries/sectors (especially in the U.S.). The recommendations suggest there likely will be increased domestic investment by the Government (including tax credits and tax incentives). Overall, there seems to be recognition that domestic options may be more expensive, but that the higher price is worth the cost.
- Higher costs for foreign sourcing. The Government will be looking to increase the costs associated with foreign sourcing, making those foreign sources more expensive and thereby more competitive with the more costly domestic alternatives.
- Restrictions on Chinese imports. In particular, the Government will continue to move away from sourcing products/components/materials from China – "China" is the great buzzword in this Report, being mentioned 458 times!

- More “Buy America” requirements.
- More regulations.
- Implementation of the new bi-partisan infrastructure bill (announced last week), complete with its focus on public transportation options, may give us near-term insights into how some of these policies will play out over the longer term (including the push for more domestic jobs).

CHINA RARE EARTH THREAT

<https://ca.finance.yahoo.com/news/china-gears-weaponize-rare-earths-002041977.html>

'DONT' SAY WE DIDN'T WARN YOU'

<https://uk.finance.yahoo.com/news/china-ready-hit-back-u-rare-earths-ruling-025323000--finance.html>

DRUDGE REPORT

The Disaster In The Weak Lithium Market Will Crash Tesla’s EV Plans, Albemarle warns

By [Ernest Scheyder](#), [Dave Sherwood](#)

(Reuters) - Global supplies of lithium used to make electric vehicle (EV) batteries will fall short of projections for demand to more than triple by 2025 if prices do not rebound to fund expansions, an executive at industry leader Albemarle Corp said on Tuesday.

The warning laid bare the tension emerging in the EV industry between the companies that supply the lithium crucial for battery development and automakers who are hunting for discounts.

Prices for lithium dropped last year due in part to the coronavirus pandemic, forcing Albemarle and peers to pause expansions, a step they will reverse only if the price is right, Eric Norris, who runs Albemarle’s lithium business, told the Reuters Next conference.

“We’re at the ready to expand, but it’s got to be at terms that make sense,” Norris said.

Global lithium supply and demand at the end of last year was nearly even, according to data from Benchmark Mineral Intelligence. By 2025, though, demand is expected to outstrip supply by nearly 228,000 tonnes.

Prices have started to inch higher, especially in China, the world’s largest EV market, but must rise at least 10% more in order to make any expansions worthwhile, Norris said.

Wall Street seems to be expecting higher lithium prices: Albemarle's stock price has more than doubled in the past year.

"If we don't work as a supply chain together - from the lithium supply base all the way to the EV producer - there is a risk of slowing down plans," he said.

BIDEN ADMINISTRATION

The Charlotte, North Carolina-based company, Norris said, is hopeful that the U.S. EV supply chain will grow under President-elect Joe Biden, who will be inaugurated next week.

Biden has proposed a \$2 trillion climate plan aimed, in part, at building a national network of EV charging stations.

To help boost U.S. lithium production, Albemarle is studying ways to produce the metal from clay reserves near its existing Nevada operations, a plan that mimics one from Tesla Chief Executive Elon Musk.

"We agree with the assertion from Tesla and Elon Musk that there's a lot of lithium in clay," Norris said. "We cannot put a number on it, but given the demand for lithium we owe it to the industry to try."

CLIMATE PROMISES

Automakers, including Volkswagen and Daimler, have ratcheted up environmental scrutiny of Chile's Salar de Atacama salt flat, home to some of Albemarle's largest lithium operations.

While questions have lingered for years on how lithium production affects the area's fragile ecosystem, Norris said he welcomes the scrutiny and sees Albemarle's operations as helping reduce global greenhouse gas emissions.

"Lithium does enable our customers to deliver on their climate promises," said Norris, who drives a Tesla Model S sedan.

The London Metal Exchange, meanwhile, plans to launch a lithium contract this summer, a step long sought by automakers. Norris said that Albemarle supports more transparency but is concerned that one traded price would not reflect the many types of lithium products.

The industry could face further changes as EV battery recycling gains in popularity. Albemarle is studying ways to reuse the white metal from batteries at the end of their life - typically 10 years - a plan that will first require mass adoption of EVs to make recycling economic, Norris said. "In the future ... we won't be talking as much about lithium resources as we will be talking about battery collection and re-processing," he said.

Afghanistan: The Saudi Arabia of Lithium?

Lithium, which is from mobile phone nation's economy.

By JAMES RISEN
Published: June 13, 2010

WASHINGTON — The United States has discovered nearly \$1 trillion in untapped mineral deposits in [Afghanistan](#), far beyond any previously known reserves and enough to fundamentally alter the

As of late February held Ener1 Group.

loan to Think Global, which is trying to emerge from bankruptcy — is held by Bzinfin, a British Virgin Islands company whose "indirect beneficial owner" is Boris Zingarevich, a Russian businessman. Zingarevich has close ties to Russian President Dmitry Medvedev and Prime Minister Vladimir Putin.

Investing in Lithium Mining Stocks

How To Profit from the Lithium Boom

By Brian Hicks
Friday, October 16th, 2009

Editor's Note:

While Western Lithium remains trades — and possibly a third — opportunity to double if not trip

Green power corrupts

June 08, 2012 - 9:00 PM

Goldman Sachs culture 'toxic'? Letter confirms suspicions about Wall Street.

A123 lithium-ion battery maker bankruptcy fuels criticism of President Barack Obama's alternative

Energy & Genius

The Saudi Arabia of Lithium

Brendan I. Koerner, 10.30.08, 06:00 PM EST
Forbes Magazine dated November 24, 2008

The gas engine made petroleum the world's biggest commodity. The electric car could do the same for the third element on the

Ener1 Wants to Win Lithium Ion Battery Race

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U.S. Identifies Vast Mineral Riches in Afghanistan



The problem with lithium

David Booth, National Post

RUSSIAN OWNED

Goldman Sachs discloses ownership in Talison Lithium Corp.

N
chloride ring SQM
creating the illusion
the ultra-arid sala

Image: CarSpace

Talison Lithium Ltd's

Lithium ion battery manufacturer Ener1 (HEV) could become the country's first lithium ion battery mass producer—if it wins a \$480M Department of Energy loan. [CNNMoney](#) has more:

The Organized Tech Mobsters Manipulating Lithium

Merrill Lynch Caught Criminally Manipulating Precious And Rare Earth Metals Market "Thousands Of Times" Over 6 Years

-
by [Tyler Durden](#)

Remember when it was pure tinfoil-hat conspiracy theory to accuse one or more banks of aggressively, compulsively and systematically manipulating the precious metals - i.e., gold and silver - market? We do, after all we made the claim over and over, while demonstrating clearly just how said manipulation was taking place, often in real time.

Well, it's always good to be proven correct, even if it is years after the fact.

On Tuesday after the close, the CFTC [announced](#) that Merrill Lynch Commodities (MLCI), a global commodities trading business, **agreed to pay \$25 million to resolve the government's investigation into a multi-year scheme by MLCI precious metals traders to mislead the market for precious metals futures contracts traded on the COMEX (Commodity Exchange Inc.)**. The announcement was made by Assistant Attorney General Brian A. Benczkowski of the Justice Department's Criminal Division and Assistant Director in Charge William F. Sweeney Jr. of the FBI's New York Field Office. In other words, if the Merrill Lynch Commodities group was an individual, he would have gotten ye olde perp walk.

As MLCI itself admitted, **beginning in 2008 and continuing through 2014, precious metals traders employed by MLCI schemed to deceive other market participants by injecting materially false and misleading information into the precious metals futures market.**

They did so in the now traditional market manipulation way - by placing fraudulent orders for precious metals futures contracts that, at the time the traders placed the orders, they intended to cancel before execution. In doing so, the traders intended to "spoofer" or manipulate the market by creating the false impression of increased supply or demand and, in turn, to fraudulently induce other market participants to buy and to sell futures contracts at quantities, prices and times that they otherwise likely would not have done so. **Over the relevant period, the traders placed thousands of fraudulent orders.**

Of course, since we are talking about a bank, and since banks are in charge of not only the DOJ, and virtually every other branch of government, not to mention the Fed, nobody will go to jail and MLCI entered into a non-prosecution agreement and agreed to pay a combined - and measly - \$25 million in **criminal** fines, restitution and forfeiture of trading profits.

Under the terms of the NPA, MLCI and its parent company, Bank of America, have agreed to cooperate with the government's ongoing investigation of individuals and to report to the Department evidence or allegations of violations of the wire fraud statute, securities and commodities fraud statute, and anti-

spoofing provision of the Commodity Exchange Act in BAC's Global Markets' Commodities Business, whose function is to conduct wholesale, principal trading and sales of commodities. Laughably, MLCI and BAC also agreed to enhance their existing compliance program and internal controls, where necessary and appropriate, to ensure they are designed to detect and deter, among other things, manipulative conduct in BAC's Global Markets Commodities Business.

Translation: it will be much more difficult to catch them manipulating the market next time.

The Department reached this resolution based on a number of factors, including MLCI's ongoing cooperation with the United States - **which means the DOJ must have had the bank dead to rights with many traders potentially ending up in jail** - and MLCI and BAC's remedial efforts, including conducting training concerning appropriate market conduct and implementing improved transaction monitoring and communication surveillance systems and processes. Translation - no longer boasting about market manipulation on semi-public chatboards.

The Commodity Futures Trading Commission also announced a separate settlement with MLCI today in connection with related, parallel proceedings. Under the terms of the resolution with the CFTC, MLCI agreed to pay a civil monetary penalty of \$11.5 million, along with other remedial and cooperation obligations in connection with any CFTC investigation pertaining to the underlying conduct.

As part of the investigation, the Department obtained an indictment against Edward Bases and John Pacilio, two former MLCI precious metals traders, in July 2018. Those charges remain pending in the U.S. District Court for the Northern District of Illinois.

This case was investigated by the FBI's New York Field Office. Trial Attorneys Ankush Khardori and Avi Perry of the Criminal Division's Fraud Section prosecuted the case. The CFTC also provided assistance in this matter.

Oh, and for anyone asking if they will get some of their money back for having been spoofed and manipulated by Bank of America, and countless other banks, into selling to buying positions that would have eventually made money, the answer is of course not.

At Issue

Dear Lithium: A Dear John Letter

We never had a chance to fall in love

By David Mantey, Editor, PD&D

I get it, I get it. We're a culture that loves buzzwords. iPhone, Palm Pre, energy efficiency, green, change, synergize, monetize, functionality, stimulus, Tesla, etc. The list is long and can be efficiently compiled, even though it's in a constant state of fluctuation, by looking at the top stories on any aggregate or social site.

Just look at the top stories on reddit or Digg. Look at the most read news stories on CNN.com . Look at this newsletter and the PD&D site: If we feature anything on Tesla, our servers go into cardiac arrest and our IT Scotsman burns his mustache administering mouth-to-mouth.

All things lithium or Li-ion typically make the top 10 on this list, and I'm not sure the position is warranted. After all, few know what it is, where it comes from and how much of it is buried under the earth's surface.

We only need to know that this green efficient technology will help power our gadgets, replace fossil fuels, help alleviate the pain we're feeling at the pump, cure noise and noxious pollution woes and pull a golden-egg-laying rabbit out of a 40-story hat.

I was speaking with Scott Redmond, chairman of XP Vehicles, when he casually mentioned the limited amount of lithium – and how more than half of this green power stash was located in a country that typically hasn't played nice with others. I didn't brush off the comment, but I offered an agreeable 'Right, right,' and continued with my line of questioning for the cover story...

I was working out the article when the comment came back to me. Limited lithium? That can't be. Our country would never make a fool-hearted investment and risk billions of tax payer dollars on a technology with a finite amount of resources.

If two of these companies figure it out, the forecasted lithium shortage could happen much sooner than 2015.

Back to the green revolution getting stalled in South America. Bolivia is the potential owner of 5.4 million tons of lithium under the Salar de Uyuni salt desert (about half the worlds supply). According to an article run in the Guardian (UK) , "Bolivia's socialist government has a habit of clashing with foreign multinationals in other sectors and has not clinched a deal – and, according to some, may never seal one – with the investors needed to extract significant quantities of lithium."

The holder of Bolivia's most interesting title, Mining & Metallurgy Minister Luis Alberto Echazu hopes to extract 1,200 tons of lithium next year, with exponentially more to follow as the operation becomes more efficient in subsequent years. Right now, the government is building a bungalow to house technicians and miners for a pilot plant that seems dangerously similar to Fordlandia.

The government is in the market for a partner, but foreign companies have been afraid to work with a government that "confiscates assets and rips up contracts."

Not only is there a finite number of lithium resources, but it seems unlikely that Bolivia will find a way to harness its potential.

No lithium for the batteries and a desert that is once again known for nothing more than being salty.

Lithium, it's just not working for me. You say you're going to be there for me and then you never show. Do you know how embarrassing it was to describe to my friends? I sit in your driveway waiting for hours, only to have your father come out and say, 'It's not going to happen. it's over. I'm done playing games. Thanks for nothing, I'm keeping the toaster.' Dictated but not read. Is lithium the answer?

Energy & Genius

The Saudi Arabia of Lithium

Brendan I. Koemer, 10.30.08, 06:00 PM EST
Forbes Magazine dated November 24, 2008

The gas engine made petroleum the world's biggest commodity. The electric car could do the same for the third element on the periodic table.



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Mounds of magnesium chloride ring SQM's mine, creating the illusion of snow in the ultra-arid *salar*.



The Lithium Gold Rush
Saudi Arabia's Next Act
Mr. Ethanol Fights Back

The gas engine made petroleum the world's biggest commodity. The electric car could do the same for the third element on the periodic table.

Nothing grows in the heart of the Salar de Atacama, this ancient Chilean lake bed 700 miles north of Santiago may be the driest place on Earth, a wasteland strewn with salt-encrusted rocks that resemble cow pies. Annual rainfall on the *salar* (which in Spanish means "salt lake") rarely tops a few millimeters. The cloudless skies combine with the high altitude, 1.4 miles above sea level, to produce sparkling salt

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[Matt Bohlsen](#)

Summary

Lithium prices were flat for the past month. Morgan Stanley says 2021 should see lithium's market closer to balance as supply cuts bite and demand recovers, prices capped for now.

Lithium market news - US declares a national emergency to deal with the threat of US critical materials supply. Biden campaign tells miners it supports domestic production of EV metals.

Lithium company news - Tianqi Lithium warns of \$1.9 billion default as loan date looms. Pilbara Minerals achieved higher recoveries, stronger production and sales.

Too many players, not enough supply, mining is now a national industrial war hostage tool!

Welcome to the October 2020 edition of the lithium miner news. October saw lithium prices flat and numerous calls from within the US to support the EV metal miners (White House Executive order on critical minerals, Biden to support EV metals). There was also the usual very strong lithium demand forecasts such as "lithium demand seen doubling in next four years". Tesla ([TSLA](#)) Battery Day also served as a major acceleration to the EV boom and hence a wake-up call for auto manufacturers to secure EV metals or risk missing out. You can read more on this in my recent Trend Investing article: "[Tesla Just Put The Accelerator Down On The EV And Battery Boom.](#)"

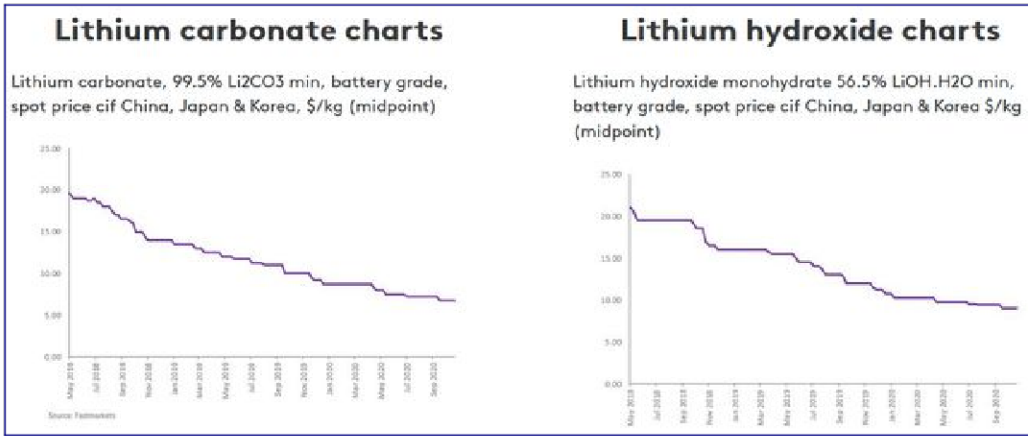
Lithium spot and contract price news

During October, 99.5% lithium carbonate China spot prices were up [0.92%](#). Lithium hydroxide prices were down [0.34](#). Spodumene (6% min) prices were [unchanged](#).

Fastmarkets (formerly Metal Bulletin) [reports](#) 99.5% lithium carbonate battery grade spot midpoint prices cif China, Japan & Korea of US\$6.75/kg (US\$6,750/t), and min 56.5% lithium hydroxide battery grade spot midpoint prices cif China, Japan & Korea of US\$9.00/kg (US\$9,000/t).

[Benchmark Mineral Intelligence](#) has September global weighted average prices at US\$6,086/t for Li carbonate, US\$8,795/t for Li hydroxide, and US\$375/t for spodumene (6%).

Lithium carbonate & hydroxide, battery grade, cif China, Japan & Korea



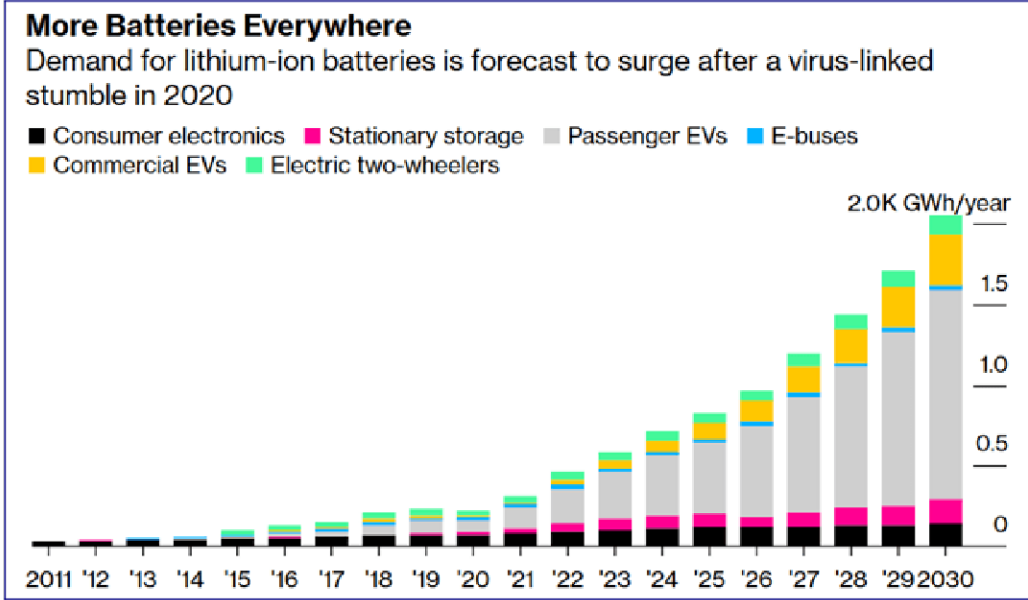
Source: Fastmarkets

Lithium demand versus supply outlook

As part of a September 28 article on the Piedmont Lithium/Tesla deal the [Investors.com](#) article [quoted](#):
Morgan Stanley note - "Separately in a note Monday, Morgan Stanley analysts gave a strong lithium outlook. They wrote that "2021 should see lithium's market closer to balance as supply cuts bite and demand recovers, but the large volume of latent hardrock capacity and continued brine expansions cap price upside."

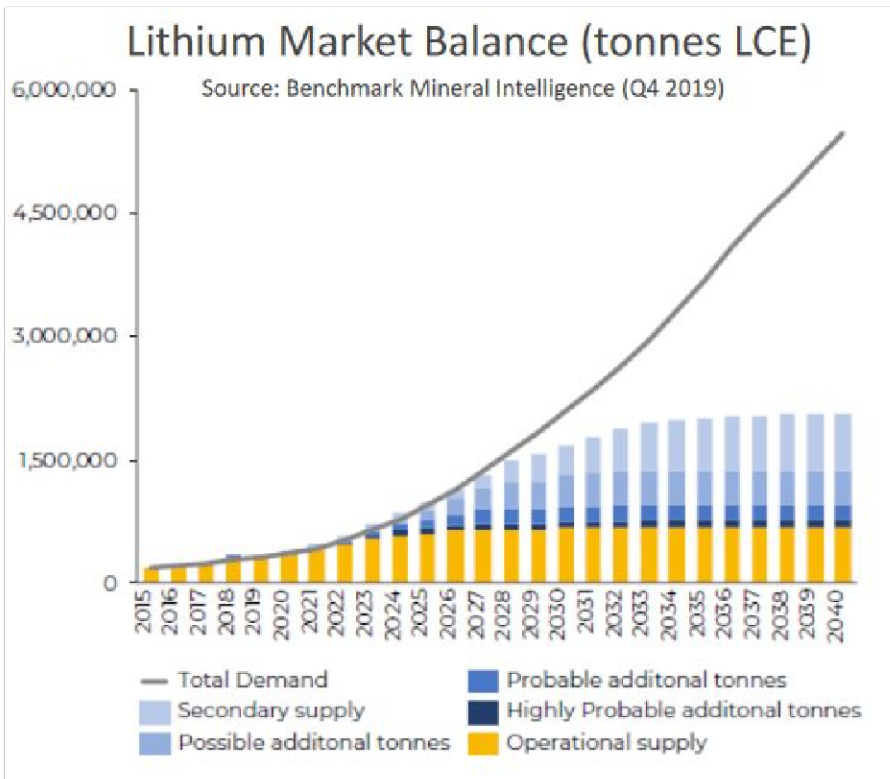
BNEF updated Li-ion battery demand outlook (June 2020)

Note: This may soon be updated considerably higher in the years 2025 to 2030 following Tesla Battery Day.



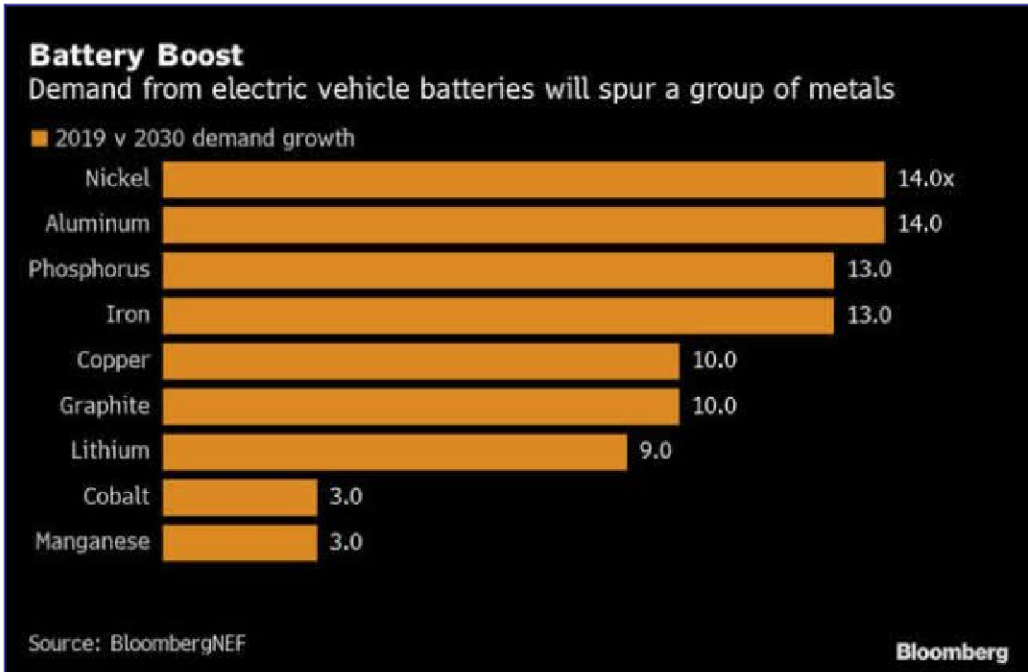
Source: Bloomberg New Energy Finance [BNEF]

Benchmark Mineral Intelligence lithium demand v supply forecast



Source: Core Lithium courtesy of Benchmark Mineral Intelligence

2019 to 2030 'battery' demand increase forecast for EV metals as the EV boom takes off



Source: Courtesy BloombergNEF

Benchmark Mineral Intelligence - Simon Moores's - forecasts



[Source](#): Benchmark Mineral Intelligence Twitter

Lithium market and battery news

Some news I missed from last month. Nasdaq [reported](#):

Indonesia says LG Chem, CATL sign deal for lithium battery plant.... Indonesia has set a 2024 target to start producing lithium batteries....Indonesia's Investment Coordinating Board said in June that LG Chem was considering a \$9.8 billion investment in an electric vehicle battery factory integrated with a smelter. Meanwhile, CATL is already investing in a plant on Indonesia's Sulawesi island to extract battery-grade nickel chemicals. Indonesia stopped exports of unprocessed nickel earlier this year to ensure raw material supply for nickel investments in the country.

On September 28 Benchmark Mineral Intelligence [reported](#):

Tesla to build lithium hydroxide refinery in Texas to feed Terafactory; first automaker to enter lithium. The EV maker will build a spodumene conversion facility adjacent to the Terafactory / Gigafactory 5 in Austin, Texas in what has a typically aggressive start up target of Q4 2022. This adds to Tesla's plans to build a cathode facility in Texas in what Elon Musk describes as “part of our cell production plan”. Despite a flurry of Tesla Battery Day announcements, confusion reigned over Tesla's lithium direction in particular the EV makers plans' to extract lithium from Nevada-clay, which Benchmark understands is more of an early stage idea than a supply solution.

On September 28 Seeking Alpha reported:

Tesla said to be eyeing investment in LG Chem. Tesla ([TSLA](#)) is looking into purchasing a [stake](#) in battery maker LG Chem ([OTCPK:LGCLF](#)) of as much as 10%, according to the Korea Times. The report follows word earlier this month that LG will spin off its battery business to create a new company called LG Energy Solutions. Tesla is hoping to secure a supply of batteries as it also goes down a dual path of developing its own batteries.

On September 29 Reuters [reported](#):

Battery maker Northvolt raises \$600 million in private placement...with Volkswagen, Baillie Gifford, Goldman Sachs and Spotify founder Daniel Ek among the investors, it said on Tuesday. Northvolt,

which aims to take on major Asian players such as CATL and LG Chem and targets a 25% market share in Europe by 2030, said the deal would enable further investments in capacity expansion, research and development, and recycling.

On September 30 The White House [announced](#):

Executive Order on addressing the threat to the domestic supply chain from reliance on (35) critical minerals from foreign adversaries | The White House.....I therefore determine that our Nation's undue reliance on critical minerals, in processed or unprocessed form, from foreign adversaries constitutes an unusual and extraordinary threat, which has its source in substantial part outside the United States, to the national security, foreign policy, and economy of the United States. **I hereby declare a national emergency to deal with that threat.** In addition, I find that the United States must broadly enhance its mining and processing capacity, including for minerals not identified as critical minerals and not included within the national emergency declared in this order.

Note: The above report says the US Gov. will look into giving "grants to procure or install production equipment for the production and processing of critical minerals in the United States", "loan guarantees" and for projects that support domestic supply chains "funding awards and loans pursuant to the Advanced Technology Vehicles Manufacturing incentive program."

You can view the US critical minerals list [here](#). It contains cobalt, graphite, **lithium**, manganese, PGMs for catalytic agents (Eg: palladium), rare earth elements group, scandium, titanium, vanadium etc.

On October 6 Reuters [reported](#):

EV battery maker Romeo Systems to go public through a \$1.33 bln SPAC deal....Romeo Systems Inc, a battery maker for electric vehicles, will go public through a merger with blank check company RMG Acquisition Corp in a \$1.33 billion deal, the companies said on Monday. Romeo will use the proceeds for capacity expansion and research & development to further develop battery system technologies for commercial vehicles, according to a statement. After the deal closes, which is expected in the fourth quarter of 2020, the combined company will list on the New York Stock Exchange under the symbol "RMO".

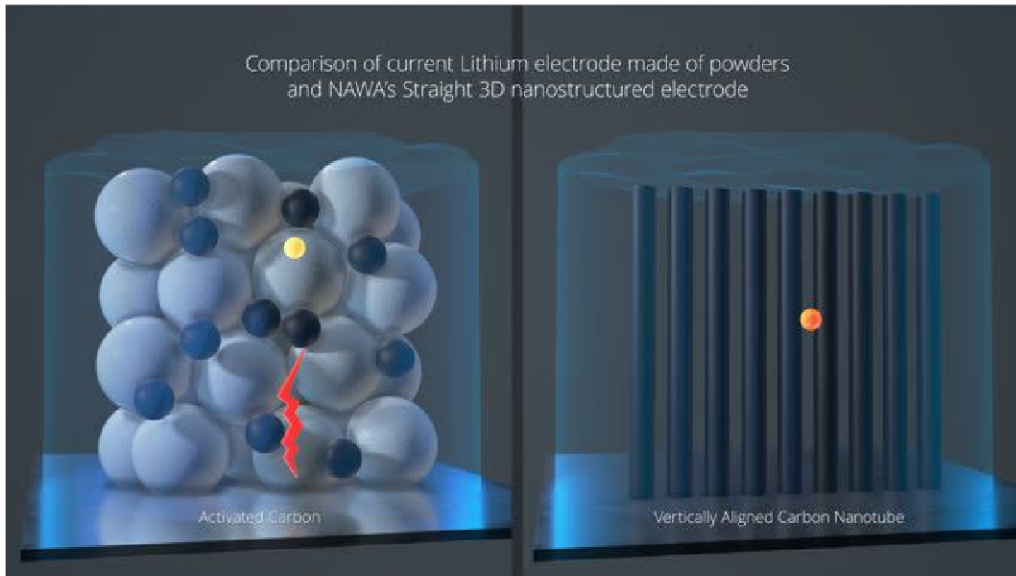
On October 6 Reuters [reported](#):

Toyota-Panasonic venture to build lithium-ion batteries for hybrids in Japan.... to manufacture lithium-ion power units for hybrid vehicles beginning in 2022....The production line at a Panasonic factory in Tokushima prefecture will have enough capacity to build batteries for around 500,000 vehicles a year.

On October 6 New Atlas [reported](#):

"World's fastest electrodes" triple the density of lithium batteries. French company Nawa technologies says it's already in production on a new electrode design that can radically boost the performance of existing and future battery chemistries, delivering up to 3x the energy density, 10x the power, vastly faster charging and battery lifespans up to five times as long..... Nawa's vertically aligned carbon nanotubes, on the other hand, create an anode or cathode structure more like a hairbrush, with a

hundred billion straight, highly conductive nanotubes poking up out of every square centimeter.....The result is a drastic reduction in the mean free path of the ions – the distance the charge needs to travel to get in or out of the battery – since every blob of lithium is more or less directly attached to a nanotube, which acts as a straight-line highway and part of the current collector..... We put the question of cost to Nawa. "The million dollar question!" said Boulanger. "Here's a million dollar answer: the process we're using is the same process that's used for coating glasses with anti-reflective coatings, and for photovoltaics. It's already very cheap."



Source

On October 7 Mining weekly [reported](#):

Lithium demand seen doubling in next four years.....On its Battery Day, US EV manufacturer Tesla announced it is working towards achieving 100 GWh of cell production capacity by 2022 and up to 3 000 GWh by 2030. This is far greater than other manufacturers such as China's BYD, which is expected to expand its capacity to 126 GWh in 2024, versus 40 GWh in 2019. Japan's Panasonic, a key supplier to Tesla itself, is expected to increase its capacity from 40 GWh in 2019 to 63 GWh in 2021, while LG Chem will expand from 65.2 GWh in 2019 to 172.4 GWh in 2024....

On October 8 Battery Materials Review [reported](#):

October's lead article is about the chronic under-investment in battery raw materials supply and the threat it poses to the EV event. Since 2018 US\$50bn has been raised for new battery capacity, US\$60bn for EV capacity but only US\$8bn in new raw materials capacity...and raw materials capacity takes 2-3 years longer to build. There is now a material risk of supranormal raw material prices which will impact battery prices and EV makers' profitability.

On October 13 PV-magazine [reported](#):

Lithium-ion gigafactory breaks ground in Australia. Less than a year from now, Australia will start producing its own renewables-storing lithium-ion batteries in New South Wales.

On October 21 [Mining.com reported](#):

Over \$1 trillion needed for energy transition metals. An investment of over \$1 trillion will be needed in key energy transition metals – aluminium, cobalt, copper, nickel and **lithium** – over the next 15 years just to meet the growing demands of decarbonisation. Wood Mackenzie, in a new report, says the figure is double what was invested over the last 15 years.

On October 23 Reuters [reported](#):

Biden campaign tells miners it supports domestic production of EV metals. Joe Biden's campaign has privately told U.S. miners it would support boosting domestic production of metals used to make electric vehicles, solar panels and other products crucial to his climate plan, according to three sources familiar with the matter, in a boon for the mining industry.

Lithium miner news

Albemarle (NYSE:[ALB](#))

No lithium related news for the month.

Sociedad Quimica y Minera S.A. (NYSE:[SQM](#))

On October 8 Nasdaq [reported](#):

Chile lithium miner SQM says to slash water, brine use at Atacama. The announcement comes two months after SQM lost a high profile legal battle that forced it to begin again on a plan to make amends for over-pumping brine from the environmentally sensitive Atacama..... The company said in a statement announcing its "Sustainable Development Plan" that it would voluntarily reduce its use of brine by 20% from November this year, with a goal of slashing it by 50% by 2030. "We do not believe that this brine extraction reduction will have an impact on our near- or long-term lithium production," the company said in the statement.

On October 8, SQM [announced](#): "SQM announces sustainable development plan."

Investors can read the company's latest presentation [here](#).

Jiangxi Ganfeng Lithium [SHE:002460] [HK: 1772], Mineral Resources [ASX:MIN], International Lithium Corp. [TSXV:ILC] ([OTCPK:ILHMF](#))

On October 16, Mineral resources [announced](#): "Sustainability report."

On October 15 S&P Global [reported](#):

China's Ganfeng Lithium expects up to 5x YOY rise in Q3'20 earnings. Ganfeng Lithium Co. Ltd. expects its net profit attributable to shareholders for the third quarter to increase 419.9% to 524.7% year over year to between 173.5 million Chinese yuan and 208.5 million yuan.....For the first nine months of this year, Ganfeng expected its earnings to be 330 million to 365 million yuan, a yearly

increase of 0.3% to 10.9%. The company said profit growth was affected by lower prices for lithium products during the period, offset by increased sales in its battery business. Ganfeng attributed the earnings increase to a rise in the stock price of 6.85%-owned Pilbara Minerals Ltd.

(Chengdu) Tianqi Lithium Industries Inc. [SHE:002466]

On September 29, 4-traders [reported](#):

Tianqi Lithium warns of \$1.9 billion default as loan date looms. China's Tianqi Lithium Corp said on Tuesday it may not be able to make a \$1.88 billion repayment due in November on a loan taken out to buy a stake in Sociedad Minera y Quimica de Chile [SQQ] in 2018.

Livent Corp. (LTHM)[GR:8LV] - Spun out from FMC Corp. (NYSE:FMC)

No significant news for the month.

Orocobre [ASX:ORE] [TSX:ORL] (OTCPK:OROCF)

No significant news for the month.

Upcoming catalysts include:

- H1 2021 - Olaroz Stage 2 (42.5ktpa) commissioning.
- H1 2021 - Naraha lithium hydroxide plant (10ktpa) commissioning (ORE share is 75%).

You can read the latest investor presentation [here](#).

Galaxy Resources [ASX:GXY] (OTCPK:GALXF)

On October 14, Galaxy Resources [announced](#):

Quarterly conference call & preliminary results.....At Mt Cattlin, Galaxy shipped 16,753 dry metric tonnes (“dmt”) of lithium concentrate during the quarter and 15,700 dmt at the beginning of October. Quarterly production of 30,067 dmt was achieved at a grade of 5.92% Li₂O and recovery of 57%, in line with full year guidance.

Upcoming catalysts include:

2020 - Construction progress at SDV.

2022 - SDV Stage 1 production commencement target.

Investors can read my recent article "[Galaxy Resources Plan To Be A 100,000tpa Lithium Producer By 2025](#)", and my CEO interview [here](#), and the latest company presentation [here](#).

Pilbara Minerals [ASX:PLS] (OTC:PILBF)

On October 12, Pilbara Minerals [announced](#): "Pilgangoora operational update. Sustained higher recoveries, stronger production and sales during September 2020 quarter sees unit costs continue to trend down." Highlights include:

- "An increase in plant run-time and utilisation, which represented approximately 70-75% utilisation across the quarter (compared with 40% in the June quarter).
- Higher plant utilisation and continued high product recovery contributed to a lower average unit cash operating cost of US\$355/dmt (CIF China) for the September quarter.
- Increased production, with a total of 62,404 dry metric tonnes [dmt] of spodumene concentrate produced for the quarter (compared with 34,484 dmt for the June quarter).
- An increase in sales, with spodumene concentrate shipments totalling 43,630dmt for the quarter, in line with guidance provided in the June Quarterly Report (compared with 29,312 dmt for the June quarter)."

Upcoming catalysts:

2021/22 - Stage 2 commissioning timing to depend on market demand.

Investors can read my article "[An Update On Pilbara Minerals](#)", and an interview [here](#).

Altura Mining [ASX:AJM] ([OTC:ALTAF](#))

No news for the month.

Investors can read a company presentation [here](#).

AMG Advanced Metallurgical Group NV [NA:AMG] [GR:ADG] ([OTCPK:AMVME](#))

No significant news for the month.

Upcoming catalysts:

2020/21 - Progress on lithium projects in Zeitz, Germany and in Zanesville, Ohio, both in the planning stage.

?2021--> - Stage 2 production at Mibra Lithium-Tantalum mine (additional 90ktpa) planned.

Neometals ([OTC:RRSSE](#)) ([Nasdaq:RDRUY](#)) [ASX:NMT]

On October 9, Neometals [announced](#):

Legal proceedings relating to Mt Marion. On 8 October 2020, project development company, Neometals Ltd, was served with a writ of summons in respect of proceedings commenced against it in the Supreme Court of Western Australia. The plaintiffs, Mr Murray Ward and his associated company, Roseland Capital Pty Ltd, ("Plaintiffs") seek damages from Neometals for alleged breaches of contract, breaches of the Australian Consumer Law, and tortious conspiracy. Neometals emphatically denies the Plaintiffs' claims and intends to vigorously defend the proceedings.

Lithium Americas [TSX:LAC] ([LAC](#))

On October 20, Lithium Americas [announced](#):

Lithium Americas provides corporate update and establishes US\$100m ATM program.....the Company has established an at-the-market equity program (the “ATM Program”) that allows the Company to issue up to US\$100 million (or its Canadian dollar equivalent) of common shares (the “Common Shares”) from treasury to the public from time to time, at the Company’s discretion. “With over 60% of the capital costs spent and enhanced COVID-19 health and safety protocols in place, we remain fully-funded to advance Cauchari-Olaroz to production,” said Jon Evans, President and CEO. “In Nevada, the permitting process continues to progress as planned with the public comment period complete on the Draft EIS and local support with the recently approved tax abatements from the Governor’s Office of Economic Development. Finally, the Company has decided to implement an ATM Program to strengthen our position as we advance discussions with potential partners and customers at Thacker Pass.”

Upcoming catalysts:

- 2020 - Cauchari-Olaroz plant construction.
- Q4 2020 - Thacker Pass DFS.
- ~Mid 2021 - Cauchari-Olaroz lithium production to commence and ramp to 40ktpa.
- 2023 - Possible lithium clay producer from Thacker Pass Nevada (full ramp by 2026). Also any possible JV announcements prior.

NB: LAC owns 49% of the Cauchari-Olaroz project and partners with Ganfeng Lithium (51%).

Investors can read my article "[An Update On Lithium Americas.](#)"

Global X Lithium & Battery Tech ETF (NYSEARCA:[LIT](#)) - Price = [US\\$42.19](#).

The LIT fund was up strongly again in October. The current PE is [41.8](#). My updated model forecast is for lithium demand to increase 3.6 fold between 2020 and end 2025 to ~1.1m tpa, and 9.6x this decade to reach ~3.7m tpa by 2030.



[Source](#): Seeking Alpha

Note: Amplify Advanced Battery Metals and Materials ETF ([BATT](#)) is a broad based EV metals fund worth considering.

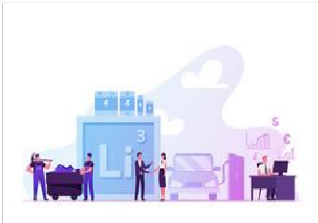
Conclusion

October saw lithium prices flat.

Highlights for the month were:

- Indonesia says LG Chem, CATL sign deal for lithium battery plant.
- Tesla to build lithium hydroxide refinery in Texas to feed Terafactory; first automaker to enter lithium.
- Morgan Stanley note: "2021 should see lithium's market closer to balance as supply cuts bite and demand recovers, but the large volume of latent hardrock capacity and continued brine expansions cap price upside."
- Tesla said to be eyeing investment in LG Chem.
- Battery maker Northvolt raises \$600 million in private placement
- EV battery maker Romeo Systems to go public through a \$1.33 bln SPAC deal.
- **Lithium demand seen doubling in next four years.**
- Under-investment in battery raw materials supply and the threat it poses to the EV.
- CATL and LG Chem have signaled they may join projects that could see \$20 billion more invested in supply chains in Indonesia.
- Wood Mackenzie says **over \$1 trillion needed for energy transition metals** – aluminium, cobalt, copper, nickel and **lithium** – over the next 15 years just to meet the growing demands of decarbonisation.
- Biden campaign tells miners it supports domestic production of EV metals.
- Chile lithium miner SQM says to slash water, brine use at Atacama.
- Tianqi Lithium warns of \$1.9 billion default as loan date looms.
- Galaxy Resources - Quarterly production of 30,067 dmt was achieved.
- Pilbara Minerals achieved higher recoveries, stronger production and sales during September 2020 quarter, unit costs continue to trend down.
- Lithium Americas establishes a US\$100m at-the-market equity program.
-
- Only a short time later we see the trends solidify:
 - Summary
- Lithium prices rose the past month.

- Lithium market news - US unveils plans for supply of batteries, critical minerals, semiconductors. Volkswagen and Tesla active at securing battery metals.
- Junior lithium miner company news - Ganfeng offers to buy the balance of Bacanora Lithium shares at 67.5 pence. Sigma Lithium exceptional PEA results supporting doubling planned production capacity.
- Neo Lithium produces 99.9% battery grade lithium carbonate. Sayona Quebec (Sayona 75%; Piedmont 25%) awaiting Court approval of contested bid for NAL.
- Piedmont Lithium updated Scoping Study result of after-tax NPV8% US\$1.923b, after tax IRR 31%, initial CapEx US\$838.6m. Frontier Lithium intersects over 340 metres of pegmatite averaging 1.68% Li₂O at the spark pegmatite. Nano One graduates to the TSX, changes ticker to "NANO".
- I do much more than just articles at Trend Investing: Members get access to model portfolios, regular updates, a chat room, and more. [Learn More »](#)



Welcome to the June 2021 edition of the "junior" lithium miner news. I have categorized those lithium miners that won't likely be in production before 2022 as the juniors. Investors are reminded that most of the lithium juniors will most likely be needed in the mid and late 2020's to supply the booming electric vehicle [EV] and energy storage markets. This means investing in these companies requires a higher risk tolerance, and a longer time frame.

June saw lithium prices rise again and plenty of good news from the lithium juniors.

Lithium spot and contract price news

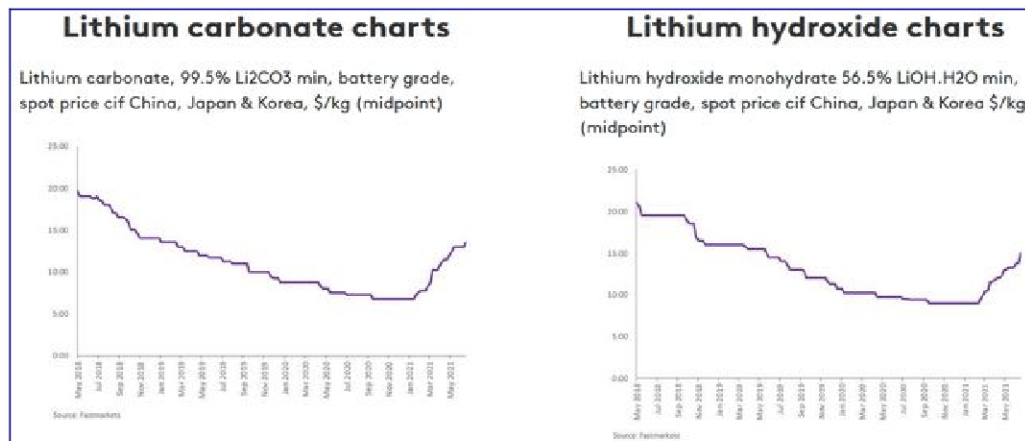
Asian Metal reported during the past 30 days, 99.5% lithium carbonate China spot prices were up [2.41%](#). Lithium hydroxide prices were up [4.42%](#). Spodumene (6% min) prices were up [6.15%](#) over the past month.

Fastmarkets (formerly Metal Bulletin) [reports](#) 99.5% lithium carbonate battery grade spot midpoint prices cif China, Japan & Korea of US\$13.50/kg (US\$13,500/t), and min 56.5% lithium hydroxide battery grade spot midpoint prices cif China, Japan & Korea of US\$15.00/kg (US\$15,000/t).

[Benchmark Mineral Intelligence](#) as of Mid-June reported China lithium carbonate prices of US\$12,875/t (technical grade) to US\$13,800 (battery grade), and for lithium hydroxide prices of US\$13,800/t, and for spodumene-6% no figure was quoted (I have heard US\$620-720/t).

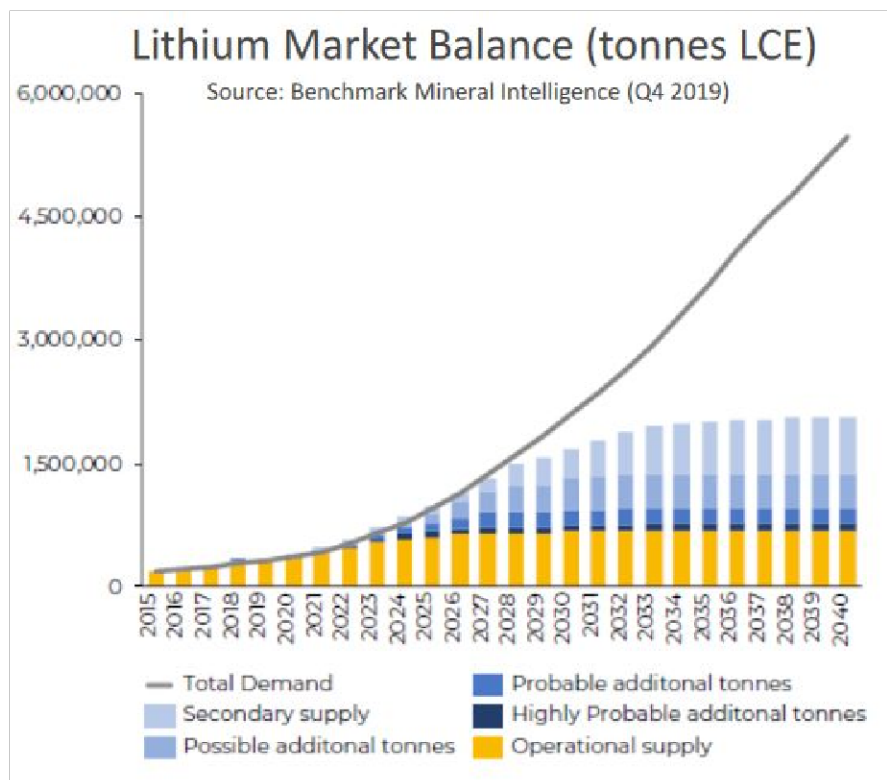
[Metal.com](https://www.metal.com) reports lithium spodumene concentrate (6%, CIF China) price of USD 720/mt, as of June 17, 2021.

Lithium carbonate & hydroxide, battery grade, cif China, Japan & Korea



Source: Fastmarkets

Benchmark Mineral Intelligence lithium demand vs. supply forecast



Source: Core Lithium courtesy of Benchmark Mineral Intelligence

Lithium market news

For a summary of the latest lithium market news and the "major" lithium company's news, investors can read my "Lithium Miners News For The Month Of June 2021" [article](#). Highlights include:

- Roskill - "By 2031, demand is expected to exceed 2.0Mt LCE from all end-use applications, which will require fundamental changes in the scale and types of lithium projects in operation to meet."
- EV prices fall as battery technology improves, ICE/EV parity forecast by 2023.
- Global EV battery sales surge as demand for clean cars booms.
- Volkswagen to 'get actively involved in the raw materials business'.
- Tesla to buy more than \$1 billion of Australian battery minerals a year.
- US unveils plans for supply of batteries, critical minerals, semiconductors.
- CATL and BYD in talks with Apple (NASDAQ:[AAPL](#)) for EV battery supply... (Apple) aims to start production of a passenger vehicle in 2024, Reuters [reported](#).
- Sweden's Northvolt raises \$2.8 bln to supercharge EV battery output.
- FREYR ([ALUS](#)) in negotiations for building battery production facilities in the United States
- The global lithium ion battery megafactory count is now at 211 (3,791 GWh), up from 142 a year ago, and 84 two years ago.

Junior lithium miners company news

Bacanora Lithium [LSE-AIM:BCN] [GR:2F9] ([OTCPK:BCLMF](#))

On June 3, Bacanora Lithium [announced](#):

PUSU extension. Bacanora Independent Directors and Ganfeng International Trading (Shanghai) Limited ("Ganfeng") announced that Bacanora Lithium PLC ("Bacanora") and Ganfeng had entered into an agreement regarding the terms of a possible cash offer by Ganfeng for the entire issued and to be issued share capital of Bacanora, other than that which it already owns, at a price of 67.5 pence per Bacanora Share (the "Offer Price") (the "Possible Offer"). The Possible Offer remains subject to a number of pre-conditions as set out in the 6 May 2021 announcement.

On June 22, Bacanora Lithium [announced](#):

Update on Zinnwald Lithium, the Sonora Project and debt facility. Bacanora Lithium plc, a lithium development company, is pleased to note today's announcement by Zinnwald Lithium Plc (AIM:ZNWD) ("Zinnwald") of its acquisition of the remaining 50% of Deutsche Lithium GmbH ("Deutsche Lithium"). The Company also announces an update on its site activities at the Sonora Lithium Project (the "Project"), located in Mexico, and its debt facility agreement with RK Mine Finance ("RK"). Zinnwald has announced that it has entered into a binding agreement to acquire the 50 percent of Deutsche Lithium that it does not already own for a total consideration of €8.8 million to be settled with a cash payment of €1.5 million and the issue of approximately 50 million new shares (the

"Acquisition"). Deutsche Lithium is developing the advanced Zinnwald Lithium Project in Germany (the "Zinnwald Project"). The Acquisition gives Zinnwald full ownership and operational control of the Zinnwald Project and is in line with its corporate objective to become a key supplier to the European lithium market. On completion of the Acquisition, Bacanora's shareholding in Zinnwald will decrease from 44.2% to 35.5%. Bacanora will maintain its right to appoint one Director to the Board of Zinnwald.

Investors can view the Company's latest presentation [here](#).

Catalysts include:

- 2021 - Sonora [construction has begun](#) (50:50 JV with Ganfeng Lithium) as Bacanora's share is now fully funded.
- 2023---> Plan to commence Sonora production ramping to 17,500 tpa, and in stage two 35,000 tpa.

Sigma Lithium Resources [TSXV:SGMA]([OTCQB:SGMLF](#))

Sigma is developing a world class lithium hard rock deposit with exceptional mineralogy at its Grotto do Cirilo property in Brazil.

On June 2, Sigma Lithium Resources [announced](#): "Sigma Lithium announces exceptional PEA results supporting doubling planned production capacity to 440,000 tpa (66,000 LCE)." Highlights include:

Phase 2 production highlights

- "Project's near-term production capacity of battery grade high-purity green lithium will be potentially doubled: Production is planned to increase from 220,000 tpa (33,000 LCE) planned for 2022 in Phase 1, to 440,000 tpa (66,000 LCE), within approximately one year. Phase 2 production has a projected life of mine of approximately 13years: vertically integrated to Sigma's second deposit, Barreiro with 20.5 Mt of measured & indicated high-grade and high-purity lithium resources at 1.43% Li₂O. Low-risk execution strategy: Phase 2 construction is planned to start once Phase 1 concludes commissioning and ramps up production in 2022. The Company has significantly advanced multiple Project workstreams with the objective of preparing for Phase 2 production after 2023."

Phase 2 financial highlights

- "Phase 2 has the potential to more than double total NPV of the Project to US\$844 million: NPV of Phase 2 Production US\$449 million. Low initial capital expenditures of US\$44.5 million.
- Phase 2 after-tax cash flow generation during 13 years is projected as follows: Net revenue of US\$2.1 billion (annualized US\$165 million). After Tax Free Cash Flow of US\$ 766 million (annualized US\$60 million). EBITDA of US\$1 billion (annualized US\$83million). IRR of 208%.

- Located close to Atlantic emerging supply chain for electric vehicles in North America and Europe, Phase 2 would enable Sigma to continue to be amongst the lowest cost producers in the industry. PEA projects Phase 2 average total cash cost to be US\$256/t (FOB Plant, life of mine) and US\$360/t (CIF China Port, life of mine)."

Phase 1 construction update

- "All Detailed Engineering and Pre-Construction workstreams continued to advance to achieve production in the third quarter of 2022..."

On June 23, Sigma Lithium Resources [announced](#):

Sigma breaks ground advancing project to implementation stage and commences earthworks in preparation for civil construction.

Catalysts include:

- Q3 2022 - Production targeted to begin at the Grota do Cirilo Project in Brazil.

Investors can read my recent Trend Investing article [Sigma Lithium Looks To Be A Potential 2022 Lithium Producer With Significant Next Stage Expansion Potential](#).

Neo Lithium [TSXV:NLC] ([OTC:NTTHE](#))

On May 27, Neo Lithium [announced](#): "Neo Lithium discovers new deep brine aquifer in the high-grade zone of the 3Q project." Highlights include:

- "Every new drill hole intercepted high-grade brine at depth of up to 362m and outside of the previous resource estimate in 2018.
- Previous resource estimate in the northern high-grade zone only went to 100m and drill hole PP1-R-26 250m off-strike..."

On June 9, Neo Lithium [announced](#): "Neo Lithium updates 3Q project with 125% increase of measured and indicated resources in the high-grade zone." Highlights include:

- "Significant increase in northern high-grade mineral resource estimate at 800 mg/l lithium cut-off: Measured and indicated resource estimate of 1,682,000 tonnes of lithium carbonate equivalent at an average grade of 926 mg/l Lithium.
- Significant increase of central and southern medium-grade resource estimate at 400 mg/l Lithium cut-off: Measured and indicated resource estimate 5,304,000 tonnes of lithium carbonate equivalent at an average grade of 636 mg/l Lithium
- Average combined impurities for Magnesium/Lithium and Sulphate/Lithium continue to be lowest in industry. High grade resource with 800 mg/l cut off: Mg/Li=1.66 and Sulfate/Li=0.49
- Potential for resource expansion continues to exist at depth, and off strike on the eastern border of the 3Q Project under the alluvial cones.

On June 17, Neo Lithium [announced](#): "Neo Lithium produces 99.9% battery grade lithium carbonate." Highlights include:

- "Highest battery grade lithium carbonate produced to date with 99.9% purity.
- The Company will now convert the Plant from batch mode into continuous mode to produce large samples for specification certification.
- Lithium carbonate has now been considered acceptable for the development of batteries by CATL."

Investors can read the latest company presentation [here](#), and an excellent video [here](#). My CEO interview is available on Trend Investing [here](#).

Upcoming catalysts include:

- Mid 2021 - Environmental permit expected.
- Q3 2021 - Feasibility Study due. Possible project partner/funding announcements usually after FS is released.
- Late 2021/early 2022 - Project construction planned to begin (subject to financing).

Core Lithium Ltd. [ASX:CXO] [GR:7CX] ([OTC:CORX](#))([OTCPK:CXOXF](#))

Core 100% own the Finnis Lithium Project (Grants Resource) in Northern Territory Australia. Significantly they already have an off-take partner with China's Yahua (large market cap, large lithium producer), who has [signed a supply deal with Tesla \(TSLA\)](#). The Company states they have a "high potential for additional resources from 500km² covering 100s of pegmatites."

On May 26, Core Lithium Ltd. [announced](#): "Core secures Darwin Port Operating Agreement." Highlights include:

- "Core signs 5-year Darwin Port Operating Agreement [POA].
- Darwin Port Operations Facilities include truck dump, ship loader and conveyor and unloading of (mining and plant construction) equipment.
- POA contemplates exporting lithium concentrate and DSO and cements a key part of Core's low cost logistics chain from mine to port.
- Core preparing for FID in coming months to target first exports of lithium in 2022."

On June 1, Core Lithium Ltd. [announced](#): "Lithium resource expansion and exploration drilling recommences at Finnis Lithium Project."

On June 24, Core Lithium Ltd. [announced](#):

Nuggets at new Toolebuc prospect extends far east gold trend to 2,500m in length. Core's major focus is on the development of the Finnis Lithium Project.

Investors can read a company presentation [here](#).

Catalysts include:

- 2021 - Updated Feasibility Study for the Finnis Lithium Project.
- H2 2021 - Construction anticipated to begin at Finnis, subject to FID (Q3 2021).
- 2021 - Fieldwork on the Adelaide River Gold Project.

Neometals ([OTC:RRSSE](#)) ([Nasdaq:RDRUY](#)) [[ASX:NMT](#)]

On May 27, Neometals [announced](#): "Primobius enters MoU for North America with Stelco ("STLC") to construct a plant for extraction and recycling of battery metals." Highlights include:

- "Primobius (JV between Neometals and SMS group) enters into lithium-ion battery recycling MoU with leading Canadian steel producer Stelco Inc. (TSX: "STLC").
- MoU contemplates a potential 50:50 joint venture to recycle battery packs arising from end-of-life vehicle and rejected battery recycling.
- MOU sets out key commercial arrangements for Primobius' first potential operation in North America with a partner capable of providing large volumes of end-of-life batteries."

On June 3, Neometals [announced](#):

Neometals realises A\$30M for Mt Marion offtake option... The Company retains significant exposure to the lithium-ion battery supply chain through its Primobius battery recycling JV and portfolio of proprietary lithium processing technologies. Neometals' cash, receivables and investments increase to ~A\$107 million. Commenced a strategic review of the Indian lithium refinery project.

Catalysts:

- 2021 - Possible spin-off the Mt Edwards Nickel Project.
- 2022 - Advancements in key projects with JV partners towards final investment decisions.
- 2023 - Potential Lithium refinery in India (or Australia), potential for lithium-ion battery recycling 50:50 JV Primobius to have several projects globally, possible late stages with the Barrambie Titanium Vanadium Iron Project & the Vanadium Recovery Project.

You can read my very recent article "[An Update On Neometals 5 Key Projects Across The Energy Storage Metals And EV Battery Metals Sector](#)"

Savannah Resources [[LSE:SAV](#)] [[GR:SAV](#)] ([OTCPK:SAVNE](#))

On June 1, Savannah Resources [announced](#): "Mina do Barroso Lithium Project update. Savannah to evaluate additional strategic opportunities due to improved market conditions." Highlights include:

- "... Amid this backdrop the Heads of Agreement ('HoA') with Galp (announced on 12 January 2021) has now expired, and discussions in relation to strategic investment and offtake will continue with Galp outside of the exclusive terms of the HoA.
- Meanwhile, Savannah intends to leverage this degree of commercial interest in MdB to create a strong economic platform to support the Project's development and to maximise shareholder value. Savannah is now evaluating its many strategic options.
- This process may include alternative or supplementary offtake contracts, with or without investment from the offtaker[s] in Savannah or the project directly. It may also result in strategic investments in the Company independent of offtake, or the sale of a portion of the Mina do Barroso Project.
- Savannah's own financial position has been significantly strengthened during the period following the execution of the oversubscribed £10.3m fund raise in April 2021. This provides Savannah with the opportunity to independently advance the definitive feasibility study work at Mina do Barroso and add to its lithium project portfolio.
- Savannah intends to leverage this degree of commercial interest in MdB to create a strong economic platform to support the Project's development."

On June 2, Savannah Resources [announced](#): "Financial results for the Year Ended 31 December 2020." Highlights include:

Subsequent Events & 2021 Outlook

Mina do Barroso Lithium Project, Portugal

- "Public consultation on the EIA initiated in April 2021; Key milestone of 'Declaration of Environmental Impact' expected later this year.
- Received increasing investment and offtake interest in parallel with H1 2021 lithium price recovery...
- Subject to ongoing COVID-related restrictions, complete the project's Definitive Feasibility Study in support of securing construction financing.
- Adding to our in-house team in preparation for the development of Mina do Barroso."

Argosy Minerals [ASX:AGY][GR:AM1] ([OTCPK:ARYME](#))

Argosy has an interest in the Rincon Lithium Project in Argentina, targeting a fast-track development strategy.

On June 4, Argosy Minerals [announced](#): "Rincon 2,000tpa li₂co₃ project update." Highlights include:

- "2,000tpa lithium carbonate process plant development works progressing on schedule and budget.
- 24% of scheduled total construction works now complete.

- First commercial production of battery quality Li₂CO₃ product targeted by mid-2022.
- Positive lithium sector fundamentals to leverage attractive off-take agreements to support the 2,000tpa operation and 10,000tpa project development.
- Strategic investment discussions on-going for 10,000tpa capex funding solution."

Investors can view the company's latest investor presentation [here](#).

Wesfarmers [ASX:WES] (took over Kidman Resources)

The Mt Holland Lithium Project is a 50/50 JV between Wesfarmers [ASX:WES] ([OTCPK:WFAFF](#)) and SQM ([SQM](#)), located in Western Australia. There is also a proposal for a refinery located in WA. Wesfarmers acquired 100% of the shares in Kidman for A\$1.90 per share, for US\$545 million in total.

On June 16, Wesfarmers [announced](#):

Wesfarmers issues inaugural sustainability-linked bonds... Wesfarmers is to raise AUD1 billion following the successful pricing this week...

You can view the latest company presentation [here](#).

Upcoming catalysts include:

- [H2, 2024](#) - Mt Holland production planned to begin.

Sayona Mining [ASX:SYA] ([OTC:DMNXF](#))

On May 27, Sayona Mining [announced](#):

Sayona bid for NAL to be submitted for court approval. Emerging lithium producer Sayona Mining Limited is advancing its Québec expansion strategy after the monitor (administrator) appointed by the Court overseeing the Companies' Creditors Arrangement Act (Canada) process of North American Lithium Inc. [NAL], further to the support confirmation from both secured creditors of NAL, has confirmed that it will support the filing of a motion with the Court for the approval of Sayona's joint bid for NAL with Piedmont Lithium Inc. (Sayona 75%; Piedmont 25%).

On May 28, Sayona Mining [announced](#):

Sayona Québec: NAL Offer "Takes a New Step". Emerging lithium producer Sayona Mining Limited attaches the following statement from the Company's wholly owned subsidiary, Sayona Québec, regarding the joint bid with Piedmont Lithium Limited for North American Lithium (Sayona 75%; Piedmont 25%) (refer ASX release 27 May 2021). Also included is a link to the Québec Government announcement concerning the proposed bid... (if successful) Sayona Québec aims to resume production as soon as possible. The company is putting priority on environmental update of the facilities, technical improvements as well as the upgrading of certain equipment which was at a standstill.

On June 2, Sayona Mining [announced](#): "New drilling underway at Authier Project; WA Lithium earn-in." Highlights include:

- "New drilling campaign underway at flagship Authier Lithium Project, Québec, with goal of expanding lithium resource, reducing strip ratio and accelerating production to enhance profitability.
- Earn-in agreement reached with Altura Mining to expedite exploration at Sayona's lithium assets in Pilgangoora, Western Australia and facilitate Company's focus on North America."

On June 8, Sayona Mining [announced](#): "Completion of Piedmont investment in Sayona Québec."

On June 22, Sayona Mining [announced](#):

Update on Sayona's bid for North American Lithium. Emerging lithium producer Sayona Mining Limited announced today an update on the status of Sayona Québec Inc.'s (Sayona Québec) bid to acquire North American Lithium Inc. [NAL] as part of the Companies' Creditors Arrangement Act [CCAA] proceedings of NAL. A preliminary hearing of the Joint Motion was held on 18 June, at which the Court scheduled the substantive hearing of the Joint Motion for 28 June 2021. The Joint Motion is being jointly contested by an alternative bidder for, and unsecured creditor of, NAL.

Investors can read the Company presentation [here](#), and my Trend Investing CEO interview [here](#).

Upcoming catalysts include:

- 2021 - Authier permitting. Result of NAL bid. Possible project financing and off-take.

Critical Elements Lithium Corp. [TSXV:CRE] [GR:F12] ([OTCQX:CRECF](#))

On June 2, Critical Elements Lithium Corp. [announced](#):

Critical Elements is UL ECOLOGO® certified for mineral exploration. Critical Elements Lithium Corporation is very proud to announce that it has received UL 2723 ECOLOGO® Certification for Mineral Exploration Companies. The Company has successfully completed the final stage of the certification process, which includes audit results, use of the UL ECOLOGO® mark, and registration in UL's SPOT sustainable product database.

On June 7, Critical Elements Lithium Corp. [announced](#):

Lithium hydroxide engineering study. Critical Elements Lithium Corporation is pleased to announce it has retained the services of Metso Outotec and WSP in Canada [WSP] to prepare a Phase II engineering study for a chemical plant to produce high quality lithium hydroxide monohydrate for the electric vehicle and energy storage system battery industries.

On June 18, Critical Elements Lithium Corp. [announced](#): "Critical Elements engages GoldSpot Discoveries to apply AI Exploration Technologies at its lithium-tantalum projects within the Nemiscau belt in Quebec."

Upcoming catalysts include:

- 2021 - Rose Lithium-Tantalum Project permitting. Possible off-take or financing announcements. Results of studies for a chemical plant to produce high quality lithium hydroxide monohydrate.

Lithium Power International [ASX:LPI] ([OTC:LTHHF](#))

No significant news for the month.

Upcoming catalysts:

- 2021 - Maricunga drill results. Further developments with Mitsui re off-take partner and funding announcements for Maricunga Lithium Brine Project in Chile.

Millennial Lithium Corp. [TSXV:ML] ([OTCQB:MLNLF](#)) ([OTCQX:MLNLF](#))

Millennial has tenements at the Pastos Grande Lithium Project and the Cauchari East Lithium Project, in Argentina. Mining licence and environmental permit has been granted.

On June 15, Millennial Lithium Corp. [announced](#):

Millennial Lithium Corp. announces additional license acquisitions at its Pastos Grandes Project, Argentina to increase holdings to 14,091 hectares... The acquisition of these licenses, particularly PPG 01, allows Millennial to continue to develop and plan our Project infrastructure and it also provides the Project with the potential to expand significantly the sources of fresh water for our processing facility. Millennial is fully engaged at Pastos Grandes with pilot plant operations continuing and discussions progressing with a number of off-takers and strategic investors.”

You can view the Company's latest investor presentation [here](#).

Upcoming catalysts:

- 2021 - Possible off-take agreements and project funding.

Lake Resources NL [ASX:LKE] [GR:LK1] ([OTCQB:LLKKE](#))

Lake Resources own the Kachi Lithium Brine Project in Argentina. Lake has been working with Lilac Solutions Technology (private, and backed by Bill Gates) for lithium extraction.

On June 4, Lake Resources NL [announced](#): "Kachi Project finance advances." Highlights include:

- "Strong interest for lower cost project debt finance of Lake’s flagship Kachi Lithium Project has been indicated, amid increasing focus from EV makers on sustainable, high purity lithium.
- Preliminary interest indicated by over half a dozen major international banks with strong experience of funding projects in Argentina subject to support from Export Credit Agencies.
- Lake well-funded through to final investment decision [FID] on construction finance, anticipated to be mid-2022, with A\$24 million in bank at end March 2021."

AVZ Minerals [ASX:AVZ] ([OTC:AZZVF](#))

On June 14, AVZ Minerals [announced](#): "AVZ's DRC logistics arm, Nyuki Logistics, secures long term land concession for Kabondo Dianda Intermodal Staging Station." Highlights include:

- "AVZ's 100% owned DRC Logistics and Haulage company, Nyuki Logistics, secures 1,227 hectare site at Kabondo Dianda for Intermodal Staging Station and local community social economic development programmes.
- 25-year renewable rental agreement for industrial land awarded by Haut-Lomami Lands Office."

Upcoming catalysts include:

- 2021 - Initial project work, possible project funding/partner.

ioneer Ltd [ASX:INR] [GR:4G1] ([OTCPK:GSCCF](#))

No significant news for the month.

Upcoming catalysts include:

- 2021 - Possible off-take and project financing discussions.

European Metals Holdings [ASX:EMH] [AIM:EMH] [GR:E861] ([OTC:ERPNE](#)) ([OTCPK:EMHLE](#)) (Nasdaq:EMHY)

On June 10, European Metals Holdings [announced](#): "Lithium life cycle assessment specialist engaged." Highlights include:

- "... Cinovec LCAs to be produced for both battery-grade lithium carbonate and battery-grade lithium hydroxide monohydrate which will be manufactured at a lithium chemical plant nearby to the Cinovec mine.
- Cinovec LCAs will be benchmarked against global lithium peers.
- Minviro will be actively engaged to identify low-carbon optimisations in the developing feasibility study for Cinovec.
- Cinovec LCAs expected to demonstrate strong carbon footprint credentials with lower energy use, less intensive reagent application and net carbon credits from mine and process by-products.
- LCA Report anticipated to be completed and provided to the Company in Q3 2021."

On June 18, European Metals Holdings [announced](#):

EMH ADS to trade in the U.S... ADSs expected to commence trading on the OTC Market as a member of the Nasdaq International Designation during July 2021 under the ticker symbol "EMHY" ... Prague Listing to be postponed at suggestion of Prague Stock Exchange.

Upcoming catalysts include:

- 2021 - DFS to be released.

Piedmont Lithium [ASX:PLL] (Nasdaq:PLL)

Piedmont Lithium state they are "the only US lithium spodumene project", with their 100%-owned Piedmont Lithium project in North Carolina.

On June 9, Piedmont Lithium [announced](#):

Scoping update highlights the exceptional economics and industry-leading sustainability of Piedmont's Carolina Lithium Project. Piedmont's Carolina Lithium Scoping Study Update is based on the Company's Mineral Resource estimate reported in April 2021, of 39.2 Mt at a grade of 1.09% Li₂O and the by-product Mineral Resource estimates comprising 7.4 Mt of quartz, 11.1 Mt of feldspar and 1.1 Mt of mica reported in June 2021. The fully integrated Study contemplates a 20-year project life, with the downstream lithium hydroxide chemical plant commencing 90 days after the start of concentrate operations. The chemical plant is assumed to achieve full capacity within 12 months. Table 1 provides a summary of production and cost figures for the integrated Project.

Note: After-tax NPV8% of US\$1.923b, after-tax IRR of 31%. Total initial CapEx estimated at US\$838.6m, average LiOH production cash costs US\$2,943/t, 20 year mine life, 2.9 year payback.

Piedmont Lithium's updated Scoping Study results summary

<p>US\$401MM Average Annual EBITDA</p>	<p>US\$1.92B After-tax NPV</p>	<p>31% After-tax IRR</p>
<p>30,000 Tonnes per Year LiOH Production</p>	<p>US\$2,943 Per Tonne LiOH Cash Cost</p>	<p>2.9 year Payback Period</p>

Source

Upcoming catalysts include:

- 2021/22 - Possible off-take and project funding announcements.

You can view the company's latest presentation [here](#).

Wealth Minerals [TSXV:WML] [GR:EJZN] (OTCQB:WMLLF)

Wealth Minerals has a portfolio of lithium assets in Chile, such as 46,200 Has at Atacama, 8,700 Has at Laguna Verde, 6,000 Has at Trinity, 10,500 Has at Five Salars.

On May 25, Wealth Minerals [announced](#):

Wealth arranges \$3,900,000 strategic investment. Hendrik van Alphen, CEO of Wealth, commented: "This is part of Wealth`s strategy to advance our corporate development for the benefit of shareholders."
“

On June 21, Wealth Minerals [announced](#): "Wealth closes second tranche of \$3,900,000 strategic investment."

Investors can view the company's latest presentation [here](#).

Cypress Development Corp. (TSXV:CYP) ([OTCQB:CYDVF](#))

Cypress Development owns tenements in the Clayton Valley, Nevada, USA.

No significant news for the month.

Liontown Resources [ASX:LTR] ([OTC:LINRE](#))

Liontown Resources 100% own the Kathleen Valley Lithium spodumene project in Western Australia.

No news for the month.

You can view the company's latest presentation [here](#).

Upcoming catalysts include:

- Q4 2021- DFS due on Kathleen Valley Lithium-Tantalum Project

Standard Lithium [TSXV:SLL] ([OTC:STLHF](#))

On June 14, Standard Lithium [announced](#):

Standard Lithium announces the early conversion of loan facility with LANXESS Corporation. The Company has issued 6,251,250 common shares, and 3,125,625 share purchase warrants (each, a "Warrant"), to the Lender in connection with the conversion of the outstanding Loan and has retired the principal of the Loan in the amount of US\$3,750,000. Each warrant is exercisable to acquire an additional common share of the Company at a price of C\$1.20 until June 10, 2024...

Frontier Lithium [TSXV:FL] ([HLKMF](#))

Frontier Lithium own the PAK Lithium (spodumene) Project comprising 26,774 hectares and located 175 kilometers north of Red Lake in northwestern Ontario. The PAK deposit is a lithium-cesium-tantalum [LCT] type pegmatite containing high-purity, technical-grade spodumene (below 0.1% iron oxide).

On May 26, Frontier Lithium [announced](#):

Frontier to receive funding from Ontario Government. The Ontario government is investing \$363,000 in Frontier Lithium to help the emerging Greater Sudbury-based junior mining company demonstrate its new innovative extraction process for lithium. This investment will support jobs and opportunities in the mining sector, promote economic development in the north and highlight Ontario's high mineral development potential.

On June 1, Frontier Lithium [announced](#): "Frontier Lithium intersects over 340 metres of pegmatite averaging 1.68% Li₂O at the spark pegmatite." Highlights include:

- "Diamond Drill Hole ("DDH") PL-048-21 collared in pegmatite and intersected 340.7m of pegmatite averaging 1.68% Li₂O; Includes two continuous intersections of 153.1 and 116.2m averaging 1.62% and 1.68% Li₂O. Includes narrower high grades zones of up to 26m of 2.36% with one 8m zone averaging 3.13% Li₂O.
- Geomechanical DDH PL-GDH-06-21 intersected 82.2m averaging 1.25% Li₂O with an 11.2 m zone at the top of the hole averaged 2.22% Li₂O.
- The western extent of the deposit is open and appears to be trending to the southwest.
- Results from the remaining 4 holes are pending."

E3 Metals [TSXV:ETMC] ([OTCPK:EEMMF](#))

E3 Metals is a lithium development company focused on commercializing its extraction technology and advancing the world's 7th largest lithium resource with operations in Alberta. E3 has an inferred mineral resource of 6.7 million LCE.

On May 27, E3 Metals [announced](#): "E3 Metals Corp announces filing of Q1 2021 financial statements and MD&A."

On June 2, E3 Metals [announced](#): "E3 Metals expands Aquifer Management Plan following successful optimization..."

On June 9, E3 Metals [announced](#):

E3 Metals completes R&D, commissions flow testing and design... on the sorbent technology has completed. The Company has selected the final candidates to advance into the process design phase with the commissioning of a flow column testing program at its Calgary Testing Facility ("the Facility"). E3 Metals has been developing its proprietary, lithium selective sorbent for the purposes of primary extraction of lithium from brine. This development work began with the University of Calgary in 2017 and has been the major focus for E3 Metals since the Company released its third resource report in 2018, now totaling 7.0Mt LCE inferred mineral resources, with opportunity for significant expansion.

On June 23, E3 Metals [announced](#):

E3 Metals' improved sorbent outperforms, advanced for flow column testing... has demonstrated longer life and consistent performance in batch testing with 97% lithium recovery while removing over 99% of the critical impurities.

You can read the company's latest presentation [here](#).

American Lithium Corp. [TSXV: LI] ([OTCQB:LIACE](#)) (acquired Plateau Energy Metals Inc.)

On May 20, American Lithium Corp. [announced](#): "American Lithium adds drill-ready lithium exploration targets west of Falchani and outlines plans for advancing Peruvian Lithium and Uranium Projects." Highlights include:

- "Two new high priority, drill-ready lithium target areas have been identified west of Falchani through mapping and surface sampling.
- Drilling now being planned to test these targets and focus on the discovery of new lithium deposits.
- In-fill and expansion drilling to begin at Falchani and focus on resource re-classification (upgrading resource categories) and resource expansion. Expansion drilling to begin at Macusani to expand existing uranium resources and test for new deposits.
- Permitting process, including environmental and community permitting, underway with goal of launching the above drill programs late June to coincide with the end of the local rainy season."

On June 17, American Lithium Corp. [announced](#):

American Lithium provides update on its plan of operations for TLC... Next phase at TLC to include a drill program of up to 95 drill holes to extend, expand and upgrade existing resource and complete up to 5 test pits for metallurgical bulk sampling.

Rio Tinto [ASX:RIO] [LN:RIO] ([RIO](#))

Rio owns a large lithium deposit called Jadar, which is yet to be developed. Jadar is a unique, world-class lithium-borate deposit near the town of Loznica in Serbia. They also have a potential US lithium project from their Boron Mine tailings.

On May 25, Rio Tinto [announced](#):

Rio Tinto partners with InoBat to explore innovative lithium battery initiative. Rio Tinto and InoBat, a European battery technology and manufacturing company, have signed a Memorandum of Understanding to work together to accelerate the establishment of a "cradle to cradle" battery manufacturing and recycling value chain in Serbia.

Catalysts:

2022 - Jadar construction to begin (4 years as underground mine).

2026/27 - Jadar production planned to begin

Lithium processing and new cathode technologies

Nano One Materials [TSX:NANO] ([OTCPK:NNOME](#))

On May 27, Nano One Materials [announced](#):

Nano One receives conditional approval to graduate to the Toronto Stock Exchange. (Ticker change to "NANO")

On June 3, Nano One Materials [announced](#): "Nano One and Johnson Matthey enter into a Joint Development Agreement for Lithium-ion Battery Materials." Highlights include:

- "... Co-development of next generation products and processes for Johnson Matthey's eLNO® family of nickel-rich advanced cathode materials using Nano One's patented One-Pot process.
- Includes detailed commercialization study for pre-pilot, pilot and scaled up production.
- Builds on the successful technical reviews and evaluations conducted by Nano One and JM over the past year."

On June 17, Nano One Materials [announced](#): "Nano One granted 3 new patents." Highlights include:

- "3 new patents, issued and allowed in Canada, the US and China.
- Patents extend protection on One-Pot process and LNMO cathode materials.
- Patents add value to One-Pot, M2CAM, coated nanocrystal and sustainability enhancing technologies."

Other lithium juniors

Other juniors include: Alpha Lithium Corporation [CVE:ALLI] ([OTCPK:ALLIF](#)), American Lithium Corp. [TSX-V: LI] ([OTCQB:LIACE](#)), American Pacific Borate & Lithium [ASX:ABR], Anson Resources [ASX:ASN] [GR:9MY], Ardiden [ASX:ADV], Argentina Lithium and Energy Corp. [TSXV: LIT] (OTCQB: [OTCQB:PNXLF](#)), Avalon Advanced Materials [TSX:AVL] [GR:OU5] ([OTCQX:AVLNF](#)), Carnaby Resources Ltd [ASX:CNB], Electric Royalties [TSXV:ELEC], Eramet [FR: ERA] ([OTCPK:ERMAF](#)) ([OTCPK:ERMAY](#)), European Lithium Ltd [ASX:EUR] ([OTCPK:EULIF](#)), Far Resources [CSE:FAT] ([OTCPK:FRRSE](#)), Firefinch Limited (ASX: FFX) (formerly Mali Lithium Limited), Galan Lithium [ASX:GLN], Ltd [ASX:HNR], Iconic Minerals [TSXV:ICM] [FSE:YQGB] ([OTCPK:BVTEF](#)), Infinity Lithium [ASX:INF], International Battery Metals [CSE: IBAT] ([OTCPK:RHHNF](#)), Ion Energy [TSXV:ION], Jadar Resources Limited [ASX:JDR], Kodal Minerals (LSE-AIM: KOD), Lake Resources [ASK:LKE] ([OTCQB:LLKKE](#)), Latin Resources Ltd [ASX: LRS] ([OTC:LAXXF](#)), Liberty One Lithium Corp. [TSXV:LBY] ([OTCPK:LRTTF](#)), Lithium Australia [ASX:LIT] ([OTC:LMMFF](#)), Lithium Chile Inc. [TSXV:LITH] [GR:KC3] ([OTCPK:LTMCF](#)), Lithium Energi Exploration Inc. [TSXV:LEXI]([OTCPK:LXENE](#)), Lithium South [TSXV:LIS] ([NRGME](#)), MetalsTech [ASX:MTC], MGX Minerals [CSE:XMG] ([OTC:MGXMF](#)), Noram Ventures [TSXV: NRM], One World Lithium [CSE:OWLI] ([OTC:OWRDF](#)), Portofino Resources Inc.[TSXV:POR] [GR:POT], Power Metals Corp. [TSXV:PWM] ([OTCPK:PWRMF](#)), Prospect Resources [ASX:PSC], Pure Energy Minerals [TSXV:PE] ([OTCQB:PEMIF](#)), Rock Tech Lithium [CVE:RCK], Spearmint Resources Inc [CSE:SPMT] ([OTCPK:SPMTE](#)), United Lithium Corp. [CSE:ULTH] (OTC PINK:ULTHF)[FWB:0UL], Vision Lithium Inc. [TSXV:VLI] ([OTCQB:ABEPEF](#)), Vulcan Energy Resources [ASX: VUL] ([OTCPK:VULNF](#)).

Conclusion

June saw lithium spot prices higher again.

Highlights for the month were:

- Global EV battery sales surge leading to strong lithium demand and pricing.
- Ganfeng offers to buy the balance of Bacanora Lithium shares at 67.5 pence.
- Sigma Lithium announces exceptional PEA results supporting doubling planned production capacity to 440,000 tpa (66,000 LCE).
- Neo Lithium discovers new deep brine aquifer in the high-grade zone of the 3Q project. Neo Lithium produces 99.9% battery grade lithium carbonate.
- Neometals realises A\$30M for Mt Marion offtake option. Primobius (50/50 JV Neometals & SMS group) enters MoU for North America with Stelco (“STLC”) to construct a plant for extraction and recycling of battery metals.
- Sayona Quebec (Sayona 75%; Piedmont 25%) awaiting Court approval of contested bid for NAL.
- Millennial Lithium Corp. announces additional license acquisitions at its Pastos Grandes Project, Argentina to increase holdings to 14,091 hectares.
- Lake Resources Kachi Project finance advances.
- European Metal Holdings ADS to trade in the U.S, ticker "EMHYY".
- Piedmont Lithium's Carolina Lithium Project updated Scoping Study results in an after-tax NPV8% of US\$1.923b, after-tax IRR of 31%. Total Intial CapEx US\$838.6m, average LiOH production cash costs US\$2,943/t, 20 year mine life, 2.9 year payback.
- Frontier Lithium intersects over 340 metres of pegmatite averaging 1.68% Li₂O at the spark pegmatite.
- Rio Tinto and InoBat sign MOU to work together to accelerate the establishment of a “cradle to cradle” battery manufacturing and recycling value chain in Serbia.
- Nano One graduates to the TSX, changes ticker to "NANO".
-
- OVERALL: Short term gains will lead to long terms sadness and war
- [My Top 2 Battery Metal Miners For Lithium, Cobalt, Nickel; And 1 For Graphite & Manganese](#)
- [Top 5 Lithium Miners To Accumulate In 2020 & 2021](#)

Ownership Questions Dog ENER1 (HEV) As It Competes For Loans And Grants

Posted by [Alison Kroulek](#) | # |
08:40:27 am on March 23, 2009

RUSSIANS, RUSSIANS, RUSSIANS

Ener1 seems like it would be one of the companies most likely to benefit from the stimulus plan. After all, the company makes batteries for electric cars and it has a manufacturing plant in Indiana, so it benefits American workers. Plus, the market for these batteries should take off as America tries to reduce the amount of fossil fuels used to power our vehicles. Here's how [Barron's](#) describes Ener1's growth potential:

If Ener1 were to win 5% to 12% of a million-vehicle battery market, the company estimates, it could pull in \$2.1 billion in annual revenue with 15% margins (based on earnings before interest, taxes, depreciation and amortization). "If you want to apply a 15 times multiple to that cash flow, which in any normal market is a reasonable growth market, you're talking about a \$4.5 billion equity-market cap," says CEO Charles Gassenheimer.

To help expand its facilities here, Ener1 has applied for a \$480 million loan from the US Department of Energy and plans to apply for some of a \$2 billion dollar grant that is part of the Advanced Battery Manufacturing Initiative in the stimulus plan.

However, questions about the company's ownership are complicating the application process. Here's how the [Barron's](#) article I linked to above explains the problem:

As of late February, some 62% of Ener1's outstanding shares were owned by privately held Ener1 Group. In turn, 66% of Ener1 Group — a recent participant in a \$5.7 million loan to Think Global, which is trying to emerge from bankruptcy — is held by Bzinfin, a British Virgin Islands company whose "indirect beneficial owner" is Boris Zingarevich, a Russian businessman. Zingarevich has close ties to Russian President Dmitry Medvedev and Prime Minister Vladimir Putin.

This is a concern for the Department of Energy. There are fears that if Ener1 develops a successful battery, all of the research and development funded with DOE loans and grants could be transferred back to Russia, especially since there are also military applications for the technology.

Speaking to [Barron's](#), Ener1 CEO responded to these concerns by denying that the Russian investors have any influence on the decisions the company makes. Here's how he explains the situation:

Gassenheimer says that Zingarevich joined the company "when the two founders ran into financial difficulties... If it were not for Boris, this company would not be alive today. He's been a tremendous partner, a patient investor. It's nice to have someone with this level of patience that is fully committed to the story." He adds that Zingarevich "as a matter of SEC rules... is deemed to 'beneficially own' a majority of our shares" but has

What Already Exists That Obsoletes Lithium Mining?

The Thing That a Couple of Technology Billionaires Will Do Anything To Sabotage

Certain, known, technology billionaires spend billions of their dollars, per year, flooding blogs with anti-hydrogen lies because they don't have the products to beat it in the competitive market place. Their tactics are detailed in the feature film, *The Merchants of Doubt*, available now on **Netflix** and other Movie-on-Demand sites

Some battery VC's, who are campaign financiers, have put moles in competitors, bribed senators and black-balled start-ups to keep you, the public, from getting clean energy-products

Now the FBI, The U.S. Senate, and the entire Japanese and European auto industry have called these “*Solyndra-scammers*” out and the Hydrogen cars are now on sale! The world has said: ***“The lying Lithium battery billionaires are full of BS!”***

Here are the federally, and university, proven facts:

Lithium-ion batteries blow up spontaneously. They set homes, offices and planes on fire and have crashed multiple jets. They release cancer-causing, brain damaging, fetus mutating fumes when they burn. They kill the factory workers and nearby towns, where they are made, due to deadly toxins used in making them. They cause one to invade other countries in order to make them. They poison the Earth when they are manufactured and when they are disposed of. A “certain” group of Silicon Valley campaign financiers pushed for the invasion of Afghanistan, and Bolivian political fractures in order to take over the lithium mineral mines for their monopoly of these batteries. Those billionaires **“War Profiteered”! And paid** U.S. Senators with stock in their companies related to lithium ion batteries.

The greedy VC's didn't do their homework. They didn't see that the lithium ion was such a disaster. They only saw dollar signs. They now spend over a billion dollars per year to sabotage, troll, meat puppet and anti-blog any competing sustainable energy technology because..MONOPOLY!

So that idea “blew up”, literally. A famous battery car billionaires is, point-blank, **LYING** about hydrogen and fuel cells in order to protect his lithium battery Afghanistan mining scam.

So What's Next?

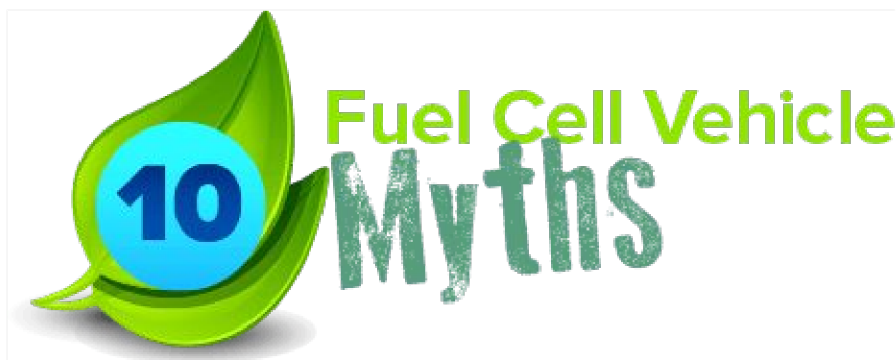
Wouldn't it be cool if you could provide the fuel stock, for the next generation of automobiles, from the water and waste materials that you generate at home?

Wouldn't it be cool if you could drive your next generation car across the nation with fuel you can carry on board, or pick-up from any grocery store?

Wouldn't it be cool if the only waste material that car gave off was simple water?

WELCOME TO COOL! WELCOME TO GETTING: BACK TO THE FUTURE! WATCH THIS VIDEO:

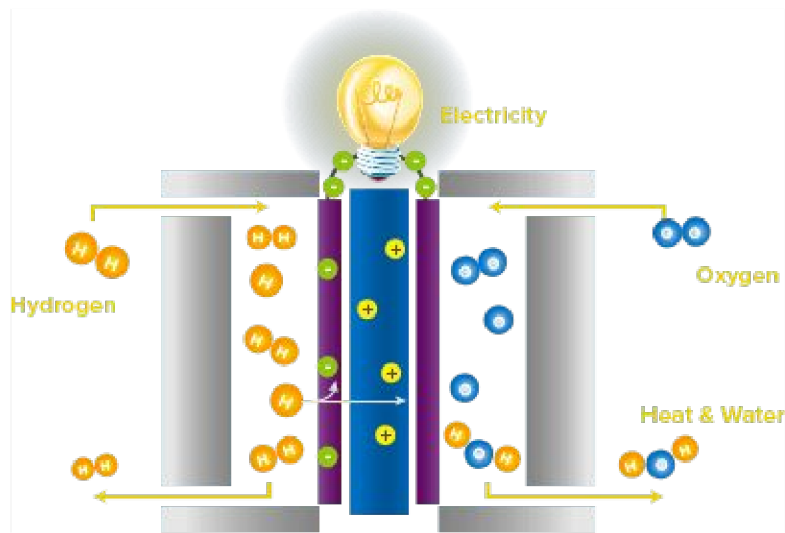
https://videos.files.wordpress.com/GlyLVuI9/toyota-fuel-cell_fmt1.ogv



With Toyota and others offering fuel cell powered vehicles in 2015, it's time to tackle some myths about fuel cells and the vehicles that will use them.



Myth #1: Fuel Cell Vehicles Burn Hydrogen

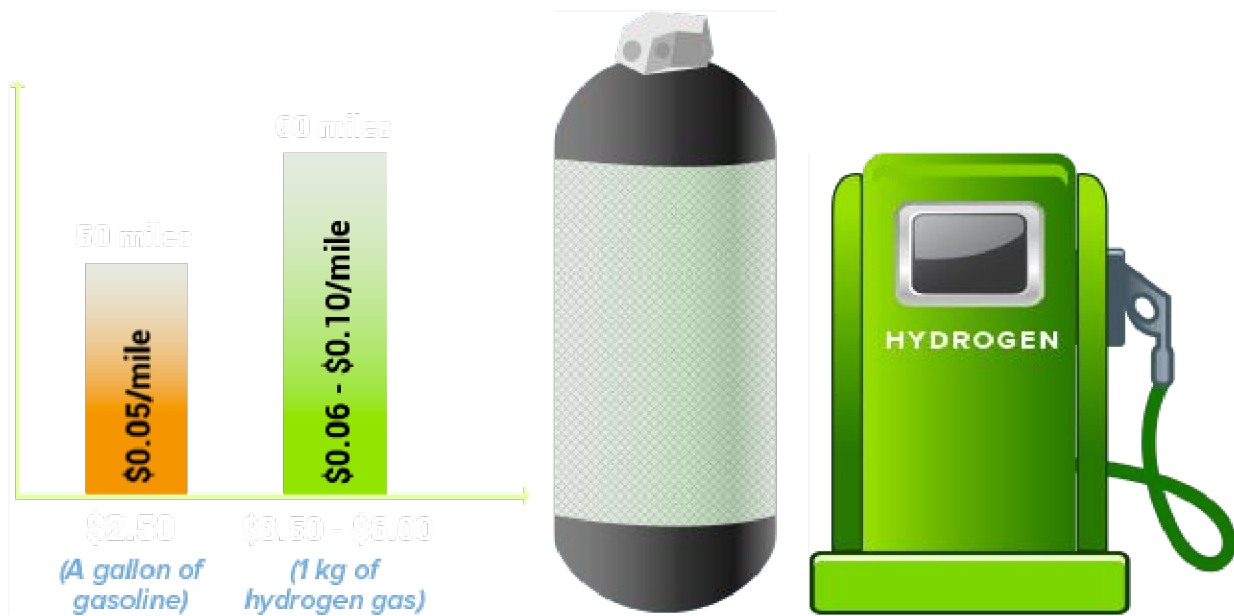


Fuel cells don't burn hydrogen - they use an electrochemical process to convert hydrogen and atmospheric oxygen into electricity and water. They have no moving parts and no open flames.

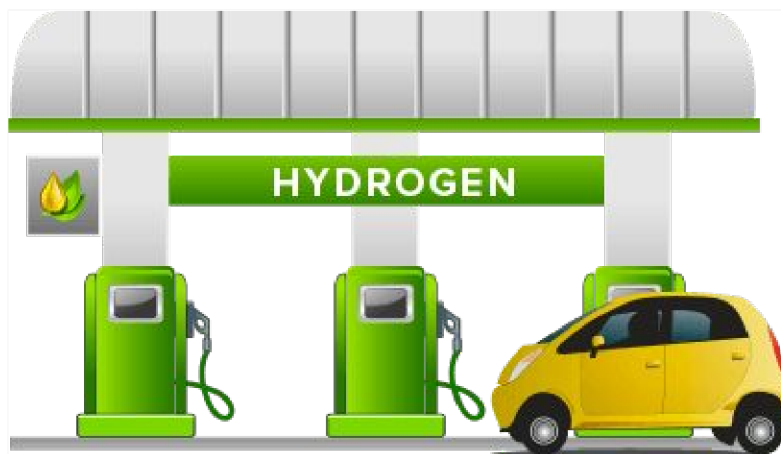
Myth #2 Fuel Cell Vehicles Are Expensive

This *used* to be true - a prototype 2007 Toyota FCV [reportedly](#) cost more than \$1 million dollars to build.

However, recent advances in fuel cell manufacturing and catalyst performance have led to a dramatic cost decrease. According to the US Dept. of Energy, fuel cells will cost [\\$30-\\$50 per kw of output by 2020](#), depending on production volume. To put this number in perspective, Tesla battery packs are estimated to cost over \$250 per kw-hr of capacity today and may fall to [\\$196/kWh by 2018](#). Some optimists believe battery pack costs could fall to [\\$100/kWh by 2025](#), while others believe battery pack costs will fall no lower than [\\$167/kWh by 2025](#). The point? A mid-sized car with a 60kWh battery pack will likely cost more than a similar sized car with a 125kW fuel cell, all things being equal. Fuel cell cars might not be "cheap," per se, but they likely won't be any more expensive than battery powered vehicles (and could be a great deal less).



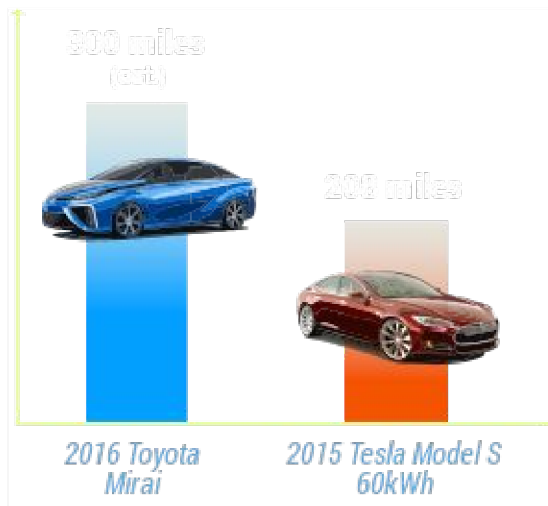
Hydrogen Costs less, is cleaner, and can be acquired from more sources than anything else:



You can fill up just like any car on Earth PLUS in many new ways



The entire supply and creation chain can be 100% clean



Hydrogen cars beat lithium battery cars on range, weight, safety, flexibility, fire issues, and hundreds of other metrics. In fact, lithium battery cars can't beat fuel cell cars on anything

Myth #10 Fuel Cells Are “BS”



Elon Musk, with much of his personal wealth invested in lithium ion battery-electric car technology, says rival fuel cell vehicle technology is "BS."

Tesla's Elon Musk once famously [quipped](#) that fuel cells are "so BS." Considering Musk's reputation as an innovator and his success with Tesla, many people have taken this comment at face value.

However, in light of FCV range and refueling ease, and Musk's personal investment in battery electric vehicle technology, it would be a mistake to accept his criticism of fuel cells without skepticism.

NOTE: A great deal of misinformation about hydrogen fuel cell vehicles stems from an [article in The New Atlantis magazine](#). Please note that this article is several years old (it was written in 2007). Much of what was written is no longer accurate.

This page was created by [Spork Marketing](#) and references both cited data sources and official Toyota news releases. Visit <http://www.toyota.com/fuelcell/> for more information about Toyota's new FCV.

More Myths and Misconceptions



Myth: Installing a hydrogen infrastructure will be prohibitively expensive

The hydrogen transition will not need enormous investments in addition to those that the energy industry is already making. Instead, it will displace many of those investments.

It is expected that the roll-out of a hydrogen infrastructure will occur regionally over time to coincide with vehicle deployment. Yet with the adoption of hydrogen fuel cell products in early markets such as forklifts, airport baggage tugs, back-up power for telecom sites; distributed power for remote communities; and in transit buses, we are seeing a near-term demand for hydrogen.

With automotive fuel cell electric vehicles in the near term horizon, we must begin to install a hydrogen infrastructure now.

Myth: Hydrogen and fuel cells are too expensive

What do computers, cell phones, televisions, wind turbines and solar panels all have in common? People initially thought that they were too expensive when they were first developed.

As with any new technology, cost can be an issue. But, as demand increases, scientists make new breakthroughs, and companies find ways to cut costs, the price will continue to go down. So, while cost remains an issue right now, hydrogen and fuel cells have the potential to be produced for even less than current technologies.

Hydrogen Costs

Many industries already use large quantities hydrogen as a raw material in the chemical synthesis of ammonia, methanol, hydrogen peroxide, polymers, and solvents. Even oil refineries use hydrogen to remove the sulphur from crude oil. But, because hydrogen products for consumers aren't widely available, there is little economic incentive to make and sell hydrogen fuel.

When analysis's evaluate hydrogen's cost to consumers, they often forget that hydrogen can be made nearly anywhere, from any power source, including renewable energy sources. This flexibility can eliminate most or even all transportation costs. Since a large portion of the price that consumers pay for fuel is for transportation, this is significant. For example, the present price of delivered liquid hydrogen is around four times the cost of producing hydrogen.

Finally, in any cost comparison of hydrogen to other fuels, we shouldn't compare apples to oranges. It isn't meaningful to compare the price of a gallon of hydrogen to a gallon of gasoline because both fuels produce a different amount of energy. What really counts is how many cents a kilometre your fuel costs. Even at the present price of delivered liquid hydrogen, if you used hydrogen to power a fuel cell vehicle, your cost per kilometre would be the same as getting gasoline for a dollar a gallon.

Fuel Cell Costs

The costs of fuel cells will inevitably decrease because the raw materials (such as graphite, commodity metals, plastics, and composite) are inexpensive. The only material that is expensive is current catalyst, typically platinum. To overcome this, scientists are researching alternative catalysts from base metals and reducing the amount of platinum needed. Furthermore, platinum may become less expensive due to new platinum recycling systems. Despite their higher setup and development cost, fuel cells have lower maintenance costs and longer operating life.

Myth: Hydrogen is dangerous

Most fuels have high energy content and must be handled properly to be safe. Hydrogen is no different. In general, hydrogen is neither more nor less inherently hazardous than gasoline, propane, or methane. As with any fuel, safe handling depends on knowledge of its particular physical, chemical, and thermal properties and consideration of safe ways to accommodate those properties. Hydrogen, handled with this knowledge, is a safe fuel. Hydrogen has been safely produced, stored, transported, and used in large amounts in industry by following standard practices that have been established in the past 50

years. These practices can also be emulated in non-industrial uses of hydrogen to attain the same level of routine safety.

Myth: Hydrogen caused the Hindenburg to blow up.

Actually, the cause of the fire that destroyed the German passenger airship Hindenburg in 1937 in New Jersey is still unknown. An investigation in 1990 by Addison Bain, a NASA engineer, showed that the paint coating used on the skin of the airship caused the fire. The coating contained reactive chemicals similar to solid rocket fuel. When the airship was docking in 1937, an electrical discharge ignited the skin, and the fire raced over the surface of the airship.

Myth: Commercial hydrogen can make a hydrogen bomb

It's not possible to make a hydrogen bomb with commercially available hydrogen fuel for a couple of reasons. The thermonuclear explosion from a hydrogen bomb results from a nuclear fusion reaction. Two isotopes of hydrogen – deuterium and tritium – collide at very high energy to fuse into helium nuclei, releasing tremendous amounts of energy. However, to get these rare isotopes of hydrogen to fuse requires extraordinary temperatures (hundreds of millions of degrees) supplied by a thermonuclear weapon by an atomic bomb to trigger the fusion reaction. The sheer amount of energy makes this impossible for anyone but professionals in a lab. Furthermore, commercial hydrogen gas doesn't even contain deuterium or tritium. Without these isotopes, it is impossible for ordinary hydrogen gas to produce a thermonuclear reaction under any circumstances.

Myth: Hydrogen isn't a clean fuel

Hydrogen as a fuel doesn't create any emissions when used in a fuel cell. However, it is only as clean as the energy source it's derived from. Producing hydrogen from fossil fuels does create emissions, but it is less than gasoline or diesel. It is also easier to control this pollution because the pollution is limited to the fuel production process. Hydrogen is best when produced from non-polluting renewable energy sources. Different countries will make different choices, depending on their current energy availability and future priorities.

For vehicles, according to well-to-wheels studies, hydrogen fuel cell vehicles are at least twice as efficient as gasoline vehicles, and 40% more efficient than a hybrid. Most hydrogen internal combustion engines are about 30% more efficient than their gasoline counterparts and fuel cells are 100-200% (2-3 times) more efficient.

If we continue to drive vehicles running on fossil fuels, we will continue emitting carbon dioxide into the atmosphere at an ever-growing rate. But if we drive vehicles running on hydrogen, and burn fossil fuels to make that hydrogen, we can choose to sequester the carbon emitted during production or emit it into the atmosphere. If we choose to produce hydrogen from non-polluting sources of energy, we will decrease the amount of global air pollution that we will create.

Myth: There isn't an abundant source of hydrogen fuel

Hydrogen can be made from almost any source of energy. Oil, coal, hydro power, solar power, nuclear power, geothermal power and other energy sources can all be transformed into electricity and then, by electrolysis, into hydrogen.

Contrast that with gasoline for cars. Even though people tend to talk about cars running on oil, they actually run on gasoline, which is manufactured, not found. Gasoline can only be made from oil, which we get out of the ground, as a feedstock. When we can no longer find oil at a reasonable cost, we can still make hydrogen.

Myth: In cars, hydrogen can't compete with regular gas

In many ways, hydrogen vehicles are more viable than gasoline. Vehicles that use hydrogen in an internal combustion engine are about 30% more efficient than comparable gasoline vehicles. Best of all, they produce ultra-low emissions, with no CO₂. Fuel cells are ideally suited for cars that use electrical systems instead of hydraulics for functions such as steering and braking. These cars are two to three times more energy efficient than gas cars. Also, in a fuel cell electric vehicle, automakers can put the power train anywhere, which gives them the ultimate in design freedom.

Myth: Using renewable power to produce hydrogen wastes energy

It would be ideal if you could just plug in to your solar panel or wind generator and use that power right away. However, it's not always windy or sunny, so renewable energy projects need a storage system that provides energy whenever you need it. Hydrogen can store energy that would otherwise go to waste.

Myth: Hydrogen and fuel cell products are still in development and we can't buy them today

Hydrogen and fuel cell products are available today. Many hydrogen fuel cells are used today in forklifts in warehouses, buses in cities, and back-up power for communications companies. Companies and governments recognize the performance, financial, environmental and health benefits. These early uses are playing a pivotal role in refining the technology and establishing infrastructure.

Scientists and companies are currently testing micro fuel cells, often called portable power, to recharge and power cell phones and laptops. These should be available in the near future.

In the next couple of years, we'll start to see new vehicles available for customers too. For example, Honda, Toyota and Mercedes-Benz currently have concept cars on the go and are all planning on releasing fuel cell cars for consumers in 2015.

Twenty Hydrogen Myths That Battery Companies and Oil Companies Spend Billions of Dollar Per Year Trying to Make You Believe:

White paper published at www.rmi.org

[Download the detailed report at the links below:](#)

http://www.rmi.org/Knowledge-Center/Library/E03-05_TwentyHydrogenMyths

http://www.rmi.org/cms/Download.aspx?id=6667&file=E03-05_20HydrogenMyths.pdf&title=Twenty+Hydrogen+Myths

This peer-reviewed white paper offers both lay and technical readers a documented primer on basic hydrogen facts, weighs competing opinions, and corrects twenty widespread misconceptions. Some of these falsehoods include the following: “a hydrogen industry would need to be developed from scratch; hydrogen is too dangerous for common use; making hydrogen uses more energy than it yields; we lack a mechanism to store hydrogen in cars; and hydrogen is too expensive to compete with gasoline”. This paper explains why the rapidly growing engagement of business, civil society, and government in devising and achieving a transition to a hydrogen economy is warranted and, if properly done, could yield important national and global benefits.

Abstract

Recent public interest in hydrogen has elicited a great deal of conflicting, confusing, and often ill-informed commentary. This peer-reviewed white paper offers both lay and technical readers, particularly in the United States, a documented primer on basic hydrogen facts, weighs competing opinions, and corrects twenty widespread misconceptions. **It explains why the rapidly growing engagement of business, civil society, and government in devising and achieving a transition to a hydrogen economy is warranted and, if properly done, could yield important national and global benefits.**

About the author

Physicist Amory Lovins is cofounder and CEO of Rocky Mountain Institute (www.rmi.org) and Chairman of Hypercar, Inc. (www.hypercar.com), RMI's fourth for-profit spinoff (in which, to declare an interest, he holds minor equity options). Published in 28 books and hundreds of papers, his work has been recognized by the “Alternative Nobel,” Onassis, Nissan, Shingo, and Mitchell Prizes, a MacArthur Fellowship, the Happold Medal, eight honorary doctorates, and the Heinz, Lindbergh, World Technology, and “Hero for the Planet” Awards. He has advised industry and government worldwide on energy, resources, environment, development, and security for the past three decades.

About the publisher

Rocky Mountain Institute is an independent, entrepreneurial, nonprofit applied research center founded in 1982. Its ~50 staff foster the efficient and restorative use of resources to make the world secure, just, prosperous, and life-sustaining. The majority of its ~\$7-million annual revenue is earned by consultancy, chiefly for the private sector; the rest comes from foundation grants and private gifts. Much of the context of its work is summarized in Natural Capitalism (www.natcap.org). Donations are

welcome and tax-deductible (#74-2244146). RMI is at 1739 Snowmass Creek Road, Snowmass, CO 81654, phone + 1 970 927-3851

Twenty myths

Myth #1. A whole hydrogen industry would need to be developed from scratch.

Myth #2. Hydrogen is too dangerous, explosive, or “volatile” for common use as a fuel.

Myth #3. Making hydrogen uses more energy than it yields, so it’s prohibitively inefficient

Myth #4. Delivering hydrogen to users would consume most of the energy it contains...

...Myth #17. A viable hydrogen transition would take 30–50 years or more to complete, and hardly anything worthwhile could be done sooner than 20 years

http://www.rmi.org/Knowledge-Center/Library/E03-05_TwentyHydrogenMyths

Full document (PDF)

http://www.rmi.org/cms/Download.aspx?id=6667&file=E03-05_20HydrogenMyths.pdf&title=Twenty+Hydrogen+Myths

THE INFLUENCE GAME: Toyota's Powerful DC Friends

THE INFLUENCE GAME: Toyota has friends in high places in Washington, but are they enough?

By SHARON THEIMER

The Associated Press

WASHINGTON

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Twenty Hydrogen Myths

AMORY B. LOVINS, CEO, ROCKY MOUNTAIN INSTITUTE
20 June 2003

is,

Hydrogen technologies are maturing. The world's existing hydrogen industry is starting to be recognized as big — producing one-fourth as much volume of gas each year as the global natural-gas industry. Industry, government, and civil society are becoming seriously engaged in designing a transition from refined petroleum products, natural gas, and electricity to hydrogen as the dominant way to carry, store, and deliver useful energy. New transitional paths are emerging, some with a vision across sectoral or disciplinary boundaries that makes them harder for specialists to grasp. Naturally, there's rising speculation about winners, losers, and hidden agendas. And as the novel hydrogen concept is overlain onto longstanding and rancorous debates about traditional energy policy, constituencies are realigning in unexpected ways.

In short, the customary wave of confusion is spreading across the country. What's this all about? Is hydrogen energy really a good idea? Is it just a way for incumbent industries to reinforce their dominance, or could it be a new, different, and hopeful melding of innovation with competition? Is it a panacea for humanity's energy predicament, or a misleading *deus ex machina* destined to inflict public disappointment and cynicism, or neither, or both?

The conversation about hydrogen is confused but hardly fanciful. The chairs of eight major oil and car companies have said the world is entering the oil endgame and the start of the Hydrogen Era. Royal Dutch/Shell's planning scenarios in 2001 envisaged a radical, China-led leapfrog to hydrogen (already underway): hydrogen would fuel a fourth of the vehicle fleet in the industrialized countries by 2025, when world oil use, stagnant meanwhile, would start to fall. President Bush's 2003 State of the Union message emphasized the commitment he'd announced a year earlier to develop hydrogen-fuel-cell cars (FreedomCAR).

Yet many diverse authors have lately criticized hydrogen energy, some severely.¹⁻¹² Some call it a smokescreen to hide White House opposition to promptly raising car efficiency using conventional technology, or fear that working on hydrogen would divert effort from renewable energy sources. Some are skeptical of hydrogen because the President endorsed it, others because environmentalists did. Many wonder where the hydrogen will come from, and note that it's only as clean and abundant as the energy sources from which it's made. Most of the critiques reflect errors meriting a tutorial on basic hydrogen facts; hence this paper.

Introductory facts

To establish a common factual basis for exploring prevalent myths about hydrogen, let's start with six points that are universally accepted by hydrogen experts but not always articulated:

- Hydrogen makes up about 75% of the known universe, but is not an energy *source* like oil, coal, wind, or sun.¹³ Rather, it is an energy *carrier* like electricity or gasoline — a way of transporting useful energy to users. Hydrogen is an especially versatile carrier be-

cause like oil and gas, but unlike electricity, it can be stored in large amounts (albeit often at higher storage cost than hydrocarbons), and can be made from almost any energy source and used to provide almost any energy service. Like electricity, hydrogen is an extremely high-quality form of energy, and can be so readily converted to electricity and back that fuel-cell pioneer Geoffrey Ballard suggests they be thought of together as a fungible commodity he calls “Hydricity™.”

- The reason hydrogen isn’t an energy *source* is that it’s almost never found by itself, the way oil and gas are. Instead, it must first be freed from chemical compounds in which it’s bound up. There are broadly three ways to liberate hydrogen: using heat and catalysts to “reform” hydrocarbons or carbohydrates, or electricity to split (“electrolyze”) water, or experimental processes, based typically on sunlight, plasma discharge, or microorganisms.¹⁴ All devices that produce hydrogen on a small scale, at or near the customer, are collectively called “hydrogen appliances” to distinguish them from traditional large-scale industrial production.
- Fossil-fuel molecules are combinations of carbon, hydrogen, and various other atoms. Roughly two-thirds of the fossil-fuel atoms burned in the world today are hydrogen. (However, hydrogen yields a smaller share of fossil-fuel energy, because its chemical bonds are weaker than carbon’s.) The debate is about whether combusting the last third of the fossil fuel — the carbon — is necessary; whether it might be cheaper and more attractive not to burn that carbon, but only to use the hydrogen; and to what degree that hydrogen should be replaced by hydrogen made with renewable energy sources.
- Using hydrogen as a fuel, rather than burning fossil fuels directly, yields only water¹⁵ (and perhaps traces of nitrogen oxides if used in a high-temperature process). This can reduce pollution and climate change, depending on the source of the hydrogen. But when journalists write that hydrogen can “clean the air,”¹⁶ that’s shorthand for keeping pollutants out of the air, not removing those already there.
- Hydrogen is the lightest element and molecule. Molecular hydrogen (two hydrogen atoms, H₂) is eight times lighter than natural gas. Per unit of energy contained, it weighs 64% less than gasoline or 61% less than natural gas: 1 kilogram (2.2 lb) of hydrogen has about the same energy as 1 U.S. gallon of gasoline, which weighs not 2.2 but 6.2 pounds.¹⁷ But the flip side of lightness is bulk. Per unit of *volume*, hydrogen gas contains only 30% as much energy as natural gas, both at atmospheric pressure. Even when hydrogen is compressed to 170 times atmospheric pressure (170 bar), it contains only 6% as much energy as the same volume of gasoline. Hydrogen is thus most advantageous where lightness is worth more than compactness, as is often true for mobility fuels.
- One of the biggest challenges of judging hydrogen’s potential is how to compare it fairly and consistently with other energy carriers. Fossil fuels are traditionally measured in cost, volume, or mass per unit of *energy content*.¹⁸ That’s valid only if the fuels being compared are all used in similar devices and at similar efficiencies, so all yield about the same amount of energy service. But that’s not valid for hydrogen. Fuel cells (explained further in Myth #6) are not subject to the same thermodynamic limits as fuel-driven engines, because they’re electrochemical devices, not heat engines. A hydrogen fuel-cell car can therefore convert hydrogen energy into motion about 2–3 times as efficiently as a normal car converts gasoline energy into motion: depending on how it’s designed and run, a good fuel-cell system is about 50–70% efficient, hydrogen-to-electricity,¹⁹ while a typical car engine’s efficiency from gasoline to output shaft averages only about 15–17%

efficient.²⁰ (Both systems then incur further minor losses to drive the wheels.) This means you can drive several times as far on a gallon-equivalent (in energy content) of hydrogen in a fuel-cell car as on a gallon of gasoline in an engine-driven car. Conversely, hydrogen costing several times as much as gasoline per unit of *energy contained* can thus cost the same *per mile* driven. Since you buy automotive fuel to get miles, not energy, ignoring such differences in end-use efficiency is a serious distortion, and accounts for much of the misinformation being published about hydrogen's high cost. Hydrogen's advantage in cars is especially large because cars run mainly at low loads, where fuel cells are most efficient and engines are least efficient.²¹ (Hydrogen can also have other economic or functional advantages that go beyond its efficient use. For example, when hydrogen fuel cells power digital loads in buildings, hydrogen may yield even greater extra value because suitably designed arrays of fuel cells can be exceptionally reliable and can yield the high-quality power that computers need.²²)

To reinforce this sixth point, the U.S. Department of Energy (DOE) says bulk hydrogen made and consumed onsite costs about \$0.71/kg.²³ That's equivalent in *energy* content to \$0.72 per gallon of gasoline.²⁴ But *per mile driven* — which is the objective — it's equivalent to about one-third to one-half that price, *i.e.*, to about \$0.24–0.36/gallon-equivalent, because of the 2–3-fold greater efficiency of a hydrogen fuel cell than a gasoline engine in running a car. Of course, the *price of hydrogen delivered* into the car's fuel tank will be much higher. For example, DOE says the delivered price of industrial liquid hydrogen is about \$2.2–3.1/kg. If it could be delivered into the tank of a car for the same price, it would be roughly equivalent *per mile* to \$1-a-gallon gasoline. Thus it can cost several times as much to deliver liquid hydrogen as to produce it. (Fortunately, as we'll see, gaseous hydrogen can be produced at a filling station and put into the car for well under \$2/kg.) Price also depends on hydrogen purity. So to assess hydrogen's price or cost or value or benefit meaningfully, we need to know how it'll be used, whether it's pure enough for the task, whether it's delivered to the task, and how much of the desired work it actually does.

Different questions yield different answers

So much for the basics. What's different about Rocky Mountain Institute's perspective that underlies this paper?

- RMI believes that radical but practical and advantageous efficiency improvements at three levels — vehicles, energy distribution, and overall energy infrastructure — can make the hydrogen transition rapid and profitable.
- At least for the next decade or two, RMI envisions a distributed model for hydrogen production and delivery that integrates the gas, electricity, building, and mobility infrastructures. Instead of building a costly new distribution infrastructure for hydrogen, we'd use excess capacity inherent in the existing gas and electricity distribution infrastructures, then make the hydrogen locally so it requires little or no further distribution. Only after this decentralized approach had built up a large hydrogen market in buildings and vehicles could centralized hydrogen production merit much investment, except in special circumstances.

- RMI’s insights into the full economic value of distributed power suggest that hydrogen fuel cells *today* can economically displace less efficient central resources for delivering electricity, paving the way for hydrogen use to spread rapidly, financed by its own revenues.
- RMI recognizes that especially in North America, natural gas is logically the main near-term fuel to launch the hydrogen transition, along with cost-effective renewables. If making hydrogen requires more natural gas (which it may not — see Myth #12), it should come first from natural gas saved by making existing applications more efficient. In the longer run, more mature and diverse renewables will play an important and ultimately a dominant role. Even during the initial, mainly fossil-fueled, stages of the hydrogen transition, carbon emissions will be much smaller than today’s emissions from burning those fossil fuels directly. In time, those carbon emissions will approach zero. Insisting that they *start* at zero — that hydrogen be made solely from renewable energy sources, starting now — is making the perfect the enemy of the good. But done right, the hydrogen transition will actually make renewable energy more competitive and speed its adoption.

And what “headlines” will emerge from this perspective in the following discussion?

- **The oft-described technical obstacles to a hydrogen economy — storage, safety, and the cost of the hydrogen and its distribution infrastructure — have already been sufficiently resolved to support rapid deployment starting now. No technological breakthroughs are needed, although many will probably continue to occur. Until volume manufacturing of fuel cells starts in the next few years, even costly handmade or pilot-produced versions can already compete in substantial entry markets. Automotive use of fuel cells can flourish many years sooner if automakers adopt recent advances in crashworthy, cost-competitive ultralight autobodies. If fuel cells prove difficult to commercialize or hydrogen’s benefits are desired sooner, there might even be a transitional role for hydrogen-fueled engine-hybrid vehicles.**
- **The hydrogen transition should not need enormous investments in addition to those that the energy industries are already making. Instead, it will displace many of those investments. Hydrogen deployment may well need *less* net capital than business-as-usual, and should be largely self-financing from its revenues.**
- **A well-designed hydrogen transition will also use little more, no more, or quite possibly *less* natural gas than business-as-usual.**
- **A rapid hydrogen transition will probably be *more* profitable than business-as-usual for oil and car companies, and can quickly differentiate the business performance of early adopters.**
- **Most of the hydrogen needed to displace the world’s gasoline is already being produced for other purposes, including making gasoline. A hydrogen industry big enough to displace all gasoline, while sustaining the other industrial processes that now use hydrogen, would be only severalfold bigger than the mature hydrogen industry that exists today, although initially it will probably rely mainly on smaller units of production, nearer to their customers, to avoid big distribution costs.**
- **A poorly designed hydrogen transition could cause environmental problems, but a well-designed one can resolve most of the environmental problems of the current fossil-fuel system without making new ones, and can greatly enhance security.**

Now for the currently prevalent hydrogen myths, and what their correction implies about desirable courses of action. Writing for a mainly U.S. audience, we'll use a mixture of U.S. and international units of measurement.

Twenty myths

Myth #1. A whole hydrogen industry would need to be developed from scratch.

Producing hydrogen is already a large and mature global industry, using at least 5% of U.S. natural gas output. Globally, about 50 million metric tons of hydrogen is made for industrial use each year. That's over half a trillion cubic meters measured at atmospheric pressure.²⁵ The U.S. Department of Energy (DOE) reports²⁶ that about 48% of global hydrogen production is reformed from natural gas, 30% from oil, and 18% from coal (chiefly in China and South Africa for producing nitrogen fertilizer; half the world's hydrogen goes into ammonia-based fertilizer). Only 4% of the world's hydrogen comes from electrolysis, because that process can compete with reforming fossil fuels only under three main conditions: with very cheap electricity, generally well under 2¢/kWh (see Myth #9 below); if the hydrogen is a byproduct (about 2%, for example, is unintentionally made during "chloralkali" electrolytic chlorine production); or perhaps if the producer is charged for carbon emissions and has a carbon-free source of electricity but no way to sequester (keep out of the atmosphere) carbon released from reforming fossil fuels.

U.S. hydrogen production is at least one-fifth and probably nearer one-third of the world total,²⁷ is equivalent to ~1.8% of total U.S. energy consumption, and comes ~95% from natural gas at ~99% purity from steam reforming and associated cleanup processing.²⁸ Roughly 47% of U.S. or 37–45% of world hydrogen production is reportedly used in refineries;²⁹ it is made onsite, mostly by steam reforming of gas or oil, and is used mainly to make gasoline and diesel fuel. Most hydrogen production by refineries is deliberate, used to make hydrogen-rich refined products or to remove sulfur from them; some is a byproduct of making aromatic compounds. The rest of the world's hydrogen output goes to ammonia fertilizer, methanol, petrochemicals, edible fats and oils, metal production, microchips, and other products, and a little to special industrial furnaces. World hydrogen production is reportedly doubling about every decade, driven by refineries' need to make lower-sulfur fuels and by other growth industries. Usage for fertilizer has been relatively flat for the past decade, and usage for methanol is growing more slowly (roughly with GDP) as prospects fade for wide use of methanol-derived MTBE gasoline additive, so the biggest growth market for industrial hydrogen appears to be refineries.

The industrial infrastructure for centralized hydrogen production already exists. Throughout industry, most hydrogen is currently made at large plants and is used at the industrial site or nearby. There are ~1,500 km (~930 miles) of special hydrogen pipelines (720 km or 446 miles in North America) operating at up to 100 bar.³⁰ Moving hydrogen gas through pipelines takes about half as much of its energy as is currently lost when transporting electricity, and the pipeline is far smaller — a 1.7-meter-diameter hydrogen pipeline at 70 bar delivers 16 GW, whereas a 60-meter-tall pylon with three pairs of ±500-kVDC power lines delivers only 9 GW.³¹ Hydrogen is less dense and takes more compressor energy than natural gas, but also flows better, so transporting hydrogen through existing natural-gas pipelines would deliver only ~20–25% less en-

SEE THE REST AT: http://www.rmi.org/cms/Download.aspx?id=6667&file=E03-05_20HydrogenMyths.pdf&title=Twenty+Hydrogen+Myths

MOBILE FUEL CELL PACKS VS. BATTERIES

Batteries catch on fire quite a bit and have been the result of many more fires and explosions than hydrogen. AT&T 's U-verse TV service now had a massive exploding battery problem, making it necessary for the firm to replace 17,000 backup batteries in its nationwide network.

The Federal Government has OUTLAWED Lithium Batteries on airplanes because they explode unexpectedly so often. Batteries blow up when they want to.

Fuel Cell power systems run many, many times longer and provide massively greater range per charge than batteries.

The run time of batteries constantly shortens while Fuel Cell technology does not.

Batteries have a problematic "Memory Effect" while Fuel Cell technology does not.

Fuel Cell technology is "instant-charge" via hot-swap while battery packs require hours to recharge.

Charge life- Fuel Cell systems have an extensive charge life while batteries have a much shorter end-of-life metric.

The cost per 300 mile range for a Fuel Cell technology car system is far lower than a battery system. A Fuel Cell powered car TODAY that will drive 300 miles without a refill is 50% or less of the price of a battery car that will drive 300 miles without a refill.

A Fuel Cell system can be charged from a completely clean home energy system but batteries need to be charged from a "sour-grid".

Fuel Cell technology can make energy at home. Batteries cannot.

Fuel Cell technology has a far higher storage density than batteries.

Fuel Cell systems are far less bulky than batteries.

The weight of batteries is so great that it reduces the range of travel of a vehicle which causes the use of wasteful energy just to haul the batteries along with the car. Fuel Cell energy systems weigh far less.

The disposal of batteries, after use, presents a deadly environmental issue while Fuel Cell technology does not.

Fuel Cell technology does not self discharge like batteries.

Batteries cause a greater carbon footprint than Fuel Cell technology

Batteries require coal be burned to charge them. One pound of coal has roughly 14,000 Btu of chemical energy in it. When everything operates well, all that turns out to be generally around 30% efficient, meaning that 30% of the chemical energy that started out in the coal has become actual electricity. New H2 production systems are up to 93% efficient.

HYDROGEN TANKS VS. HYDROGEN SOLID STATE CASSETTES

Infrastructure cost per cubic foot of H2 is far more expensive with pressurized and liquefied hydrogen.

In an accident, the pressure tanks could shoot, like a rocket, through hundreds of innocent bystanders killing or maiming most of them.

In an accident, the pressure wave from pressure tanks expels the organs of nearby people out of their bodies.

In an accident, the pressure wave from pressure tanks crushes the lungs of nearby people.

In an accident, the pressure wave from pressure tanks shoots shrapnel through the neighborhood like a hand grenade.

Ability to ship via UPS/FEDEX/US MAIL does not exist for pressurized and liquefied hydrogen but does for H2 cassettes.

Percentage of existing infrastructure that can be used for H2 cassettes is far, far greater than that which can be used for pressurized and liquefied hydrogen.

Insurance costs are far less for H2 cassettes.

Ability of tank to crush the foot of workers, thus increasing insurances costs, does not exist with H2 cassettes.

Time to refuel vehicle is only seconds for an H2 cassette while it is many times longer for pressurized and liquefied hydrogen.

Only the Fuel Cell products have the ability to be hand carried.

Only the Fuel Cell products are H2-on-Demand where H2 is not present unless needed.

Fuel Cell products have less bulkiness.

Fuel Cell products are fully scalable while tanks are not very scalable.

Fuel Cell products have better hydrogen-source-to-consumption efficiency metrics.

Fuel Cell products require no special delivery vehicles and can use any common carrier while tanks cannot.

Tanks require special pipelines while Fuel Cell technology requires no pipelines.

High pressure is required for tanks while no pressure is required for Fuel Cell technology.

Skin cutting on refueling or refilling occurs with tanks but not with Fuel Cell technology.

Your finger could freeze and snap off using liquid hydrogen but not with Fuel Cell technology.

Fuel Cell fuel is intelligent and monitors itself but tanks do not have this ability.

Fuel Cell fuel notifies you when you need more but tanks do not.

Fuel Cell fuel advises you of its health and purity but tanks do not.

The overall transport safety of Fuel Cell beats tanks by at least a magnitude.

Fuel Cell technology uses off-the-shelf, domestically available scalable components but tanks require special service safety parts.

Fuel Cell technology has fully rechargeable, recyclable, pressure variable output but tanks do not.

Fuel Cell technology use may improve insurance premiums but tanks will always increase premiums.

Factory man-power productivity increases using Fuel Cell at the plant-level over tanks

All stored H2 is live and explosive with tanks but not with Fuel Cell.

Fuel Cell increases balance-of-plant metric but tanks reduce the metrics.

Fuel Cell's source compound agnostic but tanks are fixed to source compound.

Fuel Cell is fully patent protected and tanks are not.

Fuel Cell base hardware investment is future-protected while tanks are only partially protected.

Fuel Cell technology is fully systemically modular while tanks are fixed.

Fuel Cell technology fits the box-like form factor of car while tanks dictate their location.

Tanks require an extensive safety compound required around customer storage area while Fuel Cell does not.

Tanks need an annual X-Ray and material audit while Fuel Cell technology does not.

Fuel Cell technology does not flow across the ground and surfaces in a fire like napalm like liquid hydrogen.

GASOLINE VS. HYDROGEN SOLID STATE CASSETTES

Fuel Cell technology does not flow across the ground and surfaces in a fire like napalm like gasoline.

Gasoline service stations are one of the primary sources and causes of cancer. Fuel Cell eliminates the need to go to a service station.

The gasoline and associated vapors in a vehicle while you drive cause cancer, brain damage and numerous health issues and Fuel Cell technology does not.

The residue after use of gasoline causes numerous environmental damage issues and Fuel Cell technology does not.

The residue after use of gasoline causes numerous environmental damage issues and Fuel Cell technology does not.

Gasoline is increasing in cost and hydrogen sources and end product are decreasing in cost.

Honda also announces hydrogen commitment to H2 as eventual sole fuel source:



Honda - Honda just unveiled its new hydrogen-powered car
Emits nothing but water vapour.

Just when everyone's getting all excited about electric cars usurping their fossil fuel-guzzling counterparts, Honda has announced that its hydrogen-powered cars will go on sale in Japan as early as March 2016, with launches in Europe and the US to follow.

The five-seater sedan, called the FCV Clarity, can travel 700 km (434 miles) on a single charge. It's been priced at 7.66 million yen, or US\$62,807, which puts it just in the affordability range for the average consumer, the Japanese automaker saying it expects to sell far more than the 72 units it sold of its previous-generation model, the FCX Clarity. "We want this car to be the trigger for the 'hydrogen society'," Honda operating officer, [Toshihiro Mibe](#), [told Reuters](#) at the Tokyo Motor Show in Japan this week.

A Honda hydrogen-powered car is nothing new. Back in 2008, [the FCX Clarity](#) was leased to a handful of private buyers in California as part of a [subsidized trial deal](#), but things didn't go so well that time around.

For one thing, the car cost 10 times more than it does now, and on top of that, it was 30 percent less powerful. The hydrogen fuel cell stack was also incredibly bulky, and the last thing you want to do is

Countering the anti-hydrogen trolls

By Dan Baleen

Senators with stock market holdings in the battery industry, oil executives and Silicon Valley battery VC's spend billions of dollars to try to keep hydrogen and fuel cells from happening. U.S. Secretary of Energy Steven Chu was partners with lithium ion battery companies, so he froze fuel cells, for almost a decade, to protect his, and his friends business ventures. These abuses of public office for market manipulation, are deepky documented at such sites as: <http://thesiliconcoup.weebly.com> <http://thesiliconcoup.wordpress.com> and others.

I see some negative assumptions about hydrogen out there by these shills and paid nay-sayers. Every single one of those people, slamming hydrogen energy, and fuel cells, can be financially, and politically tracked back to competing technology companies. I believe hydrogen is the right way to go. I would like to provide some cut-and-paste of some well-known postings of others, on the Internet, which counter some of the points against H2:

“Hydrogen beats batteries, biofuel and all other vehicle power solutions”

The positions:

Hydrogen is better than batteries by many times!

Oil is the cause of cancer!

Battery makers hire writer-shills and spend tens of millions to put out hydrogen disinformation!

There is nothing better than hydrogen that anybody knows of!

Are proven by the facts below:

A. Hydrogen can be made at home and requires NO NEW INFRASTRUCTURE. You can make it for free, at home, all day long and all night long. The production can be powered by solar, wind, microbes and other free sources. The volume of H₂ produced “IS” enough to charge solid state H₂ containers from Hbank, Ergenics, Fuel Cell, ECD, Horizon, JSW, Labtech, Palcan, UTC, Jadoo and hundreds of others. The metrics quoted by the anti-hydrogen crowd are just lies to protect their competing business interests.

B. It now costs less to make hydrogen from water than any known way to make gasoline and it continues to get cheaper every month: The GE Noryl system, The R4 processor and over a hundred different systems can do this NOW; with many more expected next year. The “battery shill” spin has worn thin and has been supplanted by facts. Hydrogen is made from WATER via solar energy, wind energy, microbes, radio waves, sunlight and salt, and other FREE sources of energy. Hydrogen can also be made from any organic garbage, waste, plants or ANYTHING organic via lasers, plasma beams or dozens of other powered exotics which can be run off of EITHER the grid or the free hydrogen made from solar energy, wind energy, microbes, radio waves, sunlight and salt, and other FREE sources of energy OR the grid. There is no oil that needs to be involved anywhere in the production of hydrogen. These systems trickle charge hydrogen into storage containers, either tanks or solid state cassettes, 24/7. GE, ITM Power, QSI, U of Korea and 30 others have this year announced technologies that make H₂ hundreds of times more efficiently than any other energy solution.

C. Tens of millions of dollars are being spent by battery companies like A123, Cobasys, AltairNano, etc. in order to discredit hydrogen because hydrogen works better than batteries. A large number of “pundits” who act as “writers”, “bloggers”, “authors” and “non-profit evangelist group founders” are actually supported by financial gain from battery companies who are terrified of hydrogen displacing their revenue streams. They include: Ulf Bossel of the European Fuel Cell Forum, Alec Brooks, James Woolsey, EV World, Sam Thurber, Cal Cars, Felix Kramer and others.

Lets go over the battery and bio-fuel shills lies:

Anti-Hydrogen Lie # 1:

“But critics say the process of producing hydrogen requires three to four times more energy than the hydrogen later generates in the fuel cell.”

RESPONSE: This is data from the 60’s. It is now more efficient to make hydrogen than it is to make gasoline, build or use batteries or process bio-fuel. The technology has beat everything else.

Anti-Hydrogen Lie # 2:

“the cars are too expensive.”

RESPONSE: The production of hydrogen cars is at an early stage while battery cars have been around for almost a hundred years and the battery cars are still expensive for what you get. The Moore’s law on hydrogen cars shows a clear price decline to low cost in market volume. A Fuel Cell car that goes 500 miles without a charge costs half as much TODAY as a battery car that goes 500 miles without a charge.

Anti-Hydrogen Lie #3:

“ hydrogen molecules can't be contained easily without energy-consuming compressors or maintaining them in liquid form at extremely low temperatures , and it's extremely difficult to store,”

RESPONSE: This data is also from the 60’s. Hydrogen is stored in chemical powders and muds that

easily contain vast amounts of hydrogen. Pressure and liquid tanks to store hydrogen are old school archaic technologies. Hydrogen can be easily stored in over 2800 different solid state compounds.

Anti-Hydrogen Lie #4:

"The infrastructure isn't there"

RESPONSE: Solid state hydrogen can be shipped by UPS, Common Carrier and uses all existing infrastructure. DOPT has already licensed and approved such solid state delivery via common EXISTING INFRASTRUCTURE. This method can reach every person on earth TODAY! This requires almost NO NEW INFRASTRUCTURE. NO INFRASTRUCTURE IS NEEDED!!! This is the biggest lie of all. A large number of start-ups have solid state hydrogen solutions that entirely use existing infrastructure.

Anti-Hydrogen Lie #5:

"the hydrogen is too expensive"

RESPONSE: Hydrogen can be made at home or office in numerous ways powered by solar or wind or microbes or any number of free power sources. It is always being made by such devices and constantly trickle charged into solid state storage systems all day and night FOR FREE without grid power. Hydrogen processors now make hydrogen with 91% efficiency.

Anti-Hydrogen Lie #6:

"Hydrogen is too dangerous"

RESPONSE: If the gasoline in your car blows up it will do a VAST AMOUNT more death and damage than H2 ever will. You are driving a MOLOTOV COCKTAIL. H2 on fire rapidly dissipates up and into the air. Gasoline flows all over people, cars and streets and covers all of the above with flaming death you can't easily extinguish. In 2030 oil is GONE and there is NO OTHER OPTION that can be delivered world-wide in time but H2! Biofuel only solves 2% of the problem. Batteries have failed. Nuclear is too dangerous.

Anti-Hydrogen Lie #7:

"We have enough gasoline to last forever"

RESPONSE: Gasoline/petroleum/petrochemicals have now been shown to be the number one cause of cancer, and maybe the primary cause of cancer, in the world. Besides causing global warming, lung disease and all of the other bad things that it does; the oil industry itself knows that affordable oil is gone around the year 2030. Even if it wasn't, do you really want the ROOT CAUSE OF CANCER around one day longer than it needs to be? (See the EPA report "EPA/600/S-6-87/001 Sept. 1987" as one of over 16,000 studies validating this.) Gasoline, Petroleum and the plastics made from it are the single largest cause of cancer in the world. This is a known fact, verified by thousands of studies which the oil industry counters by paying pundits to say: "Well, we just are not sure yet"

This chemical array has killed more Americans than every terrorist since the beginning of time. The petrochemical bisphenol-a, or BPA, causes precancerous tumors and urinary tract problems and made babies reach puberty early. Every gas pump has a label on it that oil and gas causes cancer and a host of lethal medical problems. When there is an oil spill, you are not allowed on the beach because most agencies classify oil as toxic.

A study of childhood leukemia in England mapped every child with the disease and found they all occurred in a circle, in the center of which was a gas station.

Alberta's oil sands are one of the world's biggest deposits of oil, but the cost of extracting that oil may be the health of the people living around them. High levels of toxic chemicals and carcinogens have been found in the water, soil, and fish downstream of the oil sands. The local health authority of Fort Chipewyan, Alberta commissioned the study in response to locals' claims that the oil extraction projects upstream were damaging the health of citizens. Petrochemicals and their byproducts, such as dioxin, are known to cause an array of serious health problems, including cancers and endocrine disruption. Total petroleum hydrocarbons (TPH) is a term used to describe a large family of several hundred chemical compounds that originally come from crude oil. Crude oil is used to make petroleum products, which can contaminate the environment. Because there are so many different chemicals in crude oil and in other petroleum products, it is not practical to measure each one separately. However, it is useful to measure the total amount of TPH at a site. TPH is a mixture of chemicals, but they are all made mainly from hydrogen and carbon, called hydrocarbons. Scientists divide TPH into groups of petroleum hydrocarbons that act alike in soil or water. These groups are called petroleum hydrocarbon fractions. Each fraction contains many individual chemicals.

Some chemicals that may be found in TPH are hexane, jet fuels, mineral oils, benzene, toluene, xylenes, naphthalene, and fluorene, as well as other petroleum products and gasoline components. However, it is likely that samples of TPH will contain only some, or a mixture, of these chemicals. The International Agency for Research on Cancer (IARC) has determined that one TPH compound (benzene) is carcinogenic to humans. IARC has determined that other TPH compounds (benzo[a]pyrene and gasoline) are carcinogenic to humans.

Benzene causes leukemia. Benzene as a cause of leukemia had documented since 1928 (1 p. 7-9). In 1948, the American Petroleum Institute officially reported a link between this solvent used in many of their industries used and cases of leukemia in their workers. Their findings concluded that the only safe level of benzene exposure is no exposure at all (2).

The largest breast cancer incidents are in Marin County, California which is tied to the air, water and ecosphere of the Chevron Oil refinery right next door. Gasoline, Petroleum and the plastics made from it are the single largest cause of cancer in the world. This is a known fact, verified by thousands of studies which the oil industry counters by paying pundits to say: "Well, we just are not sure yet"

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Benzene causes leukemia. Benzene as a cause of leukemia had documented since 1928 (1 p. 7-9). In A "fuel cell car" and an "electric car" ARE THE SAME THING. The skills want you to think otherwise. The only difference is where the electricity is stored. You can pull the batteries out of every Zenn, Tesla, Zap, EV1, Venture Vehicle, etc. and pop a fuel cell/hydrogen pack in the same hole and go further, more efficiently in EVERY SINGLE CASE.

A modern fuel cell and hydrogen system beats batteries on every front

The charge-keeping capability of a typical lithium-ion battery degrades steadily over time and with use. After only one or two years of use, the runtime of a laptop or cell phone battery is reduced to the point where the user experience is significantly impacted. For example, the runtime of a typical 4-hour laptop battery drops to only about 2.5 hours after 3,000 hours of use. By contrast, the latest fuel cells continue to deliver nearly their original levels of runtime well past the 2,000 and 3,000 hour marks and are still going strong at 5,000+ hours

The electrical capacity of batteries has not kept up with the increasing power consumption of electronic devices. Features such as W-LAN, higher CPU speed, "always-on", large and bright displays and many others are important for the user but severely limited by today's battery life. Lithium ion batteries, and lithium-polymer batteries have almost reached fundamental limits. A laptop playing a DVD today has a runtime of just above one hour on one battery pack, which is clearly not acceptable.

Batteries require coal be burned to charge them. One pound of coal has roughly 14,000 Btu of chemical energy in it. Any reference textbook says that. When that pound is burned in an electric powerplant, steam is made, which drives turbines at high speed, alternators are turned, and electricity is made. When everything operates well, all that turns out to be generally around 30% efficient, meaning that 30% of the chemical energy that started out in the coal has become actual electricity.

(The other 70% all becomes various forms of heat, all of which contributes toward Global Warming and other problems). Now we have around 4200 Btus of remaining energy, now as electricity, which is a little over a kilowatt-hour. (It turns out that nuclear power is slightly better, at around 32% efficiency, and petroleum and natural gas turbines tend to be around 28% or 29%, but all are essentially the same.) That electricity then has to travel long distances through transformers and wires to get to your house. If you lived right next door to a power plant, it would be fine, but for average Americans, it turns out that around 60% of the electricity put into those wires and transformers never gets to the customers at the other end! It is mostly wasted because the wires become hot because of all the electrical current flowing through them, and they act a lot like giant toasters! People are therefore not generally aware that **only around 13% of the chemical energy burned in the coal in the power plant is actually available as electricity in your house!** (The rest, the other 87% all winds up being various forms of heat, all contributing to global warming!)

So, for a pound of coal burned, your house electrical outlets then receive around 1,820 Btu of electrical power. Around 1100 Btu of that can actually get put in the batteries, due to efficiencies of battery chargers and batteries. Of the energy STORED in the batteries, the efficiencies of batteries, motors and gear trains are such that around 450 Btu of that are eventually available at the wheels as motive power. (Remember that this is out of 14,000 Btu of chemical energy that was produced when that pound of coal was burned!)

One watt-hour is equal to about 3.412 Btus, so this 450 Btus is the same as around 130 watt-hours, or, for a 14-volt automotive battery, around 10 ampere-hours of actual usable power. The 130 watt-hours is also equal to around 0.18 horsepower for an hour. Now, this might sound like a lot, but remember that the 14,000 Btu in the pound of coal resulted in this 450 Btu that is actually usable in a car, only about 3% overall efficiency! And the other 97% of that energy when the coal was burned all went toward heating that contributes to global warming.

In contrast, a gallon of gasoline has around 126,000 Btu of energy in it, of which a modern car converts around 21% into motive power, so there results around 26,000 Btu of motive power. **POINT: Around 60 pounds of coal (with 840,000 Btu of chemical energy in it) must actually get burned to provide the electricity such that a battery-powered car can do the equivalent to a single gallon of gasoline!** ($60 * 450 = 27,000$) (This is a VERY "losing proposition"!)

That amount of electricity that needs to go INTO the batteries in the car (to be equivalent to that ONE gallon of gasoline) is therefore the 1100 Btu per pound of coal divided by that 3.412 times 60 pounds, or around 20,000 watt-hours of electricity. That is a LOT of electricity! Say you will have 10 hours at night for the batteries to recharge. That means that you would have to have 2,000 watts of power constantly being used and feeding the batteries. For the 14 volt circuitry of standard batteries, that would mean that around 140 amperes of charging electricity would constantly be needed. (NOT the 6 amperes of a good battery charger!) (This huge charging current might actually cause the batteries to explode, unless they are a special and more expensive Deep-Discharge type of battery!) (Batteries in golf-carts are generally wired in series to reduce the amount of current needed.)

Even the house wiring involved might be in question! We are talking about a REALLY impressive battery charger, of course, akin to 25 conventional battery chargers used together, which requires that $1820 / 3.412 * 60$ or about 32,000 watt-hours of input electricity. Over our ten hours, we are therefore talking about needing 3,200 watts of electricity constantly coming in to supply your battery charger.

Your house electrical service is sufficient for this need, but standard house wiring would not be. If at 120 volts, a constant 30 amperes of house electricity would be needed, where normal house circuits are either 15 amp or 20 amp if heavy duty. This probably means you would need the specialized wiring like was installed for your air conditioner, which uses roughly the same amount of electricity, through a special 240 volt wiring made especially for the air conditioner. This means you need around 15 amperes of input power to provide that 3,200 watts at 240 volts, or about 30 amps if it is 120 volts.

Herein could be a problem, because most houses were built with 100-ampere electrical service. If the A/C is running and this battery charger and some other electrical devices, you might get close to the full capacity of the house wiring! The existing house wiring, and even the transformers up on the utility poles, are barely big enough and could overheat at that constant heavy ten-hour load! We haven't even yet considered the cost of all that electricity! When you think about a constant 10-hour long consumption of about as much electricity as your central air conditioner uses, you probably start to get the picture. But say you are in some wonderful location where electricity is still only 10 cents per kilowatt-hour. We are needing to use up 32 kilowatt-hours (to equal the vehicle performance of a single gallon of gasoline, remember), so that is $32 * 10$ or \$3.20 of electricity added to your house electric bill, for the equivalent to ONE gallon of gasoline! It does not initially APPEAR to cost anything, and the car merrily scoots around on its battery power. **But if and when an owner realizes that they also have to spend at least \$3.20 in extra electricity for each gallon of gas not used, much of the financial argument goes away!**

You are encouraged to do research to confirm what is described above. It is all true. Did you notice the "worst part" of what is described above? I'm not even talking about the fact that you would wind up paying for at least \$3.20 of house electricity to replace each \$3 gallon of gasoline! In refining a gallon of gasoline, yes, significant energy is used up, although I have never been able to get a reliable figure. But certainly well under 840,000 Btu of refining energy is required to form the gallon (126,000 Btu) of gasoline. **Replace all cars with battery-powered vehicles, and we then would NEED to burn 60 pounds of coal or use 840,000 Btu of coal (or nuclear) chemical energy to produce the equivalent effect of every gallon of gasoline.** This is worse, regarding resource energy wastage, than the vehicles that are currently on the roads! (Yes, the energy is used up in a distant place, and maybe it seems possible to be able to be ignored, but that is still a really bad idea!) And virtually everything that does not contribute to the "motive power" winds up as wasted heat energy.

When those 60 pounds of coal were burned to create the needed electricity to duplicate the benefits of one gallon of gasoline, carbon dioxide is also released into the atmosphere. The coal is around 75% of bituminous coal, or 45 pounds of that. It is fairly simple to determine the amount of carbon dioxide that is created when it is oxidized. The amounts of carbon and oxygen have to be in a molal relationship of one to two. That means the weight relationship has to be 12 (the atomic weight of carbon) to (12 + 16 + 16 or 44) (the atomic weight of the molecule of CO₂). This means that $44/12$ or 3.67 times the weight of carbon dioxide is created, or in this case, 165 pounds, of carbon-dioxide would get released in this process. When a gallon of gasoline is burned in an automobile, it is less. A gallon of gasoline weighs around 6 pounds, and it is about 83% carbon. That means that it contains nearly exactly 5 pounds of carbon in the gallon. Again using the 3.67 multiplier, we can see that only around 18 pounds of carbon-dioxide is released.

This means that global warming then would occur around 7 times as fast as now! ($840,000 / 126,000$ [heat]) or ($165 / 18$ [CO₂]). If millions of people started driving battery-powered or

Hydrogen-powered vehicles, it would therefore be a far WORSE environmental disaster than now, causing global warming to become even faster than it already is!

The "Ethanol adventure" of using 1/5 of the total farm crop production of 2006 for conversion to Ethanol, which provided only around 2% of the vehicle fuels we used in 2006, is simply endangering our near-term food supplies. News reports are already (April 2007) discussing higher milk, bread, beef, and many other food prices in our grocery stores, as a result of the massive focus on producing Ethanol. But some weather problem is bound to occur. Where we used to have massive over-production of nearly all crops, our government has planted the seeds of a true food-supply disaster, which could happen any year now. In 2008, it is expected that the amount of America's total crop production which will go to making Ethanol will be 1/3 of everything grown! It is as if we are totally crazy, or that we do not even give any thought to what might be a consequence next week or next month or next year! It really is amazing!

What are called Hybrid vehicles are promoted and sold everywhere already, cars that include both a gasoline-powered engine and a battery-powered electric motor. The promotions for them are unbelievably misleading to the public! They totally ignore all that electricity needed to charge the batteries, but then use the charged batteries to help it get very high fuel-efficiency numbers! People are buying such vehicles (which cost a premium because of their having to include two entirely separate sources of power) greatly because they are told they are GREEN and that they see those very impressive mileage numbers. Those are both very clearly pure lies! As to the GREEN part, we discussed above that the electric powerplant where the electricity was made necessarily produces around seven times as much carbon dioxide and heat loss as a gallon of gasoline produces directly.

As to the mileage figures, well, without recognizing that at least \$3.20 of bought house electricity is needed to replace each equivalent gallon of gasoline (eliminating any actual savings), there are a LOT of other details that no one bothers to tell customers! Such as driving a Hybrid or battery-powered car at night consumes far more electricity for all the lights! Far less battery power is left to actually move the vehicle! And no one seems to mention that the battery-mode operation provides only roughly 10 horsepower maximum for the vehicle, meaning only low speeds and rather poor performance. And this deception is INTENTIONAL! TV ads for a Hybrid vehicle that has a 470 horsepower gasoline engine makes it seem that an owner can have his cake and eat it too! A driver who buys a car because it has a 470 horsepower engine is NEVER going to be satisfied with the performance during a 10-horsepower battery-powered mode of operation! There are many other drawbacks as well.

Another stupid-brilliant idea is manufacturing and selling vehicles that will only run on what is called E-85, meaning 85% Ethanol fuel. Again, if there were unlimited supplies of Ethanol, that might make sense. But when America uses up one-fifth of all its farm crop production to provide only around 2% of the amount of fuel that American drivers use up each year, it indicates scary thinking, or lack thereof. By the time the auto manufacturers fully perfect cars that they will be able to sell to run on E-85, and by the time there are enough service stations that even carry E-85 for such drivers, it is certain that some overwhelming crisis will occur (probably in a weather problem and severe shortages of food for Americans), where sanity might again briefly appear and the massive effort toward Ethanol will very suddenly end. For the few people who may wind up buying E-85 vehicles, they will merely wind up having something that might someday go into a museum, something like what happened to the Edsel automobile!

It is really sad that even supposed Regulatory Agencies of the Government have participated in this hype. A car that has a conventional engine, is likely to get the gas mileage that has long been known, somewhat UNDER what the EPA estimates say! But regarding Hybrids, they seem to have just considered the battery-powered miles to be "free" (because no gasoline is used) and they have listed some Hybrids as having 60 miles per gallon fuel efficiency. That is technically true, if you totally ignore the cost of all that electricity needed as calculated above! If they wanted to go even farther, they could set up a really short test procedure where ONLY the batteries were even used, and then they could let the manufacturers advertise "1000 MPG" or "1,000,000 MPG" or more! The person's home electric bill would go off the charts, but they do not seem to see any reason to consider that expense!

There is an extremely heavily promoted new vehicle being presented in the news in 2007. The Tesla Sports Car certainly can show impressive acceleration. However, both the media reports and their own web-site present some information that simply violates the laws of Physics! It would be wonderful if such things were possible, even in a \$92,000 car.

Unfortunately, they clearly have done the common "spin" that spokespeople seem to all use today to deceive the public. THAT is really sad. Especially since this particular product actually can probably provide pretty decent performance. Why is it always seen as necessary to be deceptive today?

Using information from their own web-site:

First, there is a small-print, very faint, and very hard to read Disclaimer at the bottom of their web-pages that notes that their vehicles have not yet passed government safety testing, and they say that their specifications might change as a result of that. (By the way, since they have not yet passed government safety tests, they are not yet street legal in any State and could therefore not yet be licensed!)

First, they say that the car can produce an absolute maximum of 185 kW of electrical power. Since 746 Watts is equal to 1 horsepower, this is equal to $185/0.746$ or 248 horsepower. They state in the same sentence that that is equal to 248 peak horsepower. That is fine.

They show a graph where the available torque is basically constant over a wide range of motor speeds (which is fine), and the same graph also shows the horsepower curve that is linear, rising from 0 horsepower at 300 rpm and rising to that maximum of about 248 horsepower at maximum speed. That is also fine, and in good agreement with science.

However that information can be mathematically Integrated to determine the actual acceleration, when one also knows the vehicle weight. The web-site gives the vehicle total weight as being 2,500 pounds.

We can first calculate some more things that DO agree with their claims, to show that at least those claims are credible. Let's consider their vehicle top speed. The streamlined shape of the vehicle certainly has a Coefficient of Drag of around 0.3. The total frontal area of the vehicle is around 18 square feet. The claim is that the top speed is 120 mph, which is the same as 176 feet/second. We can simply calculate the total aerodynamic drag from this information (and the average density of air (around one slug mass per 420 cubic feet). It is $0.3 * 18 * 176^2 / 420$ or around 398 pounds of aerodynamic drag. There is also tire drag which is around another 45 pounds for that vehicle weight. The total vehicle drag is therefore around 443 pounds (at that speed). If we just multiply this drag force

by the velocity (176) and divide by 550 to convert it to horsepower, we get 142 actual horsepower as being needed. Given that they indicate that their motor efficiency is around 85% to 90%, and there are mechanical efficiencies of the tires and wheels, this is in fairly good agreement with the roughly 180 horsepower claimed available from their graph at 13,000 rpm (times that efficiency factor). This confirms that the expected top speed is likely to be around what they claim. Fine here. Let's look at their acceleration claim, of zero-to-sixty in around four seconds (which is impressively fast).

They certainly did that demonstration in what they call first gear, which has a total gear ratio (and therefore torque multiplication) of 14.3. It is easy to see from this ratio that the motor would be turning at close to its maximum revs at 60 mph, so first gear might have been provided simply to be able to show off with this impressive zero-to-sixty acceleration. In any case, they provide a torque curve for their motor, which suggests that it would produce an average of around 160 ft-lbs of torque through this whole sequence. Multiplying this by the total gear ratio gives around 2300 ft-lb of torque, which becomes around 1900 pounds of thrust after considering the various mechanical losses. We have the aerodynamic drag of around 40 pounds average and the tire drag of another 40 pounds to subtract, so we have around 1820 net pounds of thrust available for acceleration. We divide this by the vehicle weight of 2500 pounds to get 0.73 to get the g-force acceleration. This is roughly 16 mph/second acceleration, or around four seconds to get from zero to sixty. This confirms that in their first gear, the acceleration they describe is realistic.

There is actually another factor involved here, regarding a flywheel effect of the motor rotor itself having to accelerate as well. Without knowing the Rotational Inertia (I) of that armature and rotor, it is not possible to calculate the reduction which must occur in this vehicle acceleration, but it must certainly be slightly less than calculated above. In other words, slightly over 4 seconds for zero-to-sixty is then realistic.

The acceleration claim also tells us something else about the Tesla! It has absolutely nothing to do with the matters at hand here, but it still seems worth noting. The acceleration they describe, of zero-to-sixty-in-around-four-seconds, means that the average acceleration is therefore around 0.73G (as indicated above.) On a dry and clean roadway, the best static coefficient of friction is around 1.0. This means that the 1820 pounds of thrust for acceleration must necessarily require roughly that amount of weight on the driving wheels, or around 1800 pounds. If one axle of a 2,500 pound car has 1,800 pounds on it, the other axle has only 700 pounds. This would be an incredibly dangerous vehicle to drive on any curvy roads, if it has that extreme of a weight-distribution. For an actual Licensed highway vehicle, it could not possibly pass road safety tests with such an extreme weight-distribution. Maybe it will be modified before any get onto the road. Which also would mean that the acceleration performance would necessarily have to be slightly less. (It is interesting all the things that Physics can tell us about any mechanism!) (They might also have used extremely sticky tires for such runs, where less vehicle weight would then have to be on the driving axle.)

So the actual mechanical performance of their car is impressive. Again, much of that is because it is a rather small car that is very aerodynamic. Still, impressive.

However, when we get to the charging of the batteries, their claims seem extremely outrageous. They claim that after driving 100 miles (presumably at highway speed) it only takes two hours to recharge the batteries, and by simply plugging it in.

If we do a drag analysis for 60 mph (similar to the 120 mph calculations shown above), we can see that the total vehicle drag is around 100 pounds aero plus 45 pounds tires or 145 pounds total. As above, this calculates to 23 horsepower being constantly needed. To drive 100 miles at that (constant) speed takes 1.66 hours, or 38.7 horsepower-hours of energy. This is the same as around 29 kilowatt-hours of energy. However, getting electricity out of batteries is not a perfectly efficient process, and they acknowledge that their motor ranges from 90% to 80% efficient. To charge this amount in a two hour period therefore requires charging at a rate of over 15,000 watts. Their charger circuits cannot have perfect efficiency so certainly around 18,000 watts of household electricity would be needed.

If this were simply "plugged in" to a standard outlet, it would require 160 amperes at 110 volts! But standard household outlets are only rated at 15 amperes and even heavy duty ones are only rated at 20 amperes! They are talking about so much electricity that at least 6 or 8 standard outlets would be needed to provide enough power! In fact, the very special wiring that was put in your house for your central air conditioner might not be enough to provide the 80 amperes at 220 volts that would apparently be needed to charge a Tesla in the two hours as described.

In this area, their promotion is extremely misleading. It cannot simply be plugged in as they imply. Very heavy duty special house wiring is required to be able to do that massive charging. From generally known evidence regarding charging batteries extremely fast like that, the internal structure of the battery often suffers and the battery lifetime might therefore suffer. They don't mention what the cost of replacing their battery pack is, but it certainly would be expensive. A moderately similar experimental electric car recently shown to the press has such an exotic battery pack that replacing it would cost over \$300,000! Obviously, the Tesla battery pack is not that exotic or expensive, but it clearly would be a significant expense if and when it needs to be replaced.

A Tesla spokesperson was on TV talking about this after the above text was written. The battery pack would apparently currently cost around \$9,000 to replace, but she pointed out that battery technology is constantly improving and that cost might drop. She also said that the battery pack lifetime is currently at least two years. It was refreshing to see an honest and open answer to such a question. Similarly, as discussed much earlier about battery-powered vehicles, the COST of that electricity can be significant. Using Tesla's numbers and this analysis, we are talking about needing to charge around 29 kWh actually into the batteries (in those two hours, after that 100-mile drive). And that due to the efficiencies of chargers, this necessarily requires at least 35 kWh of actual house electricity. If electricity is charged at conventional rates of around 10 cents per kWh, this is around \$3.50 for the electricity for that hundred miles. Granted that this is less than the cost of gasoline in any vehicle to go that distance, but it is still considerably more (around triple) what they claim the electricity cost would be.

But finally, the worst part of such an interesting vehicle is that problem described above regarding the amount of coal that would need to be burned at that remote electric powerplant to provide that much electricity. With the Tesla numbers and this 100 mile trip example, the calculations presented far above show that around 65 pounds of coal would have to be burned in that unseen electric powerplant, which would send around 240 pounds of carbon dioxide into the atmosphere, to provide the electricity for a Tesla to make that (relatively constant speed) 100 mile trip. If a small gasoline engine were used instead inside a similarly aerodynamic and light and small vehicle, maybe two gallons of gasoline would have been required to go that 100 miles, which would have released around 36 pounds of carbon

dioxide into the atmosphere. Even if a full-sized sports car such as one of my Corvettes made the trip, with there highway 27 mpg, only 3.7 gallons of gasoline would be used, which would send 67 pounds of CO2 into the atmosphere. The Tesla causes nearly four times as much carbon dioxide to be dumped into the atmosphere than my big-gasoline-engined Corvette would!

Therefore, the Tesla, which is being promoted as being TOTALLY green, in reality causes at least four times as much carbon dioxide to be sent into the atmosphere than if it simply had a gasoline engine in it! Otherwise, it seems to be a rather attractive idea! Impressive acceleration and top speed and decent range. Only the immensity of the charging process, and the consequences of that are such terrible necessary requirements. Like discussed above, NO battery-powered vehicle has any of its own energy, and it requires to get all that energy from some different power source, in this case, house electricity. Even if Tesla is right that electric power companies would give tremendous rate reductions for the electricity because it was nearly all used at night, that cannot stop the requirement that the (remote) electric powerplant necessarily has to cause the release of that 240 pounds of carbon dioxide into the atmosphere from the coal burned.

By the way, many of the advantages of the Tesla have to do with its tiny size and very aerodynamic shape. Any car that had a more conventional size and shape would require a far, far bigger motor and far, far more electricity and battery size and capacity. If that car had a similar horsepower gasoline engine in it, the acceleration and top speed would be comparable, and the gas mileage would be impressive. The two main differences would be that the range would be easily 500 miles (with maybe an 8 gallon gas tank) and that the weight of the vehicle would be more engine instead of the same total weight of batteries.

The Tesla information is very vague about its battery system. Obviously, they are protective about their own unique advances. But we have calculated here that to charge at the rate they describe, there must be around 15,000 watts of charging that is done. Their literature mentions that their charger works at 70 amperes. This seems to imply that their batteries must be a series battery pack, because these numbers imply an effective battery voltage of around 200 volts. Such a high voltage (instead of conventional cars 12-volt batteries) makes a lot of sense in permitting far thinner wires to be used inside the car and in the charger and connectors, although even 70 amperes requires fairly stout wiring.

I suspect that you will NEVER see any reference to a Tesla being driven at night (because all those light bulbs use up a LOT of electrical power which is therefore taken away from being available for the electric motor); nor being driven with the (included) air conditioning operating. Automotive air conditioning normally takes around 6 horsepower, so the 23 required horsepower for that 60 mph highway driving would become 29 horsepower. This would both reduce the range by 25% and increase the charging time by 30% (as well as increasing the carbon dioxide given off at that distant electric powerplant by another 30%).

I realize that there are many optimistic people who simply say that the detriment of burning coal (which currently provides around 51% of all the electricity used in the US) could be eliminated by CHOOSING to use nuclear powered powerplant electricity instead. First, you don't have any way of deciding where your electricity is made, but second, few people seem to realize that the US already mined essentially all of its Uranium some years ago, and all of the 39 Uranium mines in the US have been closed and completely shut down for some years as a result. We import virtually all the Uranium used in American powerplants! No one seems to know that! (Only a very small percentage is actually

from US sources, and that happens to be from the decommissioning of nuclear weapons, for just a few percent.)

There are certainly other even more optimistic people who simply assume that photovoltaic cells (solar cells or PV) can supply the needed electricity. First, such electricity is only available during the daytime when the sun is shining (and Tesla describes recharging through the night). But people who want to believe that have no clue as to how many PV cells would be needed! We have calculated above that around 18,000 watts of electricity would be needed to do the charging that Tesla describes. In a different energy-related page in this Domain, we present the Physics of PV devices, where around 7 watts per square foot of PV cells is possible during bright sunlight around noon. Even under those perfect conditions (noon, no clouds) around 2600 square feet of PV cells would be required. That web-page presentation describes that it is common that around \$150 in total installed cost is involved for each square foot of PV cells. This would mean that around \$390,000 worth of solar cell installation would likely be required to provide the amount of electricity the Tesla describes being needed! I suppose that if you can afford a \$92,000 electric car, you may also be able to afford \$390,000 of solar cells to charge it! But keep in mind that this is for NO CLOUDS and only around noon! Even more solar cells would be required for nearly any real climate!

See the problems? Even though that Tesla can show impressive acceleration and top speed, and decent range, and even though it is such a tiny car that the amount of electricity used is only around three cents per mile (while even at 50 mpg with a small gasoline engine, the gasoline would currently cost around 6 cents per mile), the bottom line regarding why it is even supposed to be desirable is allegedly how GREEN it is. But the reality is that some distant electric powerplant has to pump at least four times as much carbon dioxide into the atmosphere than if the vehicle had simply had a smaller gasoline engine. **The single point for which it is sold is therefore (sadly) totally invalid.** It may be fortunate that the only people who will be able to buy a \$92,000 car probably have plenty of money available! However, I suppose that most of them will not even be bothered by the need for maybe an extra thousand dollars of specialized heavy duty wiring being installed in their house to be able to charge the Tesla. And their likely lifestyles are such that they will never even notice if their electric bills happen to get a lot higher because of charging their Tesla.

I see it as a wonderful "novelty" for rich people to play with. For the practical reasons presented in this article, it seems inconceivable that "normal" people will ever benefit from such battery-powered vehicles or even use them (except for golf carts and electric wheelchairs).

It would be nice to be able to say that there was any chance whatever that this technology could advance to actually becoming useful some day. But Tesla even notes that they have already accomplished impressive efficiencies of around 90% and 80% at peak use. What a Tesla has is probably about as good as it will ever be able to get. And if it were not for the horrible requirement that some distant electric powerplant has to release massive amounts of carbon dioxide into the atmosphere to be able to charge the Tesla, it actually could be a useful product. But when a product is SOLD and PROMOTED as being totally green, while the actual reality is entirely opposite, it then turns out to be a really terrible idea!

The truly sad thing is that if millions of people could some day drive vehicles that are electric powered like the Tesla, Global Warming would necessary become far worse as a direct result.”

Such limitations have led to an enormous interest in alternative power sources, of which the fuel cell is the most promising candidate. Storage density, i.e. the electrical capacity available per unit mass of energy storage means, is one of the most important parameters.

So you have the well-known battery and competing fuel shills who are anti-hydrogen sheep: Ulf Bossel of the European Fuel Cell Forum, Alec Brooks, James Woolsey, Elon Musk, John Doerr, EV World magazine, The Fool, Sam Thurber, Cal Cars, Felix Kramer and plugin America lobby group, Think Progress, and similar...

Yet for every manipulated argument they come up with, they are shot down by hundreds of sites with facts.

The interventions of these 'doubters', shills, meat puppets and trolls fall into a number of clear categories which I'll summarise as:

1 **"You can't succeed because no-one has ever succeeded at this (sports car making / battery-power / taking on the majors, etc etc) before"**. - May I commend to everyone Dava Sobel's wonderful (and short!) book, "Longitude", which offers a perfect map of the tendency of government and the scientific establishment collude to reject true innovation. This effect can only be overcome when a tipping-point of perceived popular utility is reached, at which point the establishment suddenly has a bout of collective amnesia about their earlier denials. (Same story many times over, historically, of course - from Gallileo onwards.)

2 **"It's inefficient to carry around"**. Rather as it's inefficient to carry around a full tank of gas, perhaps? Or to carry around a SUV chassis which itself weighs a ton or more? (Come on, Detroit, you can find a better argument than that, surely?)

3 **"This technology is not a solution and never will be."** This very much reminds me of the IBM's famously short-sighted take on the prospect of home computing, back in the 70s. The language of these contributions, let alone their content, points to a thought-process rooted in volume-producers' vested interests. Consider the successes of some other new-tech challengers of vested interests: Dyson taking on Hoover with a bagless vacuum-cleaner; Bayliss bringing clockwork (i.e. battery-less) radios and laptops to the third world; thin-film solar panels (sorry, can't remember who, but you know who I mean). On this point, it was deeply depressing, at a high-level environmental science conference of the UK Government last year, for me to witness a "leading and respected" Professor of Transport rejecting electric traction out-of-hand with the words "it will never be more than just power storage on a trolley". Given that this "expert" was advising ministers of state setting future national policy on alternative transport, my immediate thought was "Who pays this man's research grant?"

You can see more about their tactics in the film: **MERCHANTS OF DOUBT**.

So let's be vigilant for any who claim, in a smooth way, that invention can't possibly have the answers. From a position of some expertise in this field, may I remind readers that the "you-don't-understand-how-our-industry-works" argument has been the policy instrument of choice for numerous corporate fraudsters and protectionists down the ages (Enron, anyone?). New York's energetic DA, Mr Spitzer, has made a fine career out of challenging such thinking in the finance sector (with the simple rejoinder: "WHY does your industry work like that? Against customer choice?"). And then of course there's the

entire consumer movement (remember Flaming Fords? remember "Unsafe at Any Speed"?). We can and should ask the same questions of the conventional auto industry.

The good news is that genuine innovation will out - as long as ordinary consumers are able to find it and buy it. One of the early lessons of the twentyfirst century, thank goodness, is that the old-school, browbeating style of corporate communication - terrorising one's customers into rejecting alternatives - increasingly fails as people wise up to making decisions based on their own independently-gathered information about benefits and risks. (Interestingly, a popular reaction against "selling by fear" is also now happening in the political field. Now why might that be?) As a consumer, one doesn't have to agree with the in-ya-face techniques of anticorporate critics like Michael Moore and Morgan Spurlock to still subscribe to the view that we can buy what we want to buy. We no longer want to be told by old-tech that new-tech is inherently suspect. Isn't it old-tech that brought us dependency on oil, climate change, wars over energy sources?

So c'mon people, how about a reward system for "spot the spoiler"? I'm all for free debate on the issues, but some of these blogs smell rather like the work of paid old-tech corporatists trying to sabotage your success.

Challenge such interventions with the greatest possible vigour, and let consumers decide for themselves!

- 1.) Battery companies are spending millions of dollars to knock H2 because it works longer, better, faster and cheaper than batteries! Most of the people writing these screaming anti-H2 articles are battery company shills or have investments there. H2 does beat batteries on every front so they should be SCARED!
- 2.) The steel unions hate H2 because H2 cars don't use steel. Steel is too hard to afford any more so nobody will use it in any case.
- 3.) Activists hate H2 because they think it can only be made by the oil companies and they hate the oil companies. This is a falsehood created by the battery and steel guys.
- 4.) Oil companies hate H2 because it is so much better than oil but they only get to hate it until 2030 when the affordable oil runs out. Then they know they must love it because H2 energy will be all that is left. The Oil industry is dismayed that H2 is coming on so fast and they are trying to slow it down even more.
- 5.) Other alternative energy interests hate it because it is getting all of the funding because the politics are better with H2 than ANYTHING ELSE ON EARTH.

If the gasoline in your car blows up it will do a VAST AMOUNT more death and damage than H2 ever will. You are driving a MOLOTOV COCKTAIL. In 2030 oil is GONE and there is NO OTHER OPTION that can be delivered world-wide in time but H2! Biofuel only solves 2% of the problem. Batteries have failed. Nuclear is too dangerous.”

The Hydrogen Economy

Fuel cells powered by hydrogen are about to hit the market. In time, they'll let us kiss the sheikhs goodbye.

FORTUNE

By David Stipp

As far back as Jules Verne, visionaries have predicted that society will someday be utterly transformed by energy based on hydrogen. The lightweight gas, the most abundant element in the universe, can be made from water. It is wondrously clean, emitting mainly pristine steam when burned. When fed into fuel cells, which generate electricity, it offers unprecedented efficiency--these electrochemical reactors extract twice as much useful energy from fuel as internal-combustion engines can.

In fact, hydrogen-powered fuel cells promise to solve just about every energy problem on the horizon. In homes and offices, fuel cells would keep the lights on when the grid can't. Cars propelled by the cells wouldn't foul the air. Hydrogen-based energy would mean less global warming as we shift away from fossil fuels.

None of this is as pie-in-the-sky as it sounds. Potent commercial forces are bringing the hydrogen economy along faster than anyone thought possible only a few years ago. In the next two years, the first wave of products based on hydrogen-powered fuel cells is expected to hit the market, including cars and buses powered by fuel cells, and compact electric generators for commercial buildings and houses. Technology for generating hydrogen is ready now: "reformers" that extract hydrogen from natural gas, and "electrolyzers," Jules Vernian devices that extract hydrogen from plain water. Those electrolyzers, if powered by so-called renewable-energy technologies like wind turbines and solar panels, could truly put an end to oil. Wind turbines and solar panels are emerging fast; after long decades of development, they have entered a Moore's law-like pattern of rapidly falling costs. All these advances add up to a startling reality. Major oil companies have begun to bet quietly but heavily on a hydrogen future. So have many of the largest manufacturers, including United Technologies, General Electric, Du Pont--and every major car company.

Like all disruptive technologies, the hydrogen revolution must overcome major barriers to achieve ubiquity, however. The greatest hurdle is cost: Fuel cells are too pricey for all but niche applications, and they're likely to remain so until economies of scale kick in. Likewise, fully installing the infrastructure needed to produce and deliver hydrogen on a massive scale--think of the refineries, pipelines, and gas stations that have been built to support the oil economy--will take decades and require tens of billions of dollars. Meanwhile, support for hydrogen technology in Washington, D.C., has been almost as evanescent as the gas: For the fiscal year ended Sept. 30, the Department of Energy's hydrogen research budget was \$27 million, a minuscule 0.14% of the DOE's total budget--and earlier this year the Bush Administration proposed roughly halving that allotment.

Still, it's hard to dismiss a technology that promises a way to kiss the sheikhs goodbye. Suppose further unthinkable things happen--a fundamentalist coup in Saudi Arabia, say, or terrorist attacks on the

kingdom's brittle petroleum infrastructure, either of which might precipitate an oil crisis. Could we put the Hydrogen Age on the fast track?

Hydrogen experts, though accustomed to thinking in decades instead of years or months, are already mulling that question, and their answer can be summed up as "yes." A major source of hydrogen is instantly available: natural gas, or methane. Already it is widely processed into hydrogen for manufacturing plastics, "hydrogenated" vegetable oil, and other products. Making hydrogen this way is not totally environmentally friendly--reforming methane generates carbon dioxide, the main culprit in global warming. But it's strategically friendly: Today 99.5% of the methane consumed in America is produced in the U.S. and Canada. What's more, companies such as Praxair of Danbury, Conn., and Air Products & Chemicals of Allentown, Pa., operate a limited but widely dispersed hydrogen infrastructure in the U.S., including pipelines, storage terminals, tanker trucks, and reformers.

Such assets represent a kind of hydrogen-economy starter kit. To jump-start the transition, the first order of business would be to outfit service stations to fuel the hydrogen-powered cars that will soon reach the market, says C.E. "Sandy" Thomas, president of H2Gen Innovations, an Arlington, Va., startup developing novel low-cost methane reformers. Revving up the hydrogen economy would also probably require heavier spending, by industry or government, to accelerate the low-cost mass production of fuel cells, says John A. Turner, a principal scientist at the DOE's National Renewable Energy Laboratory in Golden, Colo. The technology faces the classic chicken-and-egg problem, he explains: To compete with piston engines and achieve mass commercialization, the costs of the technology must come down by at least a factor of ten. That can happen, but probably not without the cost savings that flow from mass production.

Short-term moves like those would pave the way to a future that excites giant oil companies and environmentalists alike--in which methane would begin to recede as a hydrogen feedstock while renewable sources, like solar and wind power, and biomass, would come to the fore. Before September's terrorist attacks such a shift was projected to happen around the middle of this century. Royal Dutch/Shell, one of the oil giants that is investing heavily in a hydrogen future, projects that by 2050 about half of the world's entire energy supply may well originate with renewables.

Around the industrialized world, the seeds of oil displacement are already visible. Next year, for instance, three major energy companies in Scandinavia plan to build a pilot plant to make hydrogen from wind power. While it's only a start, the implications are huge: Denmark, the world wind-power leader, already gets nearly 15% of its electricity from the wind. Use that electricity to produce hydrogen, and the Danes would have the energy equivalent of the euro: an energy currency that can be efficiently swapped for heat or locomotion, or turned back into electricity. And while electricity is hard to store in large quantities, hydrogen is easy. The Scandinavians plan to use it in fuel-cell-equipped buildings and vehicles--such as the hydrogen-powered buses that DaimlerChrysler expects to roll out in Europe next year.

The U.S. is rich with similar prospects. The windy Dakotas, if studded with twirling wind turbines, could become the Saudi Arabia of hydrogen. Spare megawatts from the 55 major dams along the Columbia River and its tributaries in the Pacific Northwest could be fed into electrolyzers, turning them into the equivalent of inexhaustible oil gushers. Hawaii could help too: Its volcanically abundant geothermal energy could be tapped to generate electricity for churning out hydrogen.

In a telling sign of how far renewable energy has matured since the Age of Aquarius, Home Depot recently started selling solar photovoltaic systems made by AstroPower of Newark, Del., at some of its California stores. Meanwhile, companies such as United Solar Systems in Troy, Mich., have rolled out nifty forms of solar roofing--including shingles that can double as little power plants. Solar cells are only one-tenth as expensive today, on a per-watt basis, as they were in the 1980s, and manufacturers are having trouble keeping up with demand. Worldwide, photovoltaic sales jumped 38% last year. (No high-tech bust there.)

Despite its dropping cost, solar power is still too expensive to mount a serious challenge to grid-supplied electricity--most solar installations power buildings and machines remote from the grid, or are fostered by government-sponsored programs. But wind power, the other high-growth prospect in renewable energy, faces no such limitation.

Thanks to advances such as the advent of monster 1.65-megawatt turbines, wind-power costs have dropped 90% since 1980. In some places, wind watts are now cheaper than those from oil- or gas-fired generators. Over the past decade wind power worldwide has grown, on average, 25% a year, faster than any other energy source, says the Worldwatch Institute, a Washington, D.C., think tank. (Only solar comes close, with a 20% annual growth rate.)

Europe's wind capacity could reach a staggering 60 billion watts by 2010, enough to serve 75 million people, according to the European Wind Energy Association. (By comparison, a large nuclear plant has a capacity of about one billion watts.) The U.S. lags behind Europe in developing wind power, but America's wind-generating capacity is ramping up fast--it's expected to increase by a whopping 60% this year, or 1.5 billion watts.

Much of the growth is happening not in green-dominated California but in America's thrifty heartland. For example, five years ago a school district in Eldora, Iowa, proposed erecting a wind turbine to supply its high school with electricity. The local utility blocked the idea by refusing to allow the wind-supplied watts to offset grid power at the going rate, says Bill Grove, superintendent of the Eldora-New Providence school district. Recently, though, the utility, Alliant Energy of Madison, Wis., rethought the issue and decided to join with the district to install a turbine three times as powerful as originally planned.

Simple arithmetic has inspired a growing number of Midwestern towns, school districts, and farmers to emulate Eldora's pioneering move, says Thomas A. Wind, a wind-power consultant in Jefferson, Iowa. The systems generally pay for themselves over a decade or so, he adds, then continue to whirl out cash year after year.

Richard and Robert Kas, farmers in Woodstock, Minn., were among the first to capitalize on the trend. Two years ago they allotted six acres of their family farm to an energy firm that planted 17 wind turbines, together capable of generating up to ten megawatts, enough for some 4,000 homes. Now the brothers are about to install two 750-kilowatt turbines of their own to sell power to the local utility. Richard estimates the turbines will each generate \$25,000 annually after paying for themselves over about 12 years.

Renewable energy, excluding hydropower, which currently dwarfs other renewables, provides only 2% of U.S. electricity today. But its potential is huge. The harnessable wind power in Midwestern and

Western states alone could supply as much electricity during a 15-year period as all of Saudi Arabia's vast oil reserves if they were burned in power plants, according to a federal study.

Such factoids are no longer merely the stuff of environmental confabs and engineering conventions--they are guiding boardroom decisions. Energy bellwethers such as ABB in Zurich and Enron in Houston are positioning themselves to become hydrogen sheikhs by making major investments in wind power. Meanwhile, Royal Dutch/Shell has formed a division devoted to hydrogen and a division devoted to renewables--Shell's top executives have promised to kick-start the new businesses with investments of at least \$500 million by mid-decade. Britain's BP (the former British Petroleum now calls itself the "beyond petroleum" company) has made a major push into solar power--it's the No. 3 photovoltaics maker. (Sharp and Kyocera, both of Japan, are the leaders.)

Clearly, the energy industry will look a lot different two decades hence. Based increasingly on hydrogen, its big players will be more diverse and far-flung than ever. Indeed, they'll probably resemble oil producers crossed with electric utilities. The energy industry's small players will be even stranger creatures: They're likely to be people like us--when we're not using the fuel cells in our homes and cars, we'll plug them in to serve as Internet-like "micropower" nodes supplying electricity to the grid. Fuel cells are increasingly shaping up to be the 21st century's answer to the internal-combustion engine. You'll probably be able to buy yourself a fuel cell this Christmas. By year-end, Sunbeam's Coleman Powermate unit plans to launch small, portable power modules incorporating fuel cells made by Ballard Power of Vancouver. Plug Power of Latham, N.Y., H Power of Clifton, N.J., and other companies are readying bigger fuel-cell systems designed to supply homes and small businesses with electricity and heat--many have been installed in pilot programs, and full-scale launches are expected by 2004.

In part because of California's recent electricity crisis, the please-let-there-be-light market for fuel cells is likely to skyrocket: Sales, estimated at \$218 million last year, should reach \$2.4 billion by 2005, according to a recent analysis by Fuel Cell Technology News, a Norwalk, Conn., newsletter. One surprising thing about this projection is that there's already a substantial market for fuel cells. In fact, the "stationary" market for the cells has been quietly growing for years. A decade ago, International Fuel Cells, a United Technologies unit in South Windsor, Conn., introduced fuel-cell systems to supply "uninterruptible" power to buildings. Now its 200-kilowatt PC25 systems are electrifying everything from an Omaha bank to a former stable in New York City's Central Park that's used as a police station. The latter system, housed in a van-sized green box next to the old stable, enabled the city to avoid a \$1.2 million power-line upgrade--office machines at the precinct house sometimes couldn't all be on at once until the fuel cell was installed in 1999.

Toward the end of this decade, fuel-cell cars should become the hydrogen economy's main driver. Indeed, the auto industry has made by far the boldest investment in the new technology. Four years ago Ford and Daimler-Benz, now DaimlerChrysler, stunned rivals by committing \$750 million to a joint venture with Ballard aimed at rolling out fuel-cell cars by 2004. Not to be outdone, General Motors and Toyota teamed up in pursuit of the same goal. Honda, Renault-Nissan, Hyundai, and Volkswagen have also joined the race.

Today some \$500 million to \$1 billion a year is going into this automotive Manhattan Project, according to analysts. None other than Henry Ford's great-grandson Ford Chairman William Clay Ford

Jr. has declared that the fuel cell will "finally end the 100-year reign of the internal-combustion engine."

The venerable piston engine won't be a pushover, though--versatile and cheap, it embodies an entire century of tinkering. Further, there's still no widely accepted way to carry lots of hydrogen around in vehicles. This problem stems from the same property that made hydrogen useful for getting early-20th-century Zeppelins aloft: It's very low-density stuff, so small amounts occupy a large volume.

Like all gases, however, hydrogen can be compressed, so one proposed solution calls for cars to carry special tanks filled with pressurized hydrogen. Such tanks already exist, but more work is needed to establish safety standards for their widespread use in vehicles. (If hydrogen makes you think of the Hindenburg, think again: A 1997 report showed that the famous Zeppelin's skin was painted with chemicals used in rocket fuel. Ignited by static electricity, the chemicals probably were the main cause of its fiery 1937 demise, not the hydrogen inside. In fact, hydrogen dissipates so rapidly outside buildings that the risk of an explosion while gassing up a fuel-cell car with the stuff is practically nil.) It's likely to be at least several years before you can buy hydrogen at the corner gas station. But if you want to gas up your fuel-cell car at home, you might use one of the highly efficient electrolyzers that Stuart Energy Systems of Toronto is developing. The hydrogen appliances would require only a garden hose (for water) and an electrical outlet to generate enough hydrogen overnight for your daily commute.

The main alternative to onboard hydrogen tanks requires that cars carry compact reformers to synthesize the gas from either gasoline or methanol (wood alcohol). Those liquid fuels wouldn't require radical changes to the corner gas station. But gasoline reformers are costly, bulky, energy consuming, and complex--and they're still at the prototype stage. Methanol, while closer to prime time and less polluting to reform into hydrogen than gasoline, is very toxic. Ingesting half a cup can kill you, and unlike gasoline, it doesn't induce vomiting when swallowed.

Given those daunting problems, why are industry statesmen like Bill Ford so sure that fuel cells will blow away the piston engine? One reason is that the cells offer an astounding 100% leap in fuel efficiency over the venerable competition. Another is that fuel-cell technology is zipping along an arc of development that promises to amplify its already compelling pluses for decades to come. The piston engine, by comparison, is a mature technology that's increasingly difficult to improve.

Despite its recent fiscal woes, DaimlerChrysler, like every other major automaker, is pouring hefty sums into the effort to launch the cars between 2003 and 2005. But they won't necessarily turn up in showrooms then. The first ones are expected to be marketed as "fleet" vehicles such as taxis. That's because corporate fleets can be gassed up at home bases and so can be rolled out before hydrogen is widely available at service stations. The fuel-cell car market probably won't surpass 5% of U.S. new-vehicle sales, now about 850,000 vehicles a year, until after 2008.

That is, unless the federal government steps in to fast-track the hydrogen economy. Doing so would require a major energy-policy rethink--but probably nothing like the extravagant spending with which the government tried to answer the oil shocks of the 1970s. Instead, seed funding, tax incentives, and mandates for electric utilities to add more renewable power would help; so would shifting federal vehicle fleets to fuel cells. Uncle Sam's hydrogen to-do list might include:

- Creating incentives to install methane reformers at 10% of the nation's service stations--the minimum deemed necessary to support initial mass commercialization of fuel-cell cars. The installations would cost a total of \$4.1 billion, according to a study last year jointly funded by the DOE and Ford Motor.
- Earmarking, say, \$500 million a year through mid-decade to hurry wind, solar, and other renewable-energy technology. Tax incentives would help erect wind turbines; R&D grants might speed development of advanced "multilayer" solar cells, capable of cutting the cost of solar power in half.
- Providing \$500 million to ramp up fuel-cell manufacturing. The money would fund federal R&D matching grants for labs working on fuel-cell manufacturing processes. It would also pay for shifting federal vehicle fleets to fuel-cell technology, helping fuel-cell makers more quickly achieve economies of scale.

Federal handouts for hydrogen might seem anathema to the oilman in the White House. Yet in Texas two years ago then-governor George W. Bush enacted a sweeping mandate that made Texas a leader in renewable energy. Its first phase requires the state's electric utilities to add 400 megawatts of renewable-energy generating capacity by 2003. The utilities opted for wind power; won over by its low cost, they have since doubled their renewable-energy commitment. Randall Swisher, executive director of the American Wind Energy Association, a trade group in Washington, D.C., calls the Texas program "the most effective renewable-energy policy in the country." More such mandates are sorely needed, adds Swisher, for many utilities and state power regulators still view wind power with a jaundiced eye.

Once the fuel-cell market begins to take off, its impact could snowball. Using hydrogen to combine such renewable energy sources with highly efficient fuel-cell cars could deliver a double whammy to oil's hegemony, says Amory Lovins, an influential energy expert at Rocky Mountain Institute in Snowmass, Colo. That's because the cars' fuel cells could be used both for transportation and, when parked, to generate electricity to feed into the grid. The dividends from such dual-use "Hypercars," he predicts, would probably make them less expensive to get around in than conventional gasoline-powered cars even when oil is still fairly plentiful and cheap, accelerating its displacement by hydrogen. Oil will still have a role in future years: "It will be good mainly for holding up the ground," he quips.

 **NBC NEWS Oct. 14, 2015**

Toyota to Phase Out Gas-Powered Vehicles, Doubling Down on Hydrogen

by Paul A. Eisenstein

Toyota Motor Co. wants to virtually eliminate gasoline-powered vehicles from its fleet by 2050, and is betting that hydrogen cars, rather than electric vehicles, will be the long-term answer.

The Japanese maker recently introduced the Mirai, its first retail fuel-cell vehicle, and though sales have so far been measured in the hundreds, the target is to reach 30,000 annually by 2020, and even higher in the years beyond.

A number of other automakers are experimenting with hydrogen power; Hyundai already offers a fuel-cell version of its Tucson SUV, and Honda will launch a retail model next year.

While most competitors are focusing on hybrids, with a heavy emphasis on battery-based models, Toyota remains skeptical about the long-term role of electric vehicle technology.



Japanese auto giant Toyota Motor's hydrogen fuel-cell vehicle Mirai is displayed in Tokyo in November 2014. YOSHIKAZU TSUNO / AFP - Getty Images

Carmakers prepare to shift to hydrogen fuel cells



Hydrogen (center) is being used to power the Tucson SUV above the year. To the right is a fuel cell on display at the 2013 LA Auto Show. (Corbis Images, For the Times)

By CHARLES FLEMING
contact the reporter

SHARELINES

- Toyota actually favors fuel cells over other zero-emission vehicles, a Toyota manager says.
- Toyota will launch a fuel cell sedan in Japan early next year and in the U.S. by the summer.
- Honda is preparing to launch a new fuel cell car next year.

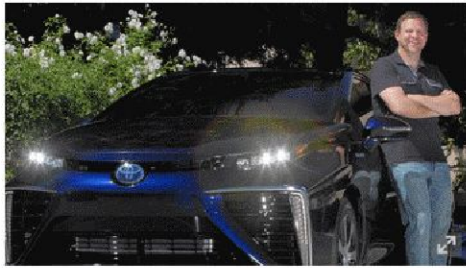
OCTOBER 26, 2014, 9:02 AM

Concerned about slow sales of electric cars and plug-in hybrids, automakers are increasingly betting the future of green cars on hydrogen fuel cell technology.

Even Toyota Motor Corp., maker of the popular Prius gas-electric hybrid, will use hydrogen instead of batteries to power its next generation of green vehicles.

"Today, Toyota actually favors fuel cells over other zero-emission vehicles, like pure battery electric vehicles," said Craig Scott, the company's national manager of advanced technologies. "We would like to be still selling cars when there's no more gas. And no one is coming to our door asking us to build a new electric car."

But even hydrogen's most ardent proponents agree the technology faces enormous hurdles. Like electric cars, hydrogen fuel cell vehicles are expensive. So is the infrastructure to refuel them.



He would like to be still selling cars when there's no more gas. Auto10 Inc. is coming to our door asking us to build a new electric car." said Toyota's Craig Scott. (Drew Chapman, Los Angeles Times)

Car companies have been slow to put hydrogen fuel cell vehicles on the market in part because of the lack of fueling stations. Operators of fueling stations, in turn, won't build more retail outlets unless they see more fuel cell car sales.

Dan Poppe is among the few early investors in hydrogen stations. Wearing a hard hat and coveralls at his Burbank hydrogen station, Poppe chews on the edges of his mustache and worries about his future.

"In 2004, we were told we'd have 10,000 cars on the road [in California] by 2009 — but it was more like 200 cars," said Poppe, whose company, H2 Frontier, builds and operates stations in California. "Today, we still only have about 250. That's not going to do it."

Hydrogen fuel cell car makers and station operators like Poppe are subsidized by the state of California, which has set a goal of having 1.5 million zero-emission cars on the road by 2025. By the same year, the state wants 15% of all new cars sold to be zero-emission vehicles.

The category includes plug-in hybrids — which can travel a few miles on battery power alone before a gas engine kicks in — but it doesn't include traditional hybrids, which sell at lower cost and in much higher volumes.

Automakers are still working on electric car technology, and sales of battery electric and plug-in hybrid vehicles are up 30% this year over 2013. Still, total sales for zero-emission vehicles represent less than 1% of all cars nationally.

They are more popular in California than anywhere else. The state's drivers own 40% of the nation's zero-emission vehicles, almost all of them plug-in hybrids and battery electric vehicles. With automakers still struggling to produce a mass-market electric car, fuel cells increasingly look like the ascendant platform.

“We would like to be still selling cars when there's no more gas. And no one is coming to our door asking us to build a new electric car.”

— Craig Scott, Toyota's national manager of advanced technologies

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Hydrogen fuel cells are designed to power electric motors much the way batteries do. But instead of storing their energy in a battery pack that takes hours to recharge, the fuel-cell vehicles store hydrogen gas in an onboard tank that can be refilled in minutes, just like a gasoline tank.

The state subsidizes hydrogen-powered cars the same way it does battery-powered cars, with the same \$5,000 rebate it offered buyers of electric cars in the early days. (Electric car buyers now are eligible for a \$2,500 state rebate.) New fuel cell car buyers also qualify, at least until the end of 2014, for a \$4,000 federal rebate — down from as much as \$12,000 for cars that hit the road in earlier years.

The state will also award automakers environmental credits for building them, which they can use to comply with California clean air mandates or sell to other automakers who need the credits to comply. Automakers get more credits for fuel cell cars than most battery electric or plug-in hybrids.

Hydrogen refueling station operators like Poppe also get money from the state and other agencies, among them the California Energy Commission, California Air Resources Board and South Coast Air Quality Management District.

Poppe received \$3 million from the state to build a station in Chino. He got \$500,000 from the energy commission and the air quality district to operate his station in Burbank.

The district says it has spent \$11.4 million so far on the construction, operation and maintenance of nine Southern California stations, with "considerably more funds" having been spent by the energy commission and the air resources board, agency spokesman Sam Atwood said.

To qualify for a \$1-million grant, Poppe had to invest \$250,000 to \$300,000 of his own money. To receive grants to cover operational expenses, he has had to hit specific performance goals — a certain number of pumps open, operating at certain capacities, by certain dates — or face being disqualified.



Dan Poppe demonstrates filling her vehicle at a hydrogen fuel station in Burbank operated by her husband, Dan Poppe, an early investor in such stations. (Anne Cusack, Los Angeles Times)

Despite the risks to entrepreneurs, Poppe believes the future is hydrogen, because fuel cell vehicles address the two main shortcomings of today's battery-powered cars: short driving range and long recharging times.

Car companies agree.

Toyota will launch a fuel cell sedan in Japan early next year and in the U.S. by the summer. Hyundai Motor Co. started leasing a hydrogen fuel cell version of its Tucson sport utility vehicle this year. Honda Motor Co., which has spent years testing and leasing its FCX Clarity fuel cell vehicle, is preparing to launch a new fuel cell car sometime next year.

Ford Motor Co., which has put 1.3 million test miles on a fleet of 300 fuel cell vehicles over the last several years, recently cut a deal with Daimler, Renault and Nissan to develop a joint fuel cell technology that all four companies would share.

General Motors Co., which holds more patents for hydrogen fuel cell technology than any other carmaker, has similarly tested its HydroGen4 car. GM has partnered with Honda, its rival for the number of new fuel cell patents each year, to co-develop new automotive fuel cell applications.

The cars, when they arrive, won't come cheap. Toyota hasn't set a price for its car here, but when it's launched in Japan it will have a \$68,000 sticker price — though buyers will qualify for a \$20,000 government rebate.

Fuel cell cars have about the same range as many gas-powered vehicles — as much as 300 miles between fueling stops.

Most electric cars have a range of about 80 miles, though more expensive battery-powered cars — namely, the Tesla Model S — offer more than 200 miles of driving range. The Tesla Model S starts at \$72,000 and can cost upward of \$100,000 with the largest battery and luxury options.

In addition, fuel cell advocates point out that there are multiple sources of hydrogen, including hydro-electric or wind generators, nuclear power plants and natural gas.

Elon Musk, chairman of the battery-electric vehicle manufacturer Tesla Motors Inc., derides hydrogen-powered cars and calls the science behind them overcomplicated.

"I usually call them 'fool cells,'" Musk told shareholders in June, having earlier dismissed the technology as "a load of rubbish."

Musk did not elaborate on specific weaknesses of hydrogen power or why he believes batteries will remain the dominant power source for zero-emission cars. A Tesla spokesperson declined requests for interviews with Musk or other executives.

Some observers caution that the appearance of competing technologies can be misleading. They say the need for clean transportation won't necessarily be found in a single system.

"If you have a fuel cell car, you have a longer range between visits to the gas station; but if you plug in at home, you never have to go to the gas station at all," said Don Anair of the Union of Concerned Scientists. "It's not an either-or proposition. It's a both-and proposition."

California is at the leading edge of subsidizing the fuel cell movement. The state Legislature passed AB 8 late last year, dedicating \$20 million a year through 2023 to finance the construction of as many as 100 hydrogen fueling stations.

There are only 11 such stations in California now, though that number could increase to 40 stations within a year.

Automakers and station owners have little incentive to invest without government subsidies to develop cars and stations.

"Without government support, this is not a viable business," Poppe said.

Until the nascent technology goes mainstream, hydrogen station operators like Poppe — who's such a believer in the technology that he and his wife both drive Mercedes-Benz E-Class fuel cell cars — must wait for their businesses to become profitable. His Burbank station serves 10 or

20 cars a day; he needs at least 30 to recoup his investment.

Experts put the price of building a single hydrogen fueling station, excluding the cost of the real estate, at about \$2 million. A single nozzle at his Burbank station costs \$12,000, Poppe said.

That's expensive, but so are gasoline stations — along with the drilling and refining operations that feed them.

"We could put in a nationwide network of [hydrogen] stations for less than the cost of building the Alaska pipeline," said Charlie Freese, head of the fuel cell vehicle program for GM. "There are a lot of other hidden costs too, like the cost of keeping the [strait] of Hormuz open."

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While roughly eighty percent of the cobalt mined in the DRC is produced by mining operations that make use of heavy machinery, the remaining twenty percent of cobalt production comes from hand-dug mining operations that rely on **child labor**. Since the 1970s, the goal of eliminating **child labor** has achieved near-universal consensus.

[iPhone mineral miners of Africa use bare hands | Daily Mail ...](#)

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Rare Earth; Industrial Metals ... It can do that by making sure industry standards on **child labor** and conflict **minerals** are being met, that there is auditing and certification," said a LME ...

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Metal vital to many electric vehicles has tripled in 18 months. From a report: The appetite for electric cars is driving a boom in small-scale cobalt production in the Democratic Republic of Congo, where some mines have been found to be dangerous and employ **child labor**.

Cobalt mining for lithium ion batteries has ... - Washington Post

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Beyond "Conflict **Minerals**": The Congo's Resource Curse Lives On "In sub-Saharan Africa," a video at the 2014 Consumer Electronics Show announces, "there is war that feeds off of global demand for electronics.

Your Hybrid Car Is Hogging All the Rare Earth Metals ...

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A **rare earth** element found in trace quantities in a variety of **minerals**, Neodymium is a crucial component in the alloy used to make the Prius's electric motors' magnets

[Child labour behind smart phone and electric car batteries ...](#)

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"The dangers to health and safety make mining one of the worst forms of **child** labour. Companies whose global profits total \$125 billion cannot credibly claim that they are unable to check where key **minerals** in their productions come from," said Mark Dummett.

[Clean Energy Boom Could Fuel One of the World's Dirtiest ...](#)

 <https://earther.gizmodo.com/clean-energy-boom-could-fuel-one-of-the-worlds-dirtiest-1829334689>

The irony of transitioning to clean energy is we're going to have to mine the shit out of the **Earth** to do it. Much like our computers and smartphones, wind turbines and solar panels are high-tech devices whose production demands a smattering of metals and **minerals** from across the periodic table and the planet.

[Electric Vehicles, Batteries, Cobalt, and Rare Earth Metals ...](#)

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Though neither lithium nor cobalt are **rare earth** metals, and **rare earth** metals aren't nearly as **rare** as precious metals like gold, platinum, and palladium, there are important issues surrounding the production of lithium-ion batteries that must be acknowledged and addressed.

[Plight of African child slaves forced into mines - for our ...](#)

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Glenn Lesak, who heads Save The Children's relief programme in Congo, estimates that between 5000 and 6000 **child** slaves are forced to work in the mines. He said: "This is an industry which is concentrated on forced labour and **child** labour. It's horrific.

[America's Rare Earth Ultimatum: A National Policy of Vertical ...](#)

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China's monopoly of the global **rare earth** market should be no surprise-they are the pioneers of **rare earth** innovation and are the authors of **rare earth** development history as previously discussed. Today, China is by far the world's leading researcher, producer, and exporter of **rare earth minerals** and metals.

[Trade War With China Exposes U.S. Mineral Import Problem](#)

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Jul 11, 2018 · In fact, of the 90 **mineral** commodities that our U.S. Geological Survey tracks, we are more than 50% import reliant for 50 of them and 100% import reliant for 20, including very important **rare ...**

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[In U.S.-China Trade War, Rare Earths Are the Nuclear Option ...](#)

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In U.S.-China Trade War, **Rare Earths** Are the Nuclear Option **Rare earths** are vital ingredients in everything from U.S. missiles to wind turbines to cellphones - and China holds 80% of the market.

[Why We Need Cobalt & Rare Earth Minerals To Power Electric Cars](#)

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Cobalt: The Key **Mineral** in Electric Vehicle Batteries. The electric vehicles (EV) need a lithium-ion battery pack to function. A lithium-ion battery is made with **rare earth minerals** like cobalt, lithium, nickel, and other metals. Cobalt is a **rare** bluish-gray metal that is found deep in the **Earth's** crust.

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The availability of lithium is a well-known concern with electric vehicle batteries, but much less reported is the concentration of the **rare earth minerals** vital to making electric motors for EVs ...

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China, aided by its low **labor** costs and lax environmental regulations, became the dominant force in the **rare earth** market during the 1980s, surpassing the U.S. China, which sits on close to 40% of ...

[Can China Hold The U.S. Hostage With Rare Earth Metals ...](#)

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China dominates global **rare earth** metals supplies. China is a dominant force when it comes to **rare earth** metals. Low **labor** costs and generous environmental regulations led to China's control of ...

EXHIBITS

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Investing in Lithium Mining Stocks

How To Profit from the Lithium Boom

By Brian Hicks
Friday, October 16th, 2009

Editor's Note:

While Western Lithium remains a buy, the *Pure Asset Trader* team tells me they have 2 rare earth trades — and possibly a third — they're looking to issue over the next two weeks... with an opportunity to double if not triple your money in mere months.

Ian Cooper heads up this team. And when they talk energy, our readers are all ears. That's because they've closed 33 winners in 35 tries this year. The gains have been exceptional.

For more information on the *Pure Asset Trader's* next move, [click here](#).

For now, here's the lithium piece I wrote a few months ago. This market is just heating up. And as you'll see below, it's a call that's already made readers a quick 30% gain.

Warren Buffett stunned the market back in September 2008 when he announced that he was investing \$250 million in a Chinese electric car company.

I say *stunned* because Warren Buffett seemed to violate one of his own rules of investing: Invest in companies you understand.

He admitted that he doesn't know a thing about electric cars.


So why did he invest?

Because maybe, just maybe, he knows that electric cars are a guaranteed winner.

I'm not recommending GM, Nissan, or any other automobile stock that's developing electric cars. . .

Instead, I'm going to recommend the commodity that is vital to the battery technology that'll be used in electric cars: **lithium**.

My play is a tiny mining outfit called Western Lithium (WLC.V; WLCDF). The stock currently trades for about \$1.08 a share.



If you're skeptical or concerned that fuel efficiency alone is not enough to entice Americans to buy electric cars, consider the Silicon Valley company Tesla Motors (pictured above). While their roadster is the first production automobile to use lithium-ion battery cells and travel more than 200 miles per charge, it is also capable of going from 0-60mph in under four seconds.

Not only will the Roadster leave most sports cars in the dust, the car recently set a distance record in April 2009 when it completed the 241-mile Rallye Monte Carlo d'Energies Alternatives with 36 miles left on the charge.

Even though the Roadster is probably too pricey for the average consumer at just over \$100,000, Tesla has taken more than 1,000 reservations for the car and expects to begin production of an all-electric and more affordable sedan starting in late 2011.

But just remember, the Tesla - as well as every other electric car - needs lithium. And [demand for lithium](#) is skyrocketing.

Lithium prices have nearly tripled over the past decade with 22% compound annual growth since 2000 for use in laptops, cell phones, and other electronics.

Demand is expected to continue rising, the recent lithium mania has been ignited by the fact that [electric cars](#) require about 3,000 times the lithium needed for an average cell phone, or 100 times the lithium used in a computer battery.

This huge spike in demand should propel lithium prices much higher over the next few years.

The best way to profit from the lithium boom is [Western Lithium](#), which owns the largest known lithium deposit in North America. Take a look. . .

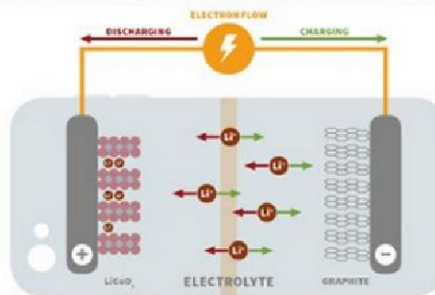


WHY LITHIUM-ION BATTERIES CATCH FIRE

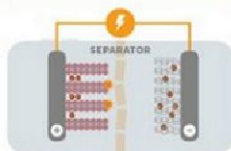
Lithium-ion batteries have been in the news recently with reports of some of Samsung's phones unexpectedly catching fire. Here, we examine how the batteries work and what can make them ignite.

HOW THEY WORK

Lithium-ion batteries often use lithium cobalt oxide (LiCoO₂) as the positive electrode and graphite as the negative electrode. When the batteries charge, lithium ions and electrons move from the positive to the negative electrode. When they discharge, the ions and electrons move from the negative to the positive electrode, powering phones and other devices. The ions move through an electrolyte, typically made of a lithium salt dissolved in an organic liquid.

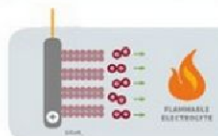


SHORT-CIRCUITING



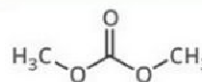
A porous separator keeps the battery electrodes apart. Charging the battery for long periods or inflicting a mechanical blow can damage the separator, causing the battery to discharge rapidly and generate a lot of heat.

OVERCHARGING



When overcharged, lithium cobalt oxide releases oxygen. This can react with the flammable electrolyte and also with cobalt oxide (Co₂O₃) left over after the release of oxygen. Co₂O₃ also increases the resistance of the battery, raising the risk of overheating.

ELECTROLYTE BREAKDOWN



DIMETHYL CARBONATE

Common electrolyte substance

During charging, some of the organic molecules in the electrolyte can break down, forming carbon dioxide. Because the battery is sealed, this causes pressure to build up. If it gets high enough, the battery bursts, exposing the flammable electrolyte.







Shocking roadside Tesla blaze takes 35 firefighters to extinguish

Shocking roadside Tesla car blaze in Austria takes 35 firefighters to extinguish. The Tesla Model S caught fire after a car crash. The fire could not be put out until power was cut from the car's lithium batteries.

Figure 2: Water Makes Lithium Battery Fires Worse And Firemen Can't Stop Lithium Battery Fires

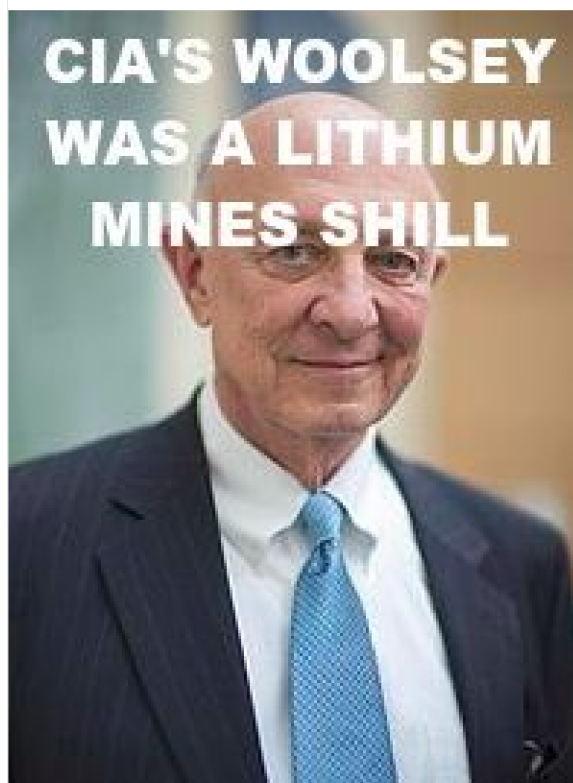


Figure 3: The Head Of The CIA Is A Spokesperson For Lithium Mining Profiteering

ELON MUSK'S LITHIUM, NICKEL AND COBALT MINES USE CHILD SLAVE LABOR



ELON MUSK'S LITHIUM & COBALT SLAVE LABOR MINES



"Let's Go Get Some Lithium!"



ELON MUSK'S LITHIUM & COBALT SLAVE LABOR MINES

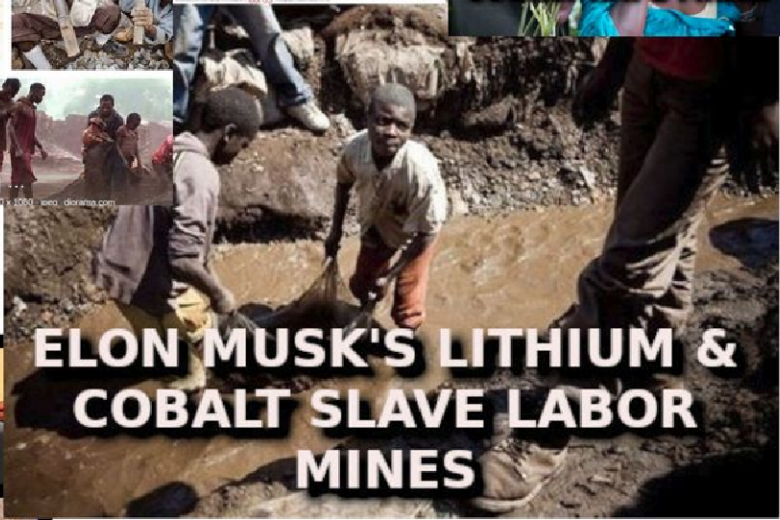
Elon Musk's Congo Child Labor Cobalt Mines Have Caused Millions To Flee Bloodshed As Congo Falls Apart From Musk's Corruption



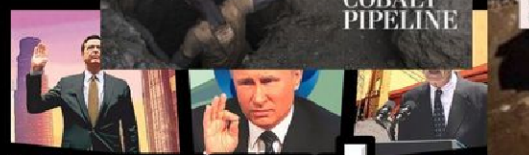
ELON MUSK'S CONGO COBALT RAPE MINES



MOBILE POWER, HUMAN TOLL THE COBALT PIPELINE



ELON MUSK'S LITHIUM & COBALT SLAVE LABOR MINES



grand theft URANIUM

OBAMA & ELON MUSK LITHIUM MINES IN AFGHANISTAN ARE CORRUPT GOLDMAN SACHS STOCK SCAMS



ELON MUSK'S LITHIUM & COBALT SLAVE LABOR MINES

Bild: Noah Friedman-Rudovsky





ELON
MUSK

ERIC
SCHMIDT

JOE
BIDEN

SPECIAL GUEST
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THE TRUE STORY



A PUBLIC INTEREST FILM

HOW POLITICAL CORRUPTION WORKS

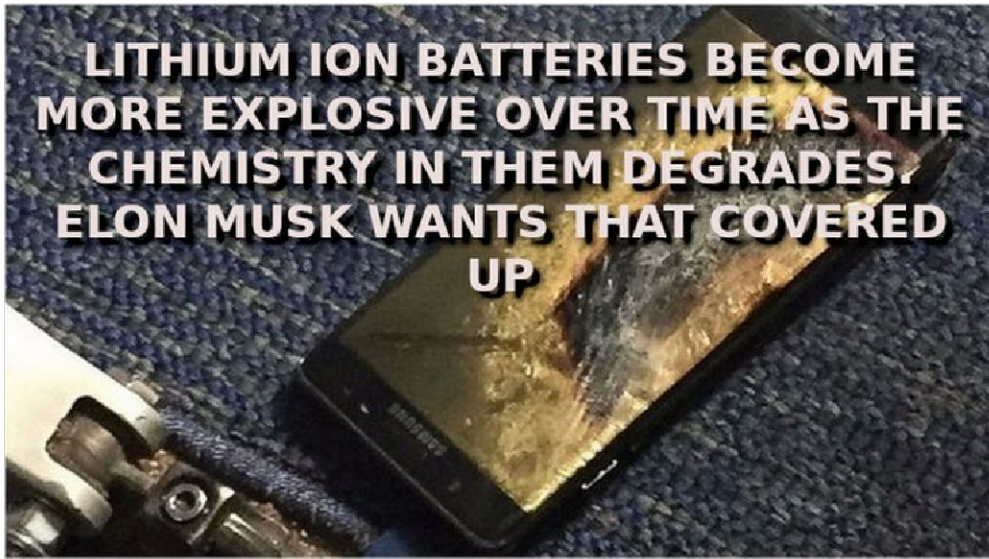
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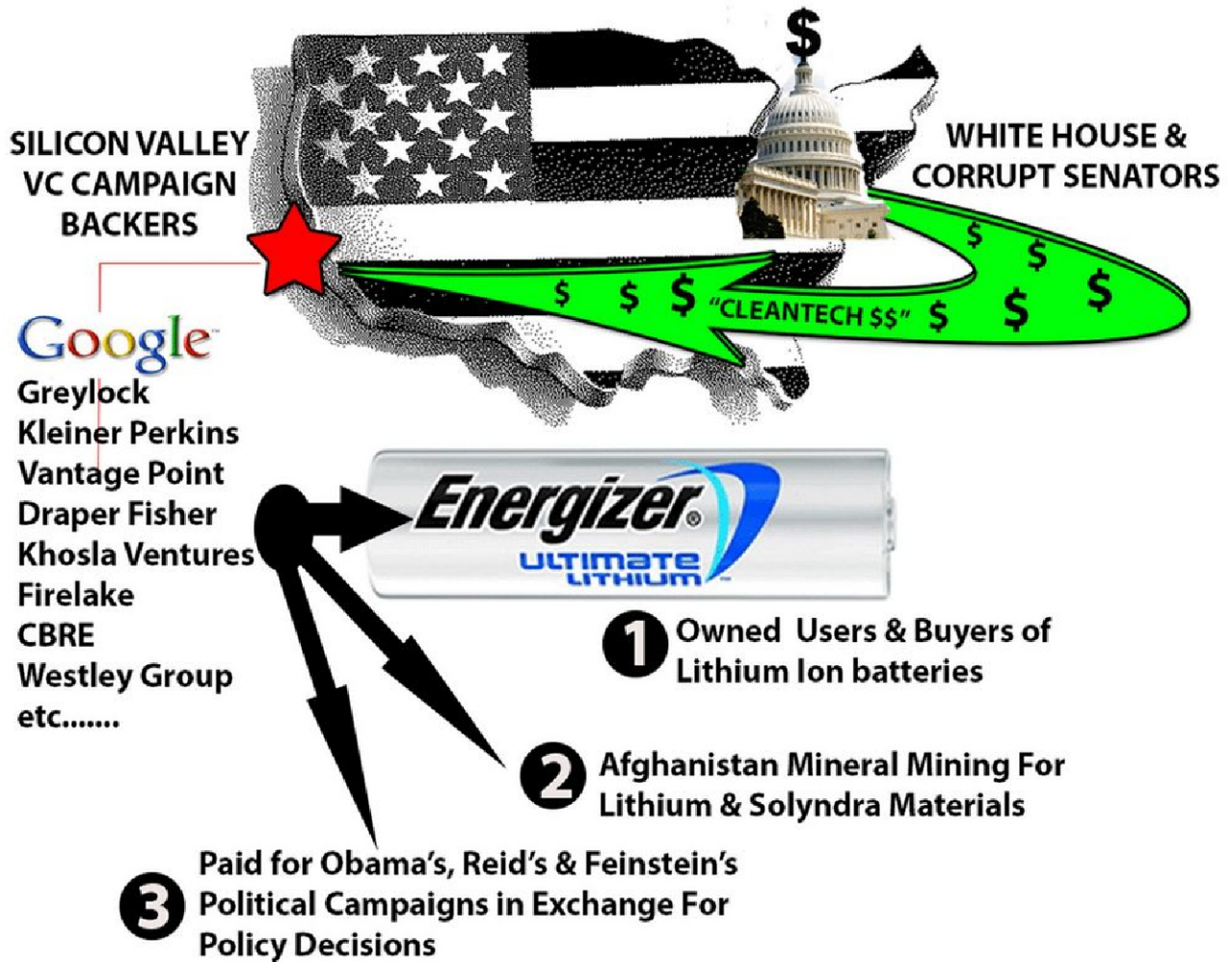
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OpenShot Video Editor | whitehouse.gov/petition/ban-dangerous-lithium-ion-batterie

WE the PEOPLE
YOUR VOICE IN THE WHITE HOUSE

WE THE PEOPLE ASK THE FEDERAL GOVERNMENT TO PROPOSE A NEW ADMINISTRATION POLICY

Ban dangerous lithium ion batteries from U.S. regions as advised by thousands of experts

Created by S.B. on November 07, 2016

Sub-atomic issues and the highly explosive nature of lithium ion batteries cause them to explode all the time. Lithium ion batteries explode when they get wet, bumped, charged or cross certain types of high-energy fields. The lithium is mined in Afghanistan, Bolivia and other war-profiteering regions which are exploited by those very same campaign-billionaires.

Federal investigators and federal MSDS records state that the thermal vapors from these batteries cause cancer, brain and liver damage, neurological damage and mutate the fetus in the womb. The FDA and the UN have published extensive new rules warning about the lethal dangers of lithium ion batteries. A large percentage of the factory workers, that make lithium ion batteries, become poisoned and often die from the poisoning.

WE THE PEOPLE

Sign This Petition

Need 59,399 signatures by **December 7, 2016** to get a response from the White House

1,000/59,399

First Name *

Last Name *

Email Address *

PRESIDENT DONALD TRUMP AND THE WHITE HOUSE ARE USING THE EMPLOYMENT TRAIL AND OTHER TRICKS

Sign Now

BY SIGNING THIS PETITION YOU AGREE TO THE TERMS OF PARTICIPATION AND PRIVACY POLICY

Figure 4: THIS IS A PUBLIC RECORD DOCUMENT