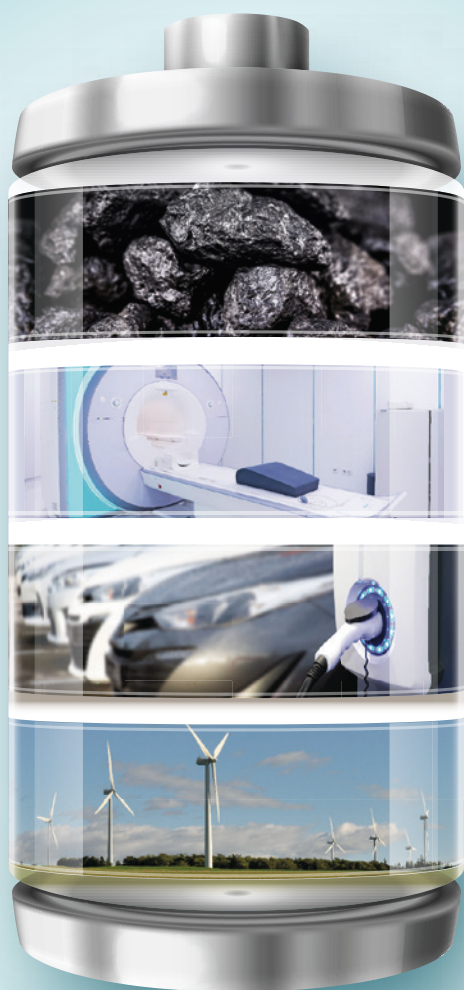


# CRITICAL AND STRATEGIC MINERALS IN QUÉBEC

New Wealth and Business Opportunities





This publication was produced by the ministère de l'Énergie et des Ressources naturelles.

**Text**

Direction des communications, in collaboration with the Secteur des mines

**Graphic design**

Direction des communications

The publication is available online:  
[Quebec.ca/critical-strategic-minerals](https://Quebec.ca/critical-strategic-minerals)

**Legal Deposit**

Bibliothèque et Archives nationales du Québec, 2022

ISBN : 978-2-550-92064-9 (Print, 2<sup>nd</sup> edition, 2022)

ISBN : 978-2-550-88736-2 (Print, 1<sup>st</sup> edition, 2020)

ISBN : 978-2-550-92063-2 (PDF, 2<sup>nd</sup> edition, 2022)

ISBN : 978-2-550-88728-7 (PDF, 1<sup>st</sup> edition, 2020)

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# QUÉBEC, A PARTNER IN YOUR SUCCESS

**The gouvernement du Québec has adopted a plan to promote the development of critical and strategic minerals in order to encourage investments within its territory, meet the growing demand for these resources and play an active role in the global energy and technological transition.**

The rapid development of sectors such as new technologies, telecommunications, aerospace, energy storage, medical equipment and renewable energy production has increased the demand for critical and strategic minerals (CSMs). Since there are no commercially available substitutes for these minerals, they are of major economic importance to key economic sectors and present a high supply risk.

Québec works in partnership with businesses to ensure their success at the local, regional, national and international levels. In addition to the opportunities associated with resource extraction in Québec, the development of new products from processed or recycled critical and strategic minerals offers many promising business prospects.

# WHY CHOOSE QUÉBEC?

## Huge potential, a variety of projects

Québec, with its rich and promising territory, offers tremendous potential for discovering, mining and developing CSMs.

### Québec represents:

- + The largest Canadian province (1.7 million square kilometres)
- + The most diverse reservoir of mineral resources in Canada
- + The upcoming first producer of scandium oxide in North America
- + World-class deposits of rare earths and vanadium
- + More than 180,000 active mining titles covering over 9 million hectares
- + More than half of Canada's lithium projects

### A well-established industry which notably includes:

- + An active copper foundry and refinery
- + The second-largest production of niobium in the world, the only one in the Northern Hemisphere
- + A second place ranking in Canada for the production of nickel and zinc, and a third place ranking for the production of copper
- + An active zinc refinery
- + A graphite mine and a mining project that will produce high purity graphite
- + A titanium mine



## An attractive business environment



A competitive, reliable and modern mining regime favouring investment



A stable political context and predictable legal framework



Several tax incentives:

- + The Capital Natural Resource and Energy Fund
- + Refundable tax credits
- + Deductions and allowances in the mining tax regime



Recognized practices to promote social acceptability and support the sustainable and profitable development of the CSM sector, including standards and tools to protect the environment, the health and safety of workers as well as local and Indigenous communities



Reliable support for the mining industry via access to several types of capital:

- + Caisse de dépôt et placement du Québec
- + Fonds de solidarité (FTQ)
- + Investissement Québec
- + Ressources Québec
- + SOQUEM
- + SIDEX
- + Société de développement de la Baie-James



An advantageous geographic position:

- + Close to industry and major population pools
- + With deep water ports facilitating access to the U.S., European and Asian markets



Modern treaties and partnerships with Indigenous nations



Measures supporting research and innovation



Technological and scientific expertise, know-how, specialized equipment manufacturers and suppliers, a skilled workforce and several applied research centres

### QUÉBEC'S ADVANTAGE: CLEAN, RENEWABLE, LOW-COST ENERGY

Québec's energy sector has a significant advantage. Québec is one of the top five hydroelectricity producers in the world and supplies about 50% of Canada's hydroelectricity. 99.8% of the electricity produced in Québec comes from clean, renewable and reliable sources.



## Effective tools

The gouvernement du Québec assists mining proponents from the beginning of their projects through effective management of knowledge and mining rights. It offers two main tools for this:

- + SIGÉOM: Provides easy access to a public geoscientific database [sigeom.mines.gouv.qc.ca](http://sigeom.mines.gouv.qc.ca)
- + GESTIM: Provides easy access to mining titles and online designation [gestim.mines.gouv.qc.ca](http://gestim.mines.gouv.qc.ca)

Another source of support is the Bureau de coordination des droits [Rights Coordination Office], which was created to assist companies and ensure better government coordination in the process of granting permits and authorizations.

### SIGÉOM:

#### A VALUABLE ASSET FOR MINERAL EXPLORATION COMPANIES

SIGÉOM (Québec's geomining information system) is recognized worldwide for the quality and accessibility of its information. It consolidates geoscientific data from the gouvernement du Québec, public agencies, the mineral exploration industry and the university research sector. It provides free access to more than a million technical and scientific measurements and observations.



# OUR PRIORITIES FOR THE DEVELOPMENT OF THE CSM SECTOR

Investments totalling more than \$100M in order to develop critical and strategic minerals

## + Knowledge acquisition

Accelerate investments in geoscientific knowledge acquisition and exploration to reveal Québec's full potential

## + Research and development

Provide financial support to innovative projects in exploration, transformation, recycling, artificial intelligence and R&D

## + Infrastructure

Consolidate the transportation, energy and telecommunications networks

## + Local investments

Stimulate investments in Québec and assist companies with their development projects

Coordinating with other government actions to go further

**\$1B**

for the development of structuring projects from the fonds Capital ressources naturelles et énergie. Capital contribution of \$1M to \$100M for projects valued at more than \$5M.

**\$55M**

set aside for the Stratégie québécoise de développement de la filière batterie [Québec Battery Industry Development Strategy].

**\$6.7B**

in investments in the 2030 Plan for a Green Economy.

**\$10M to \$150M**

in equity capital or in the form of a loan from Ressources Québec.

# APPENDIX 1

## CSM DEVELOPMENT IN QUÉBEC: DEPOSITS, DEVELOPMENT PROJECTS AND MINES

### Graphite

Several graphite projects are underway in Québec.

- |                                                         |                                                                 |
|---------------------------------------------------------|-----------------------------------------------------------------|
| <b>1</b> <b>Lac-des-Îles</b><br>Northern Graphite Corp. | <b>6</b> <b>Miller</b><br>Canada Carbon                         |
| <b>2</b> <b>Lac Guéret</b><br>Mason Graphite            | <b>7</b> <b>Bell Graphite</b><br>Volt Carbon Technologies       |
| <b>3</b> <b>Matawinie</b><br>Nouveau Monde Graphite     | <b>8</b> <b>Mousseau West</b><br>Northern Graphite Corp.        |
| <b>4</b> <b>Lac Knife</b><br>Focus Graphite Inc.        | <b>9</b> <b>Lac Rainy Nord</b><br>Metals Australia Ltd          |
| <b>5</b> <b>La Loutre</b><br>Lomiko Metals Inc.         | <b>10</b> <b>Berkwood Graphite</b><br>Green Battery Metals Inc. |
|                                                         | <b>11</b> <b>Lac Tétépisca</b><br>Focus Graphite Inc.           |

### Nickel, Copper, Cobalt and Platinum Group Elements

Two mines extract cobalt and platinum group elements as nickel by-products.

- |                                                                           |                                                               |
|---------------------------------------------------------------------------|---------------------------------------------------------------|
| <b>12</b> <b>Raglan</b><br>Glencore Canada Corporation                    | <b>16</b> <b>Hawk Ridge</b><br>Nickel North Exploration Corp. |
| <b>13</b> <b>Nunavik Nickel</b><br>Canadian Royalties Inc.                | <b>17</b> <b>Lac Rocher</b><br>Victory Nickel Inc.            |
| <b>14</b> <b>Dumont Nickel</b><br>Magneto Investments Limited Partnership | <b>18</b> <b>Nisk-1</b><br>Power Nickel                       |
| <b>15</b> <b>Bravo</b><br>Jien Nunavik Mining Exploration Ltd.            | <b>19</b> <b>Grasset</b><br>Wallbridge Mining Company         |

### Niobium

Québec is the second largest producer of niobium in the world and the only producer in the Northern Hemisphere.

- |                                                  |                                                       |
|--------------------------------------------------|-------------------------------------------------------|
| <b>20</b> <b>Niobec</b><br>Magris Resources Inc. | <b>21</b> <b>Crevier</b><br>Les Minéraux Crevier inc. |
|--------------------------------------------------|-------------------------------------------------------|

### Titanium or Vanadium

Québec is the third largest producer of titanium in the form of ilmenite in the world.

- |                                                                  |                                                          |
|------------------------------------------------------------------|----------------------------------------------------------|
| <b>22</b> <b>Lac Tio</b><br>Rio Tinto Fer et Titane              | <b>25</b> <b>Magpie</b><br>The Magpie Mines Inc.         |
| <b>23</b> <b>BlackRock</b><br>BlackRock Metals Inc.              | <b>26</b> <b>Iron-T</b><br>Vanadiumcorp Resource Inc.    |
| <b>24</b> <b>Vanadium-Lac Doré</b><br>Vanadiumcorp Resource Inc. | <b>27</b> <b>Mont Sorcier</b><br>Voyager Metals Inc.     |
|                                                                  | <b>28</b> <b>Lac la Blache</b><br>Splendor Titanium Inc. |

### Lithium

Québec has high lithium potential.

- |                                                            |                                                                |
|------------------------------------------------------------|----------------------------------------------------------------|
| <b>29</b> <b>North American Lithium**</b><br>Sayona Québec | <b>32</b> <b>Rose</b><br>Critical Elements Lithium Corporation |
| <b>30</b> <b>Whabouchi</b><br>Nemaska Lithium              | <b>33</b> <b>Moblan</b><br>Sayona Nord/SOQUEM                  |
| <b>31</b> <b>Authier</b><br>Sayona Québec                  | <b>34</b> <b>James Bay</b><br>Allkem                           |

### Rare Earth Elements

Québec has several rare earth elements deposits and is recognized as having global potential.

- |                                                                   |                                                                      |
|-------------------------------------------------------------------|----------------------------------------------------------------------|
| <b>35</b> <b>Crater Lake</b><br>Imperial Mining Group Ltd.        | <b>39</b> <b>Kipawa (Zeus)</b><br>Vital Metals Ltd.                  |
| <b>36</b> <b>Kwyjibo</b><br>SOQUEM                                | <b>40</b> <b>Niobec - REE Zone</b><br>Magris Resources               |
| <b>37</b> <b>Eldor (Ashram)</b><br>Commerce Resources Corporation | <b>41</b> <b>Carbonatite from Montviel</b><br>Geomega Resources Inc. |
| <b>38</b> <b>Strange Lake - Zone B</b><br>Torngat Metals Ltd.     |                                                                      |

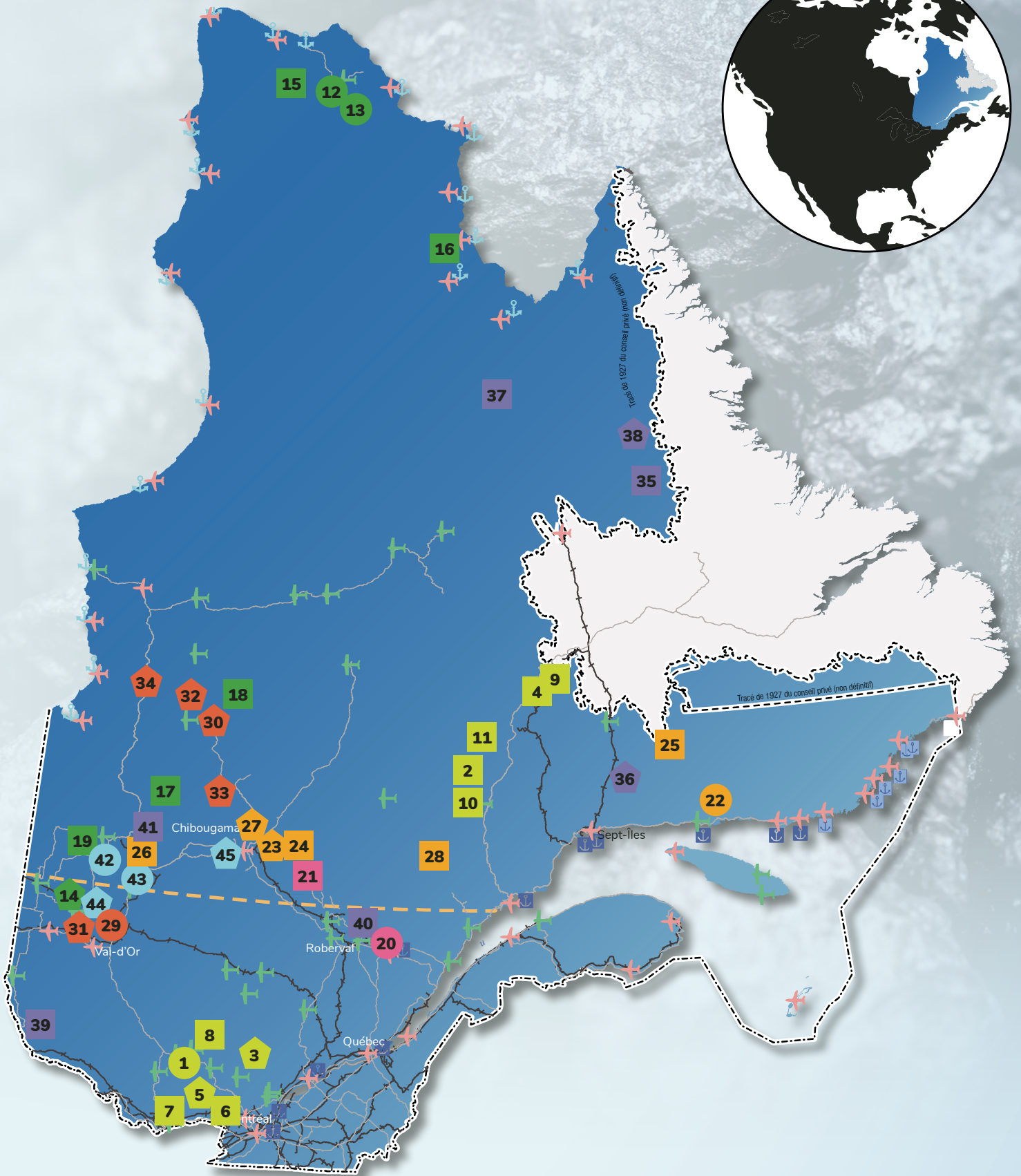
### Zinc and Copper\*

A copper smelter and refinery and a zinc refinery are in operation in Québec.

- |                                                                 |                                                       |
|-----------------------------------------------------------------|-------------------------------------------------------|
| <b>42</b> <b>Bracemac-McLeod</b><br>Glencore Canada Corporation | <b>44</b> <b>Abcourt-Barvue</b><br>Mines Abcourt inc. |
| <b>43</b> <b>Langlois (Grevet)**</b><br>Ressources Breakwater   | <b>45</b> <b>Lac Scott</b><br>Yorbeau Resources Inc.  |

\* The zinc and copper resources are not represented on the map.

\*\* Mines in maintenance



**Project legend:**  Deposits (mineral resources)  Development or construction and running-in projects  Mines

## APPENDIX 2

# CSM PROCESSING IN QUÉBEC: PLANTS AND PROJECTS

### Primary processing plants

- |                                                                                                                           |                                                                                                        |
|---------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------|
| <b>1</b> <b>Horne Smelter, Glencore, Canada</b><br>Copper                                                                 | <b>4</b> <b>Nanoxplore</b><br>Graphene                                                                 |
| <b>2</b> <b>CCR Refinery, Glencore, Canada</b><br>Copper                                                                  | <b>5</b> <b>5N +</b><br>Tellurium, bismuth, antimony, cadmium, indium,<br>gallium, selenium, tin, zinc |
| <b>3</b> <b>Canadian Electrolytic Zinc Limited, Société<br/>en commandite Revenu Noranda, Glencore<br/>Canada</b><br>Zinc | <b>6</b> <b>Niobec, Magris Resources Inc.</b><br>Ferroniobium                                          |
|                                                                                                                           | <b>7</b> <b>Rio Tinto Fer et Titane</b><br>Titanium                                                    |
|                                                                                                                           | <b>8</b> <b>Imerys Graphite</b><br>Graphite                                                            |

### Processing projects

- |                                                               |                                                                    |
|---------------------------------------------------------------|--------------------------------------------------------------------|
| <b>9</b> <b>Innord Inc., Geomega Resources</b><br>Rare earths | <b>14</b> <b>Magnesium Technologies Recycles Inc.</b><br>Magnesium |
| <b>10</b> <b>Rio Tinto Fer et Titane</b><br>Scandium          | <b>15</b> <b>BlackRock, BlackRock Metals</b><br>Vanadium           |
| <b>11</b> <b>Alliance Magnesium</b><br>Magnesium              | <b>16</b> <b>North American Lithium*, Sayona Québec</b><br>Lithium |
| <b>12</b> <b>KSM</b><br>Magnesium                             | <b>17</b> <b>Nemaska Lithium</b><br>Lithium                        |
| <b>13</b> <b>Eco2Magnesia</b><br>Magnesium                    | <b>18</b> <b>Nouveau Monde Graphite</b><br>Graphite                |

\* Mines under maintenance



## APPENDIX 3

### LIST OF CSMs AND SITUATION IN QUÉBEC

| List of CSMs for Québec <sup>1</sup> | Main producing countries <sup>2</sup>                                 | Situation in Québec |                                |              |                                                                      |
|--------------------------------------|-----------------------------------------------------------------------|---------------------|--------------------------------|--------------|----------------------------------------------------------------------|
|                                      |                                                                       | Active mines        | Deposit Appraisal <sup>3</sup> | Deposits     | Processing                                                           |
| Antimony                             | China (55.0%)<br>Russia (22.5%)<br>Tajikistan (11.7%)                 | -                   | -                              | -            | High purity metal<br>Alloys<br>Semi-conductors<br>Recycling          |
| Bismuth                              | China (84.2%)<br>Laos (5.3%)<br>South Korea (5.1%)                    | -                   | -                              | -            | High purity metal<br>Salts<br>Alloys<br>Recycling                    |
| Cadmium                              | China (41.7%)<br>South Korea (12.5%)<br>Japan (7.8%)                  | -                   | -                              | -            | High purity metal<br>Alloys<br>Semi-conductors<br>Recycling          |
| Cesium                               | N.A.                                                                  | -                   | -                              | -            | Catalysts                                                            |
| Cobalt                               | Congo (69%)<br>Russia (12%)<br>Australia (4.0%)                       | 2 (b-p)             | 1 (b-p)                        | 4 (b-p)      |                                                                      |
| Copper                               | Chile (27.8%)<br>Peru (10.4%)<br>China (8.4%)                         | 4 (b-p)             | 3 (b-p)                        | 6<br>7 (b-p) | Anodes<br>High purity metal<br>Recycling                             |
| Rare earth elements                  | China (58.3%)<br>United States (16.3%)<br>Myanmar (12.9%)             | -                   | 2                              | 3<br>1 (b-p) | Recycling                                                            |
| Platinum group elements              | South Africa (48.4%)<br>Russia (30.3%)<br>Zimbabwe (7.3%)             | 2 (b-p)             | 1 (b-p)                        | 4 (b-p)      | By-product of copper refining                                        |
| Pewter                               | China (31.8%)<br>Indonesia (20.1%)<br>Myanmar (11%)                   | -                   | -                              | 1            | High purity metal<br>Alloys<br>Semi-conductors<br>Recycling          |
| Gallium                              | United States (96.9%)<br>Russia (1.5%)<br>China (0.9%)                | -                   | -                              | -            | High purity metal<br>Salts<br>Recycling                              |
| Graphite (natural)                   | China (78.9%)<br>Brazil (6.6%)<br>Mozambique (2.9%)                   | 1                   | 2                              | 8            | Micronization<br>Spheroidization<br>(demonstrators)                  |
| Indium                               | China (56.3%)<br>South Korea (21.9%)<br>Japan/Canada (6.9%)<br>(each) | -                   | -                              | -            | High purity metal<br>Salts<br>Alloys<br>Semi-conductors<br>Recycling |
| Lithium                              | Australia (48.1%)<br>Chile (26.1%)<br>China (16.1%)                   | -                   | 6 <sup>4</sup>                 | -            | Sulphate<br>Hydroxide<br>Recycling (pilot)                           |

| List of CSMs for Québec <sup>1</sup> | Main producing countries <sup>2</sup>                                                                                         | Situation in Québec |                                |              |                                                                       |
|--------------------------------------|-------------------------------------------------------------------------------------------------------------------------------|---------------------|--------------------------------|--------------|-----------------------------------------------------------------------|
|                                      |                                                                                                                               | Active mines        | Deposit Appraisal <sup>3</sup> | Deposits     | Processing                                                            |
| Magnesium                            | Compound:<br>China (70.4%)<br>Brazil (6.7%)<br>Turkey (5.4%)<br><br>Metal:<br>China (88.6%)<br>Russia (4.8%)<br>Israel (1.9%) | -                   | -                              | -            | Recycling (demonstrator)                                              |
| Nickel                               | Indonesia (30.7%)<br>Philippines (13.3%)<br>Russia (11.3%)                                                                    | 2                   | 1                              | 5<br>2 (b-p) |                                                                       |
| Niobium                              | Brazil (88.3%)<br>Canada (9.6%)<br>Other (2.0%)                                                                               | 1                   | -                              | 1<br>2 (b-p) | Ferroniobium                                                          |
| Scandium                             | N.A.                                                                                                                          | -                   | 1 (b-p)                        | 1            | Demonstrator plant under development (pilot)                          |
| Tantalum                             | Congo (37.1%)<br>Brazil (22.4%)<br>Nigeria (12.4%)                                                                            | -                   | 1 (b-p)                        | 2 (b-p)      | Recycling                                                             |
| Tellurium                            | China (58.7%)<br>Japan (12.5%)<br>Russia (12.6%)                                                                              | -                   | -                              | -            | High purity metal<br>Salts<br>Semi-conductors<br>Dioxide<br>Recycling |
| Titanium                             | Ilmenite and rutile:<br>China (32.6%)<br>South Africa (12.9%)<br>Mozambique (11.3%)                                           | 1                   | 1                              | 2 (b-p)      | Slag                                                                  |
| Vanadium                             | China (66.7%)<br>Russia (18.6%)<br>South Africa (8.2%)                                                                        | -                   | 2 (b-p)                        | 1 (b-p)      |                                                                       |
| Zinc                                 | China (33.8%)<br>Peru (11.1%)<br>Australia (10.9%)                                                                            | 1<br>1 (b-p)        | 3 <sup>4</sup><br>1 (b-p)      | 5<br>3 (b-p) | High purity metal<br>Salts<br>Alloys<br>Semi-conductors<br>Recycling  |

1. The list of critical and strategic minerals for Québec was based on those from the European Union, the United States, Japan and Australia, and was endorsed by a committee of government experts in June 2020.
2. Mineral Commodity Summaries 2022, United States Geological Survey: <https://pubs.usgs.gov/periodicals/mcs2022/mcs2022.pdf>
3. To be regarded as under development according to the Mineral Development Process, a project must have been the subject of at least one preliminary economic survey.

4. Includes mining projects at the development stage and one mine under maintenance.  
b-p. Element as a by-product

# THE BEST PLACE TO DO BUSINESS: QUÉBEC!

With a population of 8.5 million people, Québec welcomes you with a broad range of assets and possibilities.

## For additional information

You will find a host of information on the [Investing in the Mining Sector web page](#). Full details on CSM development can be found in the [Québec Plan for the Development of Critical and Strategic Minerals 2020-2025](#).

You can also email us at:  
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[info@invest-quebec.com](mailto:info@invest-quebec.com).

