

## Canada's critical minerals: A trade imperative



*(Source: Grid Battery Metals Inc.)*

*Jonathon Brown | The Market Online*

The escalating trade war between Canada and the United States is casting a shadow over the critical mineral mining sector, which is vital for the electrification revolution. As tariffs and geopolitical tensions rise, the push to localize resources within North America becomes increasingly urgent. This shift aims to reduce dependence on long supply chains and foreign deposits, particularly from China, and bolster supply chain security.

Some companies in this space are in a solid position to benefit from this trend. However, the economic climate remains uncertain, and the mining industry faces significant challenges in navigating these turbulent times.

### **Grid Battery Metals: Powering the future of electrification**

Canadian exploration company [Grid Battery Metals \(TSXV:CELL\)](#) is at the forefront of the booming battery metals market, focusing on high-value metals essential for the electric vehicle (EV) industry. In an exclusive interview, CEO Tim Fernback shared insights into the company's strategic direction and the broader trends shaping the industry.

## **Onshoring critical minerals**

The global trend towards onshoring critical minerals is gaining momentum, driven by geopolitical tensions and the need for supply chain security. Lithium and copper, among other metals, are crucial for electrification. North American domestic supply is beneficial for both Canada and the U.S., reducing reliance on foreign sources. Grid Battery Metals is positioned with lithium properties in Nevada, directly supporting the U.S. market.

## **Canada's resource powerhouse**

Canada has long been a major supplier of nickel, copper, and iron ore, all vital for electrification.

Copper, in particular, is facing significant supply-demand imbalances, with predictions of major shortages in the near and long term. The construction, manufacturing, and automotive industries are driving high demand for copper. Grid Battery Metals aims to tap into this demand with its advanced exploration projects with its large 275 km<sup>2</sup> [B.C. Copper exploration project](#).

## **Impact of tariffs and trade wars**

The current economic climate, influenced by tariffs and trade wars, is reshaping the mining industry. The push to localize resources between Canada and the U.S. aims to reduce dependence on long supply chains and foreign deposits. This geopolitical shift is expected to benefit companies like Grid Battery Metals, which are focused on North American resources.

## **An alternative to China**

In the broader geopolitical context, Canada can position itself as a strategic alternative to China by stressing reduced reliance on Chinese critical minerals. Local communities and individual companies must also contribute by highlighting operational excellence, innovation, and stakeholder engagement, thereby enhancing Canada's reputation as a reliable supplier.

## **Investment thesis**

Grid Battery Metals offers investors exposure to both lithium and copper, two metals with strong future prospects. The company's Nevada lithium projects and Canadian copper projects provide a geographic hedge and a diversified portfolio. The long-term supply-demand dynamics for copper and the critical role of lithium in electrification make Grid Battery Metals a compelling investment opportunity.

## **Government support**

The British Columbia government recently released a list of 18 critical mineral and energy projects worth roughly [C\\$20 billion](#) that it says it's working to accelerate in the face of ongoing tariff threats from the United States. The British Columbia government says the "initial list" is made up of projects that already have developed business cases but still need some type of permit or approval from the government. In addition to four mines, there are energy security projects, and 11 BC Hydro clean energy ventures that mostly involve wind power. The Office of the Premier said in a statement that the projects will employ approximately 8,000 people in B.C. and the provincial government is working to identify other projects. The release of the list comes after Premier David Eby said on Monday that the government was expediting them to diversify the economy, assuming there would be "four years of continual on and off tariff threats" from the United States under the presidency of Donald Trump.

These incentives can be positive to Grid shareholders because of the close proximity of its Copper exploration project located in the Omineca Mining Division of north-central British Columbia, approximately 150km north of Ft. St. James.

Meanwhile, The U.S. government issued an executive order in March emphasizing the importance of securing a stable and predictable supply of critical minerals, which directs federal agencies to expedite approvals for domestic mineral production projects.

As quoted in a [Mining.com](#) article, *"Despite possessing some critical minerals, the US currently imports a significant amount, creating economic and security risks, according to the White House. The administration said the US is import-reliant on at least 15 critical minerals and that 70 per cent of imports of rare earths come from China."*

## **Strong future outlook**

Government initiatives in both Canada and the U.S. are accelerating the transition from exploration to production. Easing permits, reducing timeframes, and providing subsidies and grants are all part of this effort. Significant funding is being directed towards critical mineral projects, ensuring that the entire process, from extraction to refining, takes place in North America.

In our next article looking at Grid Battery Metals, we will focus on the company's endeavours in the copper market, as well as taking a deeper look into the market at large and its supply / demand imbalance, given how many copper mines are needed for electrification to really get underway.

Copper has many practical uses across several industries as a global market that is not totally dependent on good Canada / U.S. relations, because copper could be sold

anywhere in the world, and people will buy it because it's a price per pound, a globally recognized dollar.

### **Investor's corner**

Grid Battery Metals is well-positioned to capitalize on the growing demand for battery metals. With strategic projects in Nevada and Canada, the company is set to play a crucial role in the electrification revolution. Investors can benefit from the company's focus on high-value metals and its alignment with broader industry trends.

[Grid Battery Metals](#) is a Canadian exploration company with a focus on exploration for high-value battery metals for the electric vehicle market.

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