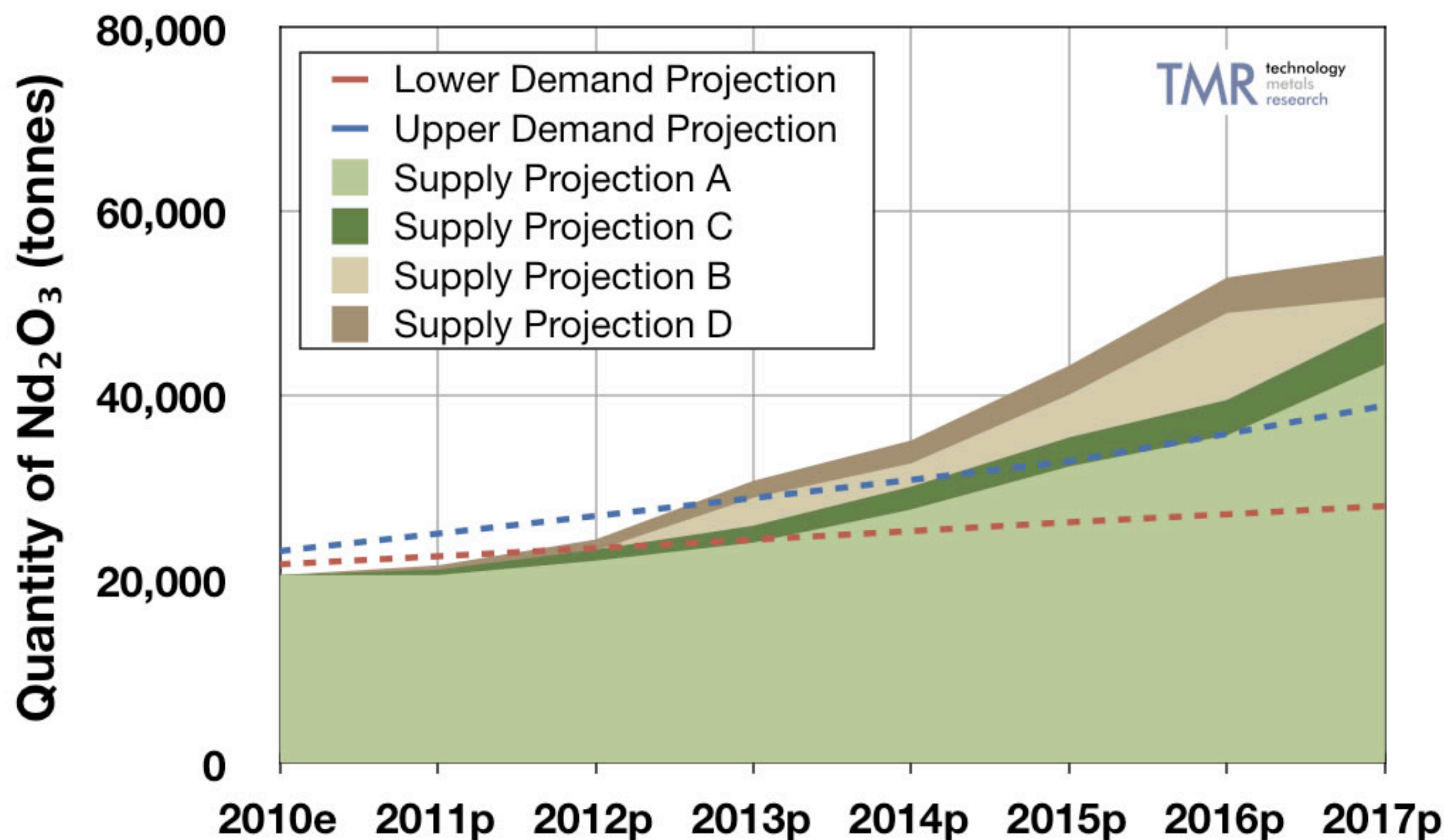


Supply Projection Scenarios

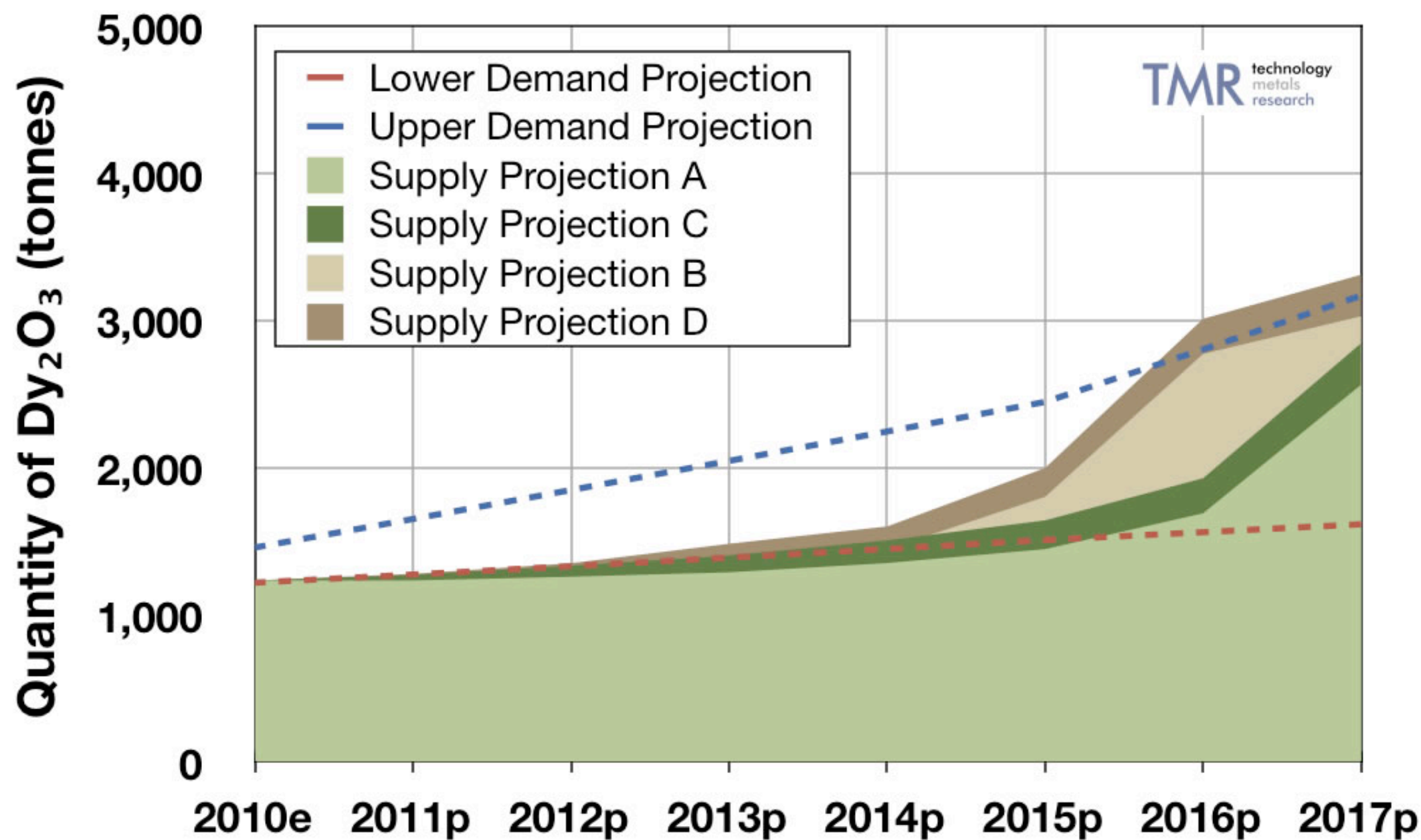
		Annual increase in Chinese Production Rate	
		0 %	3 %
Roll out of new non-Chinese production (based on schedules published by companies)	No delays + all production rates met	B	D
	Some delays + not all production rates met	A	C

New Global Nd_2O_3 Supply & Demand



Sources: CSRE, CREIC, CMLR, CMC, USDOE, company reports, scientific literature, TMR estimates

New Global Dy₂O₃ Supply & Demand




Sources: CSRE, CREIC, CMLR, CMC, USDOE, company reports, scientific literature, TMR estimates

Free supply & demand report on critical rare earths will be published by Gareth Hatch in the near future.

To be notified when it's ready - subscribe to the TMR Web site or send us an email.

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