FUTURE MINERALS FORUM

12 - 14 January 2027
King Abdulaziz International
Conference Centre, Riyadh, Saudi Arabia

SECURING MINERALS FOR INDUSTRIES

Connecting Resources, Capital and Industrial Demand

Convened by

Endorsed by

WHY DOWNSTREAM MATTERS NOW

The Global Competition for Mineral Supply

The world's largest industries are competing for access to the critical minerals required to power economic growth, industrial development and technological advancement.

Demand is accelerating across:

- Artificial Intelligence & Data Centers
- Defence & Aerospace
- Automotive & Battery Manufacturing
- Renewable Energy & Grid Infrastructure
- Advanced Manufacturing & Electronics

At the same time, governments and industries are seeking to:

» Reduce supply chain concentration

» Secure long-term access to critical minerals

» Build resilient industrial ecosystems

» Support domestic manufacturing and value creation

» Accelerate investment in processing and refining capacity

The Challenge

» The challenge is no longer simply discovering mineral resources

» The challenge is securing reliable supply, attracting investment and connecting resources to the industries that need them most

The Opportunity

The organizations that successfully align supply, capital, technology and industrial demand will define the next generation of global value chains.

WHY FMF IS THE CONVENING PLATFORM

WHERE THE MINERALS VALUE CHAIN MEETS

Future Minerals Forum is the leading global platform that brings together stakeholders across the entire mineral value chain to strengthen supply chain resilience.

Why Saudi Arabia?

Strategically located at the crossroads of Africa, Asia, and Europe, Riyadh, Saudi Arabia is the gateway to an emerging global minerals hub connecting resource-rich regions, industrial demand centers, global capital, and trade corridors. As home to the Future Minerals Forum, it provides the ideal platform to bring together governments, investors, industry leaders, and innovators to accelerate downstream investment and strengthen resilient mineral value chains.

FMF brings together:

Governments
Creating policy frameworks, industrial strategies and investment opportunities.

Mining Companies
Developing the projects required to meet future demand.

Investors
Funding the next generation of mineral and industrial development.

Industrial Buyers
Seeking secure, long-term access to critical raw materials.

Technology and Manufacturing Leaders
Driving demand across high-growth sectors.

FMF by the Numbers

21,500 +
participants

5,073 +
meetings facilitated

450 +
speakers

170 +
countries represented

91 +
senior government representatives

Saudi Arabia: a Natural Setting for Downstream Development

Saudi Arabia is rapidly establishing itself as a global hub for minerals processing and value-added manufacturing, creating compelling investment opportunities across the downstream value chain. Backed by competitive energy, world-class industrial infrastructure, integrated logistics and a rapidly expanding mining ecosystem, the Kingdom offers investors the scale, certainty and market access needed to build globally competitive operations.

From aluminium and phosphate to iron, steel, titanium, building materials and battery materials, Saudi Arabia has developed one of the region's most advanced industrial bases, enabling investors to capture greater value beyond extraction.

Phosphate

- One of the largest exporters of phosphate fertilizers.
- Holds 2.7 billion tons of estimated reserves (~7–8% of world total).

Aluminum

- Home to the world's largest fully integrated aluminum complexes (Ras Al Khair).
- Export-ready aluminum sector with SAR 7bn in exports in 2024, serving markets across the GCC, Asia, Europe and Africa.

Titanium

- Home to dual-route titanium platform anchored by the world's largest ilmenite smelter and the Middle East's only titanium sponge producer.

WHO WILL YOU MEET

The Leaders Shaping Future Mineral Supply Chains

» **Governments & Policymakers**
Ministers, regulators, policymakers and economic development leaders.

» **Mining & Minerals Companies**
Producers, developers, explorers and processors across critical minerals and metals.

» **Investors & Financial Institutions**
Sovereign wealth funds, private equity, infrastructure investors, banks and development finance institutions.

» **Industrial Buyers & Manufacturers**
Automotive, battery, defence, aerospace, energy, technology and advanced manufacturing companies.

» **Technology & Infrastructure Providers**
Digital solutions, logistics, engineering, automation and industrial development partners.

»

Previous Industry Leaders at FMF

» Albemarle
» General Motors
» Siemens Energy
» Lucid
» Ganfeng Lithium
» CEER
» Alcoa
» Emirates Global Aluminium
» Sigma Lithium
» Tianqi Lithium

Industries Driving Future Mineral Demand

AI & Data Centres

Demand for computing infrastructure, cloud services and AI technologies is accelerating.

Key minerals: Copper, aluminium, nickel, rare earths, silicon, graphite

Defence & Aerospace

Advanced defence systems and aerospace manufacturing require secure access to critical minerals.

Key minerals:
Rare earths, titanium, nickel, cobalt, copper

Energy & Grid Infrastructure

Grid expansion, renewables and energy storage require significant mineral inputs.

Key minerals:
Copper, aluminium, nickel, lithium, graphite, silver

Advanced Manufacturing

Electronics, semiconductors, robotics and industrial technologies depend on critical minerals.

Key minerals:
Copper, rare earths, silicon, aluminium, nickel, titanium

Automotive & Batteries

Electrification is driving demand for battery materials and associated supply chains.

Key minerals:
Lithium, nickel, cobalt, graphite, manganese, copper

FUNDING THE DOWNSTREAM MINERALS HUB BETWEEN EAST AND WEST

The future of minerals is not only about extraction. It is about where value is created, where materials are processed, and how global supply chains are connected.

For downstream minerals industries, funding is a strategic enabler. It supports the processing, refining, manufacturing and technology capabilities needed to serve fast-growing sectors such as batteries, clean energy, electric vehicles, advanced electronics, defence, automation and high-performance materials.

This creates a strong opportunity to establish a downstream minerals hub positioned between East and West—connecting mineral-rich regions, global manufacturers, technology providers, investors and logistics corridors.

A well-funded downstream hub can bridge upstream supply with industrial demand, linking Africa's resource potential, Asia's manufacturing scale, Europe's industrial markets, and the Middle East's infrastructure, capital and trade connectivity.

Key opportunity areas

- Critical Minerals Supply
- Processing & Refining
- Battery & Energy Technologies
- Defence & Aerospace
- AI & Advanced Manufacturing
- Investment & Strategic Partnerships

For technology providers, this funding conversation is highly relevant. They are not only users of minerals; they can help build the systems, platforms and industrial capabilities that make downstream minerals more efficient, transparent and globally connected.

Funding downstream minerals is key to turning strategic location into industrial value—and building a hub that connects East and West.

OPERATING MODELS THAT TURN DOWNSTREAM AMBITION INTO DELIVERY

Funding creates the opportunity. Operating models turn that opportunity into delivery.

For technology providers and advanced manufacturers, this is essential. Their industries depend on reliable access to processed minerals, battery materials, specialty metals and advanced industrial inputs that meet strict standards for quality, sustainability and delivery.

A connected downstream operating model helps strengthen supply chains by bringing together industry, investors, governments and technology partners. By improving collaboration, encouraging investment and supporting innovation, it creates resilient industrial ecosystems that enable long-term growth, competitiveness and access to global markets.

For downstream companies, participation in this conversation is important. It allows them to shape future supply chains, identify partnership opportunities and contribute technologies that improve industrial delivery.

As demand for processed minerals and advanced materials continues to grow, collaboration across the downstream value chain becomes increasingly important. Strong partnerships help connect resources, technology, manufacturing and global markets.

Technology providers, manufacturers, investors and governments each have a role to play in developing integrated industrial ecosystems. Working together enables more resilient, efficient and competitive supply chains.

Participation also provides access to new investment opportunities, strategic partnerships and emerging markets. It creates an environment where innovation can scale and industrial capabilities can continue to evolve.

By sharing expertise and aligning priorities, organizations can help accelerate downstream development while supporting sustainable industrial growth. This strengthens regional competitiveness and improves long-term market resilience.

Together, these efforts create a connected downstream ecosystem that drives investment, encourages innovation and positions industries to meet the growing demand for advanced technologies and clean energy solutions.

Turning downstream ambition into lasting impact requires connected industries, shared expertise and operating models designed for the future.

PAST SPEAKERS AT FMF

Kent Masters
Chairman and Chief Executive Officer,
Albemarle

Bill Oplinger,
President and Chief Executive Officer,
Alcoa

Johnny Saldanha,
Chief Procurement and
Supply Chain Officer, CEER National
Automotive Company

Rajit Nanda,
Chief Executive Officer,
DataVolt

Pål Kildemo,
Chief Financial Officer,
Emirates Global Aluminium

Wang Xiaoshen,
Vice Chairman & President,
Ganfeng Lithium

Jasper Jung,
Global Policy and Public Affairs,
General Motors

Abdulqader Al Mubarak,
Chief Executive Officer,
Hadeed (Saudi Iron & Steel Company)

Marc Winterhoff,
Former Chief Operating Officer/Interim CEO,
Lucid

Joe Kaeser,
Chairman of the Supervisory Boards,
Siemens Energy and Daimler Truck Holding

Ana Cabral,
Co-President and CEO,
Sigma Lithium

Frank Ha,
Chief Executive Officer
and Executive Director,
Tianqi Lithium

Dr. George Q.,
Fang, Vice Chairman,
Executive Vice President,
Zhejiang Huayou Cobalt Co

Dale Henderson,
Managing Director and CEO,
PLS

Emilie Bodoin,
Chairman & CEO,
Pure Lithium

An Nuyttens,
President,
Solvay

DOWNSTREAM MINERALS

ENABLING INDUSTRIAL VALUE CHAINS FROM RESOURCES TO GLOBAL MARKETS

Downstream minerals are central to the next phase of industrial growth — connecting raw materials to processing, refining, manufacturing, advanced technologies and end-use markets.

As global industries respond to shifting trade routes, supply chain pressure, logistics disruption and growing demand for critical minerals, downstream development is becoming essential to building more resilient, competitive and value-driven minerals ecosystems.

Hosted in Riyadh, the Future Minerals Forum brings together the stakeholders shaping this transition across resource development, investment, logistics, industry and global supply chains

CREATING MORE VALUE AND RESILIENCE ACROSS THE MINERALS JOURNEY

Downstream development allows minerals to move beyond extraction and into higher-value industrial applications. It strengthens supply chains, supports manufacturing ecosystems and creates new opportunities for investment, technology and trade.

In a world shaped by geopolitical uncertainty, shipping delays, route disruption and concentrated supply chains, downstream minerals are no longer only about value addition. They are also about resilience, continuity and access to future markets.

WHY DOWNSTREAM MATTERS

- Moves value beyond extraction
- Links minerals to manufacturing
- Strengthens supply chain resilience
- Reduces exposure to single-route disruption
- Creates industrial and export opportunities
- Builds specialist skills and capabilities
- Attracts investment and technology partners
- Serves fast-growing end-use industries
- Supports energy transition industries

Exploration
↓
Extraction
↓
Processing
↓
Refining Markets
↓
Components
↓
Manufacturing
↓
Export

The region offers practical advantages for downstream growth, supported by major ports, logistics corridors, industrial zones, competitive energy infrastructure and proximity to key markets across Asia, Africa and Europe.

Greater value is created as minerals move closer to industry, logistics networks and end-use applications.

ADVANCING THE DOWNSTREAM MINERALS AGENDA

FMF provides a platform for the global minerals ecosystem to explore how downstream industries can unlock greater value, strengthen supply chains and connect resources to future markets.

At a time when industries are reassessing sourcing strategies, logistics routes, processing capacity and market access, FMF creates space for practical dialogue around resilience, investment and industrial growth.

FMF Enables

- Government-to-industry dialogue
- Policy and regulatory alignment
- Investment and partnership discussions
- Industrial and downstream project development
- Cross-border supply chain collaboration
- Logistics and market access conversations
- Technology and innovation exchange
- Capability building and knowledge exchange

Hosted in Riyadh, FMF sits at the intersection of resource-rich regions, global demand centres, industrial ambition and trade connectivity — creating a natural setting for downstream minerals dialogue.

Downstream minerals represent the next layer of value creation — connecting resources, industry, logistics and global markets while helping address the disruption risks facing global supply chains.

FMF brings the ecosystem together to explore how minerals can move further along the value chain and create lasting industrial impact.

Explore downstream opportunities.

Connect with minerals leaders.

Build partnerships across the value chain.

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