



Mining

The big names are back for this year's Tribeca Future Facing Commodities Conference in Singapore

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Following the overwhelming success of last year's inaugural event, the Tribeca Future Facing Commodities Conference is returning to Singapore from March 26-28 with some of the biggest names across the full spectrum of the global critical minerals supply chain confirmed to be attending.

The Resource Connect Asia event aims to bring together world leaders from the electric vehicle and critical minerals industries with some of the biggest names from global capital markets at one major forum in one major city.

Singapore has rapidly emerged as the major hub for potential Asian investment in resource companies, particularly those focused on exploring and mining key energy transition metals such as lithium, graphite, nickel, copper and rare earths.

Dedicated expert panel sessions featuring discussions concerning ESG, sustainability and decarbonisation, as well as diversity, Asian investment and the lithium and uranium sectors, are also part of the conference agenda.

Asia Pacific-based investment and advisory firm Tribeca is a foundation sponsor of the event, alongside Perth stockbroker Argonaut and Northpoint Equity.

Blue chip regional institutions, family offices and retail investors are among those expected to attend the conference at the Raffles City Convention Centre, Fairmont Hotel, Singapore.



Another strong turnout is expected for this year's Future Facing Commodities conference in Singapore. Pic: Supplied (Resource Connect Asia)

Resource Connect Asia's Stewart McDonald expects the 2024 forum to build on last year's successful inaugural showcase.

"We have a five-year plan to make this the event on the Asian conference calendar," McDonald said.

"We're working to attract governments of the ASEAN region this year. We're hopeful they will send along some senior staff to have a look and put their toe in the water. Obviously, if they like it, then it will become a bigger feature for them in the years to come.

"It's all about making this a fully rounded event in five years time. We want the big companies, the little companies, the governments, the downstreams, the upstreams, this event will cover every aspect of the supply chain."

Mr Lithium headlines star keynote speakers

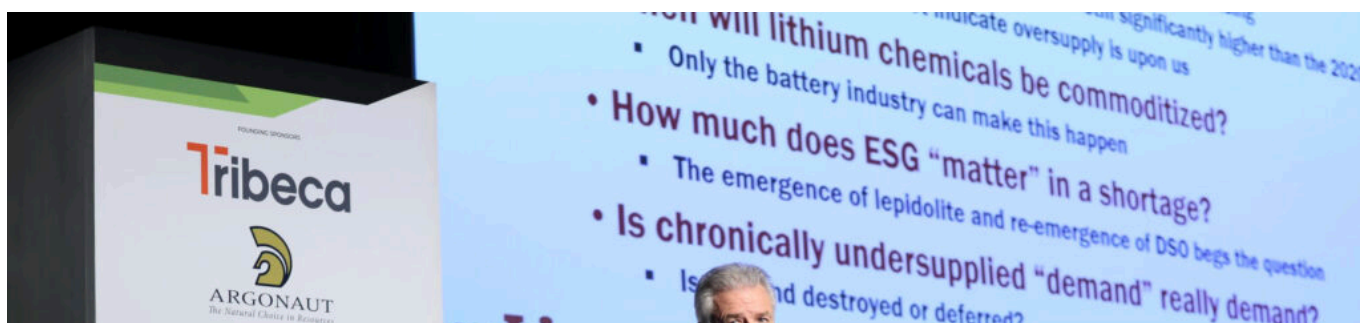
Also returning in 2024 will be international lithium expert Joe Lowry as one of three keynote speakers confirmed to date.

Universally known as "Mr Lithium", Lowry's address on the second day of the conference is highly anticipated given the leading battery mineral has seemingly fallen out of favour with investors over recent months.

Lowry told *Stockhead* he will use the Singapore event to remind investors we are still living in the "lithium decade" despite the current negative sentiment and price narrative.

"The energy transition is clearly happening with 2023 global EV growth of over 30% and a robust energy storage market for renewables," Lowry said.

"Many investors rushed into lithium stocks during the price bubble based on greed and momentum without doing adequate research.





International lithium expert Joe Lowry will again be one of the headline speakers. Pic: Supplied (Resource Connect Asia)

“Despite the fall from ‘bubble highs’, lithium prices are still high by historical standards yielding strong margins to low-cost producers. The steep decline virtually across the board in lithium equities has created a wonderful buying opportunity for patient investors that understand the lithium-ion battery supply chain and the cost curve.

“Lithium ‘oversupply’ in 2023 came more from a drawdown in excess inventories in cathode and battery cells than the increase in chemical production from low quality, high cost lepidolite and DSO supply.”

Newly appointed US deputy director for battery and critical minerals Ashley Zumwalt-Forbes will also deliver a keynote address on the opening day of the conference.

Another keynote speaker expected to pull a strong crowd is Henry Sanderson from Benchmark Mineral Intelligence, who will provide an overview of his recently published book *Volt Rush: The Winners and Losers in the Race to Go Green*.

Connecting mutual interests

Other key sponsors of this year’s forum include the ASX, Acacia, Digbee, PKF, The Ascent Group, Intertek Minerals, RPB Global, The Lind Partners, SRK, METS Engineering, Benchmark Mineral Intelligence and Xcalibur Smart Mapping.

Several prominent ASX-listed resources companies are also confirmed to be presenting, including copper producer **Sandfire Resources (ASX:SFR)** and leading lithium hopefuls

Azure Minerals (ASX:AZS), Delta Lithium (ASX:DLI), Patriot Battery Metals (ASX:PMT) and Vulcan Energy Resources (ASX:VUL).

Given the resurgence of interest in nuclear power as a key part of the energy transition, there will also be a large number of uranium companies present, including NexGen Energy (ASX:NXG) and Peninsula Energy (ASX:PEN).

Tribeca's Scott Clements said the forum was an excellent opportunity for global companies to connect with Singaporean investors who are known for their strong appetite for ESG and the broader energy transition thematic.

"Asia has not historically been a big source of capital for resource companies, but it is becoming a very large source of investment for sustainability, decarbonisation and the energy transition – and that covers very large institutional investors all the way down to family offices, high net worth and retail investors," Clements said.

"We have a real issue in the resources industry in that we lack investment, especially at the earlier-stage company part of the spectrum. It's very different to technology where you can have venture capital that will fund early-stage technology companies. There's no such thing in the resource community and so that's why we need to keep trying to find new sources of capital. The potential returns can be very compelling for investors.

Panel sessions covering sectors and topics such as lithium, uranium, diversity and Asian investment will be features of this year's program. Pic: Supplied (Resource Connect Asia)

“When we were creating this event, we wanted to make it appealing to that constituency of investors so they would come in and look at not just mining companies, but technology stories associated with energy transition and some of the downstream applications, things that are a little more technical in nature.

“Last year’s event was really important because we had a lot of educational content to help Singapore-based investors get up to speed on the key themes and an interesting range of companies. So that’s the plan again this year.”

To showcase the diversity of those aforementioned investment opportunities in the Singapore market, one of this year’s panel sessions will be dedicated to sustainable fuel in the aviation sector.

As a prelude to the three-day forum, the Singapore Mining Club is holding its annual gold and precious metals forum on Monday 25 March, to be immediately followed by the Gala Opening Cocktail Party for the 2024 Future Facing Commodities Conference at the Raffles City Convention Centre.

This article was developed in collaboration with Resource Connect Asia, a Stockhead advertiser at the time of publishing.

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