Livium Advances U.S. Critical Minerals Partnerships Amid Surging Strategic Demand

Highlights

- **Livium progressing discussions with several U.S. parties on critical mineral opportunities including solar, rare-earth elements (REE) and cathode materials**
- **Chinese export controls and U.S.–Australia cooperation on critical minerals are accelerating interest in Livium's recycling and technology capabilities**
- **Livium's U.S. engagement is supported by CSIRO and Austrade, and aligns with favourable U.S. policy and funding momentum**
- **U.S. discussions span across REE and solar recycling partnerships and LFP offtake and technology collaborations**

Livium Ltd (ASX: LIT) ("Livium" or the "Company") is advancing its international growth strategy, focused on expanding clean energy waste recycling into the United States. The Company's strategic emphasis reflects rising global demand for **critical mineral recycling**, driven by policy shifts, trade restrictions, and an urgent push for supply chain independence.

Livium's Australian operations have established partnerships with **Won Kwang S&T**, **Iondrive** and the **University of Melbourne**, underpinned by its proven battery recycling model.

Consistent with its **1 October 2025 strategy update**, Livium continues to evaluate further technology and partnership opportunities to accelerate expansion into adjacent recycling markets.

Policy and Market Tailwinds

China's October 2025 **export-control measures** on rare earth technologies and advanced LFP and LMFP (Gen-4) cathode materials have reinforced the need for secure, non-Chinese supply chains. In response, the United States has placed REEs at the core of its national security and industrial strategy, backed by:

- **US$1 billion Department of Energy proposal**, including **US$135 million for REE supply chain demonstration projects**; and
- **Defence restrictions** banning Chinese-origin REE magnets in weapons systems from 2027.

Meanwhile, the U.S. solar industry continues to expand at record pace, with installed capacity forecast to exceed **500 GW by 2030**.

U.S. Engagement and Progress

Livium has conducted multiple business development and investor visits across the United States and participated in Australian Government–led trade programs. Most recently, Livium attended *The Battery Show North America*, led by CSIRO and supported by Austrade, meeting with leading industry stakeholders.

Initial U.S. engagement by Livium was centred on LFP commercial development, however over the past year Livium has observed a clear shift toward REE and solar waste recycling. Since its repositioning as a recycler of clean energy waste, the Company has advanced several discussions in the U.S. market.

Current discussions, which are complementary to current Australian partnerships and activities, include:

- **REE and Solar Recycling**: Partnerships to develop processing technologies and establish commercial supply arrangements in both the U.S. and Australia.
- **LFP:** Offtake agreements for commercial and military applications, technology collaborations, and raw material supply development.

Livium CEO and Managing Director, Simon Linge commented:

"We are encouraged by the momentum building across the U.S. energy transition. Rare Earth Elements and solar represent two pillars of a decarbonised, electrified economy — both strongly aligned with Livium's strategy.

The U.S. Government's commitment to localising supply chains creates an unprecedented opportunity for Australian clean energy waste operators and technology exporters. Whilst there is no guarantee that discussions will result in commercial benefits for Livium's shareholders, early engagement positions us to participate in this generational shift, supported by robust policy and strong market demand."

Authorised for release by the Livium Managing Director and CEO.

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About Livium

Livium Ltd (previously Lithium Australia) is Australia's market leading battery recycler, Envirostream, a revenue and profit generating business with a focus on the recycling of clean energy waste. Livium is also dedicated to leading the clean energy transition by extracting critical materials from sustainable material recovery.

Livium's growth strategy is to expand its services into recycling rare earth elements and solar panels, and processing black mass to meet its customers' needs.

Beyond recycling, Livium has developed other innovative technologies. Lithium extraction technology, LieNA®, has progressed to a 50:50 joint venture with Mineral Resources Ltd (ASX: MIN). Livium's subsidiary, VSPC, has developed next generation lithium ferro phosphate (LFP) process, the fastest growing battery material.

Forward-looking statements

This announcement contains forward-looking statements. Forward-looking statements are subject to a variety of risks and uncertainties that it is beyond the Company's ability to control or predict and which could cause actual events or results to differ materially from those anticipated in such forward-looking statements. Investors should be aware that past performance should not be relied upon as being indicative of future performance.