



Adamas Intelligence

Rare Earth Mines, Magnets, Motors 2026

Conference Program

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WELCOME: September 28, 2026

7:00pm – 11:00pm: Welcome Reception at the Hockey Hall of Fame

Registration, food stations and drinks

Entrance at corner of Front St. West and Yonge St.

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DAY 1: September 29, 2026

7:30am: Breakfast and Registration

Grand Foyer

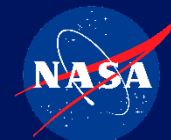
WELCOME ADDRESS

8:45am: Welcome Address

Featuring: **Ryan Castelloux**, Managing Director, Adamas Intelligence

KEYNOTE

9:00am: Fireside with **Reid Wiseman**, NASA Astronaut, Retired Navy Captain
From lunar flyby to the West's mine-to-magnet moonshot



Hear from the astronaut who led humanity farther from Earth than ever before.

Reid is a former F-14 combat pilot and test pilot who spent **165 days aboard the International Space Station** (including multiple spacewalks) and later served as Chief of NASA's Astronaut Office.

In April 2026, Reid commanded Artemis II, climbing atop the most powerful rocket ever built to lead the first crewed mission around the Moon in more than 50 years - taking his crew farther from Earth than any humans have ever traveled.

Absolute legend.

FEATURED FIRESIDE

9:45am: Fireside with [James Litinsky](#)

Founder, Chairman and CEO, MP Materials

Moderated by Ryan Castelloux, Managing Director, Adamas Intelligence



Hear from **James Litinsky**, the trailblazing leader who transformed MP Materials (MP) from a dormant mining operation into a cornerstone of America's rare earth supply chain.

Under his leadership, MP revived the Mountain Pass mine in California – the only integrated rare earth mine and processing facility in the United States – positioning it as the **world's second most productive** rare earth asset.

In this **exclusive fireside chat**, James will share insights on the rapidly evolving rare earth industry, the geopolitical implications of U.S.-China supply chain dynamics, and the critical role of neodymium-iron-boron (NdFeB) magnets in commercial and defense technologies.



MAGNETS FOR ELECTRIC VEHICLES

10:10am: Magnet Outlook for Electrified Powertrains

Featuring: **Dave Fulton**, Director of Electric Machine Innovation, BorgWarner

BREAK

10:40am: Coffee and Networking Break

Grand Foyer

UPDATES FROM THE SUPPLY CHAIN

11:10am: Magnet Makers (Panel)

- **Kai Schmersahl**, Managing Director, Neo Magnequench
- **Peter Afiuny**, Co-Founder & CCO, Noveon Magnetics
- **J.B. Lowe**, VP, Head of Investor Relations, USA Rare Earth
- **Dr. Alexander Barcza**, VP Permanent Magnets, Vacuumschmelze

Moderated by Ryan Castelloux, Managing Director at Adamas Intelligence

11:50am: Metal Makers (Panel)

- **Dr. Muhammad Imran**, Chief Operating Officer, REalloys
- **François Motte**, Chief Financial Officer, Aclara Resources
- **Hooman Reza Nezhad**, Co-Founder & CEO, Solcoa Industries

Moderated by Frik Els, Head of Adamas Inside at Adamas Intelligence

12:20pm: Heavy REO Processors (Panel)

- **Owen Gray**, General Manager, Market Development, Iluka Resources
- **Debra Porter Bennethum**, VP of Critical Minerals & Strategic Supply Chain, Energy Fuels
- **Michael Schrider**, VP & Chief Operating Officer, Ucore Rare Metals
- **Kevin Morris**, Chief Strategy Officer & EVP, Neo Performance Materials
- **David O'Brock**, Commercial Director, REEtec
- **Andrea Bory**, SVP Global Supply Chain & Strategic Procurement Partnerships, Solvay

Moderated by Ryan Castelloux, Managing Director at Adamas Intelligence

LUNCH

1:00pm: Networking Lunch

Grand Foyer

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ADAMAS OUTLOOK

2:00pm: NdFeB Supply and Demand Outside China (Presentation)

Featuring: **Ryan Castelloux**, Managing Director, Adamas Intelligence

BONDED NDFEB MAGNET OUTLOOK

2:30pm: Bonded NdFeB Magnet Market Outlook (Presentation)

Featuring: **Richard Arlot**, Founder & Managing Director, IMAG Consulting

SMCO MARKET OUTLOOK

3:00pm: SmCo Magnet Market Outlook (Presentation)

Featuring: **Robert Bunting Jr**, President & CEO, Bunting Magnetics

BREAK

3:30pm: Coffee and Networking Break
Grand Foyer

1-ON-1 WITH INDUSTRY LEADERS

4:00pm: 1-on-1 with [Rahim Suleman](#)
President & CEO at Neo Performance Materials
Moderated by Frik Els, Head of Adamas Inside

4:20pm: 1-on-1 with [Dr. Erik Eschen](#)
Chief Executive Officer at VAC Group
Moderated by Ryan Castilloux, Managing Director, Adamas Intelligence

4:40pm: 1-on-1 with [Scott Dunn](#)
Co-Founder & CEO at Noveon Magnetics
Moderated by Ryan Castilloux, Managing Director, Adamas Intelligence

5:00pm: 1-on-1 with [John Maslin](#)
Co-Founder & CEO at Vulcan Elements
Moderated by Frik Els, Head of Adamas Inside

DAY 1 CLOSING REMARKS

5:20pm: Closing Remarks
Featuring: **Ryan Castilloux**, Managing Director, Adamas Intelligence

5:30pm: End of Day

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EVENING NETWORKING EVENT

5:30pm – 7:30pm: Private reception in hotel
Grand Foyer

Sponsored by:



DAY 2: September 30, 2026**7:30am: Breakfast**

Grand Foyer

WELCOME ADDRESS**8:45am: Welcome Address**Featuring: **Ryan Castelloux**, Managing Director, Adamas Intelligence**FEATURED FIRESIDE****9:00am: Fireside with Pol Le Roux**

Chief Executive Officer at Lynas Rare Earths

Moderated by Ryan Castelloux, Managing Director at Adamas Intelligence

Lynas
Rare Earths

Hear from **Pol Le Roux**, the new CEO driving Lynas Rare Earths forward as the first company outside China to scale production of separated heavy rare earth oxides.

Under his leadership, Lynas is expanding its high-grade Mt Weld operations and processing capabilities while **broadening downstream partnerships** with emerging magnet makers to connect its rare earth supplies to new sources of demand.

In this **exclusive fireside chat**, Pol will share insights on the rapidly evolving rare earth industry, how Lynas is positioning to capitalize, and the challenges and opportunities associated with its expansion into heavy rare earth processing.

**UPDATES FROM THE SUPPLY CHAIN****9:25am: Energy Fuels: An Unconventional Path to Rare Earth Dominance (Presentation)**Featuring: **Ross Bhappu**, President & CEO, Energy Fuels

9:50am: Update from USA Rare Earth (Presentation)

Featuring: **Gregory Bowman**, Chief Global Policy Officer & Head of External Relations, USA Rare Earth

10:15am: Update from Tronox (Presentation)

Featuring: **Eric Bender**, VP Strategy & Corporate Development, Tronox

10:40am: Update from Arafura Rare Earths (Presentation)

Featuring: **Darryl Cuzzubbo**, Chief Executive Officer & Managing Director, Arafura Rare Earths

BREAK

11:05am: Coffee and Networking Break

Grand Foyer

11:35am: The Missing 70%: The Overlooked Iron Bottleneck in the Magnet Supply Chain (Presentation)

Featuring: **Dr. Laureen Meroueh**, Founder & CEO, Hertha Metals

OPPORTUNITIES BEYOND MAGNETS

12:00pm: Scandium, Yttrium and More (Panel)

- **Mark Smith**, Executive Chairman, President and CEO, NioCorp Developments
- **Simon Thibeault**, President & Chief Executive Officer, Scandium Canada
- **Pavel Ráček**, Head of Materials Sourcing Americas, Oerlikon Metco

Moderated by Ryan Castilloux, Managing Director at Adamas Intelligence

ADAMAS PRESENTATION

12:30pm: What the Rare Earths Cost Curve Can Tell Us About the Future of Prices (Presentation)

Featuring: **Chris Williams**, Rare Earth Mining Analyst, Adamas Intelligence

LUNCH

12:50pm: Networking Lunch

Grand Foyer

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PROJECT DEVELOPERS & RECYCLERS

1:50pm: Americas (Panel)

- **Christine Burow**, Chief Marketing Officer, Torngat Metals
- **Mark Tory**, President & CEO, Defense Metals
- **Nick Holthouse**, Managing Director, Mont Royal Resources
- **Trevor Anderson**, Head of Business Development, Brazilian Rare Earths
- **Stuart Gale**, Managing Director & CEO, Meteoric Resources
- **Alonso Guzmán**, Chief Financial Officer, Aclara Resources

Moderated by Chris Williams, Rare Earth Mining Analyst, Adamas Intelligence

2:25pm: EMEA and Australia (Panel)

- **Kurt Budge**, Chief Executive Officer, Leading Edge Materials
- **George Bennett**, Chief Executive Officer, Rainbow Rare Earths
- **Alex Lemon**, Co-Founder & President, Mkango Resources
- **Travis Beinke**, Managing Director & CEO, Australian Rare Earths
- **Philip Kenny**, Chairman, Frontier Rare Earths

Moderated by James Tekune, Senior Research Associate at Adamas Intelligence

3:00pm: Recyclers (Panel)

- **Ahmad Ghahreman**, Founder & CEO, Cyclic Materials
- **Will Dawes**, Director, HyProMag
- **Claire Blanchelande**, Commercial Director, Ionic Rare Earths
- **Ben Kincaid**, CEO of ReElement Africa, ReElement Technologies

Moderated by Frik Els, Head of Adamas Inside at Adamas Intelligence

BREAK

3:35pm: Coffee and Networking Break

Grand Foyer

NOVEL MAGNETS & PROCESSES

4:00pm: Niron's Iron Nitride Magnets (Presentation)

Featuring: **Tom Grainger**, Chief Financial Officer, Niron Magnetics

4:20pm: AML's PM-Wire Magnets (Presentation)

Featuring: **Dr. Philippe Masson**, Chief Technology Officer, AML

4:40pm: Momentum Technologies' Approach to Rare Earth Separation (Presentation)

Featuring: **Preston Bryant**, Founder, Executive Chair & CCO, Momentum Technologies

5:00pm: Western technologies for rare earths metals (Presentation)

Featuring: **Marco Corbella**, VP of Metals, Tenova

CLOSING REMARKS

5:20pm: Closing Remarks

Featuring: **Ryan Castelloux**, Managing Director, Adamas Intelligence

END OF CONFERENCE

5:30pm: Farewell

Thank you from Adamas Intelligence