The global supply chain for lithium chemicals is dominated by the Australia-China alliance which accounts for 98% of hard rock chemical production.

The expansion of Australian spodumene resources has accounted for the majority of lithium industry expansions over the past decade, overtaking brine as the leading global feedstock in 2018.

While the US historically hosted spodumene conversion facilities to support domestic spodumene refining in North Carolina, China has controlled spodumene conversion for a generation with dozens of producers across the country.

The number of spodumene producers stands at five today, up from one prior to 2017, however the country has no domestic conversion capacity and ships effectively all its material into Chinese refiners.

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