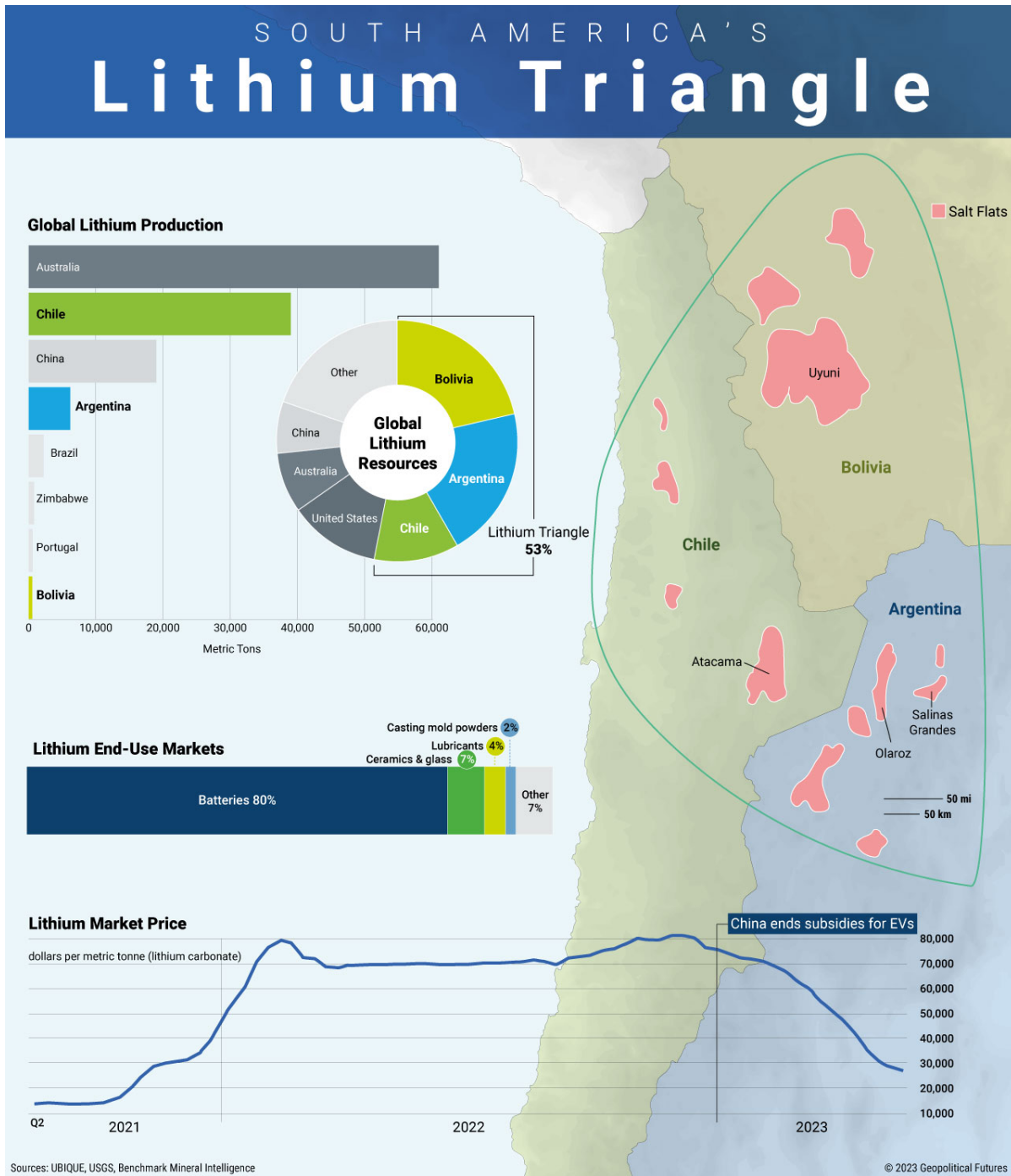


South America's Lithium Triangle

by Geopolitical Futures - May 5, 2023



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South America has some of the largest lithium deposits in the world. Chile, Argentina and Bolivia collectively account for 53 percent of the world's lithium reserves and stand to profit enormously – but

only if they can bring their production up to scale in time to take advantage of the green transition, including the rising sales of electric vehicles. These countries are hoping to become not just lithium suppliers but also major refiners and producers of value-added goods containing the metal. To do this, however, they need to develop their infrastructure and mining capabilities.

For investors, a major concern is the role the governments of these countries will play in managing their lithium industries. Chile has already put lithium production under national control, and legislators in Argentina are calling on the government to take similar action. The Bolivian government, known for its anti-free market policies, also plays a large role in its national lithium industry. This could deter investors from financing projects that are necessary to get production up and running.

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