

Benjamin Sparrow

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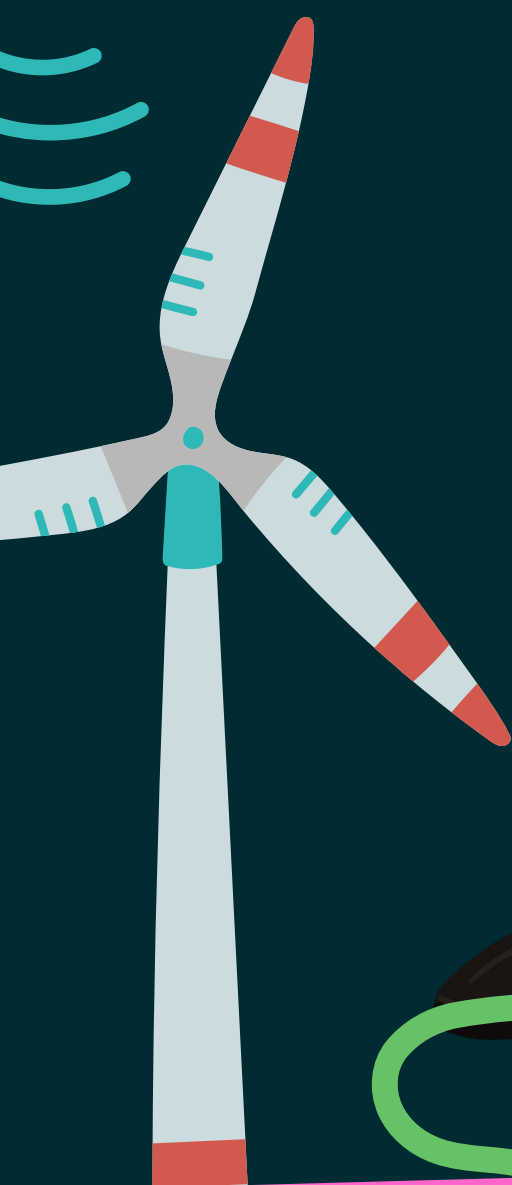
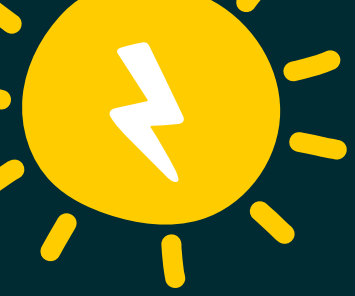
The race is on, and it hides behind the one you'd expect.

With the EV revolution around the corner, the World is desperate for the materials on the critical path of Lithium-Ion batteries production.

It's actually embodied in the name: that calls for a lot more lithium than the World currently outputs.

The Key Metric here is going to be speed. A lot of lithium projects will be developed. Those who will be first to production will achieve cash flow and profitability and will survive. Those who are late, they may miss the boat...



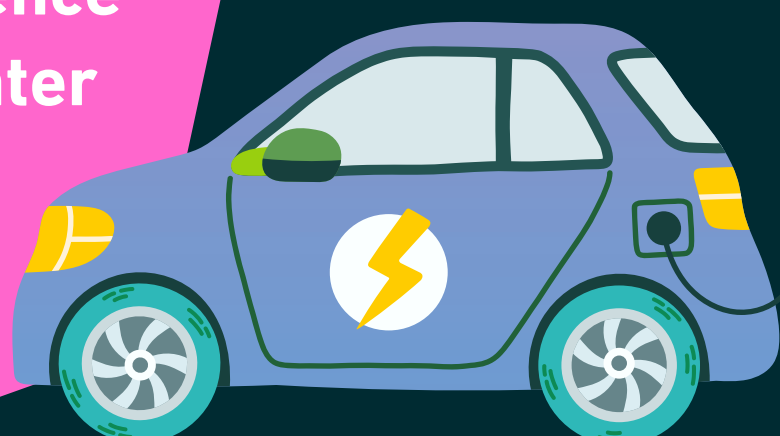


If you've listened to Ben's first appearance on this podcast, that's the race we already discussed by **Season 5, Episode 11**: the one that multiplied the price of lithium by five in under a year.

But there's more.

There's a lot of lithium in the World. There's a lot of capital that wants to be spent on lithium in the World. But there are not a lot of companies that can genuinely build and deliver full-scale plants, both at the Direct Lithium Extraction (DLE) and Concentrate Refine Convert (CRC) stages.

There's more than one bottleneck on the lithium production value chain. But while many wouldn't influence that much the course of the water sector, this one is different.



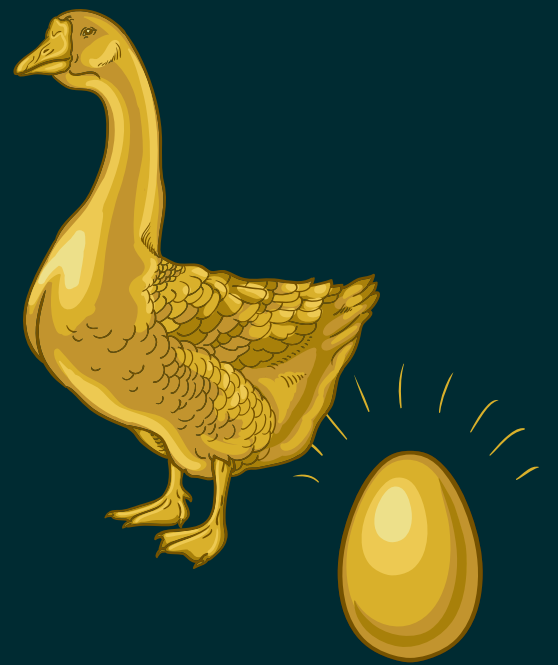
Indeed, these DLE and CRC companies that might reach capacity leverage technologies and processes that usually flow to the industrial water sector.



The industry will soon find that one of its constraints is process equipment supply. They're going to find longer lead times, which also has implications for the water industry! With the lithium industry heating up, that's going to draw capacity from the water treatment industry. Lead times are increasing across the board: some of our competitors are quoting up to three years...

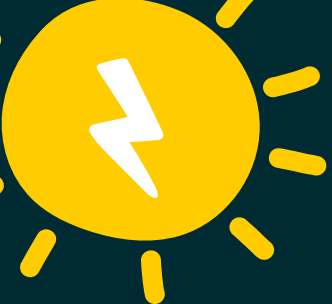
Remember the saying:

**in a gold rush,
the real golden
egg hen is the
tool seller.**



So, not investment or project management advice, but if I were to develop any shade of industrial desalination project, I wouldn't wait too long to place my order!





**Wanna understand the ins and
outs of the lithium rush and
its implication on the water
sector, the industry, and -
let's be bold - the World?**



**Check out my deep dive
on dww.show!**

