

# Graphite One and Lucid Enter into Second Non-Binding Supply Agreement

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Agreement involves Natural Graphite Material; complements existing 2024 agreement covering Synthetic Anode Active Materials

Follows [Graphite One](#)'s listing on U.S. Federal Fast-41 Permitting Dashboard and completion of its NI 43-101 compliant Feasibility Study funded by a \$37.3 million Department of Defense award under the Defense Production Act

Graphite One CEO, Anthony Huston: "This Agreement makes Graphite One the only company to date to provide both natural and synthetic graphite materials required for battery anodes to a U.S. EV company."

VANCOUVER, June 4, 2025 - [Graphite One Inc.](#) (TSXV: GPH) (OTCQX: GPHOF) ("Graphite One", or the "Company"), is pleased to announce that as part of its plan to build a complete U.S. supply chain for advanced graphite materials, the Company has entered into a second non-binding supply agreement (the "Supply Agreement") for anode active materials ("AAM") with Lucid Group, Inc. (NASDAQ: LCID) ("Lucid"), maker of the world's most advanced electric vehicles.

Whereas the previous agreement announced in July 2024 involved synthetic graphite AAM, the agreement announced today covers natural graphite AAM which will be supplied to Lucid and its battery cell suppliers for use in future vehicles.

"This agreement complements the deal we struck with Lucid in 2024 - which marked the first synthetic graphite agreement between a U.S. graphite developer and a U.S. EV company. We made history then - and we're continuing to make history now, as the deal makes Graphite One the only company to date to provide both natural and synthetic graphite materials required for battery anodes to a U.S. EV company," said Graphite One CEO Anthony Huston. "From Presidential Executive Orders to increase mineral resource production and leveraging Alaska's resource potential, to the recent inclusion of our Company on the Federal Fast-41 Permitting Dashboard -- we are building momentum for our efforts to develop a fully domestic graphite supply chain, to meet market demands and strengthen U.S. industry and national defense."

"A supply chain of critical materials within the United States drives our nation's economy, increases our independence against outside factors or market dynamics, and supports our efforts to reduce the carbon footprint of our vehicles," said Marc Winterhoff, Interim CEO at Lucid. "This partnership is another example of our commitment to powering American innovation and manufacturing with localized supply chains."

The Supply Agreement follows publication of Graphite One's feasibility study prepared in accordance with National Instrument 43-101 this spring, which with the support of Defense Production Act Title III funding, was completed 15 months ahead of schedule and showed a tripling of the Company's proven and probable reserves.

Graphite One's domestic graphite supply chain is planned to produce graphite concentrate from the Graphite Creek deposit North of Nome, Alaska and AAM at a facility to be constructed in Warren, Ohio, subject to financing.

#### Terms of the Supply Agreement

The Supply Agreement is non-binding and commences once the Company begins production of natural graphite. The initial term is for 5 years, subject to earlier termination. Sales are based on a price formula agreeable to both parties. The Supply Agreement is subject to other terms, conditions and termination rights standard for an agreement of this nature.

#### About Lucid

Lucid (NASDAQ: LCID) is a Silicon Valley-based technology company focused on creating the most advanced EVs in the world. The award-winning Lucid Air and new Lucid Gravity deliver best-in-class performance, sophisticated design, expansive interior space and unrivaled energy efficiency. Lucid

assembles both vehicles in its state-of-the-art, vertically integrated factory in Arizona. Through its industry-leading technology and innovations, Lucid is advancing the state-of-the-art of EV technology for the benefit of all.

### Graphite One's Domestic Supply Chain Strategy

With the United States currently 100 percent import dependent for synthetic and natural graphite, Graphite One is developing a complete U.S.-based, advanced graphite supply chain solution anchored by the Graphite Creek deposit, recognized by the US Geological Survey as the largest graphite deposit in the U.S. "and among the largest in the world." The Graphite One Project plan includes building an advanced graphite material and battery anode material manufacturing plant located in Warren, Ohio. The plan also includes a recycling facility to reclaim graphite and the other battery materials, to be co-located at the Ohio site, the third link in Graphite One's circular economy strategy.

### About Graphite One Inc.

GRAPHITE ONE INC. (TSXV: GPH) (OTCQX: GPHOF) continues to develop its Graphite One Project (the "Project"), with the goal of becoming an American producer of high grade anode materials that is integrated with a domestic graphite resource. The Project is proposed as a vertically integrated enterprise to mine, process and manufacture high grade anode materials primarily for the lithium&dash;ion electric vehicle battery market.

### On Behalf of the Board of Directors

"Anthony Huston" (signed)

For more information on Graphite One Inc., please visit the Company's website, [www.GraphiteOneInc.com](http://www.GraphiteOneInc.com)

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### Cautionary Note Regarding Forward-Looking Statements

All statements in this release, other than statements of historical facts, including those related to entering into future binding arrangements between Lucid and Graphite One, the anticipated benefits of the relationship between Lucid and Graphite One., future production, establishment of a processing plant and a graphite manufacturing plant, completion of project financing, establishment of a battery materials recycling facility, and events or developments that the Company intends, expects, plans, or proposes are forward-looking statements. Generally, forward&dash;looking information can be identified by the use of forward&dash;looking terminology such as "proposes", "expects", "is expected", "scheduled", "estimates", "projects", "plans", "is planning", "intends", "assumes", "believes", "indicates", "to be" or variations of such words and phrases that state that certain actions, events or results "may", "could", "would", "might" or "will be taken", "occur" or "be achieved". The Company cautions that there is no certainty that the Company will enter into a definitive agreement with Lucid and even if the Company does enter into such arrangement, that the anticipated outcomes will result. Although the Company believes the expectations expressed in such forward-looking statements are based on reasonable assumptions, such statements are not guarantees of future performance and actual results or developments may differ materially from those in the forward-looking statements. Factors that could cause actual results to differ materially from those in forward-looking statements include market prices, exploitation and exploration successes, continuity of mineralization, uncertainties related to the ability to obtain necessary permits, licenses and title and delays due to third party opposition, changes in government policies regarding mining and natural resource exploration and exploitation, and continued availability of capital and financing, and general economic, market or business conditions. Readers are cautioned not to place undue reliance on this forward-looking information, which is given as of the date it is expressed in this press release, and the Company undertakes no obligation to update publicly or revise any forward-looking information, except as required by applicable

securities laws. For more information on the Company, investors should review the Company's continuous disclosure filings that are available at [www.sedarplus.ca](http://www.sedarplus.ca).

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