

# Industrial Silver Demand Is Rewriting the Supply Equation, Explorers Are Racing to Fill the Gap

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Equity-Insider.com News Commentary

Industrial silver fabrication accounts for nearly 60% of total global demand, with industrial use reaching 680 million ounces in 2024 as solar photovoltaic installations, electric vehicle production, and AI server manufacturing continue to absorb physical supply<sup>[1]</sup>. Global EV production is forecast to reach 14 to 15 million units in 2026, adding an estimated 70 to 75 million ounces of silver demand from automotive applications alone<sup>[1]</sup>. These consumption trends are attracting attention to Americore Resources (TSXV: AMCO) (OTCQB: AMCOF), [Endeavour Silver](#) (NYSE: EXK), [Aya Gold & Silver](#) (TSX: AYA), Silvercorp Metals (NYSE-A: SVM), and [Silver47 Exploration](#) (TSXV: AGA).

Silver demand from the EV and autonomous driving sector is forecast to grow at a compound annual rate of 3.4% through 2031, with battery-electric vehicles consuming 67-79% more silver than their internal combustion counterparts<sup>[2]</sup>. AI training servers require approximately 3.5x more silver-coated components than traditional cloud hardware, adding a new structural demand floor that did not exist five years ago<sup>l</sup>.

Americore Resources (TSXV: AMCO) (OTCQB: AMCOF) recently uncovered five historic core holes drilled by US Borax in 1985 at its Trinity Silver Project in Nevada that were never included in any previously reported resource estimates, signaling potentially significant silver amounts sitting in the data that nobody counted.

The drill results speak for themselves: Hole SC-4 alone returned 209.5 feet grading 145.98 g/t silver, including 153 feet at 185.94 g/t.

Hole SC-5 hit 246.5 feet at 97.52 g/t silver, with a higher-grade core of 70 feet at 128.26 g/t. Hole SC-1 cut 321.5 feet at 65.86 g/t, including 65 feet at 220.69 g/t.

These are wide intercepts with serious grade, drilled directly in and around the historic open pit. The fact that they were overlooked in prior resource models means the existing 36-million-ounce silver equivalent resource estimate may only tell part of the story.

"The evaluation of the drone survey over the next few weeks will allow us a better understanding of not only the historic resource but also the alteration halo extending from the pit," said Jeff Poloni, CEO of Americore.

On top of this, the company has also received all data from its recently completed drone magnetometer survey, which covered approximately 350 line-kilometers across a 6-kilometer strike zone running through the Trinity pit. That survey is now under comprehensive review and interpretation, with the goal of identifying every structural target in the corridor.

Now Americore is continuing its review of approximately 300Gb of legacy project data acquired from the property vendor, and these five overlooked core holes are the first major discovery from that process.

The company has also announced that it's evaluating options to monetize historic surface stockpiles containing approximately 400,000 ounces of silver in oxide material and 365,000 ounces in sulphide material,

which represents potential near-term revenue while exploration advances.

The Trinity Project sits in Pershing County, Nevada, where previous operator US Borax mined over one million tons and produced approximately five million ounces of silver through heap-leach operations between 1987 and 1988.

To date, Americore has expanded its land position to approximately 22,700 acres through direct staking and a strategic option agreement with Primus Resources, controlling all ground covered by a 2012 estimate that tripled the resource base to 36 million ounces of silver equivalent. Near-term plans include twinning historic drillholes to verify data and provide fresh material for metallurgical testing, followed by step-out drilling toward a new mineral resource estimate targeted for Q2 2026.

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In other industry developments:

Endeavour Silver (NYSE: EXK) (TSX: EDR) provided 2026 guidance projecting 8.3 to 8.9 million ounces of silver and 46,000 to 48,000 ounces of gold as its Terronera mine ramps into a first full year of commercial production. The company also fully integrated its Kolpa operation into its operating portfolio, adding a second producing asset to the lineup.

"2026 marks a pivotal turning point for Endeavour as Terronera ramps up into its first full year of production and Kolpa now fully integrated into our operating portfolio," said Dan Dickson, CEO of Endeavour Silver.

Terronera's plant throughput is guided at 1,950 to 2,050 tonnes per day, representing a significant step-up in the company's production profile. The dual-mine operating structure positions Endeavour to capture higher silver prices across two distinct jurisdictions.

Aya Gold & Silver (TSX: AYA) (OTCQX: AYASF) reported high-grade results from its Zgounder mine in Morocco, including 781 g/t silver over 9.0 meters in hole ZG-RC-25-853 and 3,581 g/t silver over 4.5 meters in hole ZG-SF-25-347. The company's 2026 outlook calls for 6.2 to 6.8 million ounces of silver equivalent production with processing rates of 3,650 tonnes per day.

"Today's high-grade results once again confirm the strong continuity of silver mineralization both at depth and around the open-pit area," said Benoit La Salle, President and CEO of Aya Gold & Silver. "Moreover, the new intersection at depth near the Western Fault contact in hole ZG-SF-25-340 extends mineralization further west, continuing to push the boundary of our current resource model."

One of the standout intercepts returned 6,223 g/t silver over 3.6 meters, demonstrating the exceptional grade potential that continues to emerge as drilling extends beyond the known resource. The Zgounder expansion positions Aya as one of the highest-grade primary silver producers globally.

Silvercorp Metals (NYSE-A: SVM) (TSX: SVM) reported record quarterly revenue of \$126.1 million in the third quarter of fiscal 2026, a 51% increase year-over-year, with silver production of approximately 1.9 million ounces. The company realized an average silver selling price of \$49.00 per ounce while maintaining a negative cash cost of \$3.02 per ounce after by-product credits.

The company generated record cash flow from operations of \$132.9 million and record free cash flow of \$89.6 million during the quarter, reflecting the leverage that higher silver prices deliver to low-cost producers.

Silvercorp reported a cash position of \$462.8 million plus \$233.2 million in equity investments, providing substantial financial flexibility. All-in sustaining costs of \$12.86 per ounce of silver position the company

among the lowest-cost primary silver producers in the industry.

Silver47 Exploration (TSXV: AGA) (OTCQX: AAGAF) began metallurgical testwork to confirm the reprocessing potential of historic mine tailings at its Hughes property in Nevada. The tailings contain an inferred resource of 1.8 million ounces of silver and 11,000 ounces of gold, with diagnostic leaching showing 79 to 87% of silver is readily cyanide-soluble.

"The emerging new silver price environment has fundamentally changed the economics of historic tailings like those at Belmont," said Galen McNamara, CEO of Silver47 Exploration. "This fully owned, private-land asset presents a compelling opportunity to utilize modern techniques with minimal new surface disturbance."

The company holds a combined resource of 236 million ounces of silver equivalent across its properties in Alaska, Nevada, and New Mexico, and was recently recognized as a TSX Venture 50 Top 50 company for 2026.

CONTACT:  
Equity Insider  
info@equity-insider.com  
(604) 265-2873

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1. <https://www.equity.com/sec/news/global-macro-analysis/strong-industrial-demand-supports-silver-in-2026/>

2. <https://silverinstitute.org/silver-demand-forecast-to-expand-across-key-technology-sectors/> Wertpapieren

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