

Six Years of Silver Deficits Meet a Sovereign Mineral Scramble

15:04 Uhr | [CNW](#)

Issued on behalf of [GoldHaven Resources Corp.](#)

EquityInsider.com Sector Commentary

Silver has now been in a structural supply deficit for six straight years, with 762 million ounces pulled from global stockpiles since 2021 according to the Silver Institute's latest World Silver Survey^[1]. That's roughly an entire year of global mine production, gone. At the same time, governments are treating metals like tungsten, zinc, and indium as national security priorities: Canada has signed more than 20 critical mineral agreements this year alone while the U.S. committed \$12 billion to Project Vault, its first strategic minerals reserve^[2]. The convergence is directing capital toward high-grade polymetallic deposits that carry silver alongside those very metals, and five companies are positioned at the center of it: GoldHaven Resources (CSE: GOH) (OTCQB: GHVNF), Southern Silver Exploration (TSXV: SSV) (OTCQX: SSVFF), Americas Gold and Silver (NYSE-A: USAS) (TSX: USA), American Tungsten (CSE: TUNG) (OTCQB: TUNGF), and [Blackrock Silver Corp.](#) (TSXV: BRC) (OTCQX: BKRRF).

Bank of America's metals team now sees silver reaching \$135 to \$309 per ounce if physical shortages deepen, a range that reflects just how tight inventories have become across the precious metals complex^[3]. The repricing isn't limited to silver. Tungsten prices have surged roughly 900% over the past twelve months as China restricts exports of the defense-critical metal, turning polymetallic deposits with built-in critical mineral optionality into the highest-conviction exploration targets of the cycle^[4].

GoldHaven Resources (CSE: GOH) (OTCQB: GHVNF) just announced the upsizing of its previously announced non-brokered financing to gross proceeds of up to \$1.2 million-due to strong investor demand. The additional capital is set to further strengthen GoldHaven's fully funded 2026 exploration program at its flagship Magno Project in the Cassiar District of British Columbia, and it's expected to support an expanded drill campaign targeting a large-scale, multi-phase mineral system with significant and critical metals exposure, including tungsten and indium.

"The level of investor interest reflects growing recognition of the opportunity at Magno," said Rob Birmingham, CEO of GoldHaven. "With drilling set to expand beyond our initial program, we are entering a catalyst-rich phase where we can begin to test the scale of this system across multiple high-priority targets. We believe Magno has the characteristics of a large, multi-phase mineral system, and this program is a key step in advancing that potential."

Magno is a district-scale polymetallic property spanning more than 37,200 hectares, carrying silver, tungsten, lead, zinc, and indium mineralization. Tungsten is classified as a critical mineral by both the Canadian and U.S. governments, and Canada currently has no primary domestic tungsten production. GoldHaven Resources has already submitted its drill permit application at Magno and filed a technical report covering the polymetallic system, positioning the project for its first drill program as the funding comes together.

"We are entering an exciting and highly strategic phase at Magno, where multiple high-grade zones and distinct mineralization styles have now been defined across a large, consolidated land package," said Birmingham. "The combination of high-grade silver-lead-zinc mineralization and growing exposure to critical minerals such as tungsten and indium continues to reinforce our view that Magno hosts the hallmarks continues to reinforce our view that Magno is emerging as a compelling district-scale silver and critical minerals exploration opportunity in the Cassiar District."

The company is also active in Brazil, where an independent geological review of its 100%-owned Copeçal Gold Project confirmed a large-scale, structurally controlled hydrothermal gold system. The review identified higher-grade gold enrichment at the West Target tied to fold hinge structures, and copper-gold vectors at the East Target supported by zoned sulphide assemblages indicating increasing temperature at depth. A Phase II drill program at Copeçal is planned for 2026, designed to test the high-priority structural and geophysical targets identified through that review.

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In other industry developments:

Southern Silver Exploration (TSXV: SSV) (OTCQX: SSVFF) reported final assays from its Puro Corazon drill program at the Cerro Las Minitas Project in Durango, Mexico, with hole 26CLM-221 returning 4.6 metres averaging 201 g/t silver, 4.5% lead, and 9.8% zinc (557 g/t AgEq). All 23 planned holes in the program have been completed, extending skarn and replacement mineralization 400 metres laterally and to 500 metres depth.

"The 2025-26 drill program successfully outlined and upgraded mineralization on the Puro Corazon claim, extending mineralization within the skarn-altered halo around the main intrusion for upwards of 400 metres laterally and to depths of up to 500 metres below surface, where it transitions into previously identified mineralization in the larger CLM claim block," said Rob Macdonald, Vice President of Exploration of Southern Silver Exploration. "More significantly, drilling also intersected multiple bonanza-grade, replacement-styled intercepts on the outer edge of the skarn-altered halo, potentially forming a shallow high-grade lens outboard of the main skarn zone and starting within 200 metres of surface."

Southern Silver Exploration plans to incorporate Puro Corazon results into an updated mineral resource estimate and preliminary economic assessment for the full Cerro Las Minitas project.

Americas Gold and Silver (NYSE-A: USAS) (TSX: USA) reported a strong resource update, with consolidated silver M&I Mineral Resources rising 10% to 115.7 million ounces while the flagship Galena Complex in Idaho posted a 19% increase in M&I resources to 87.9 million ounces at 501 g/t silver, a 21% grade improvement year over year. The company also announced two major new vein discoveries at Galena and a near-surface high-grade find at its Cosalá operations in Mexico.

"In our new M&I Resource at Galena, we have seen very strong ounce growth of 19% year over year with a tremendous 21% improvement in grades to 501g/t silver," said Paul Andre Huet, Chairman and CEO of Americas Gold and Silver. "This increase across the board demonstrates what Galena has already done for over 100 years of mining history: replace depletion, add ounces and continue to establish itself as one of the highest grade primary silver systems in the world."

Looking ahead, the company has launched its largest-ever exploration drilling campaign, targeting 64,000 meters across its properties with a budget of up to \$20 million in 2026, underpinned by multiple new high-grade targets at both Galena and Cosalá.

American Tungsten (CSE: TUNG) (OTCQB: TUNGF) announced initial drilling results from the second drill station on the D-Level of the IMA Mine in Lemhi County, Idaho, with significant tungsten-silver intercepts in all three holes demonstrating continuity of the polymetallic vein system along strike and up-dip from historical workings. Highlights include 28.3 feet at 0.39% WO₃ (including 5.5 feet at 0.82% WO₃) in hole AT25-08, 26.2 feet at 0.33% WO₃ in AT25-09, and 10 feet at 0.80% WO₃ in AT25-10.

"The results from the second drill station on the D-Level further reinforce the continuity and scale of the tungsten-silver vein system at the IMA Mine," said Ali Haji, CEO of American Tungsten. "The consistent mineralization widths encountered across all drillholes support our understanding of the vein geometry and its extension up-dip and along strike from historical workings. These results provide continued confidence as we systematically advance drilling to define a modern, mineable resource."

Current drilling at the IMA Mine is conducted from a new exploration drift in the footwall of the vein system, targeting historical mineral reserves and extending mineralization limits up-dip and along strike. American Tungsten is advancing the Idaho project toward definition of a modern resource, with additional completed drillhole assays pending.

Blackrock Silver Corp. (TSXV: BRC) (OTCQX: BKRRF) released an updated Preliminary Economic Assessment for its 100%-owned Tonopah West silver-gold project in Nevada, delivering an After-Tax IRR of 28% and NPV5% of US\$437 million on initial capex of US\$190 million across an 11.2-year mine life.

Indicated resources increased 90% to 40.2 million AgEq ounces at 454 g/t AgEq, with average annual production of 7.1 million AgEq ounces at AISC of US\$17.44 per ounce.

"When we published our inaugural preliminary economic assessment 18 months ago, every ounce in the mine plan was inferred. Today we are presenting a high-confidence project underpinned by a substantial indicated resource base of 40.2 million silver equivalent ounces, nearly double what we reported in our previous resource estimate," said Andrew Pollard, President and CEO of Blackrock Silver.

Anchored at US\$31 per ounce silver and US\$2,700 per ounce gold, Blackrock Silver projects after-tax life-of-mine cash flow of US\$778 million with a payback period of 3.5 years. An inferred resource of 83 million AgEq ounces and an open vein system support continued resource expansion.

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SOURCES:

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