

American Rare Earths' Quarterly Activities Report for the Period Ending September 30, 2025

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Key Highlights

- Major macroeconomic and geopolitical shifts during the quarter are reshaping the Western mine-to-magnet industry
- The Halleck Creek Rare Earths Project represents a long-term, strategic solution to securing America's rare earths supply

Why it Matters

The Halleck Creek Rare Earths Project: A Wyoming Solution to Diversify and De-Risk the United States' Upstream Rare Earths Supply Chain

DENVER, Oct. 17, 2025 -- The Trump Administration has made significant and meaningful investments in reshoring the United States' rare earths industry. However, the rapidly developing U.S. mine-to-magnet industry still has a single point of failure as there is only one domestic rare earths mine currently in production in the United States. Without additional domestic rare earths mines to diversify supply, the growing domestic magnetism industry (incentivized by the US government) remains exposed to supply chain vulnerabilities given the current concentration of global upstream rare earths mining and refining capacity in China.

[American Rare Earths](#) ("ARR") (ASX: ARR | OTCQX: ARRNF | ADR: AMRRY) ("ARR" or the "Company") offers a Wyoming-based solution, the Halleck Creek Rare Earths Project, a mine to magnet project that can diversify, de-risk, and ultimately supply the United States, and its allies, rare earths magnetism industries with the necessary light and heavy rare earths feedstock for the next 100+ years. American Rare Earths applauds the Department of Defense collaboration with MP Materials to construct the 10,000 tonnes per annum Independence Magnetism Facility. However, if the Mountain Pass mine remains the sole domestic supply of mined feedstock, the domestic rare earths market remains at risk. Based on the most recent technical study undertaken by ARR¹, Halleck Creek's initial base case production could fulfil upwards of 57% of the light rare earths (i.e. Neodymium-Praseodymium or "NdPr") and 30% of the critical heavy rare earths (i.e. Dysprosium, "Dy", and Terbium, "Tb") feedstock necessary to supply the Independence Magnetism facility for generations. Halleck Creek is America's long-term rare earths supply solution.

ARR reports continued advancement at its flagship Halleck Creek Rare Earths Project in Wyoming for the quarter ending September 30, 2025. This report summarizes progress in test mining, process optimization, permitting and corporate initiatives during the period, with workstreams supporting design of a beneficiation demonstration plant and the permit-to-mine submission.

During the quarter the Company achieved many technical milestones which materially de-risk Halleck Creek's development and move the Project closer to becoming the United States next producing rare earths mine. American Rare Earths strongly believes Halleck Creek is the solution to diversify and de-risk the United States' upstream rare earths supply chain for generations to come.

Project Development and Permitting Milestones

Allanite Rare Earths Hydrometallurgical Processing Breakthrough: Successful Completion of the Impurity

Removal Neutralization Test (October 13, 2025)

- Impurity removal is one of the last steps in the hydrometallurgical processing of rare earths elements ("REE") and is performed to remove non-REE minerals from the leach liquor prior to solvent extraction and separation (i.e. the final steps before producing rare earths oxide). Historically, this has been a challenging step for processing allanite-based REEs, like Halleck Creek's ore, as the mineral typically produces unwanted byproducts such as gypsum and silica gel, resulting in additional and difficult processing steps to remove them.
- In a recent and extensive impurity removal test program on Halleck Creek ore minimal gypsum and silica gel were formed during the process, which points to immense operating benefits, including but not limited to the reduction of rare earths yield loss and fewer processing steps resulting in potentially lower capital and operating expenses.
- These results de-risk what has historically been a material technical and economic hurdle in the processing of allanite-based rare earths elements (i.e. Halleck Creek's ore) and represent a major milestone in unlocking Halleck Creek's vast REE supply potential.

Strong Recoveries and Low Impurities Shown in Extensive Leach Testing of Halleck Creek Ore (July 9, 2025)

- High Light Rare Earths Leach Recoveries
 - Praseodymium ("Pr") leach recoveries of 85% at optimal conditions
 - Neodymium ("Nd") leach recoveries of 84% at optimal conditions
- Encouraging Heavy Rare Earths Leach Recoveries
 - Terbium ("Tb") leach recoveries of 52% at optimal conditions
 - Dysprosium ("Dy") leach recoveries of 46% at optimal conditions
- Significantly lower impurity elements of iron and aluminum
 - Concentrations of iron and aluminum impurities post leach are approximately 5.0x and 2.9x, respectively, lower than the tests previously performed for the Scoping Study
- Atmospheric Tank Leach chosen as the preferred leach method
 - Atmospheric tank leaching is typically more energy and reagent efficient and less costly than other rare earth leaching methods, such as an acid-bake (i.e. cracking)

Test Mining Completed at The Cowboy State Mine (CSM), Optimization Tests Underway (September 23, 2025 and July 18, 2025)

- Excavation and primary crushing of approximately 3,080 tonnes of ore was successfully and safely completed under the Company's Wyoming exploration license. The extracted material will be used for both mineral processing optimization testing and as a stockpile for a future demonstration plant.
- Optimization testing underway with bulk samples dispatched to comminution experts in the U.S., Canada and Germany. Optimization tests will target low-effort, but high yield opportunities to increase overall rare earth magnet element recoveries and strengthen overall project economics.

Permitting Progress at Halleck Creek (August 26, 2025)

- Groundwater pump test completed at the CSM area to provide baseline data for the Wyoming Department of Environmental Quality permit-to-mine application.
- Environmental monitoring and hydrological modelling continuing as part of PFS and permitting requirements.

Corporate and Funding Milestones (July 24, 2025 & October 2, 2025)

- Robust cash position with funding secured for planned activities over the next 18-24 months
- A\$15m placement completed in July 2025 at A\$0.32 per share with strong institutional participation. Proceeds to fund a beneficiation demonstration-plant construction, in-fill drilling, and engineering programs.
- A\$1.465m raised via the exercise of options in July and August 2025
- Post quarter end, ARR announces receipt of the final payment of A\$1m, together with accrued interest, from [Cobalt Blue Holdings Ltd.](#) under the terms of the Promissory Note.

- At September 30, 2025, the Company has available approximately A\$8.8m (US\$5.6m) remaining under the State of Wyoming matching grant.

Outlook

In the December 2025 quarter, American Rare Earths will focus on integrating results from ongoing optimization testwork into the Halleck Creek Pre-Feasibility Study ("PFS") and beneficiation demonstration-plant design. Engineering and equipment planning will progress in parallel, with the goal of finalizing a robust mineral processing flowsheet for the PFS, followed by the publication of the technical report in 2026. Environmental and permitting activities will continue, including completion of the groundwater model and submission preparations for the Wyoming Department of Environmental Quality permit-to-mine application.

At the corporate level, the Company will continue to advance CEO recruitment and strengthen engagement with U.S. Federal and State agencies involved in critical-minerals strategy and funding programs. ARR remains focused on continuing to develop and de-risk the Halleck Creek project, with the goal of becoming the United States' next producing rare earths mine to support the rapidly growing magnetics industry.

Strong Cash Position

At September 30, 2025, the Company had a cash position of A\$21.2m and financial assets associated with ASX listed Cobalt Blue Holdings and Godolphin Resources of A\$1.8m.

The Company had net cash expenditure of A\$1.4m for operating costs and A\$2.3m for project development (net of reimbursement from the Wyoming Energy Authority grant) activities during the quarter.

Post quarter end, the Company announced the receipt of the final payment of A\$1m plus accrued interest from COB under the terms of the Promissory Note. Since the end of the quarter to the date of this release, the Company has raised a further A\$3.495m via the exercise of 9m options.

Payments to related parties are included in item 6 of the Appendix 5B. Item 6.1 relates to payment of managing director salary, non-executive directors' fees, superannuation and consulting fees for the quarter. Also included in the Sept 25 quarter are payments made in respect to the resignation of former Managing Director and CEO, Mr. Chris Gibbs, effective July 31, 2025.

This announcement has been authorized for release by the Board of [American Rare Earths Ltd.](#)

Investors can follow the Company's progress at www.americanree.com.

About American Rare Earths Limited:

American Rare Earths (ASX: ARR | OTCQX: ARRNF | ADR: AMRRY) is a critical minerals company at the forefront of reshaping the U.S. rare earths industry. Through its wholly owned subsidiary, Wyoming Rare (USA) Inc. ("WRI"), the company is advancing the Halleck Creek Project in Wyoming—a world-class rare earth deposit with the potential to secure America's critical mineral independence for generations. Located on Wyoming State land, the Cowboy State Mine within Halleck Creek offers cost-efficient open-pit mining methods and benefits from streamlined permitting processes in this mining-friendly state.

With plans for onsite mineral processing and separation facilities, Halleck Creek is strategically positioned to reduce U.S. reliance on imports—predominantly from China—while meeting the growing demand for rare earth elements essential to defense, advanced technologies, and economic security. As exploration progresses, the project's untapped potential on both State and Federal lands further reinforces its significance as a cornerstone of U.S. supply chain security. In addition to its resource potential, American Rare Earths is committed to environmentally responsible mining practices and continues to collaborate with U.S.

Government-supported R&D programs to develop innovative extraction and processing technologies for rare earth elements.

For further information contact:

Susan Assadi	Beverly Jedynak
Media Relations US	Investor Relations US
sassadi@americanree.com	Beverly.jedynak@viriathus.com
347 977 7125	312 943 1123

¹ ASX release dated 24 February 2025

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