

The West Wants to Break China's Critical Minerals Stranglehold. This \$68 Billion Greenland Deposit Just Locked In Three World-Class Consultants in Five Weeks.

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Issued on behalf of Greenland Mines Ltd

Critical minerals supply chains have moved from analyst footnote to White House priority. Greenland Mines (NASDAQ: GRML) is positioning its Skaergaard Project - one of the world's largest undeveloped palladium-gold-platinum deposits - as a Western answer to a structural undersupply story that the major banks are now openly pricing into 2026.

USA News Group News Commentary - In February 2026, the U.S. State Department hosted the 2026 Critical Minerals Summit, bringing together representatives of 54 countries and the European Commission to coordinate Western policy responses to critical minerals supply chain vulnerability. Earlier the same month, the Export-Import Bank approved a \$10 billion Direct Loan Guarantee, the most consequential single financing in EXIM's history, designed to establish a domestic strategic reserve for critical minerals. EXIM has issued \$14.8 billion in Letters of Interest for critical minerals projects under the current administration. Government equity stakes have been taken in MP Materials, USA Rare Earth, Lithium Americas, Trilogy Metals, Vulcan Materials, and ReElement Technologies.

Against that policy backdrop, Greenland - the world's largest island, with a geological endowment that includes one of the world's largest known undeveloped palladium-gold-platinum deposits, alongside major rare-earth and uranium occurrences - has emerged as a strategic Western-aligned mining jurisdiction. And on April 27, 2026, Greenland Mines Ltd (Nasdaq: GRML) announced the appointment of SLR Consulting as Geological Consultant and Qualified Person for its Skaergaard Project - the latest in a sequence of corporate developments that has built a world-class technical platform around what may be one of the most significant undeveloped Western precious metals deposits in decades.

A Re-Rating PGM Cycle Is Now Visible in Bank Forecasts

In January 2026, Bank of America Global Research raised its 2026 platinum price forecast to \$2,450 per ounce - up from \$1,825 - and lifted its 2026 palladium forecast to \$1,725 per ounce, up from \$1,525. The bank cited persistent market deficits, supply chain dislocations of PGMs from trade disputes keeping markets tight, and the launch of physically-backed platinum and palladium futures contracts on China's Guangzhou Futures Exchange (GFEX) in the second half of 2025 as supporting price action.

On the supply side, the World Platinum Investment Council (WPIC) reports the platinum market entered a third consecutive year of supply deficit in 2025 with a shortfall of approximately 850,000 ounces, and projects that the deficit will persist through 2026 as recycling supply grows by approximately 10% in 2026. Heraeus Precious Metals' 2026 forecast sees platinum trading in a \$1,300-\$1,800/oz range with deficit conditions narrowing but not closing. The 2025 platinum spot rally was approximately 50%.

"With strong demand for platinum group metals continuing, Bank of America raised its 2026 platinum price forecast to \$2,450/oz from \$1,825/oz and its 2026 palladium price forecast to \$1,725/oz from \$1,525/oz. The dislocations of PGMs from trade disputes are keeping markets tight, especially in the case of platinum."

Meanwhile, the U.S. Department of Commerce has estimated a dumping margin of approximately 828% on unworked Russian palladium imports, following anti-dumping and countervailing duty petitions filed by Sibanye-Stillwater and the United States Trade Union. Russia is the world's largest palladium supplier, accounting for approximately 40% of global supply. Any imposition of duties on currently-unspecified Russian volumes could push U.S. domestic prices materially higher and reshape import economics in North American and European refining markets.

Why This Greenland Story Stands Out Right Now

Greenland Mines Ltd (Nasdaq: GRML) is a Nasdaq-listed company with two operating divisions: a Natural Resources division focused on the Skaergaard Project in Southeast Greenland - one of the largest undeveloped palladium, gold, and platinum deposits in the world - and a Cell and Gene Therapy division including Klothe's KLTO-202 program for ALS. The Company holds a majority interest in the acquisition of Greenland Mines Corp., an 80% interest in Skaergaard plus an option to acquire the remaining 20%. The 43-101 Indicated and Inferred Mineral Resource is 25.4 Moz palladium-equivalent and 23.5 Moz gold-equivalent, with an undiscounted in-situ resource value of approximately \$68 billion at February 2026 metal prices.

The differentiated story is not the resource size in isolation - junior PGM developers with large in-situ resources are rare and often unheard of. The differentiated story is the technical and strategic cadence assembled around it over the past five weeks.

The Technical Team - Built in Five Weeks

On April 27, 2026, Greenland Mines appointed SLR Consulting as Geological Consultant and Qualified Person for the Skaergaard Project. SLR - with more than 5,000 employees across 140+ offices worldwide - is the same firm that prepared the latest Technical Report on Skaergaard, effective November 22, 2022, including the current Mineral Resource Estimate. The Company has positioned the appointment as providing technical continuity and execution efficiency, with SLR specialists scheduled to return site visit in late August or early September 2026 in connection with the planned summer field program.

On April 23, 2026, the Company executed a framework agreement with GTK Mintec - the mineral processing and circuit design pilot plant of the Geological Survey of Finland, located in Outokumpu, Finland. The facility runs approximately 100 projects and 8-12 industrial-scale pilot runs annually. The scope is comprehensive: advanced mineralogical characterization (MIM, QEMSCAN, EPMA), gold department, beneficiation testwork, hydrometallurgical testwork (chloride leaching, pressure oxidation, Kell-type, molten-salt processes), and pilot-scale processing using a 10-20 tonne bulk sample. Tailings and extractive-value studies will be conducted on the SMARTTEST platform.

GTK Mintec's scope explicitly extends beyond the primary palladium-gold-platinum deposit to evaluate critical metals opportunities including vanadium, gallium, germanium, titanium and iron recovery from vanadium-bearing titanomagnetite zones - as well as sorting and pre-concentration economics. The directional implication is that the eventual Skaergaard production scenario is a multi-product operation rather than a single-commodity precious metals mine.

Earlier in March, the Company engaged WSP Denmark for the full environmental impact assessment baseline program and foundational regulatory work product required for project advancement under Greenlandic mining law.

The Iceland Configuration: Mine in Greenland, Process in Iceland

On April 16, 2026, Greenland Mines announced a non-binding Letter of Intent with an Icelandic industrial site owner to establish a downstream processing hub in Iceland. Skaergaard sits approximately 450 km west of Iceland - within the reach of one of the lowest-cost industrial-power jurisdictions in the developed world.

According to the announcement, the LOI targets power costs potentially below US\$0.03/kWh through Iceland's integrated geothermal and hydropower grid, with life-of-mine savings exceeding \$1 billion against alternative on-site processing scenarios. The brownfield refurbishment approach uses existing buildings, deep-water harbor infrastructure, and grid connections to meaningfully reduce capital intensity versus greenfield development.

"Mine in Greenland. Process in Iceland. Sub-\$0.03/kWh power. Life-of-mine savings exceeding \$1 billion. The configuration represents Skaergaard's development pathway with the broader strategic Western response to critical-minerals supply concentration.

On April 2, 2026, the Company's Greenlandic subsidiary Major Precious Greenland A/S joined the Greenland Business Register - a procedural milestone that formalizes the Company's on-the-ground operating presence and signals continued engagement with Greenlandic local commerce and stakeholder networks.

The Policy Tailwind Has Become Direct Capital

For most of the past decade, the "Western critical minerals push" has been a thesis of analyst reports and policy white papers rather than a structural feature of capital markets. That has changed materially in the past 18 months.

In 2025, the U.S. Department of Defense took an approximately 15% equity stake in MP Materials alongside a 10-year, \$100 million kilogram price floor on its neodymium-praseodymium oxide product. In January 2026, the Trump administration took a similar position in USA Rare Earth through the Department of Commerce. The administration has now made critical-minerals equity or stock-purchase rights in at least ten companies, with six of those concentrated in critical minerals.

In February 2026, the U.S. State Department hosted the 2026 Critical Minerals Ministerial - bringing together representatives from 15 countries and the European Commission. The ministerial coincided with EXIM Bank's approval of the \$10 billion Project Direct Loan for a domestic strategic reserve, plus \$14.8 billion in critical-minerals-related Letters of Interest issued under the current administration.

The thesis has moved from analyst footnote to balance-sheet reality. The capital is being deployed. The companies positioned in Western jurisdictions with Western-aligned ownership structures - particularly those addressing high-priority commodity gaps like PGMs and heavy rare earths - sit at the intersection of two structural tailwinds at once.

Critical Minerals & Strategic Reshoring - Comparable Set

For investors evaluating exposure to the Western critical minerals reshoring thesis, a defined U.S.-listed comparable set emerged in the past 18 months. Each name below has reported material newsflow within the past month tied to the same and capital-cycle dynamics that support Greenland Mines' positioning.

Critical Metals Corp. (NASDAQ: CRML)

Critical Metals Corp. is the closest geographic and structural comp to Greenland Mines - also Greenland-focused, also Nasdaq-listed, also an early-stage developer. On April 17, 2026, the Government of Greenland approved the transfer of remaining 50.5% interest in the Tanbreez Mining Greenland A/S to Critical Metals Corp., bringing total ownership to 92% of the world's largest heavy rare earth deposits. The stock surged approximately 23.6% on the news, lifting market cap by roughly \$1.4 billion. In March 2026, the Company approved a \$30 million acceleration program targeting first ore production in Q1 2028 / Q1 2029. CRML carries a \$120 million Letter of Intent from EXIM Bank and a Texas Capital Buy rating with a \$200 million target initiated April 2026 - implying material upside from recent share price levels.

MP Materials Corp. (NYSE: MP)

MP Materials operates the Mountain Pass rare-earth mine and processing facility in California - the only commercial-scale rare-earth mine in the U.S. and one of only two large-scale light rare-earth production facilities outside China. The Company is the most direct beneficiary of the U.S. critical minerals onshoring push, with the Department of Defense holding an approximate 10% equity stake and a 10-year price floor of \$110 per kilogram on its NdPr oxide. In February 2026, MP announced selection of Northlake, Texas for a \$1.25 billion rare earth magnet manufacturing facility. On April 20, 2026, Wedbush initiated coverage with an Outperform rating and \$90 price target. FY2025 revenue was \$275.5 million, up 35% year-over-year.

USA Rare Earth, Inc. (NASDAQ: USAR)

USA Rare Earth is developing the Round Top Mountain heavy rare-earths and critical minerals project in West Texas, and a high-powered magnet manufacturing facility in Stillwater, Oklahoma. The Trump administration took an equity stake in January 2026 through the Commerce Department - the first such government investment in heavy rare earths. The Round Top mining and processing project is targeted for opening by end of 2028, accelerated approximately two years ahead of prior projections. USA Rare Earth's acquisition of U.K.-based Less Common Metals provides a processing and metal-making capability outside China.

[Energy Fuels Inc.](#) (NYSE American: UUUU)

Energy Fuels operates the White Mesa Mill in Utah - the only operating conventional uranium mill in the United States - and has expanded into rare earth element processing through the same facility. The Company processes monazite ore feed into rare earth oxides, positioning it as the only integrated U.S. uranium-and-rare-earth processor currently in commercial production. Energy Fuels' diversified strategic-minerals exposure - uranium, vanadium, and rare earth elements - provides a different strategic angle than the same Western-onshoring thesis.

[NioCorp Developments Ltd.](#) (NASDAQ: NB)

NioCorp is advancing the Elk Creek Critical Minerals Project in Nebraska - one of the largest known reserves of niobium and titanium in North America, plus rare earth potential. The Company holds a Letter of Interest from the U.S. EXIM Bank for \$800 million in financing support, and the project is included in the U.S. Department of Energy's critical minerals strategy. The strategic logic mirrors Greenland Mines' positioning - a Western-jurisdiction developer addressing critical commodity supply with structural government policy support.

Investor Q&A: Three Questions on the Greenland Mines Thesis

Q: Why does Greenland's jurisdiction matter for Western critical minerals supply chains?

A: Greenland combines a tier-one geological endowment (PGMs, heavy rare earths, uranium) with a modern regulatory aligned with NATO partner Denmark - and direct U.S. strategic interest, including the February 2026 Critical Minerals M that brought together 54 countries. It is one of the few large-scale, Western-aligned mining jurisdictions outside North A the geological scale to materially shift supply concentration risk.

Q: What does the Iceland processing configuration unlock that on-site processing in Greenland can't?

A: Industrial power at potentially below US\$0.03/kWh through Iceland's integrated geothermal and hydropower grid, bro capex versus greenfield buildout, and life-of-mine savings exceeding \$1 billion against alternative on-site processing so The configuration also positions output to flow directly into North American and European refining markets. The Iceland non-binding and subject to negotiation of definitive agreements.

Q: How do recent U.S. government equity stakes in critical minerals companies frame the opportunity for Western-align developers?

A: The federal government has taken positions in at least ten companies under the current administration - including a stake in MP Materials and a Commerce Department stake in USA Rare Earth - alongside the \$10 billion EXIM Project V Loan and \$14.8 billion in critical minerals Letters of Interest. Companies in Western jurisdictions addressing high-priorit gaps now sit at the intersection of re-rating commodity cycles and direct government capital. Government investment p subject to political and budgetary risk.

What to Watch From Here

Three near-term catalysts will define how the Greenland Mines story develops. First, the 2026 summer field program at - including the SLR site visit scheduled for late August or early September - will provide the technical foundation for the of NI 43-101 work and resource definition. Second, the GTK Mintec metallurgical and pilot-plant program will produce th integrated processing flowsheet results, including critical metals recovery economics and bulk-sample concentrate char Third, the Iceland LOI may convert to a binding agreement, formalizing the North Atlantic processing corridor configura

For investors evaluating exposure to the Western critical minerals onshoring thesis, the comparable set above (CRML, UUUU, NB) represents the established U.S.-listed jurisdiction comparables. Greenland Mines represents the early-stage PGM-heavy component of the same broader thesis - a different angle on the same underlying policy and capital cycle.

For more information on Greenland Mines Ltd, visit www.greenlandmines.com or the investor profile at usanewsgroup.com/grml-profile/.

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CAUTIONARY NOTE REGARDING MINERAL RESOURCES:

The Mineral Resource Estimates referenced in this article were prepared in accordance with NI 43-101 by SLR Consulting and are disclosed in the technical report dated November 22, 2022. Mineral Resources are not Mineral Reserves and do not have demonstrated economic viability. The gross undiscounted in-situ metal values expressed herein are illustrative calculations based on February 2026 metal prices and do not account for mining recoveries, metallurgical losses, capital costs, operating costs, taxes, permitting requirements, or any other technical or economic factors. These values are not indicative of future revenue, project economics or net present value. No preliminary economic assessment, pre-feasibility study, or feasibility study has been completed on the Skaergaard Project, and there is no certainty that the Mineral Resources disclosed will be converted to Mineral Reserves or that an economically viable mining operation can be established.

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