The 5 Strategic Projects Quietly Defining the Next Decade of West's Critical Minerals Supply

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Issued on behalf of Greenland Mines Ltd.

Seabridge's KSM was named a B.C. priority project on April 30. NioCorp broke ground on the Elk Creek mine portal in March. B2Gold's Goose Mine in Nunavut hit commercial production in October. Ivanhoe Electric's Santa Cruz copper PFS lands first cathode in 2028. The Western mega-asset list is short - and getting shorter.

KEY TAKEAWAYS

- The list of Western-aligned, large-scale, long-life critical-mineral deposits actively progressing toward production in 2026 is short. Seabridge Gold's KSM (BC), NioCorp's Elk Creek (Nebraska), B2Gold's Goose Mine (Nunavut), and Ivanhoe Electric's Santa Cruz / Tintic projects (Arizona / Utah) are among the small handful that have crossed the threshold from "exploration story" to "active development with government backing or production milestone."
- Skaergaard now increasingly fits that list. On May 7, 2026, Greenland Mines Ltd. (Nasdaq: GRML) released SLR Consulting's independent metal-price sensitivity analysis on its Skaergaard Project, indicating 16.58 Moz palladium-equivalent Indicated and 21.92 Moz palladium-equivalent Inferred in the high-price case - a 45% Indicated grade uplift and 55% Inferred uplift on the same 2022 underground-constrained block model.
- The 2026 field, drill, and bulk-sample campaign is fully funded. Greenland Mines holds an 80% direct interest in the Project with an option on the remaining 20%, supported by SLR (geology / Qualified Person), GTK Mintec (metallurgy at the Geological Survey of Finland's Outokumpu facility), and WSP (environmental baseline).
- Greenland Mines and its 80%-owned subsidiary Major Precious Greenland A/S were admitted to the European Raw Materials Alliance on April 22, 2026 - placing the Project formally inside the EU's industrial framework for critical-raw-materials security.

American News Group News Commentary

The Western critical-minerals development pipeline has a smaller short list than most investors realize.

To make the list, a project needs scale, jurisdictional safety, advanced technical work, recent regulatory or operational momentum, and a credible path to financing. Not many projects in the entire Western Hemisphere clear all five gates simultaneously. The ones that do are quietly attracting the institutional, government, and strategic capital that will define the next decade of critical-minerals supply.

SEABRIDGE GOLD: KSM, BRITISH COLUMBIA

Seabridge Gold (NYSE: SA) (TSX: SEA) owns one of those projects. The KSM Project in British Columbia's Golden Triangle hosts 7.3 billion pounds of copper and 47.3 million ounces of gold in proven and probable reserves (2.29 billion tonnes grading 0.64 g/t Au and 0.14% Cu) - among the largest undeveloped copper-gold deposits on Earth[1]. On April 30, 2026, the Province of British Columbia designated KSM as a provincial priority project, granting dedicated permitting coordination to streamline regulatory timelines under the Province's "Look West" strategy. The designation followed Seabridge's March 30 announcement of an updated Mineral Resource Estimate that added 6.8 million ounces of gold and 1.5 billion pounds of copper to the Measured and Indicated category. Twenty years and roughly C$1 billion of work have moved KSM well past exploration. Provincial backing is the next compounding signal.

NIOCORP DEVELOPMENTS: ELK CREEK, NEBRASKA

NioCorp Developments (NASDAQ: NB) owns another. The Elk Creek Critical Minerals Project in southeast Nebraska is North America's only niobium-scandium-titanium deposit at Feasibility Study stage and is permitted for construction. On March 4, 2026, Congressman Adrian Smith and local Nebraska officials launched the inaugural excavation of the Elk Creek mine portal[2]. On April 9, 2026, NioCorp signed a non-binding term sheet with Traxys North America covering marketing and offtake for the entire remaining product slate from Elk Creek's first 10 years of operations, alongside a potential $30 million strategic investment from Traxys[3]. On October 23, 2025, NioCorp announced a Pentagon-funded scandium technology agreement with Lockheed Martin. NioCorp's product list - niobium, scandium, titanium, and several magnetic rare earths including neodymium, praseodymium, terbium, and dysprosium - sits squarely on the U.S. government's critical-minerals list.

B2GOLD: GOOSE MINE, NUNAVUT

B2Gold (NYSE American: BTG) (TSX: BTO) owns a third. The Goose Mine in Nunavut, Canada - the most advanced asset in the Back River Gold District - achieved commercial production on October 2, 2025. The Q1 2026 results released May 6, 2026 showed all four operating mines (Fekola, Goose, Masbate, Otjikoto) exceeded production expectations, with consolidated gold production of 237,763 ounces and free cash flow of $362 million[4]. Full-year 2026 guidance is 820,000 to 970,000 ounces. On April 20, 2026, B2Gold and Agnico Eagle announced a collaboration agreement on Goose-area assets. The Goose Mine is the operational proof point for what an Arctic-jurisdiction precious-metals project looks like once it crosses into commercial production.

IVANHOE ELECTRIC: SANTA CRUZ AND TINTIC, U.S.

Ivanhoe Electric (NYSE American: IE) (TSX: IE) owns a fourth. The Santa Cruz Copper Project in Arizona - chaired by Robert Friedland - completed its Preliminary Feasibility Study in June 2025, targeting initial construction in the first half of 2026 and first copper cathode production in 2028. The Tintic Copper-Gold Project in Utah and a 50/50 joint venture with Saudi Arabian Mining Company Ma'aden across approximately 48,500 km² of underexplored Arabian Shield round out a portfolio explicitly described by the Company as supporting "United States supply chain independence"[5]. Ivanhoe Electric's exploration mandate covers copper, nickel, vanadium, cobalt, platinum group elements, gold, and silver - a multi-metal mandate that overlaps directly with the metals contained in the Skaergaard intrusion.

THE GRML POSITION

That is the company Greenland Mines Ltd. (NASDAQ: GRML) is now keeping.

The 2022 NI 43-101 Mineral Resource on the Skaergaard Project hosts 25.4 Moz palladium-equivalent and 23.5 Moz gold-equivalent across the combined Indicated and Inferred categories - one of the largest undeveloped Pd-Au-Pt deposits on Earth, with a gross undiscounted in-situ resource value of approximately $68 billion at February 2026 metal prices, calculated on an illustrative basis and before any technical or economic factors[6]. The May 7, 2026 SLR Consulting sensitivity work - applied to the existing underground-constrained block model with all geologic and technical inputs held constant - indicates 16.58 Moz palladium-equivalent Indicated and 21.92 Moz palladium-equivalent Inferred in the high-price case[7]. Greenland Mines holds an 80% direct interest with an option on the remaining 20%, executed through its 80%-owned Greenland subsidiary Major Precious Greenland A/S, which was admitted to the European Raw Materials Alliance alongside Greenland Mines on April 22, 2026[8]. The 2026 field, drill, and bulk-sample campaign is fully funded.

The 2026 program will begin evaluating open-pit and bulk-mining scenarios alongside the underground concept - a separate, mine-method-based lever independent of any further metal-price assumption[7].

President Bo Møller Stensgaard, Ph.D., described Skaergaard as: "a future operation in the making, with mine method and metal prices acting as levers."[7]

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Five gates: scale, jurisdictional safety, advanced technical work, recent regulatory or operational momentum, and a credible path to financing.

KSM has them. Elk Creek has them. Goose has them. Santa Cruz has them.

Skaergaard now checks many of the same boxes, at an earlier stage.

FREQUENTLY ASKED QUESTIONS

What did the May 7, 2026 SLR sensitivity study conclude?

Applied to the existing 2022 underground-constrained Mineral Resource model, with all geologic and technical inputs held constant, the high-price sensitivity case indicates 16.58 million ounces of palladium-equivalent Indicated and 21.92 million ounces of palladium-equivalent Inferred - a 45% grade uplift in the Indicated category and 55% in the Inferred versus the 2022 base case[7].

Where is the Skaergaard Project located?

In Southeast Greenland, less than 1,600 kilometers from the U.S. eastern seaboard. Greenland Mines holds an 80% direct interest in the Project with an option on the remaining 20%, executed through its 80%-owned Greenland subsidiary Major Precious Greenland A/S[6].

What is the European Raw Materials Alliance designation?

On April 22, 2026, Greenland Mines and its 80%-owned subsidiary Major Precious Greenland A/S were admitted to the European Raw Materials Alliance, the industry-driven alliance established by the European Commission to secure reliable, sustainable access to critical and strategic raw materials for Europe's industrial ecosystems[8].

Has GRML completed a feasibility study?

No. The most recent technical work is the 2022 NI 43-101 Mineral Resource Estimate. Mineral Resources are not Mineral Reserves and do not have demonstrated economic viability. No preliminary economic assessment, pre-feasibility study, or feasibility study has been completed on the Skaergaard Project.

For more information about Greenland Mines Ltd. (Nasdaq: GRML), visit the American News Group GRML profile.

Article Sources:

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8. Greenland Mines Ltd., admission to the European Raw Materials Alliance announcement, April 22, 2026.

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Cautionary Note Regarding Mineral Resources: Mineral Resources are not Mineral Reserves and do not have demonstrated economic viability. The sensitivity cases referenced in this article are illustrative of the deposit's leverage to long-term metal price environments rather than economic estimates. No preliminary economic assessment, pre-feasibility study, or feasibility study has been completed on the Skaergaard Project. There is no certainty that any portion of the Mineral Resources will be converted to Mineral Reserves or that the Project will be brought into commercial production.

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