

# Nasdaq-Listed Critical Minerals Developer Lands Game-Changing Greenland Rare Earth Deal

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Issued on behalf of Greenland Mines Ltd.

Companies mentioned: Greenland Mines Ltd. (NASDAQ: GRML), Neo Performance Materials Inc. (TSX: NEO; OTCQX: NPMF), USA Rare Earth Inc. (NASDAQ: USAR), [Ucore Rare Metals Inc.](#) (TSXV: UCU; OTCQX: UURAF), Lynas Rare Earths Ltd. (ASX: LYC), [American Rare Earths Ltd.](#) (ASX: ARR; OTCQX: ARRF)

AMERICAN NEWS GROUP News Commentary

If you're a retail investor trying to find an entry point into the rare earth boom, this deal is one worth paying attention to.

## Key Takeaways

- Greenland Mines Ltd. (NASDAQ: GRML) just secured one of the most strategically located rare earth projects in the world through a US\$35 million agreement with Neo Performance Materials.
- The Sarfartoq Carbonatite Complex in southwest Greenland is rich in neodymium and praseodymium - the two rare earths most needed for permanent magnets used in EVs, wind turbines, and defense systems.
- Neo Performance Materials is staying on as a long-term partner, keeping an equity stake in Greenland Mines and purchasing up to 60% of the project's future output.
- Greenland Mines now has two world-class projects: the Skaergaard palladium-gold-platinum deposit and the Sarfartoq rare earth project - both in stable, Western-aligned Greenland.
- China still controls roughly 61% of global rare earth mining and 91% of refining, making Western-jurisdiction projects like Sarfartoq strategically important for governments and manufacturers alike.

## The Deal in Plain English

Greenland Mines Ltd. (NASDAQ: GRML) just signed an agreement to take over the Sarfartoq rare earth project in southwest Greenland from Neo Performance Materials Inc. (TSX: NEO; OTCQX: NPMF). The price tag is US\$35 million - US\$20 million in cash, and US\$15 million in Greenland Mines stock. [1]

Here is what makes this stand out for retail investors:

- Neo Performance Materials is not exiting the project. They are keeping an equity stake in Greenland Mines and they will buy up to 60% of the ore that comes out of Sarfartoq under an existing offtake arrangement. [1]
- That means Neo, a real revenue-generating company that just reported Q1 2026 revenue of about US\$155 million, is essentially saying it wants Greenland Mines to advance this project - and plans to be the main customer. [2]
- For a small-cap developer, this is the kind of validation that most companies spend years trying to get.

## Why the Sarfartoq Project Is a Big Deal

Rare earth projects are not all created equal. Sarfartoq has three things going for it that retail investors should understand:

### 1. The Right Minerals

Sarfartoq is rich in neodymium and praseodymium, which together make up roughly 25% to 40% of the total rare earth

the property. [3] These two elements are the workhorses of the rare earth magnet industry. They are what makes electric motors small, light, and powerful. They are also what makes wind turbine generators efficient enough to compete with traditional power sources.

## 2. The Right Location

Most undeveloped rare earth projects are in the middle of nowhere. Sarfartoq is different. It is located about 60 kilometers from an international airport, has access to tidewater and a major port facility, and is close to some of the best hydroelectric power in Greenland. [3] That kind of infrastructure access can knock years off a project's development timeline.

## 3. The Right Jurisdiction

Greenland is a Western-aligned territory of the Kingdom of Denmark. The Government of Greenland has made critical mineral extraction a priority for economic development. The transfer of the NNSR shares is subject to government approval under the Greenland Mineral Activities Act, but Greenland has already approved a similar transfer for this same project in 2023. [3] That historical record matters.

## The Bigger Picture: Why Rare Earths Are Hot Again

China still controls roughly 61% of the world's rare earth mining and 91% of refining capacity, according to the International Trade Administration. [4] In 2025, Beijing introduced two waves of export controls on rare earths. Some of those controls were temporarily suspended in November 2025 after a U.S.-China trade truce, but the licensing system for seven key elements remains in place.

The result is that prices for heavy rare earths outside of China have climbed, and Western governments are pouring money into building alternative supply chains. The U.S. Department of Defense has already committed more than US\$439 million to rare earth projects, and Canada, Europe, and Australia are doing the same. [5]

## Four Other Names Riding the Same Wave

Greenland Mines is one of several public companies positioning to feed the Western rare earth supply chain. For retail investors building a watchlist, here are four others to know.

### USA Rare Earth Inc. (NASDAQ: USAR)

USA Rare Earth is building a domestic mine-to-magnet supply chain in the United States. The company is developing the Top project in Texas, which hosts heavy rare earths needed for high-performance magnets, and runs a magnet manufacturing facility in Stillwater, Oklahoma. [6] In April 2026, USA Rare Earth announced an agreement to acquire Serra Verde, the only scaled rare earth mine outside of Asia producing all four magnetic rare earths - a transaction with an implied value of roughly US\$2.8 billion. [7]

### Ucore Rare Metals Inc. (TSXV: UCU; OTCQX: UURAF)

Ucore is a smaller-cap Canadian company that is building a Strategic Metals Complex in Alexandria, Louisiana, using its RapidSX rare earth separation technology. The first phase is targeting about 2,000 tonnes per year of separated rare earths by 2026, with later phases scaling up significantly. [8] The U.S. Department of Defense has been backing Ucore's separation technology, making the company one of the more closely watched processing plays in the sector.

### Lynas Rare Earths Ltd. (ASX: LYC)

Lynas is the largest rare earth producer outside of China and has been operating profitably for years. The company mines rare earths at Mt Weld in Western Australia and processes them at facilities in Malaysia, with new processing capacity coming on line in the United States. Lynas serves as a benchmark for what a fully built-out, Western-aligned rare earth supply chain looks like, a reminder of how much room there is for new entrants given how dominant China remains.

## American Rare Earths Limited (ASX: ARR; OTCQX: ARRF)

American Rare Earths is advancing the Halleck Creek project in Wyoming, which the company describes as one of the largest rare earth deposits in North America. With U.S. defense procurement rules increasingly excluding Chinese material, projects like Halleck Creek are positioned to benefit directly from federal funding programs and offtake support.

### What This Means for the Average Investor

Most retail investors will never get the chance to invest at the ground floor of a true critical minerals deal. The big rare earth producers - Lynas, MP Materials - already trade at multi-billion-dollar valuations. The earlier-stage developers offer more upside but come with more risk.

What sets Greenland Mines Ltd. (NASDAQ: GRML) apart in this group is the combination of a Nasdaq listing, a partnership with a real revenue-generating company (Neo), a project in a stable Western jurisdiction, and now two world-class assets in Greenland.

For investors who already missed the big run-ups in MP Materials and USA Rare Earth, deals like this one are exactly the kind of catalyst worth tracking. Always do your own research, understand the risks, and never invest more than you can afford to lose.

For more information on Greenland Mines Ltd., visit: <https://usanewsgroup.com/grml-landing>

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