

Inside The North Atlantic Critical Minerals Push: A \$68 Billion Greenland Deposit Lands At The EU Raw Materials Summit

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Issued on behalf of Greenland Mines Ltd.

With palladium prices up materially year-over-year and Western governments mobilizing capital and policy around critical-minerals supply security, one of the largest undeveloped PGM-gold deposits on the planet is moving from technical study to active project advancement.

Equity Insider News Commentary

The Western critical-minerals capital cycle has shifted into a higher gear. Bank of America Global Research raised its 2026 platinum forecast to \$2,450/oz and palladium to \$1,725/oz earlier this year. The U.S. Department of Commerce has estimated a dumping margin of approximately 828% on unworked Russian palladium imports. The World Platinum Investment Council reports that the platinum market entered its third consecutive year of structural deficit. Inside that landscape, Greenland Mines Ltd. (NASDAQ: GRML), [NioCorp Developments Ltd.](#) (NASDAQ: NB), MP Materials Corp. (NYSE: MP), Critical Metals Corp. (NASDAQ: CRML), and USA Rare Earth, Inc. (NASDAQ: USAR) collectively represent the spectrum of Western-aligned developers and producers building the alternative supply chain for the metals critical to U.S. and European defense, energy, and industrial systems.

Greenland Mines Ltd. (NASDAQ: GRML) is moving its flagship Skaergaard PGM-Gold-Platinum-Critical Metals Project from technical study into active 2026 program execution. On May 19, 2026, the Company announced that President Bo Møller Stensgaard, Ph.D., participated in the EIT RawMaterials Summit 2026 in Brussels - one of Europe's leading public-private forums for the raw materials sector - held May 19-21, 2026. Dr. Stensgaard was invited to participate in the May 20 roundtable discussion under the Summit session titled 'Mined Once - Utilised in Full: Towards Resource Efficient Mining', hosted by GTK Mintec, the mineral processing and circular-economy pilot plant of the Geological Survey of Finland.

The Skaergaard Project hosts a disclosed NI 43-101 Mineral Resource (effective November 22, 2022, prepared by SLR Consulting (Canada) Ltd.) comprising 25.4 Moz palladium-equivalent and 23.5 Moz gold-equivalent in combined Indicated and Inferred categories, with a gross undiscounted in-situ metal value of approximately \$68 billion at February 2026 metal prices, calculated on an illustrative basis and before any technical or economic factors. On May 7, 2026, an independent metal-price sensitivity analysis - completed by SLR Consulting using the same geologic and technical inputs - indicated 16.58 Moz PdEq Indicated and 21.92 Moz PdEq Inferred at high-price sensitivity case grades, representing a 45-55% PdEq grade uplift relative to the 2022 base-case grades. These figures are sensitivity scenarios on the existing 2022 Mineral Resource model, not a new Mineral Resource or Mineral Reserve estimate.

Greenland Mines is also preparing a large multi-technical 2026 field campaign encompassing resource expansion drilling, geotechnical characterization, environmental baseline work, and the collection of a 30-50 tonne bulk sample for processing flowsheet development. GTK Mintec has been engaged under a framework agreement to conduct an integrated mineralogical, metallurgical, hydrometallurgical, and pilot-scale processing program at GTK's facilities in Outokumpu, Finland. Earlier in the month, on May 13-14, the Company presented at CMI Summit 5 - The New Critical Minerals Economy, hosted by the Critical Minerals Institute at The National Club in Toronto, with Dr. Stensgaard delivering a presentation titled From Resource to Corridor: Developing the Skaergaard PGM-Au-V-Ga-Fe-Ti Project in East Greenland for the New Critical Minerals Economy.

Skaergaard is located in Southeast Greenland and ranks among the large undeveloped palladium-gold deposits on earth by gold-equivalent value, and screens ahead of projects such as Wafi-Golpu (Papua New Guinea), Golden Summit (Alaska), and Snowfield (BC, Canada) on that metric. The deposit hosts 17.15 million ounces of palladium - equivalent to 13 to 15 years of total U.S. palladium consumption in a single deposit, located in a Western-aligned jurisdiction less than 1,600 kilometers from the U.S. The 2026 work program will also begin evaluating open-pit and bulk-mining scenarios alongside the existing underground-constrained resource model - a second, mine-method-based lever on project economics. Historical work indicates potential by-product optionality in vanadium, gallium, iron, and titanium within the same host sequence as the primary PGM-Au mineralization.

Greenland Mines holds an 80% interest in, and an option to acquire the remaining 20% of, the Skaergaard Project, through its recent acquisition of Greenland Mines Corp. The Company is also positioning within

Europe's North Atlantic critical-minerals corridor concept, which contemplates Iceland as a potential downstream processing platform given available industrial infrastructure, renewable energy access, and proximity to European and North American markets. With over \$100 million in historical investment in technical and exploration work, an active 2026 field campaign in preparation, and Brussels-level European policy visibility, GRML is positioning Skaergaard as a credible Western-aligned alternative to PGM dependence on Russia and South Africa. For more company information, visit [Equity Insider](#).

In other industry developments and happenings in the market include:

NioCorp Developments Ltd. (NASDAQ: NB) is advancing its Elk Creek Critical Minerals Project in Nebraska - positioned as the only North American project with the combined niobium, scandium, and titanium combination. On April 9, 2026, NioCorp announced a non-binding agreement with Traxys North America LLC outlining a long-term marketing and offtake arrangement for NioCorp's remaining planned critical minerals products from Elk Creek. Subject to definitive contract execution, NioCorp would be positioned to sell its planned critical minerals products for the first 10 years of operation, following project financing and commencement of commercial production.

Elk Creek mine portal construction commenced in Q1 2026 at an estimated cost of approximately \$44.6 million. The Company has raised more than \$500 million in gross capital across 2025-2026 and is advancing a U.S. Export-Import Bank debt financing application for approximately \$780 million to support project construction. Niobium offtake at Elk Creek is approximately 75% under definitive agreements, and the Company is producing initial commercial volumes from its scandium production stream. With four critical minerals slated for production - niobium, scandium, titanium, and rare earth elements - Elk Creek represents one of the more diversified North American critical-mineral development assets.

MP Materials Corp. (NYSE: MP) reported Q1 2026 results on May 7, 2026, with record NdPr oxide production of 917 metric tons (up 63% year-over-year) and record NdPr oxide sales of 1,006 metric tons (more than double Q1 2025). Total revenue reached \$90.6 million, and Adjusted EBITDA swung to a positive \$36.6 million from negative \$2.7 million in Q1 2025. The Company also produced just under 13,000 metric tons of rare earth oxide concentrate - its highest first-quarter output ever.

Founder, Chairman and CEO James Litinsky framed the quarter as advancing key growth initiatives - expanding operations at the Independence magnet facility in Fort Worth, breaking ground on the 10X plant in Northlake, Texas, and commissioning heavy rare earth (terbium and dysprosium) separation at Mountain Pass. The Company's Magnetics segment generated \$21.1 million in revenue in Q1 (+306% YoY), supported by a multi-year Apple partnership valued at up to \$500 million, a Department of Defense \$400 million preferred stock investment, and a 10-year DoD price-floor agreement. MP Materials closed the quarter with \$1.7 billion in cash and short-term investments - among the strongest balance sheets in Western rare earth.

Critical Metals Corp. (NASDAQ: CRML) on May 21, 2026 announced the execution of a definitive 15-year binding offtake agreement with REAlloys Inc. (NASDAQ: ALOY) for rare earth element concentrate from its flagship Tanbreez Project in Southern Greenland - one of the largest and most significant heavy rare earth deposits globally. The agreement formalizes and significantly expands the parties' October 2025 Letter of Intent. Under the offtake, REAlloys will purchase 15% of Tanbreez's annual production, with prioritization for concentrates rich in dysprosium and terbium - the heavy rare earth elements most critical to NdFeB permanent magnets used in defense, electric vehicle, and wind energy applications.

The offtake follows the Government of Greenland's April 17, 2026 approval of Critical Metals' ownership increase to 92.5% of the Tanbreez Project - a decisive milestone that consolidates operational control of the asset. Critical Metals is also advancing construction of an Arctic-grade, multi-use storage and pilot-plant facility in Qaqortoq, Greenland, scheduled for use on or before May 2026. The strategic positioning of two world-class rare-earth and PGM-gold deposits - Tanbreez in Southern Greenland and Skaergaard in Southeast Greenland - inside the same Western-aligned jurisdiction reinforces the broader North Atlantic critical-minerals corridor thesis.

USA Rare Earth, Inc. (NASDAQ: USAR) commissioned Phase 1a of commercial NdFeB magnet production at its Stillwater, Oklahoma facility in March 2026, targeting an initial 600-metric-ton annual run rate by the end of 2026 and Phase 1b at 1,200 metric tons by Q1 2027. Customer deliveries are expected in Q2 2026. The Stillwater build-out positions USA Rare Earth alongside MP Materials' Independence facility in Fort Worth as

one of two U.S.-based commercial rare-earth magnet manufacturing platforms now in active commissioning.

USA Rare Earth's commercial trajectory is complemented by the recent emergence of REalloys Inc. (NASDAQ: ALOY) with a \$200 million EXIM Bank letter of intent and a Department of Defense contract worth up to \$1.7 million for facility design - a parallel commercial scale-up addressing the same downstream rare-earth-to-magnet conversion bottleneck. Non-Chinese rare earth prices have surged: NdPr at \$110-120/kg (versus \$55/kg in July 2025), and heavy rare earths like dysprosium at \$1,250/kg outside China (versus \$250/kg inside) - a pricing disparity that reflects the Western supply premium emerging across the entire critical minerals complex.

Across the comparable set, the message from the past month of capital deployment, offtake execution, and government policy is consistent: the Western critical-minerals supply chain is being repriced in real time - and the upstream resource layer is where the asymmetry of the trade lives. Greenland Mines' Skaergaard Project - with its 25.4 Moz PdEq + 23.5 Moz AuEq resource base, 45-55% high-price grade uplift, GTK Mintec metallurgical engagement, EIT RawMaterials Summit visibility, and North Atlantic corridor positioning - sits squarely inside that repricing. For investors building exposure to the PGM, palladium, and Western critical-metals capital cycle, GRML deserves a closer look.

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