

# From Appalachia to Greenland: The New American Rare Earth Map

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REalloys (ALOY) has signed an agreement that could give it priority access to up to 30% of production from a 2-billion-ton Appalachian rare earth resource network, expanding its growing pipeline of domestic and allied feedstock ahead of the Pentagon's 2027 ban on Chinese-origin materials. The deal comes just two months after unveiling its buildout of the largest heavy rare earth metallization facility outside of China. Companies mentioned in today's commentary includes: REalloys Inc. (ALOY), [NioCorp Developments Ltd.](#) (NASDAQ: NB), [Perpetua Resources Corp.](#) (NASDAQ: PPTA), USA Rare Earth, Inc. (NASDAQ: USAR), Comstock Inc. (NYSE American: LODE), [Uranium Energy Corp.](#) (NYSE American: UEC).

Under a new Letter of Intent released on Wednesday with Patriot Exploration & Mining, REalloys would gain preferential allocation rights to rare earth production from more than 150 tested sites stretching across the Appalachian Basin from Alabama to Pennsylvania. It's an all-American resource base that contains neodymium, praseodymium, dysprosium, and terbium-the four magnet metals at the center of the Pentagon's effort to remove Chinese material from U.S. defense supply chains.

The agreement adds another source of domestic feedstock to a network that already includes projects and partnerships spanning North America, Greenland, Brazil, and Kazakhstan as REalloys continues assembling the raw material pipeline behind its growing processing and metallization platform.

And they are doing it just as the Pentagon attempts to rebuild weapons inventories it has blown through in the Iran conflict, while simultaneously removing China from the rare earths supply chains that make them possible. With nearly half of the U.S. arsenal of precision strike missiles now gone, and only 7 months before the Pentagon's deadline, defense industry chiefs are sounding the alarms.

Washington is sounding its own alarm bells by pouring billions into American and allied rare earth projects. The sentiment in the White House is that you can't create a domestic rare earths supply chain with strong policy alone: You need money, too, and the government is feeling generous.

This week alone, the U.S. Department of Energy (DoE) awarded \$67 million to advance a rare earth extraction project in Louisiana, while USA Rare Earth secured access to a proposed \$1.6-billion federal financing package tied to the CHIPS and Science Act to accelerate mining, processing, refining, and magnet manufacturing capacity in Texas.

REalloys is already securing the feedstock, processing capacity, and metallization infrastructure that those rules will require. Patriot is the latest addition to a feedstock network that now stretches across North America, Greenland, Brazil, and Kazakhstan. REalloys has spent the past several months securing supply agreements across multiple jurisdictions while simultaneously funding processing capacity in Saskatchewan and expanding metallization capacity in Ohio.

Together, those assets are intended to create a supply chain capable of taking rare earth material from feedstock through separation, metallization, alloy production, and eventually magnet manufacturing without relying on Chinese processing. "The defense industrial base has a 2027 deadline and a supply chain gap that REalloys intends to resolve," CEO Lipi Sternheim said in Thursday's announcement.

## APPALACHIA SECURES DOMESTIC FEEDSTOCK

The Patriot agreement is not centered on a conventional mine development story.

Patriot reports access to roughly 2 billion metric tons of above-ground rare earth-bearing material spread across more than 150 tested sites throughout the Appalachian Basin. The resource base contains more than 40 U.S.-designated critical minerals, including neodymium, praseodymium, dysprosium, and terbium. The Appalachian agreement comes just days after REAlloys provided a major update on its Saskatchewan partnership with the Saskatchewan Research Council.

REAlloys (ALOY) is building its supply chain upstream around the SRC's commercial rare earth processing operation in Saskatoon, and downstream at REAlloys' metallization and alloying platform in Euclid, Ohio. Under its agreements with SRC, REAlloys has committed roughly \$20.6 million toward targeted upgrades, engineering, permitting, commissioning, and expanded throughput capacity at the Saskatoon facility. The upgrades are expected to increase NdPr output by another 25% while doubling dysprosium and terbium production. Target annual output now stands at approximately 525 tonnes of NdPr, 30 tonnes of dysprosium, and 15 tonnes of terbium.

In exchange, REAlloys secured exclusive preferred rights to as much as 80% of the facility's expanded commercial output, giving the company long-term access to one of the only multi-feedstock commercial-scale rare earth processing streams in North America.

Separately, REAlloys contracted SRC to design, build, and commission a standalone commercial-scale heavy rare earth metallization system dedicated specifically to dysprosium and terbium metal production. Once completed, that system will be transferred to the company's Ohio facility, significantly expanding downstream heavy rare earth metallization capacity for U.S. defense customers.

#### GREENLAND ADDS SCALE

The Saskatchewan buildout is only one part of the supply chain. A recent Greenland deal combines one of the most sought-after rare earths venues in the world with the American domestic supply chain. And it's been a behind-the-scenes battle with China all the way.

Last month, REAlloys signed a definitive 15-year offtake agreement with Critical Metals Corp. covering 15% of Phase 1 production from the Tanbreez project in southern Greenland, one of the largest known heavy rare earth deposits in the world.

Critical Metals has disclosed Phase 1 production capacity of up to 15,000 metric tons of rare earth concentrate annually, with REAlloys securing rights to 15% of monthly production as well as priority access to dysprosium- and terbium-rich concentrate streams.

Tanbreez also differs from most rare earth projects because of its unusually large heavy rare earth component. Critical Metals estimates roughly 27% of the deposit's rare earth profile consists of heavy rare earths, a much higher proportion than most deposits dominated by light rare earth materials.

Tanbreez is so strategically valuable that it's been at the center of a geopolitical tug-of-war between Washington and Beijing. Earlier this year, Reuters reported that U.S. and Danish officials privately urged the project's owners not to sell to Chinese-linked buyers, reflecting growing concerns over China's dominance of the rare earth supply chain.

#### SEVEN MONTHS TO AN ALL-AMERICAN RARE EARTHS SUPPLY CHAIN

The Department of War is leading the call for American rare earths, with a May memorandum to REAlloys emphasizing the urgency of securing domestic supply before the New Year, with Dysprosium (Dy) and Terbium (TB), where REAlloys has all the leverage, topping the list.

"REAlloys is building the only large-scale heavy rare earth metallization platform in North America outside of China, purpose-engineered to produce defense-grade dysprosium and terbium metal at commercial scale with a zero-adversary-nexus supply chain," the company said. It is also the least developed part of the supply chain outside China.

"Metallization is the least developed part of the value chain outside China," REAlloys co-founder Tim Johnston explained. "It requires deep, accumulated operating expertise and process control systems capable of managing complex variables in continuous production. Even with capital and strong execution, replicating that capability typically takes three to seven years or more - with meaningful technical and qualification risk."

"We've already solved the hardest part - proving that rare earth metallization and alloying can be done domestically to the specifications real customers require," Johnston said.

Other companies to keep an eye on:

NioCorp Developments Ltd. (NASDAQ: NB) is developing the Elk Creek Critical Minerals Project in southeast Nebraska, which holds the highest-grade niobium resource in North America and the second-largest rare earth resource in the United States. The project is designed to produce niobium, scandium, and titanium, with the company currently evaluating the addition of rare earth elements to the reserve estimate. In February 2026, NioCorp broke ground on the mine portal, an approximately \$44.6 million effort to construct the main underground access point at Elk Creek.

NioCorp has raised more than \$500 million in gross capital across 2025 and 2026, which is funding the portal construction and strengthening its application to the U.S. Export-Import Bank for proposed project debt financing. The company has also locked in a long-term marketing and offtake arrangement with Traxys North America covering the remaining planned critical minerals output for the first 10 years of operations.

Perpetua Resources Corp. (NASDAQ: PPTA) is developing the Stibnite Gold Project in central Idaho, which holds the only domestic reserve of antimony. Antimony is essential for munitions, semiconductors, and solar panels, making Stibnite one of the more strategically visible projects in the domestic critical minerals pipeline. In May 2026, the U.S. Export-Import Bank approved a \$2.9 billion senior secured loan - the largest under EXIM's Make More in America initiative.

Early works construction commenced at Stibnite in October 2025. Critical-path construction activities for the 2026 field season began in May, including initial work on the Burntlog Route, a key infrastructure project targeting on-time delivery of antimony for U.S. defense interests.

USA Rare Earth, Inc. (NASDAQ: USAR) is building what it describes as the only fully integrated mine-to-magnet rare earth platform outside of China, with assets spanning mining, separation, metallization, alloy production, and magnet manufacturing. Its Round Top deposit in Texas holds heavy rare earth resources, and its Stillwater, Oklahoma facility commissioned its first commercial magnet production line in March 2026. In April 2026, the company announced a definitive agreement to acquire Serra Verde Group for approximately \$2.8 billion.

The company closed a \$1.5 billion PIPE financing in January 2026 and holds pro-forma liquidity of approximately \$3.2 billion. It also announced a second magnet manufacturing facility in Blacksburg, South Carolina, targeting 6,400 metric tons per year of NdFeB magnets and 5,000 metric tons of strip-cast metal and alloy, complementing the Stillwater plant.

Comstock Inc. (NYSE American: LODE) is taking a different angle on the critical minerals problem: recycling. Through its Comstock Metals subsidiary, the company is building what it describes as North America's only certified zero-landfill solar panel recycling solution, targeting the wave of end-of-life panels that is only beginning to hit the market.

The company published its first quarter 2026 results in May, reporting ongoing buildout of its metals recycling business alongside plans to monetize legacy mining assets, which it has guided could generate approximately \$50 million in proceeds.

Uranium Energy Corp. (NYSE American: UEC) is the largest and fastest-growing uranium company in the United States, operating two active in-situ recovery platforms - Christensen Ranch in Wyoming and Burke Hollow in Texas, the latter of which commenced production in 2026 as the first new U.S. ISR uranium mine

in over a decade. But UEC's footprint now extends well beyond uranium.

UEC reported third quarter fiscal 2026 results in June, disclosing \$794 million in liquidity and continued ramp-up across its production sites. The company is also advancing a uranium conversion facility in coordination with the U.S. Department of Energy to address structural gaps in the domestic nuclear fuel cycle.

By. Michael Kern

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