

A Greenland Critical-Minerals Platform Is Taking Shape -- and It Just Pushed Into the Midstream Chokepoint

19:12 Uhr | [CNW](#)

Issued on behalf of Greenland Mines Ltd

With its latest investment, a Nasdaq-listed developer is betting that owning the processing and conversion layer - not just the deposits in the ground - is where Western critical-materials security will be won.

Equity Insider News Commentary - The race to secure critical minerals for the West has, until recently, been told almost exclusively as a mining story: who can dig the rare earths, the magnet metals, the battery inputs out of the ground in jurisdictions that are more abundant than in China. But a more sophisticated understanding is taking hold - that the real chokepoint is rarely the rock itself. It is the refining, processing, and conversion capacity that turns raw ore into usable materials. China's dominance of critical minerals is, above all, a dominance of processing. And so the most strategically interesting companies are increasingly those moving beyond just deposits, but the industrial machinery that gives those deposits value.

Companies mentioned: Greenland Mines Ltd (Nasdaq: GRML), MP Materials Corp. (NYSE: MP), Critical Metals Corp. (NYSE: CRML), [Energy Fuels Inc.](#) (NYSE American: UUUU), [NioCorp Developments Ltd.](#) (Nasdaq: NB)

That is precisely the shift Greenland Mines Ltd (Nasdaq: GRML) signaled with its latest move. On June 16, 2026, the company announced a strategic share-exchange investment in AnorTech Inc. (TSX Venture: ANOR) (OTCQB: ANORF), a Greenland-focused technology and resource developer advancing sustainable alumina, high-purity alumina, and CO2-free cement from its wholly owned Gronne Bjerg anorthosite project. The deal gives Greenland Mines an initial 9.9% stake, with an increase to as much as 19.9%, and - more importantly - extends the company from upstream resource exposure toward the midstream processing segment it sees as the next frontier of value capture in its broader "North Atlantic Critical Metals" strategy.

The Move Into the Midstream

The logic Greenland Mines articulated is the heart of the story. "This investment expands Greenland Mines beyond upstream resource exposure and moves us closer to the midstream segment of the critical materials value chain, where strategic value and value capture increasingly sit," said Bo Møller Stensgaard, Ph.D., President of Greenland Mines. He framed it as an extension of the company's corridor vision - linking advantaged Greenland resource assets with industrial processing operations in allied jurisdictions such as Iceland or North America - "while adding exposure to sustainable alumina and other advanced materials that we believe can become strategically important to Western supply chains."

The target is differentiated. AnorTech is developing a proprietary process to produce sustainable smelter-grade alumina and high-purity alumina from anorthosite - a process designed to eliminate the bauxite-residue tailings that plague conventional alumina production and instead generate saleable byproducts such as amorphous silica and calcium-based industrial materials. Greenland Mines' company filed a U.S. provisional patent covering the process in February 2025, and has extended the platform into adjacent product lines including CO2-free refractory cement, 3D-printable cement, and alumina-based catalysts. To support pilot-scale testing, AnorTech has shipped a bulk sample of crushed Gronne Bjerg anorthosite to Ontario, Canada, and is advancing alumina and cement R&D programs from that material. Alumina and aluminum, Greenland Mines notes, sit at the center of industrial and security-relevant value chains - chains whose conventional supply remains exposed to concentrated sourcing, logistics risk, and mounting environmental pressure.

There is a notable historical thread connecting the two companies. AnorTech previously owned and operated the Sarfartoq rare earths project - the same Greenland Nd-Pr asset Greenland Mines recently agreed to acquire - and AnorTech President Bo Møller Stensgaard pointed to that lineage in welcoming the deal, citing his company's 24 years of Greenland development experience in "leading-edge alumina technologies." In other words, this is not a cold transaction between strangers; it deepens a relationship between teams with overlapping Greenland history.

The Platform Behind the Headline

To understand why the AnorTech stake matters, it helps to see the platform Greenland Mines is assembling. The Nasdaq-listed company - which adopted the GRML ticker in March 2026 - now describes itself as spanning two operating divisions: a mining business and a biotech business. The mining division is anchored by the company's flagship Skaergaard Project in southeast Greenland, one of the largest undeveloped palladium-gold-platinum deposits in the world, with a 2022 NI 43-101 mineral resource (by SLR Consulting) of 25.4 million ounces of palladium-equivalent and 23.5 million ounces of gold-equivalent across the indicated and inferred categories, and additional by-product optionality in vanadium, gallium, iron, and titanium. The company holds an 80% interest in Skaergaard and is preparing a major 2026 field campaign including resource-expansion drilling and a bulk sample for processing-flowsheet development.

Layered onto that precious- and critical-metals foundation is the company's move into magnet rare earths through its acquisition of the Sarfartoq Nd-Pr project in southwest Greenland - neodymium and praseodymium being the workhorse elements for permanent magnets that drive electric vehicles, wind turbines, and defense systems. Greenland Mines frames the AnorTech investment as the same strategic logic applied again: securing exposure not only to the rock in the ground, but to the processing, conversion, and industrial ecosystem that ultimately determines who captures the value. The throughline is the North Atlantic Critical Metals Corridor - a vision of moving bulk material from southwest Greenland by sea for refining or industrial conversion in Iceland, where the company says it has been advancing industrial site access, brownfield processing optionality, deep-sea logistics, and renewable-power partnerships.

Why Greenland, and Why Now

The macro backdrop gives the strategy its urgency. Critical minerals - rare earths above all - have become one of the defining geopolitical flashpoints of the decade, with China controlling the overwhelming majority of global processing capacity and repeatedly demonstrating a willingness to use export controls as leverage. Western governments have responded with funding programs, and a scramble to build mine-to-magnet supply chains outside Chinese control. Greenland, with its enormous mineral endowment, tidewater access, and strategic position in the North Atlantic, has moved to the center of that conversation, and a Nasdaq-listed developer assembling advantaged Greenland assets, paired with allied-jurisdiction processing, is squarely in the path of that capital and policy attention.

The Gronne Bjerg project illustrates the appeal. Located roughly 80 kilometers from Nuuk on an open-tidewater fjord and adjacent to strong hydroelectric potential, it offers a rare combination of resource quality, marine access, and low-carbon power - exactly the ingredients a future North Atlantic processing chain would require. Greenland Mines sees the combination of deep-sea logistics, Greenland resource quality, and Icelandic industrial infrastructure as a potentially powerful foundation for low-carbon alumina and industrial-materials development.

The Western Critical-Minerals Names Investors Are Watching

Greenland Mines sits within a cohort of Western-aligned critical-minerals companies racing to build supply and, increasingly, processing capacity outside China. Looking at a few of the most prominent public names helps frame both the opportunity and scale of the competition.

MP Materials Corp. (NYSE: MP) is the clearest reference point for the integrated, mine-to-magnet vision Greenland Mines is pursuing. Operating the Mountain Pass mine in California - the only large-scale integrated rare-earth operation in the U.S. - and a magnet-manufacturing facility in Texas where it began producing NdFeB magnets in late 2025, MP has become the bellwether for Western rare-earth independence, backed by government and commercial partnerships. It exemplifies the upstream-plus-midstream model, at a scale and stage far beyond an early-stage developer, that gives the processing-thesis its credibility.

Critical Metals Corp. (Nasdaq: CRML) is perhaps the most thematically precise comparison, because it too is built around Greenland. The company is advancing the Tanbreez rare-earth project in southern Greenland - one of the largest rare-earth deposits in the world - alongside its Wolfsberg lithium project in Europe. As a fellow Western-aligned developer betting on Greenland's critical-minerals endowment, Critical Metals offers a direct window into how public markets are valuing the critical-minerals thesis that Greenland Mines is also pursuing.

Energy Fuels Inc. (NYSE American: UUUU) approaches the theme from the processing side. Best known as a leading uranium producer, Energy Fuels has built rare-earth and critical-minerals processing capability at its White Mesa mill, and is now toward commercial production of separated rare-earth oxides. It is a useful illustration of the midstream-processing and conversion hub that Greenland Mines is now reaching toward - a company turning a milling and processing asset into a Western critical-minerals conversion hub.

NioCorp Developments Ltd. (Nasdaq: NB) rounds out the group as an advanced-stage U.S. critical-minerals developer.

Creek project in Nebraska is designed to produce niobium, scandium, and titanium, with rare-earth optionality, positioned as another Western-aligned answer to concentrated foreign supply. NioCorp illustrates the long, capital-intensive road from critical-minerals resource toward production - the same path Greenland Mines is navigating with its own portfolio. These are referenced to illustrate the sector and do not imply any partnership, endorsement, affiliation, or comparable financial performance; they differ widely in size, stage, and commodity mix, and Greenland Mines is among the earlier-stage, pre-production names.

The Risks Behind the Vision

The strategic narrative is compelling, but the risks are substantial and should be weighed carefully. The AnorTech transaction is an initial 9.9% stake - a minority position, with the larger 19.9% exposure contingent on an option - and it remains subject to closing conditions, including TSX Venture Exchange acceptance, with closing expected by the end of June. AnorTech's sustainable-alumina and HPA process is still at the patent-filing and pilot-preparation stage; commercialization of novel technology is difficult, capital-intensive, and far from guaranteed. The North Atlantic Critical Metals Corridor, for all its strategic logic, remains a vision under construction rather than operating infrastructure.

Greenland Mines itself is an early-stage, pre-production company. Its flagship Skaergaard resource, however large, has not advanced to a completed feasibility study or production decision, and its Sarfartoq acquisition remains subject to closing conditions and government approval. The company carries the structural complexity of operating both mining and biotech divisions, dependent on continued access to capital to fund its ambitions, and - as it has disclosed - has been working to regain compliance with minimum bid-price requirement within an extension period. Greenland project development also faces real logistical, permitting, environmental, and execution challenges given the Arctic operating environment. Investors should weigh the genuine strategic positioning against these meaningful, well-documented risks.

Why the Trajectory Still Matters

For all those caveats, the direction Greenland Mines is moving aligns precisely with where the critical-minerals conversion is heading. The recognition that midstream processing - not just mining - is the true strategic chokepoint is reshaping how governments and investors think about supply-chain security. Companies that can pair advantaged Western-aligned resource processing and conversion capability, and do so with a credible low-carbon and allied-jurisdiction story, are positioning themselves at the most defensible point in the value chain. Greenland Mines is assembling exactly that combination - precious metals, rare earths, and now industrial critical materials and midstream optionality - under a single Nasdaq-listed platform.

Whether the company can convert that vision into producing assets, operating processing capacity, and durable value will be decided over years, through drilling, feasibility work, pilot plants, permits, and financing. The path is long and the risks are high, but the question Greenland Mines is organizing itself around - not merely who controls the rock, but who controls the process that gives the rock its value - is exactly the question the West is racing to answer. For investors tracking where critical-minerals processing is headed, the company's push from the mine toward the midstream is a telling marker of the broader shift.

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