

A Greenland Rare Earth Story Is Accelerating as the West Races to Break China's Magnet Grip

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Issued on behalf of Greenland Mines Ltd.

USANewsGroup.com News Commentary - As of January 1, 2027, U.S. defense systems will be barred from using neodymium-iron-boron magnets containing Chinese-origin rare earths, and Western governments are scrambling to stand up a supply chain that, for two decades, was allowed to migrate almost entirely to China. That deadline has turned what was once a sleepy corner of the mining world into one of the most strategically charged investment themes of the decade - and it is sending capital toward the handful of companies that can credibly point to magnet-grade rare earth deposits and the processing know-how to turn them into finished product.

Against that backdrop, Greenland Mines Ltd. (Nasdaq: GRML) has moved to accelerate development of its Sarfartoq neodymium-praseodymium (Nd-Pr) rare earth magnet project in southwest Greenland, announcing it has engaged Tetra Tech Canada Inc. and GeoSim Services Inc. to prepare an updated Mineral Resource Estimate (MRE) compliant with the U.S. Securities and Exchange Commission's Regulation S-K 1300.

Key Takeaways

- Greenland Mines (Nasdaq: GRML) engaged Tetra Tech and GeoSim to prepare an updated S-K 1300 Mineral Resource Estimate for its Sarfartoq Nd-Pr rare earth project, targeting substantial completion by this summer, subject to internal review and approval.
- Sarfartoq carries a high Nd-Pr ratio - approximately 25%-40% of the total rare earth oxide (TREO) basket - which the company believes is among the higher such ratios reported globally, concentrating value in the two elements that drive magnet economics.
- The work program leans on continuity of technical leadership: GeoSim's Ronald G. Simpson, P.Geol., served as Qualified Person on the historical 2011 and 2012 resource estimates and as a principal author of the 2011 Preliminary Economic Assessment (PEA).
- Sarfartoq remains subject to closing of the previously announced transaction with Neo Performance Materials, and the formal transfer of the exploration licenses with Greenland authorities is underway - important conditions investors should weigh.
- The acceleration lands amid a sector-wide push - from MP Materials (NYSE: MP), USA Rare Earth (Nasdaq: USAR), and [Energy Fuels](#) (NYSE American: UUUU) - to build a Western, non-China mine-to-magnet supply chain ahead of a January 1, 2027 prohibition on Chinese-origin magnets in U.S. defense systems.

An accelerated path to an updated resource

Under a consulting services agreement dated June 11, 2026, GeoSim has been engaged to act as Qualified Person for the S-K 1300-compliant MRE at Sarfartoq, with the work led by Ronald G. Simpson, P.Geol. Tetra Tech has been retained under a parallel technical services mandate to provide engineering and metallurgical support. According to the company, the updated MRE is expected to form the basis for an updated PEA and to support future technical studies and public disclosure.

The timeline is deliberately compressed. Greenland Mines says the S-K 1300 work program is expected to be advanced on an accelerated basis and substantially completed by this summer, which would allow the company to announce an updated mineral resource for Sarfartoq and file a supporting S-K 1300 Technical Report Summary shortly thereafter - subject to customary internal review and approval. Management has signaled it intends to leverage the updated MRE into an expedited refresh of the 2011 PEA, with a focus on positioning Sarfartoq as an advanced Nd-Pr development project with downstream relevance to U.S. and European markets.

Ahead of closing the Sarfartoq acquisition, the company has also initiated the formal transfer process for the Sarfartoq exploration licenses with the relevant Greenland authorities, and says its local team in Nuuk is in active dialogue with regulators to facilitate an orderly transfer. It is a reminder that, for now, Sarfartoq is an asset Greenland Mines is moving toward - not one it holds outright - and the conditional language matters.

Why the Nd-Pr ratio is the story

Not all rare earth deposits are created equal. The value in the magnet supply chain is concentrated in

neodymium and praseodymium - the two elements that, alloyed with iron and boron, make the permanent magnets that spin electric-vehicle motors, pitch wind-turbine blades, and actuate the control surfaces of guided defense systems. A deposit heavy in those two elements is worth disproportionately more, ton for ton, than one dominated by the cerium and lanthanum that sit lower on the value curve.

That is what Greenland Mines is leaning on at Sarfartoq. The company describes the project as an advanced carbonatite-hosted magnet rare earth deposit with Nd-Pr constituting roughly 25%-40% of the TREO basket - a ratio it believes ranks among the higher figures reported globally. Historic work, including the 2011 PEA, outlined both open-pit and underground development concepts, and the current program is expected to revisit those alternatives while examining hybrid sequencing - an initial open-pit phase followed by a later underground phase. Tetra Tech's mandate specifically includes pit-shell and underground optimization studies, evaluation of starter-pit options, and updated metallurgical recovery assumptions.

Re-engaging GeoSim and Mr. Simpson - who have been involved with Sarfartoq for more than a decade - gives the company continuity of technical oversight and a direct line back to the geological model and database that established the project as one of Greenland's more advanced rare earth stories. In parallel, Greenland Mines has re-appointed WSP Danmark A/S to complete a second year of environmental baseline data collection, building on first-year work initiated under the prior owners. The updated MRE will also integrate additional drilling and internal resource modeling completed by Neo Performance Materials and its subsidiary between 2023 and 2025, which are to be transferred as part of the acquisition.

Part of a broader Greenland platform

Greenland Mines frames Sarfartoq not as a standalone asset but as one piece of a broader multi-asset strategy built around Greenland mineral projects and downstream optionality in the North Atlantic. The company's stated approach combines advanced upstream projects in Greenland with potential downstream processing and industrial partnerships in allied jurisdictions, including Iceland, to support more resilient supply chains serving the United States, North America, and Europe.

Within that framework, Sarfartoq adds magnet rare earth exposure alongside the company's Skaergaard precious- and critical-metals project, giving Greenland Mines a Nasdaq profile spanning the energy-transition, defense, and strategic-materials themes. The company has also pointed to its previously announced transaction structure with Neo Performance Materials - including Neo's right to purchase up to 60% of Sarfartoq Nd-Pr production - as support for the project's relevance within a potential Western-aligned mine-to-magnet value chain. As with the resource work itself, those arrangements remain tied to closing.

A sector racing the same clock

Greenland Mines is moving into a theme that has drawn some of the most aggressive capital and policy support in the mining world. The reason is a hard deadline: beginning January 1, 2027, U.S. defense systems will be prohibited from incorporating neodymium-iron-boron magnets that contain Chinese-origin rare earths - a restriction that has galvanized a scramble to build domestic and allied alternatives across the entire chain, from mining to metallization to finished magnets.

The clearest barometer of how seriously Washington takes the problem is MP Materials Corp. (NYSE: MP). The operator of the Mountain Pass mine in California - the only large-scale rare earth mining and processing operation in North America - struck a multibillion-dollar partnership with the U.S. Department of Defense in 2025 that included a 10-year price-floor commitment of \$110 per kilogram for its Nd-Pr products and a 10-year magnet offtake arrangement. The company reported record Nd-Pr production in the first quarter of 2026 and has been building out domestic magnet manufacturing in Texas.

"This initiative marks a decisive action by the Trump administration to accelerate American supply chain independence," said James Litinsky, Founder, Chairman, and CEO of MP Materials, on the Department of Defense partnership. "We are proud to enter into this transformational public-private partnership."

Further down the chain, USA Rare Earth, Inc. (Nasdaq: USAR) is racing to stand up domestic magnet manufacturing. In March 2026, the company commissioned its commercial magnet production line at its Stillwater, Oklahoma facility, enabling it to begin filling orders for sintered neodymium-iron-boron magnets. It

has since moved to consolidate feedstock, including an agreement to acquire the Serra Verde rare earth operation in Brazil.

"Today's announcement is a major step in delivering on our ambition to build a global champion and the partner of choice in rare earth elements, oxides, metals and magnets," said Barbara Humpton, Chief Executive Officer of USA Rare Earth, on commissioning the Stillwater line. "As we scale production, we are proud to help reduce reliance on foreign manufacturing while serving industries critical to our nation and its allies."

And on the processing side, [Energy Fuels Inc.](#) (NYSE American: UUUU) has been advancing one of the few operating rare earth separation capabilities in the United States at its White Mesa Mill in Utah, where it produces Nd-Pr oxide and has piloted production of the heavier rare earths dysprosium and terbium. In January 2026, the company released a bankable feasibility study for a Phase 2 expansion it says would rank among the lowest-cost Nd-Pr production globally.

"Energy Fuels is on the cusp of solving America's rare earth processing 'bottleneck'," stated Mark S. Chalmers, then-CEO of Energy Fuels, on the Phase 2 feasibility results in January 2026. (Chalmers retired in April 2026, with Ross Bhappu appointed President and CEO.) The company's progress underscores a point relevant to any aspiring developer: a deposit is only as valuable as the chain that can process it.

That is the competitive set Greenland Mines is stepping into - not as a peer in scale or stage to producers like MP Materials, but as an earlier-stage developer betting that a high Nd-Pr ratio, continuity of technical work, and a strategically located Greenland asset can earn it a place in the Western supply-chain conversation. Whether that bet pays off will depend on the updated MRE, the PEA refresh, the closing of the Neo transaction, and the license transfer - each of which carries execution risk that the company itself flags.

What to watch

The near-term catalysts are clearly defined. The first is the updated S-K 1300 MRE, which the company targets for substantial completion by this summer, followed by the filing of a Technical Report Summary. The second is the refreshed PEA that the MRE is intended to feed. The third - and the most fundamental - is the closing of the Sarfartoq transaction with Neo Performance Materials and the completion of the license transfer with Greenland authorities, without which the rest of the program is conditional. Investors will also be watching the second year of environmental baseline work as a marker of permitting readiness.

For a market that has spent two years rewarding rare earth stories tied to the 2027 deadline, Greenland Mines offers a differentiated angle: magnet-grade mineralogy in an allied Arctic jurisdiction, paired with a stated North Atlantic processing vision. The qualifier - and it is a real one - is that much of the thesis still rests on studies yet to be completed and a transaction yet to close. The coming months should provide the evidence.

- Read more information on Greenland Mines [here](#)

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SOURCES

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