Testimony of
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before the
U.S. House of Representatives
Natural Resources Committee

Legislative Hearing on H.R. 573, H.R. 4503, H.R.4776

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Good morning, Mr. Chairman, Ranking member and the members of the committee. I am Rich Nolan, President and Chief Executive Officer of the National Mining Association (NMA). I appreciate the opportunity to testify before you today on behalf of the mining industry on the need for durable and lasting permitting reforms and Chairman Bruce Westerman's bipartisan Standardizing Permitting and Expediting Economic Development (SPEED) Act (H.R. 4776).

America's mining industry supplies the materials necessary for nearly every sector of our economy – from technology and healthcare to energy, transportation, infrastructure and national security. The NMA is the only national trade organization that serves as the voice of the U.S. mining industry and the hundreds of thousands of American workers it employs before Congress, the federal agencies, the judiciary and the media, advocating for public policies that will help America fully and responsibly utilize its vast natural resources. We work to ensure America has secure and reliable supply chains, abundant and affordable energy, and the American-sourced materials necessary for U.S. manufacturing, economic and national security, all delivered under world-leading environmental, safety and labor standards.

The NMA has a membership of nearly 300 companies and organizations working in the U.S. to mine and explore for energy and minerals. With this in mind, we continue to support the efforts of this committee to pursue bipartisan permitting reforms that alleviate key permitting delays for critical U.S. industries such as mining and provide needed solutions to enhance U.S. economic competitiveness and national security objectives.

Energy and Mineral Demand Outlook

The NMA appreciates the support for our nation's mining industry from both Congress and the Trump administration, and we agree that reestablishing the U.S. as an industrial powerhouse begins with ensuring that the materials that feed our supply chains are mined in America. There is widespread recognition that we are in one of the most energy and mineral intensive eras in human history. We can only fully and reliably feed our supply chains, maintain America's global competitive edge, and underpin our national security by sourcing necessary energy and materials here at home.

Coal is increasingly needed to address rapidly growing electricity demand and to maintain grid reliability, especially during periods of peak demand or weather or fuel transport disruptions for other energy sources. U.S. electricity demand is projected to double by 2050, with a remarkable jump in demand already underway.[1] This skyrocketing demand is driven by the use of artificial intelligence, conversion to electric heating, construction of data centers, and uptake of electric vehicles (EV). A recent forecast sees demand rising 128 GW over just the next five years—equivalent to adding 80 million homes to our already overstretched and under-supplied grid.[2] While demand for electricity is skyrocketing, updating and expanding our energy infrastructure faces permitting delays and supply chain constraints. In the face of these diverging trends, which are becoming more alarming every day,[3] reliable coal-fueled electricity is needed now more than ever.

Similarly, demand for minerals and derivative products is expected to increase dramatically. According to the International Energy Agency (IEA), demand for key energy minerals continued to grow in 2024. Lithium demand rose by nearly 30 percent, demand for nickel, cobalt, graphite and rare earth elements rose by 6-8 percent, and copper also saw robust demand growth of around 3 percent, outpacing the previous two years.[4] Overall, IEA predicts that by 2040, lithium demand grows fivefold; graphite and nickel demand double; cobalt and rare earth elements demand increases by 50-60 percent; and copper demand grows by 30 percent.[5]

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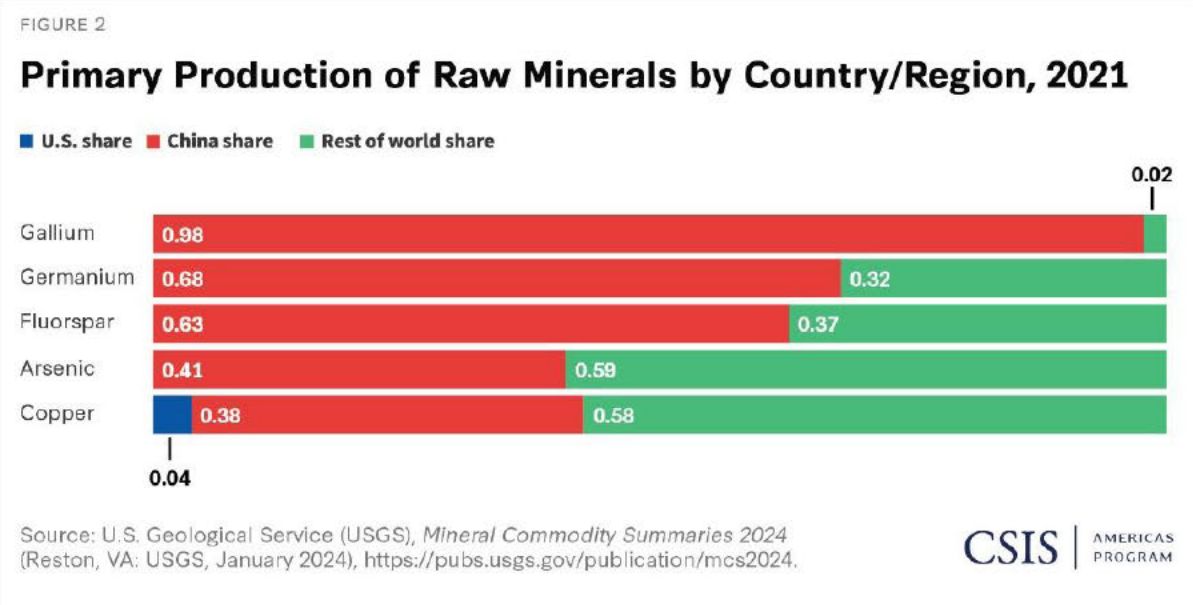
[1] Axios, Exclusive: Electricity demand to rise 78% by 2050, study says (May 25, 2025), available at https://www.axios.com/2025/05/20/electricity-demand-projection-2050-icf.
[2] Utility Dive, Five-year US load growth forecast surges 456%, to 128 GW: Grid Strategies (Dec. 6. 2024), available at https://www.utilitydive.com/news/shocking-forecast-uselectricity-load-could-grow-128-gw-over-next-5-years-Grid-Strategies/734820/.
[3] See Department of Energy Releases Report on Evaluating U.S. Grid Reliability and Security, available at https://www.energy.gov/articles/department-energy-releases-reportevaluating-us-grid-reliability-and-security.
[4] International Energy Agency, Global Critical Minerals Outlook 2025, May 2025, available at https://www.iea.org/reports/global-critical-minerals-outlook-2025.
[5] *Id*. at p.89.

Another area of significant mineral demand can be attributed to semiconductor manufacturing, which "require over 300 materials" to produce.[6] These supply chains are highly concentrated in China and are increasingly vulnerable to disruption. The following chart provides a list of common minerals found in semiconductors and where those minerals are produced.[7] The bottom line is that if we want to win the AI race, we need more minerals and we need them to be sourced here at home.



Supplying Demand

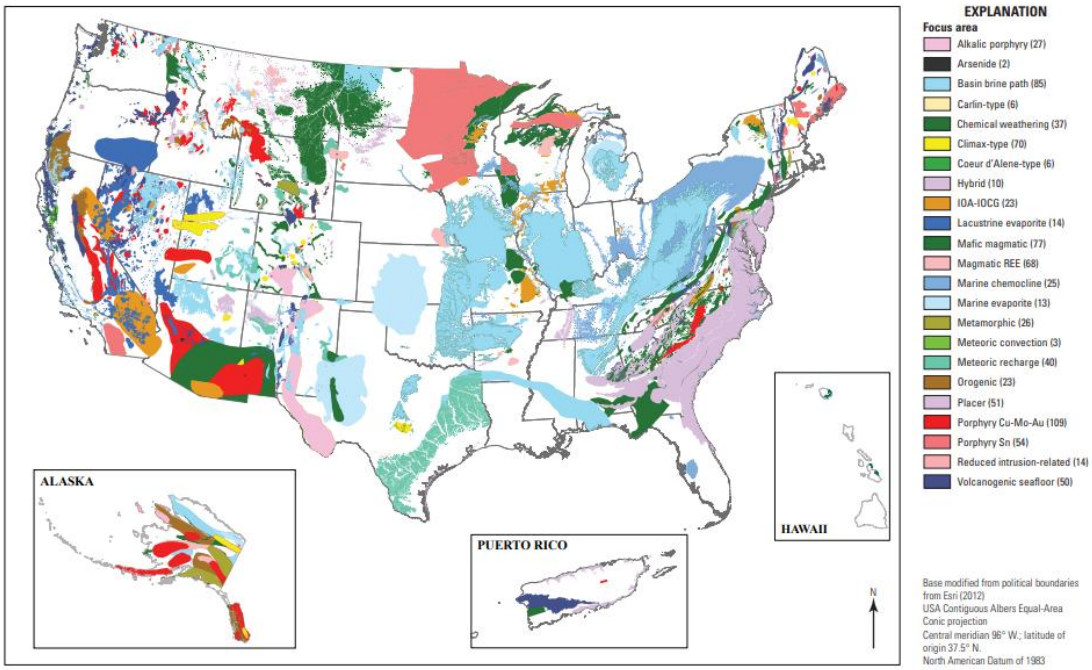
The increase in energy and mineral demand to meet U.S. economic competitiveness and national security needs is commonly agreed upon with many on both sides of the aisle acknowledging this is a problem worth addressing. Fortunately, the U.S. is home to vast mineral resources – like those in the Duluth Complex in Northern Minnesota or the Ambler District in Alaska – that could be developed under world-leading environmental, labor, and safety standards.

According to U.S. Geological Survey (USGS), when it comes to key minerals in the U.S., what is left to be discovered is almost as much as what is already found. Using the USGS's Earth Mapping Resources Initiative (MRI), which provides "data needed to understand our nation's geology, find new

[6] Wischer, G. D., & Dwivedi, S. (2022, May 10). Critical Materials Can Make or Break America's Semiconductor Supply Chains. Retrieved September 8, 2025, from https://nationalinterest.org/blog/techland-when-great-power-competition-meets-digital-world/critical-materials-can-make-or-break

[7] Berg, R. C., Ziemer, H., & Polo Anaya, E. (2024, May 14). Mineral Demands for Resilient Semiconductor Supply Chains. Center for Strategic and International Studies. Retrieved September 8, 2025, from https://www.csis.org/analysis/mineral-demands-resilient-semiconductor-supply-chains

critical and other mineral resources,"[8] nearly 25 percent of the U.S. had been mapped by the end of 2024.[9] With advanced mapping techniques like this, there is no doubt that we can identify and locate domestic resources faster and with more precision than in the past. In 2023 alone, the USGS released a map of potential critical mineral resources in the U.S. that identified more than 800 new focus areas of interest.[10]



The development of new energy and mineral resources is essential to meet demand. In 2023, the IEA calculated that 388 new mines were needed by 2030 to meet demand for international electric vehicle adoption pledges alone.[11] Without new mining operations being permitted and coming online, the U.S. and our allies cannot hope to compete in the global mineral supply chain, leaving our economic and national security increasingly vulnerable to geopolitical adversaries who understand the strategic value of weaponizing mineral supply chains.

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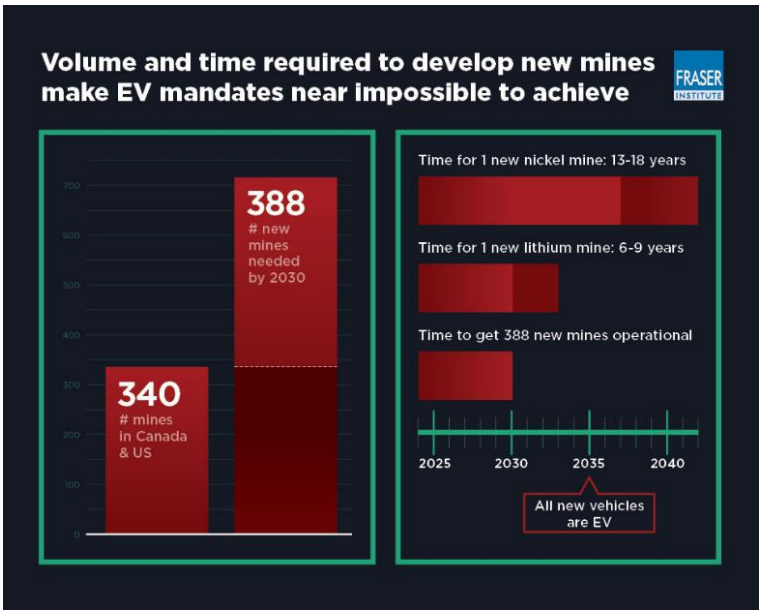
[8] U.S. Geological Survey (n.d.). Earth Mapping Resources Initiative (Earth MRI). Retrieved September 8, 2025, from https://www.usgs.gov/earth-mapping-resources-initiative-earth-mri

[9] Stone, M. (2025, March 26). Why Biden and Trump both support this federal mineral mapping project. Grist.org. Retrieved September 8, 2025, from https://grist.org/energy/critical-minerals-mapping-trump-biden-earth-mri-usgs/

[10] U.S. Geological Survey, National Map of Focus Areas for Potential Critical Mineral Resources in the United States, 2023, available at https://pubs.usgs.gov/fs/2023/3007/fs20233007.pdf.

[11] Green, K. P. (2023, November 23). 388 new mines must be built by 2030 to satisfy electric vehicle mandates. Fraserinstitute.org. Retrieved September 8, 2025, from https://www.fraserinstitute.org/studies/can-metal-mining-match-speed-planned-electric-vehicle-transition



Source: Fraser Institute.

With over $6 trillion worth of known domestic mineral resources, it is not a question of whether we could source more of our needs at home but whether we have the right policies in place to unlock these resources and process them here at home.

The lack of fully integrated domestic production supply chains is why the U.S. relies heavily on imports of critical minerals and their derivative products that are essential for the manufacturing, energy, transportation and national security sectors. Unfortunately, for some of these minerals, the U.S. is dependent on a small group of countries – both allies and geopolitical adversaries. This presents considerable risk in supply chain disruptions for many reasons including: natural disasters, labor strikes, logistical bottlenecks, geopolitical instability, trade tensions and foreign government policies creating outright competitive disadvantages for U.S. companies.

The USGS annual Mineral Commodity Summaries (MCS) report provides critically important data on net import reliance and leading import sources for a wide swath of minerals. The report's long-running annual publication sheds valuable insights on U.S. import reliance over time. As of the USGS MCS' January publication, the U.S. continues to be 100 percent import reliant for 15 minerals and is reliant on imports for more than one-half of the U.S. apparent consumption of 46 nonfuel mineral commodities. This MCS net import reliance chart highlights our nation's overwhelming reliance on foreign sources, especially from geopolitical adversaries like China and Russia, which are highlighted on the following chart.

Commodity	Net import reliance as a percentage of apparent consumption in 2024	Leading import sources (2020–23)[2]
ARSENIC, all forms	100	China,[3] Morocco, Malaysia, Belgium
ASBESTOS	100	Brazil, Russia
CESIUM	100	Germany, China
FLUORSPAR	100	Mexico, Vietnam, South Africa, China[3]
GALLIUM, metal	100	Japan, China, Germany, Canada
GRAPHITE (NATURAL)	100	China,[3] Canada, Mexico, Mozambique
INDIUM	100	Republic of Korea, Japan, Canada, Belgium
MANGANESE	100	Gabon, South Africa, Australia, Malaysia
MICA (NATURAL), sheet	100	China, Brazil, India
NIOBIUM (COLUMBIUM)	100	Brazil, Canada
RUBIDIUM	100	China, Germany, Russia
SCANDIUM	100	Japan, China, Philippines
STRONTIUM	100	Mexico, Germany
TANTALUM	100	China,[3] Australia, Germany, Indonesia
YTTRIUM, compounds	100	China,[3] Germany
GEMSTONES	99	India, Israel, Belgium, South Africa
ABRASIVES, fused aluminum oxide	>95	China,[3] Canada, Brazil, Austria
NEPHELINE SYENITE	>95	Canada
TITANIUM, sponge metal	>95	Japan, Kazakhstan, Saudi Arabia
POTASH	93	Canada, Russia, Belarus, Israel
BISMUTH, metal, alloys, and scrap	89	China,[3] Republic of Korea
IRON OXIDE PIGMENTS, natural and synthetic	87	China,[3] Germany, Brazil, Canada
TITANIUM MINERAL CONCENTRATES	86	South Africa, Madagascar, Canada, Australia
ANTIMONY, metal and oxide	85	China,[3] Belgium, India, Bolivia
PLATINUM	85	South Africa, Belgium, Germany, Italy
STONE (DIMENSION)	83	Brazil, China,[3] Italy, Turkey
DIAMOND (INDUSTRIAL), stones	81	India, South Africa, Russia, Australia
RARE EARTHS,[4] compounds and metals	80	China,[3] Malaysia, Japan, Estonia
PEAT	78	Canada
CHROMIUM, all forms	77	South Africa, Kazakhstan, Canada, Finland
COBALT, metal, oxides, and salts	76	Norway, Finland, Japan, Canada
BARITE	>75	India, China,[3] Morocco, Mexico
BAUXITE	>75	Jamaica, Turkey, Guyana, Australia
MAGNESIUM METAL	>75	Israel, Canada, Turkey, Czechia
TIN, refined	73	Peru, Bolivia, Indonesia, Brazil
ZINC, refined	73	Canada, Mexico, Republic of Korea, Peru
ABRASIVES, silicon carbide	69	China,[3] Brazil, Canada
RHENIUM	65	Chile, Canada, Germany, Poland
SILVER	64	Mexico, Canada, Republic of Korea, Poland
ALUMINA	59	Brazil, Jamaica, Australia, Canada
MAGNESIUM COMPOUNDS	52	China,[3] Israel, Brazil, Canada
GERMANIUM	>50	Belgium, Canada, China, Germany
IODINE	>50	Chile, Japan
LITHIUM	>50	Chile, Argentina
SELENIUM, metal	>50	Philippines, Mexico, Canada, Poland
TUNGSTEN	>50	China,[3] Germany, Bolivia, Vietnam
SILICON, metal and ferrosilicon	<50	Brazil, Russia, Canada, Malaysia
GARNET (INDUSTRIAL)	48	South Africa, Australia, India, China[3]
NICKEL	48	Canada, Norway, Australia, Brazil
ALUMINUM	47	Canada, United Arab Emirates, Bahrain, China[3]
DIAMOND (INDUSTRIAL), bort, grit, and dust and powder	47	China,[3] Republic of Korea, Ireland, Russia
COPPER, refined	45	Chile, Canada, Mexico, Peru
MICA (NATURAL), scrap and flake	41	China, Canada, India, Finland
VANADIUM	40	Canada, Brazil, Austria, South Africa
PALLADIUM	36	Russia, South Africa, Belgium, Italy
VERMICULITE	34	South Africa, Brazil, Zimbabwe
FELDSPAR	33	Turkey, Mexico
LEAD, refined	28	Canada, Republic of Korea, Mexico, Australia
PERLITE	26	Greece, China
BROMINE	<25	Israel, Jordan, China[3]
TELLURIUM	<25	Canada, Philippines, Japan, Germany
ZIRCONIUM, ores and concentrates	<25	South Africa, Australia, Senegal
SALT	24	Canada, Chile, Mexico, Egypt
CEMENT	22	Turkey, Canada, Vietnam, Greece

Source: U.S. Geological Survey.[12]

This perilous situation has dire implications for our national security. Given security sensitivities, precise mineral demand and reliance numbers for military applications are not readily available. The foundational role of minerals in defense systems is a factor that must be considered when evaluating mineral supply chains. A recent report evaluating defense use of minerals, estimates that the U.S. is more than 50 percent reliant on imports for 18 minerals needed for infrared goggles, jets, tanks, missiles and global positioning systems.[13] That same report comes to a terrifying conclusion, "today, the United States is analogous to Russia during World War I—mineral rich but unprepared for wartime demands and foreign supply restrictions."[14]

[12] U.S. Geological Survey, 2025, Mineral commodity summaries 2025 (ver. 1.2, March 2025), p. 7, *available at* https://doi.org/10.3133/mcs2025.

[13] Gregory D. Wischer, "The U.S. Military Risks Mineral Shortages in a U.S.-China War
Lessons from World War I, World War II, and the Korean War," Military Review: The Professional Journal of the U.S. Army, Army University Press, January-February 2025.

[14] *Id.*

Barriers to Domestic Energy and Mineral Supply Chains

The domestic mining industry operates under a comprehensive framework of federal and state laws, regulations and policies that govern nearly every inch of a mine site. While the NMA and our members support regulations that both foster environmental protection and promote responsible development, we also rely on fair, consistent and predictable permitting processes to support our national priorities and remain competitive in the global economy. For too long, regulatory uncertainty in the permitting process has delayed projects, chilled investment in U.S. mining operations, and inhibited the ability to mine the raw materials on which our nation's energy, infrastructure, manufacturing and mining supply chains depend.

Permitting uncertainty can also cause project proponents and investors alike to look outside the U.S. when determining where to invest and develop projects. This puts our nation's supply chain independence at risk and creates a dangerous situation where we become increasingly import-dependent on necessary materials from adversarial countries.

For decades, the U.S. has faced increasingly significant challenges to permit and approve projects that provide the minerals, raw materials and energy resources needed for nearly every sector of our economy. From the mining industry's perspective, an inefficient National Environmental Policy Act (NEPA) process is a primary contributor to the lengthy and unpredictable process that discourages the capital investments required for energy and mineral exploration and mine development. The implementation of NEPA and its use as a tool for litigation has allowed this well-intentioned law to stray far from its intended purpose and underlying text. For evidence, look no further than a recent report by S&P Global, which found that it takes an average of 29 years to bring a mine online in the United States.[15] This is longer than all other countries but one.

Clearly, an inefficient NEPA process presents a major barrier to the domestic mining sector's ability to perform to its full potential and meet more of our energy, manufacturing, national security and infrastructure needs. These delays have real consequences. A study from SNL Metals & Minerals found that, on average, a typical mining project loses more than one-third of its economic value as a result of protracted delays in receiving the numerous permits needed to begin production.[16]

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[15] S&P Global, "United States Ranks Next to Last in Development Time for New Mines that Produce Critical Minerals for Energy Transition," July 18, 2024. https://press.spglobal.com/2024-07-18-United-States-Ranks-Next-toLast-in-Development-Time-for-New-Mines-that-Produce-Critical-Minerals-for-Energy-Transition,-S-P-Global-Finds

[16] SNL Metals & Mining, Permitting, Economic Value and Mining in the United States, June 2015.

The longer the wait, the more the value of the investment is eroded, even to the extent that the project ultimately becomes an unviable investment. If the balance between costs, revenue, and timetable is not favorable, a large, high-grade deposit will remain unmined.

Solutions to Enhance Domestic Energy and Mineral Supply Chains

Change is needed to make the permit process for mining projects, including the NEPA component, more efficient and timely. Reducing delays and duplication caused by NEPA analyses as well as increasing transparency would benefit not only project proponents, but also federal, state and local governments as well as the public. Further, providing access to mineralized federal lands without the constant threat of withdrawals and allowing mining companies to use adjacent lands for ancillary purposes as provided under the bipartisan Mining Regulatory Clarity Act, will allow project proponents needed regulatory certainty and clarity. Additionally, applying Bureau of Land Management notice-level mineral exploration processes to other federal land management agencies and enacting durable judicial reforms would be a catalyst, not only for investment in domestic energy and mineral projects, but also the research and development capabilities needed to bring those projects to fruition.

Moreover, I strongly encourage the committee to work together to advance the bipartisan SPEED Act. H.R. 4776 is an important step forward and will help secure the nation's mineral supply chains and encourage development of our energy resources. This legislation reinforces and strengthens amendments made to NEPA in the Fiscal Responsibility Act of 2023; restrains federal authority to only the project or action under permitting consideration; and reduces duplication between state and federal reviews.

H.R. 4776 also builds on judicial reforms found in bipartisan and bicameral legislation from the last Congress and adds a new section under NEPA clarifying the standard of review and requiring claims be based off of public comments that are "unique and substantive," rather than form letters. It also includes provisions to reduce time spent on litigation by requiring courts to resolve NEPA-related cases within a specific timeframe. This legislation will enhance America's economic competitiveness and national security without compromising environmental review.

Conclusion

The U.S. has all the ingredients necessary to create our own energy and mineral supply chain dominance. That said, there can be no supply chain security — no meeting the enormous mineral demand at our doorstep —

without fundamental recognition that we need more domestic mining and processing, combined with responsible policies to achieve it.

With the right policies, the U.S. could reduce reliance on China and other foreign sources, increase our global competitiveness, and create high-paying American jobs that provide our manufacturing and defense sectors with a stable supply of the energy and minerals they need. Solutions must be comprehensive, government-wide approach to achieve a secure supply chain.

As the clarity of U.S. mineral import vulnerabilities come into focus, it is important to remember that our current, self-imposed state of affairs does not need to be permanent. It will take difficult decisions, time and political will to gain what we have lost. The path to achieving a strong mineral supply chain that supports U.S. economic and national security is only one step away, but we must be willing to take the first step together.

The mining industry supports H.R. 4776 and looks forward to working with this committee in a bipartisan way to advance lasting and effective permitting reforms. Thank you for the opportunity to testify before you today and I look forward to answering your questions.