



American Exploration &  
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**House Committee on Natural Resources  
Subcommittee on Energy and Mineral Resources  
Legislative Hearing on:  
H.R. 1501, H.R. 2969, H.R. 4781, H.R. 5929, H.R. 7126, and H.R. 7458  
February 24, 2026**

**Testimony of Mark Compton  
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**Introduction**

I want to thank the Subcommittee for highlighting mineral security issues and your bipartisan work to create an environment in which the U.S. mining industry can succeed in safely and responsibly providing the raw materials our nation requires for our national defense, economic well-being and energy security.

The American Exploration & Mining Association's (AEMA) members take great pride in finding and producing the metals and other important minerals America needs for national and economic security, as well as the materials people use in their everyday lives. We are proud of our members' contributions across the communities and regions where they operate, many of which are rural areas facing significant economic and social development challenges.

Notably, the U.S. mining industry is the safest, most environmentally responsible mining industry in the world. AEMA members have repeatedly demonstrated that mining and protecting the environment are compatible, as mineral producers make possible the development of society's basic needs and consistently minimize modern society's impacts on the environment. Americans and the environment lose when we offshore our mining and mineral requirements. It makes no sense to create mining jobs elsewhere, and to import minerals from countries with inferior environmental protection and worker health and safety standards.

Mineral demand continues to increase rapidly, year after year. Whether these minerals are required for various sources of energy, artificial intelligence (AI) or quantum computing, or weapons systems to bolster our national security, world leaders increasingly understand the importance of secure mineral supply chains.

Unfortunately, a lack of access to economically viable mineral deposits and a lengthy, inefficient federal permitting system have resulted in our unsustainable dependence on foreign countries for more than 50 essential minerals and has empowered our adversaries to strategically weaponize

mineral supply chains against us. Although we may need to obtain some minerals from our allies, we must responsibly utilize our own resources whenever possible. The surging global demand for minerals and raw materials means other countries will be competing for the same limited supplies, which will challenge our ability to obtain minerals from abroad. These supply chain concerns have led to bipartisan acknowledgement of the need for more domestic mineral production.

If we are to secure our supply chains by increasing domestic mineral production, we need to incentivize mineral exploration, the lifeblood of the minerals industry. We must ensure federal land access to explore for and develop mineral resources, we must permit mining projects in a timely manner, and we must develop the skilled workforce necessary to carry out these objectives.

### *Background on Hardrock Mining*

AEMA's members operate their respective exploration and mining activities in a responsible manner through a wide range of social and environmental conditions across the United States. Their operations are subject to extensive federal, state and local permitting processes providing ample opportunity to ensure resource protection. To meet our imminent metal and mineral needs, Congress and the administration should be focusing on how to expand areas that should be open to potential mining and exploration activities, instead of looking for ways to restrict regions from exploration.

The challenge of finding and developing mineral resources in the United States, or anywhere in the world, is very difficult because mineral deposits are geologically rare and hard to discover, with most deposits buried by tens to hundreds of feet of soil and rocks. Exploration and mining projects must undergo multiple lengthy stages of development.

First, there is the initial identification of deposits that hold potentially developable mineral reserves. To this point, the United States has only explored and mapped the mineral potential on approximately 12 percent of our country's lands. The USGS estimates that it would take more than 10 years just to find and map all domestic resources. Importantly, mining companies often do most of this work themselves and cover all the investments needed to advance a potential mineral deposit towards an operating mine. No taxpayer monies are used to discover mineral deposits and develop them into mines that produce the raw materials needed to build and maintain our society, that employ people at high-paying jobs, and that pay local, state, and federal taxes.

After a potential deposit is identified, which often takes years of exploration-level permitting to ascertain, mining companies must determine a path to confirm the nature and scale of any developable resources. They must identify the amount of additional exploration necessary to properly define the mineral deposit, gain approvals to conduct further studies, and then explore and report on the exploration results. Defining the deposit generally requires multiple years of drilling to establish the extent and quality of any valuable mineralization. This process can take up to several decades for large and complex orebodies. Exploration drilling and associated activities require significant investment, especially since they are often undertaken in geographically remote and challenging areas where access and infrastructure are limited. It's noteworthy that a single deposit is rarely confined to one tenure type—that is, it may consist of a combination of federal tenure, private tenure or even State lands where any successful operation could, for example, provide a revenue stream to the school children of that State.

In the event a mineable resource is defined, the work continues for mining companies to determine whether there is an economically feasible mine development scenario. This generally involves preparation of a Feasibility Study, sometimes preceded by a Pre-Feasibility Study, and requires several additional years to produce information sufficient to support a mine investment decision. Multiple years of baseline data collection and analysis are often undertaken to provide information for the feasibility work as well as for future permitting. While mining companies may start their pre-permitting work early, including at the exploration stage through Feasibility Study preparation, they often do not submit formal applications until a developable project is identified through the Feasibility Study.

Thus, while it is easy to focus on a single part of the mineral development process, it is important to recognize all of the crucial stages involved with development of an operating mine. When projects require two or three decades to take a potential mineral resource to the point of mine construction, any government action that could lengthen this process or create disincentives, or create risk to the security of tenure, should be carefully weighed in terms of its ramifications.

Moreover, even when a project has matured through the permitting process, litigation and other actions that jeopardize or delay further development of ancillary facilities at mine sites can have severe consequences. Unless Congress addresses the extended timeline from discovery to production, future domestic mining projects that could help fill this Nation's critical needs could be decades away from providing any substantial benefit.

#### *We Need Access to Explore for and Develop Mineral Deposits*

It is important to remember that mineral deposits are unique geologic phenomena. In a 1999 report, the National Research Council of the National Academy of Sciences recognized just how rare mineral deposits are: "Only a very small portion of Earth's continental crust (less than 0.01%) contains economically viable mineral deposits. Thus, mines can only be located in those few places where economically viable deposits were formed and discovered." We cannot choose where they are located or move the mineral deposits from areas of competing interests. The Academy further noted that, on average, 1,000 mineral targets must be examined before discovering the deposit capable of becoming a mine.

We must facilitate greater investment in environmentally safe and innovative technologies within the United States and develop clean and safe domestic mines where these valuable mineral deposits are found. The United States must strive for mineral independence if we are to compete in the future world economy and demand for minerals.

Sequestering lands with known mineral deposits or that have high mineral potential prevents the United States from responsibly developing its mineral endowment. Today, out of the 600 million acres of reserved public lands, roughly 400 million acres are set aside for conservation and preservation purposes and are thus functionally off-limits to mineral exploration and mining. According to former Department of the Interior Solicitor, John Leshy, during the period from 1980 to 2020, the acres of U.S. conservation and preservation lands grew from 250 million to 400 million.

Further restricting access to mineral resources threatens our mineral security and chills investment. If we cannot invest in mineral exploration, we cannot discover that rare, "needle in a haystack" deposit. Every time we declare land off-limits to mining, we shrink the playing field and stack the odds even higher against discovery. This highlights the importance of allowing and promoting mineral exploration across our country.

It takes 10 years or more of drilling, geological analysis, baseline studies, project feasibility evaluations, and hundreds of millions of dollars of investment to advance a prospect from exploration to the *start* of mine permitting. Permitting the mine then takes at least several more years – and even longer if the project is litigated, which happens all too often and can add years before any ore can be produced.

As a Nation, we have acknowledged the urgency of increasing domestic mineral production, strengthening our supply chains, and reducing our reliance on foreign minerals. Because it often takes two or three decades to get from exploration to production, minimizing the land access and permitting obstacles that impede domestic exploration and mining is imperative.

### *Our Increasing Mineral Import Reliance is a National Security Threat*

According to the U.S Geological Survey’s Mineral Commodity Summaries 2026, our country’s import dependence for key mineral commodities has skyrocketed over the past three decades, with the United States now 100 percent import reliant for 16 mineral commodities and greater than 50 percent import reliant for another 38, despite having tremendous mineral wealth. Our mineral dependency is at a record high, and it comes with serious consequences. Most recently, the COVID-19 pandemic, the Russian invasion of Ukraine, and Chinese dominance of minerals markets have laid bare the vulnerabilities that exist in critical U.S. supply chains, including our reliance on imported minerals.

While the United States was pursuing policies over the past several decades that discouraged mineral exploration and mine development, China was methodically making strategic global investments in mining, mineral processing, manufacturing products like battery components and batteries made from minerals, and educating mining professionals. Today, China dominates the world’s mineral supplies and products, and the human resources required to mine and process minerals. Consequently, the United States now faces a minerals emergency that poses serious economic and national security threats.

In its July 2024 critical minerals report, the Government Accountability Office (GAO) illustrates that critical minerals are essential to five key sectors: aerospace, defense, energy, telecommunications and electronics, and transportation. According to GAO’s report, the U.S. imports 100 percent of ten critical minerals and 95 percent of the listed Rare Earth Elements, with many coming from China. (See Figure 1). The national security implications of China’s mineral dominance are especially troubling.

### *The U.S Mining Law is the Key to Increasing Domestic Mineral Production*

The U.S. Mining Law is critical to achieving the objective of increasing domestic mineral production because this law capitalizes on American ingenuity, technical prowess, and entrepreneurial spirit to make the investments necessary to discover and develop minerals. The land use principles that are the hallmarks of the Mining Law including but not limited to self-initiation and security of land tenure are essential to maintaining the Nation’s ability to meet future mineral demands, regain mineral dominance, and provide economic and national security. Since its enactment in 1872, the U.S. Mining Law has leveraged private-sector investment in the risky business of looking for minerals and transformed undeveloped public lands into mines that have provided the minerals needed to win two world wars, build modern society, and continually improve Americans’ standard of living.

A false narrative exists that our members receive some kind of bargain by operating on federal lands and that they operate freely under historic laws dating back 150 years – mostly notably in reference to the Mining Law. Neither of these statements is accurate. There are many land use and environmental statutes, as well as amendments, regulations, and policies that have been enacted or promulgated since the Mining Law. Nevertheless, throughout these many decades, Congress has preserved the basic premises of the Mining Law: self-initiation and security of land tenure for U.S. citizens in the public domain. This preservation of statutory property rights is intertwined with our aforementioned environmental and labor laws and as a result, U.S. mining companies are held to the highest standards in compliance with environmental and permitting requirements.

Given our Nation’s need for a strong domestic supply, and the proven benefits that modern mining provides to local communities, the federal government should not consider adding restrictions or making changes to the Mining Law (and its basic property rights provisions) in ways that would discourage or disincentivize mineral development.

Unfortunately, over three decades of Congressional debate about the U.S. Mining Law of 1872 (30 U.S.C. §§ 21a *et seq.*, as amended) have taken their toll and contributed to the steady decline in the rate of U.S. mineral discovery and development. In response to longstanding threats to radically change the Mining Law to eliminate the land tenure security necessary to justify investing in U.S. projects, some companies have chosen to avoid the United States. Instead, they spend their mineral exploration and development budgets in countries where they have more confidence that an investment of hundreds of millions to billions of dollars won’t be rendered worthless by a new law that functionally expropriates their minerals projects. The Ninth Circuit Court of Appeals wrongly decided 2022 decision in the *Rosemont* litigation has created more uncertainty about land tenure rights under the Mining Law and has further fanned the flames of the ongoing Mining Law debate, delayed mine permitting, and chilled minerals investment.

Consequently, AEMA applauds the House of Representatives’ bipartisan action to pass the Mining Regulatory Clarity Act (H.R. 1366).

### *Mining and Metallurgy Expertise is Needed*

The USGS provides important information about mineral resources that focuses on identifying where mineral deposits may be located and their geology. Its primary mission does not include performing the detailed mine planning and metallurgical studies to determine the economic viability of a mineral deposit, the best way to mine it, or how to process the ore to optimize mineral recoveries. These essential components of extracting ores from the ground and recovering metals from them was the mission of the former U.S. Bureau of Mines (USBM), which was housed within the Interior Department, and employed mining and geological engineers, metallurgists, process engineers, and other mining professionals.

From 1910 to 1995, the USBM was the primary federal agency responsible for conducting and coordinating scientific research and disseminating information on the extraction, processing, use, conservation, and recycling of mineral resources. Mining professionals working for the USBM effectively conducted innovative and transformative R&D to improve extraction techniques, environmental sustainability, and worker safety that had broad applicability to metals, coal, and industrial minerals mining.

Since 1995, when Congress decided to stop funding the USBM, the United States has lost its position as the global leader in mining, and the Nation's dependency on foreign minerals has skyrocketed.

The Society for Mining Metallurgy & Exploration's (SME's) September 2024 concept paper, *Why the U.S. Needs a National Materials and Mining Council* describes a new Executive Branch entity similar to the former USBM that would be responsible for providing advice and coordination on minerals and mining issues and charged with performing mining and metallurgical R&D. The key findings in SME's concept paper include the following:

- With the demise of the USBM, the United States no longer has a centralized federal department or agency with the requisite mining and mineral processing expertise to assist the Executive Branch and Congress in developing coordinated mining policies responsive to the country's mineral needs.
- The absence of a federal minerals entity makes the United States less competitive on the world's stage because most nations have a Minister of Mines or a centralized mining authority charged with developing mineral policies to ensure these countries have robust mining industries.
- Federal minerals programs are currently scattered throughout dozens of executive branch departments and agencies in a bureaucratic maze where nobody is fully responsible for ensuring a robust supply of domestic minerals.
- A new, centralized minerals entity in the Executive Office of the President (EOP) should be created immediately to eliminate this inefficient bureaucracy and to reinvigorate the country's mining and mineral processing R&D capabilities.
- Reestablishing a minerals group within the EOP would signal the importance of minerals as the front-end supply chains for all sectors and governmental functions, to ensure consistency across multiple departments and agencies, to reduce inefficiencies and duplication of efforts, and to facilitate the participation of and coordination with cabinet-level executive departments with direct interest in materials and mineral supply chains including the Departments of the Interior, Agriculture, Defense, Commerce, State and others.

By establishing the National Energy Dominance Council (NEDC) in the Executive Office of the President (EO 14213), President Trump has taken an urgently needed step to make minerals and energy a top priority, recognizing they are critical to economic prosperity and national security. The NEDC's mission should be expanded to fill the mining and metallurgical expertise gap that has existed since 1995 when the USBM was disbanded. NEDC staff should include mining engineers, metallurgists, mineral economists and other mining professionals qualified to coordinate mining and metallurgical R&D and provide mining-related advice to the administration and Congress.

As the country continues to invest in critical minerals projects, it will be important for the Executive Branch to have the necessary mining and metallurgical expertise to evaluate project viability and how to optimize mining and mineral recoveries. NEDC mining and metallurgical experts should also perform R&D on enhancing recoveries of targeted critical minerals from legacy mine wastes, batteries, and recycled e-waste, all of which require mining, metallurgical,

and mineral processing expertise. These are examples of the kinds of broadly applicable, cutting-edge, and transformative research that the federal government should pursue because private-sector research efforts are typically more narrowly tailored to focus on a specific project or e-waste stream. AEMA therefore urges Congress to codify the NEDC, to include a mineral resource focus, as an office or positions within the Executive Office of the President.

In addition, like many industries, mining is facing a workforce challenge that requires urgent attention. The coming wave of retirements due to the “Baby Boomer” generation leaving the workforce is particularly pronounced in the mining industry. It is estimated that more than half of the current mining workforce will be eligible to retire by 2029. Exacerbating this exodus, American higher education is simply not producing enough geologists, engineers, metallurgists, chemists and other graduates the mining industry needs. In fact, since the early 1980s, there has been a steady decline in the number of accredited mining and mineral engineering programs at U.S. colleges and universities.

Over time, the decrease in graduates has begun to hit home. Nearly all of our member companies report difficulties finding enough qualified individuals to fill vacancies. Operating mines, engineering and consulting firms, or other service providers all feel the pinch. The federal agencies who review and process mine permit applications report similar challenges.

Therefore, AEMA strongly supports and urges the House of Representatives to approve the Mining Schools Act (H.R. 2457), bipartisan legislation to strengthen mining education in the United States.

### **Support for H.R. 1501 and H.R. 7458**

In consideration of the foregoing background, we want to express our strong support for two bills being considered today – H.R. 1501 (Protecting Domestic Mining Act) and H.R. 7458 (Domestic Opportunities for Resource Exploration Act, or the Domestic ORE Act) – both of which will help facilitate the timely and responsible production of domestic mineral resources.

#### ***Protecting Domestic Mining Act (H.R. 1501)***

H.R. 1501 codifies mining as a covered sector under Title 41 of the Fixing America’s Surface Transportation Act (FAST-41). The Federal Permitting Improvement Steering Council (FPISC) voted to include mining as a covered sector in January 2020 and finalized a rulemaking confirming that decision in January 2021.

FAST-41 was enacted to improve the timeliness, predictability, transparency, and accountability of the Federal environmental review and authorization processes for covered infrastructure projects. FAST-41 coverage does not predetermine or affect the outcome of any Federal decision-making process with respect to a covered project, nor modify any required environmental review or public or tribal consultation process.

Beyond mining, current FAST-41 sectors include renewable and conventional energy production, electricity transmission, surface transportation, aviation, ports and waterways, water resource projects, broadband, pipelines, and manufacturing. It is important to remember that mining stands at the front of the supply chain for these and nearly every sector of our economy.

In addition, Congress has acknowledged repeatedly the importance of a strong domestic mining industry. The *Federal Land Policy and Management Act* of 1976 (FLPMA) 43 U.S.C. 17.01 *et*

*seq* lists twelve policies with respect to the public lands of the United States. Section 102(a)(12) states that it is the policy of the United States that:

the public lands be managed in a manner which recognizes the Nation's need for domestic sources of minerals, food, timber and fiber from the public lands including implementation of the *Mining and Minerals Policy Act* of 1970 (30 U.S.C. 21a) as it pertains to the public lands;

The *Mining and Minerals Policy Act* of 1970 declares, in part:

[t]hat it is the continuing policy of the Federal Government in the national interest to foster and encourage private enterprise in (1) the development of economically sound and stable domestic mining, minerals, metal and mineral reclamation industries, ....

Importantly, the Permitting Council and its FAST-41 process provides a pathway to reduce permitting inefficiencies while retaining our world-class environmental protections, and we must ensure it is available to the entire mineral mining sector.

While ensuring the mining sector has access to the FAST-41 process is important, AEMA also urges further, broad action on permitting reform. We applaud the House of Representatives' bipartisan action to approve the Standardizing Permitting and Expediting Economic Development (SPEED) Act, which would codify several of the key findings in the Supreme Court's May 2025 landmark NEPA ruling in *Seven County Infrastructure Coalition v. Eagle County, Colorado*, 145 S. Ct. 1497 (2025). Of special importance are the provisions to:

- Clarify that NEPA is a procedural statute that prescribes a process but does not mandate particular results, any specific environmental outcome, confer substantive rights, or impose substantive duties beyond procedural requirements;
- Define Reasonably Foreseeable Effects and to restrict the scope of a NEPA analysis to effects that have a close causal, spatial, and temporal relationship to the proposed project or action and are not speculative, attenuated, distant, or future effects or outside the agency's regulatory authority;
- Prevent a court from substituting its judgment for that of the agency regarding the environmental effects of a proposed agency action.
- Establish judicial reforms that clarify that the standard of review is limited to finding an agency action does not comply with NEPA's procedural requirements, to limit judicial remedies in NEPA litigation to remand orders, to proscribe time limits in which an agency must respond to a remand order, and to keep final agency actions in effect during the pendency of a remand order; and
- Limit NEPA appeals to within 150 days after a final agency action and to issues and concerns that the Plaintiff raised with specificity during public comments and requiring courts to resolve NEPA cases within 180 days.

***Domestic ORE Act (H.R. 7458)***

Responding to America’s minerals emergency must begin with substantially increasing mineral exploration and the rate of discovery of domestic mineral deposits that can become future mines. Without more exploration, the U.S. will remain beholden to foreign countries, including adversaries like China, for the minerals we need.

As shown in Figure 2, exploration is the first step in the mining lifecycle when mineral deposits that may become future mines are discovered. Without discovery, there can be no mining. Unfortunately, because permitting has become increasingly difficult and more lands have been functionally sequestered, exploration investment levels have shrunk over the past thirty years. Consequently, there has been insufficient exploration and discovery of new mineral deposits to keep a pipeline of soon-to-be developed mining projects full. Instead, the flow of mineral discoveries leading to mine development has slowed to a trickle, which has dramatically inhibited the growth of the Nation’s portfolio of future mining operations, resulting in our current reliance on foreign minerals.

The reduction in exploration investment is detailed in a 2024 report by S&P Global (Figure 3), which notes that over the last 15 years, exploration budgets in Canada and Australia have been 81 percent and 57 percent higher, respectively, than the United States. The lack of exploration spending is not because the United States lacks mineral wealth. According to the report, this Nation possesses comparable gold and palladium resources and reserves, and greater copper, lithium and molybdenum reserves and resources than both Canada and Australia *combined*.

Exploration drilling projects typically involve a limited range of activities that focus mainly on building temporary roads and drill pads, managing drill water and cuttings with sumps or tanks, trenching, and avoiding cultural resources or other potentially sensitive resources. The environmental impacts (mainly surface disturbance) from these projects are short-term and can be fully reclaimed. Moreover, before exploration can begin, project operators must provide BLM or the U.S. Forest Service with financial assurance that guarantees the surface disturbance created by these exploration activities will be reclaimed.

Exploring for new mineral deposits is the most time-consuming phase of the preproduction mining lifecycle as shown in Figure 4. The S&P Global study found that it took three times longer to discover, explore, and develop mines in the 2020 to 2024 timeframe compared to mines developed between 1990 and 1999, due to extended periods for exploration, permitting and financing.

Evaluating permitting timelines for mineral projects requires an analysis of the permitting steps for the entire exploration to mining lifecycle. As shown in Figure 2, there are five phases of the Mining Lifecycle: Exploration, Discovery, Development, Production, and Reclamation. Mineral exploration and mining companies must obtain federal and state permits throughout this entire lifecycle before they can commence each phase. Permitting is thus an iterative process. Just as there are multiple phases of the exploration-mining lifecycle, there are multiple phases of permitting. Therefore, in considering the time it takes to permit a mine, each permitting phase needs to be aggregated into a total permitting timeline.

Mineral exploration is a data-dependent, iterative process. As shown in Figure 3, the International Energy Agency (IEA) estimates that the iterative process from exploration to feasibility takes 12.5 years. S&P Global has a similar timeline indicating it takes 11.9 years. Both estimates reflect the fact that exploration is time-consuming.

The Bureau of Land Management's (BLM's) 43 C.F.R. Subpart 3809 surface management regulations govern all mineral activities on BLM-administered lands that are subject to the U.S. Mining Law. These regulations require that all mineral exploration and mining projects comply with the mandate in the Federal Land Policy and Management Act to prevent unnecessary or undue degradation (UUD) as specified in FLPMA Section 302(b).

Under current BLM regulations, initial exploration projects that create less than five acres of surface disturbance on BLM-administered lands must submit a Notice pursuant to 43 CFR 3809.300 - 43 CFR 3809.336 to BLM before conducting any surface-disturbing activities including building exploration drill roads and drill pads. BLM has 15 days to review the Notice and to advise the operator if more information is required before they are authorized to commence work. Operators typically retain a BLM-approved archaeologist to survey the proposed disturbance areas to identify any cultural resources that should be avoided during the exploration activities. The operator must also provide BLM with financial assurance (a reclamation bond) to guarantee that the exploration site will be fully reclaimed.

Under current U.S. Forest Service regulations, a Notice-level provision similar to the BLM's does not exist. Rather, a time-consuming Plan of Operations is required for all exploration activities on National Forest System lands, regardless of scope.

There is an especially compelling reason to streamline the exploration permitting process on National Forest System lands because according to the U.S. Forest Service, National Forests contain important hardrock mineral resources: "By accident of category and geology, the National Forests contain much of the country's remaining stores of minerals." Despite their mineral potential, National Forest System lands are underexplored due to regulatory constraints that impede initial exploration activities including preliminary drilling.

Many companies avoid exploring for minerals on National Forest System lands due to the Forest Service's expensive and time-consuming permitting process. Consequently, the known mineral potential of National Forests has been virtually written off for the last twenty to thirty years due to the difficulty in securing permits to pursue preliminary exploration drilling projects.

In a positive move, last week the U.S. Forest Service issued a proposed rule to revise the 36 CFR Part 228 Subpart A regulations governing hardrock minerals on National Forest System lands to include a Notice-level process for initial exploration modeled after, but not identical to, the BLM's process at 43 CFR 3809.300-336.

It is noteworthy just how small hardrock mining's footprint is on National Forest System lands. In data provided by the Forest Service, they note that, of the 193 million acres in NFS lands, operating mines disturb approximately 10,000 acres, less than 0.005 percent of those lands. It is quite remarkable to consider that all the approved surface disturbance on NFS lands attributed to hardrock mining is less than the acreage of Dulles International Airport (11,184 acres, according to flydulles.com).

The Forest Service estimates that about 62 operations per year would be eligible to use the proposed notice-level provision, impacting potentially 1,550 acres under a 25-acre notice (a mere .000008 percent of NFS lands).

Codifying and expanding the BLM's notice-level provision to 25 acres and making it applicable to National Forest System lands would be an important step in reducing the overall permitting timeline from discovery to mine development because it would accelerate the discovery of

mineral deposits that can become future mines, ultimately reducing the Nation's dependence on foreign minerals.

## **Conclusion**

AEMA is a 131-year-old, 1,800-member national trade association representing the minerals industry with members residing in 46 U.S. states. AEMA is the recognized national voice for exploration, the junior mining sector, and maintaining access to public lands, and represents the entire mining life cycle, from exploration to reclamation and closure. More than 80 percent of our members are small businesses or individuals who work for small businesses.

Our members have extensive first-hand experience with exploring for mineral deposits, finding and developing mineral deposits, permitting exploration and mining projects, operating mines, reclaiming mine sites, and ensuring that exploration and mining projects comply with all applicable federal and state environmental laws and regulations.

It is important to note that the streamlining of the mine-permitting process does not equate to reducing environmental protections. AEMA members experience the challenges associated with the federal permitting process every day. They also live and play in the communities where they work. Mining in America is the most environmentally responsible mining industry in the world. Miner safety and workers' rights are the top priority. Our members take great pride in responsibly producing the minerals and metals America needs.

In addition, the economic impact of the mining industry ripples out far and wide: to employees, mine suppliers, local economies and the downstream domestic industries we supply with our products. That's not to mention the tax revenues we generate for local, state and federal governments as a result of this economic activity. Last year, according to USGS, the value of domestically mined mineral raw materials increased from \$106 billion to \$112 billion, and that \$112 billion generated more than \$4 trillion in value added to the GDP. Few industries pack such an economic punch.

For the forgoing reasons, AEMA strongly urges your support for H.R. 1501 and H.R. 7458 to help secure our mineral supply chains for our economic and national security.

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**Figure 1: GAO Chart Illustrating Key Industries' Reliance on Foreign Minerals**

**Figure 1: The 2022 U.S. list of critical minerals, percentage of the U.S. supply imported in 2022, industries in which each is used, and primary import source**

Mineral	Percentage from foreign sources <sup>a</sup>	Key Industries					Primary Import Source (2018–2021) <sup>b</sup>
		Aerospace	Defense	Energy	Telecommunications and electronics	Transportation (non-aerospace)	
Arsenic	100%		●	●	○		China: 57%
Cesium	100%	●	●	●	○		N/A
Fluorspar	100%			●	○		Mexico: 66%
Gallium	100%	●	●	●	○		China: 35%
Graphite	100%	●	●	●	○	●	China: 35%
Indium	100%	●	●	●	○		Republic of Korea: 35%
Manganese	100%	●	●	●		●	Gabon: 67%
Niobium	100%	●	●	●			Brazil: 66%
Rubidium	100%	●	●	●	○		N/A
Tantalum	100%	●	●	●	○		China: 24%
Bismuth	96%		●	●	○		China: 65%
Rare Earth Elements (Cerium, Dysprosium, Erbium, Europium, Gadolinium, Holmium, Lanthanum, Lutetium, Neodymium, Praseodymium, Samarium, Scandium, Terbium, Thulium, Ytterbium, Yttrium)	>95%	●	●	●	○	●	China: 74%
Titanium	>95%	●	●	●			Japan: 89%
Antimony	83%		●	●	○	●	China: 63%
Chromium	83%	●	●	●			South Africa: 37%
Tin	77%		●		○		Peru: 25% (refined Tin)
Cobalt	76%	●	●	●	○	●	Norway: 22%
Zinc	76%		●	●			Canada: 66%
Barite	>75%			●			China: 38%
Tellurium	>75%		●	●	○		Canada: 52%
Platinum <sup>c</sup>	66%	●		●	○	●	South Africa: 24%
Nickel	56%	●	●	●			Canada: 45%
Aluminum	54%	●	●	●		●	Canada: 50%
Vanadium	54%	●	●	●			Canada: 31%
Germanium	>50%	●	●	●	○		China: 54%
Magnesium	>50%	●	●	●	○	●	Canada: 21%
Tungsten	>50%	●	●	●	○		China: 29%
Zirconium	<50%	●	●	●			China: 89% (Zirconium unwrought, including powder)
Palladium <sup>c</sup>	26%	●		●	○	●	Russia: 34%
Lithium	>25%	●	●	●	○	●	Argentina: 51%
Beryllium	<20%	●	●	●	○		Kazakhstan: 43%
Hafnium	—	●	●	●			Germany: 36%
Iridium <sup>c</sup>	—	●		●	○	●	—
Rhodium <sup>c</sup>	—	●		●	○	●	—
Ruthenium <sup>c</sup>	—	●		●	○	●	—

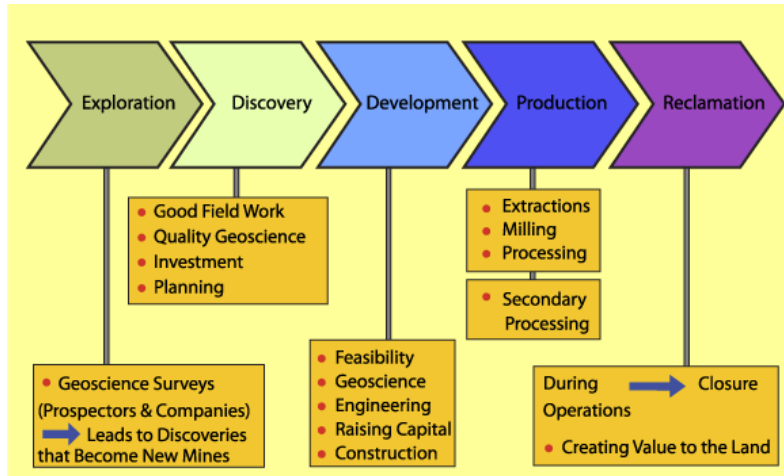
Source: U.S. Geological Survey (USGS), *Mineral Commodity Summaries 2023* (Reston, Virginia: 2023). | GAO-24-106395

<sup>a</sup>U.S. net import reliance expressed as a percentage of apparent U.S. consumption in 2022, a metric developed and calculated by USGS using import data from the U.S. Census Bureau and consumption data from USGS's *Mineral Commodity Summaries 2023*.

<sup>b</sup>Import source percentage from 2018 through 2021, calculated by USGS using import data from the U.S. Census Bureau.

<sup>c</sup>This mineral is a part of the platinum group and the key industries shown are for the group.

**Figure 2: The Mining Lifecycle Starts with Exploration**

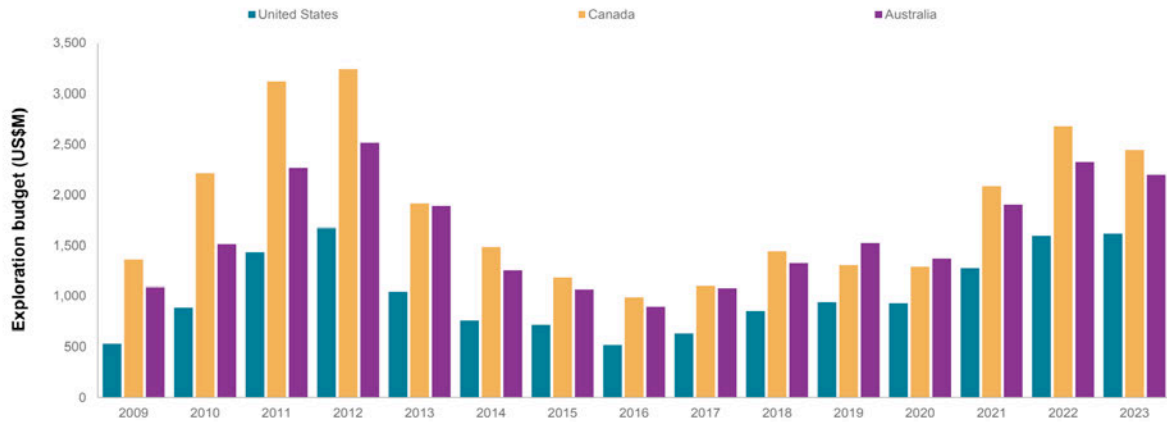


**Figure 3: Lower Exploration Spending in the U.S.**

**Exploration and endowments:** Lower investment in the US

Chronically lower mine exploration budgets in the US compound the sense of lost opportunity. Over the last 15 years, mine exploration budgets have been 81% higher in Canada and 57% higher in Australia than in the US.

Comparison of mine exploration budgets by country: 2009-2023



Data compiled Feb. 1, 2024.  
Source: S&P Global Market Intelligence.  
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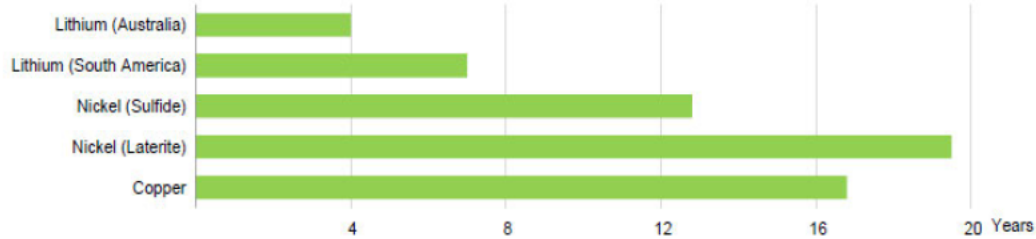
**Figure 4: Discovery-Exploration to Feasibility the Most Time-Consuming Pre-Production Phase**

Global average lead times from discovery to production, 2010-2019

Global average, 2010-2019



Average observed lead time for selected minerals (from discovery to production)



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Note: Global average values are based on the top 35 mining projects that came online between 2010 and 2019.  
 Source: IEA analysis based on S&P Global (2020), S&P Global (2019a) and Schodde (2017).