
AEC
ARCTIC ECONOMIC COUNCIL

ARCTIC MINING REPORT 2024

- September 2024

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We need mining to transition to a low-carbon future. In the Arctic we have the critical raw materials that will make it possible to reach out climate goals.

For centuries, mining together with fisheries and energy, has been the backbone of Arctic communities and economies.

Today the mining sector in the Arctic operates responsibly and to some of the highest standards in the world with fewer greenhouse gas emissions than anywhere else.

Critical Raw Materials are important because of the link to industry, because of modern technology's reliance on them and due to the impact they will have on the environment and climate.

We have developed a set of recommendations of how to kick-start the CRM development in the Arctic. We need to look at skills, speed, showcasing opportunities and much more.

Mads Qvist Frederiksen
Executive Director
Arctic Economic Council

MINING AND CRITICAL RAW MATERIALS IN THE ARCTIC

INTRODUCTION

The purpose of this report is to provide a comprehensive analysis of the state of critical raw materials mining in the Arctic.

Throughout this report, we will bring some light into the status of critical raw materials extraction within the Arctic states' mining industry and its potential to supply critical minerals to the region and the world. This report aims to explore current mining activities, future projects and potential in critical raw materials production in the Arctic, and its relevance and significance for the global critical raw materials needs.

Governments around the world are racing to develop strategies to ensure a just energy transition and critical raw materials will play a key role here.

For the Arctic this mean massive opportunities to develop remote communities with new infrastructure and create local jobs. The region is already home to some of the world's leading mining companies.

The Arctic region has stable and robust environmental and ethical regulations. There is a history of indigenous participation in the mining industry with local variations throughout the region. Furthermore, many of the Arctic states are frontrunners in circularity and recycling.

In the future, the Arctic could be at the forefront of new ways of mining. In Northern Sweden, the steel industry is converting to fossil-free production and mining is becoming a part of a battery production cluster.

In Arctic Canada and Alaska, models of Indigenous co-ownership and collaboration in mines have been in the spotlight for many years.

Exploration and extraction projects are already underway, with the ambition to mine new types of minerals, like the first rare earth elements deposit in Europe in Kiruna, Sweden.

Critical raw materials projects are also promoted and facilitated by blooming critical raw materials strategies, focusing on better and faster opening of new mines.

The Arctic region has historically seen the exploitation of mines on its territory, with local companies established for sometimes centuries, providing minerals for the region and the entire world.

Northern territories are endowed with a rich subsoil with plentiful mineral resources, including significant quantities of raw materials that are deemed critical in most of the Arctic and observer countries.

The structure of the report is first an introduction to critical raw materials overall followed by brief introduction to each Arctic state's work on mining. In the end recommendations are stated based on the challenges at hand.

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According to IEA To reach net zero emissions by 2050 (NZE) global EV sales are set to grow fivefold to 70 million by 2030.

The demand for critical minerals will nearly triple by 2030 and grow to over 3.5 times the current levels by 2050.

In a NZE Scenario, demand for copper rises by 50% by 2040, while demand for nickel, cobalt and rare earth elements doubles, and graphite demand increases by four times over the same period, propelled by the substantial increase in battery deployment for EVs and grid storage.

Of all the minerals, lithium stands out in this scenario with eightfold growth by 2040, highlighting its crucial role in batteries.

The combined market value of key energy transition minerals more than doubles by 2040 in climate-driven scenarios, reaching USD 770 billion in the NZE Scenario.

The current investments and expected volumes of several critical minerals are far from guaranteed and meeting the requirements for an NZE Scenario.

International Energy Agency
Global Critical Minerals outlook 2024

A REGION OF MINING OPPORTUNITIES

Largest gold deposit in Europe

Suurikuusikko at Kittilä mine is the largest gold deposit located in central Finnish Lapland

Largest nickel and cobalt deposits

Greenland contains one of the largest sources of nickel and cobalt.

Largest zinc mine in the world

One of the world's largest zinc mines in the world is in Alaska.

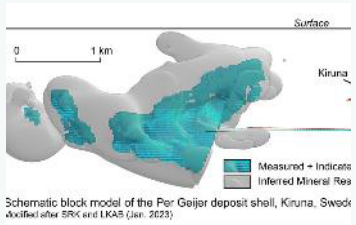
In 1982, Red Dog Operations was established through a unique operating agreement between the operator Teck and NANA, a Regional Alaska Native corporation owned by the Iñupiat people of northwest Alaska

Largest iron mine Europe/ North America

The largest iron mine in Europe is located in the Arctic.

The Kiruna mine opened in 1898.

One of world's richest reserves of high-grade iron are located in Nunavut



Largest REE deposits in Europe

Norway and Sweden are home to some of the largest Rare Earth Element deposits in the world.

Largest producer of palladium

Nornickel is the largest pallaudium producer. The Norilsk–Talnakh area in the North of Siberia.

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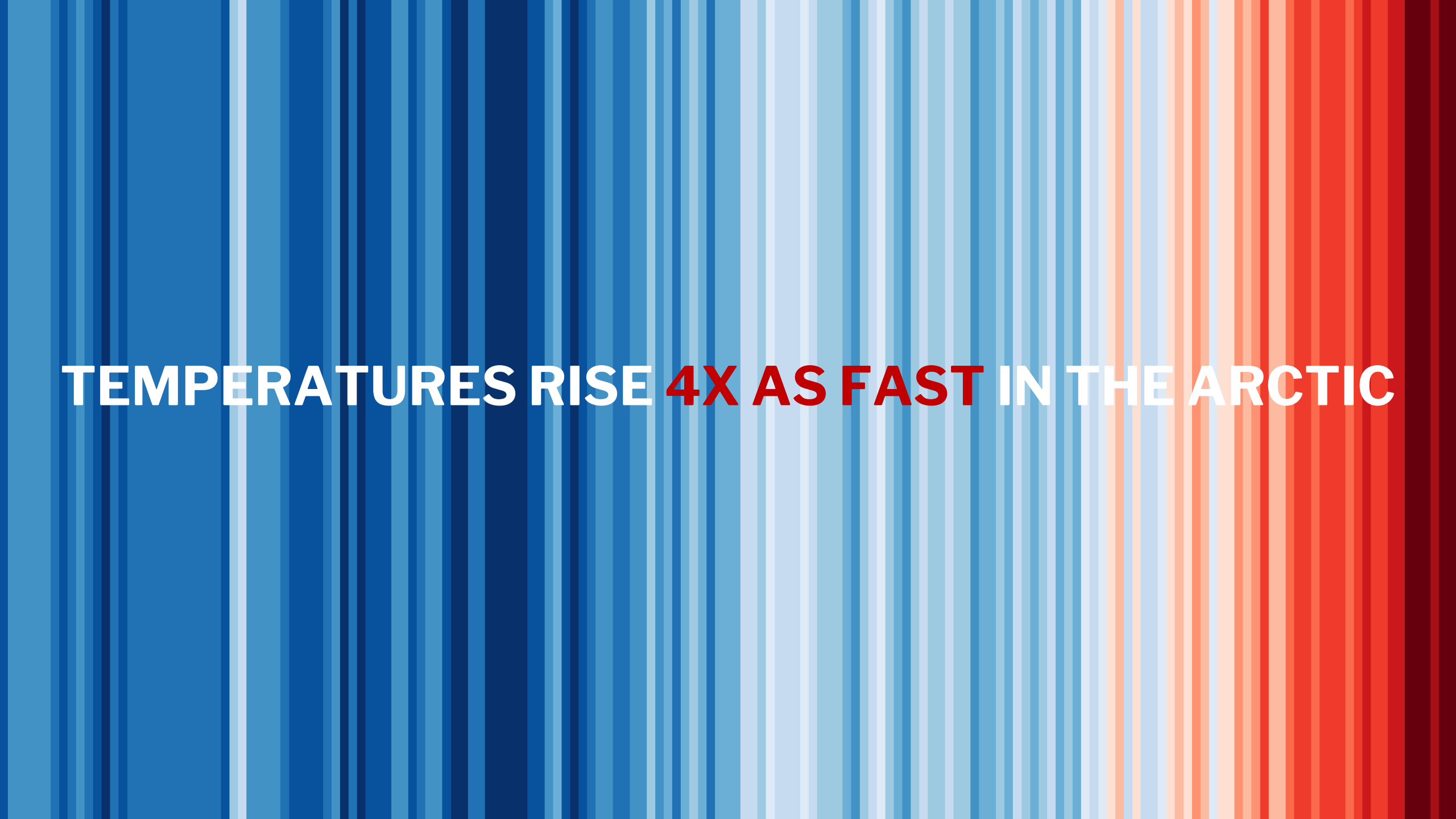
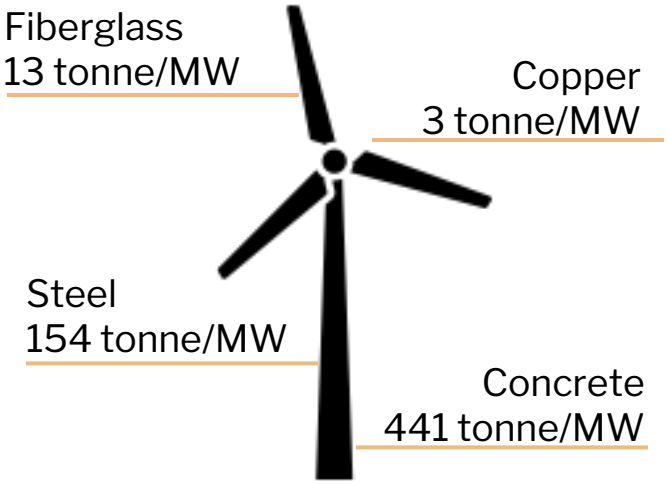
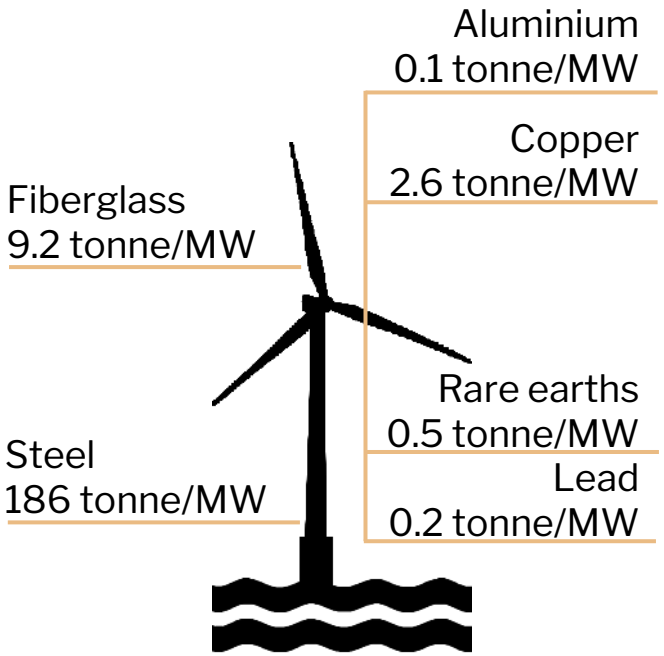
Photo: Creative Commons, NASA, LKAB


TEMPERATURES RISE 4X AS FAST IN THE ARCTIC

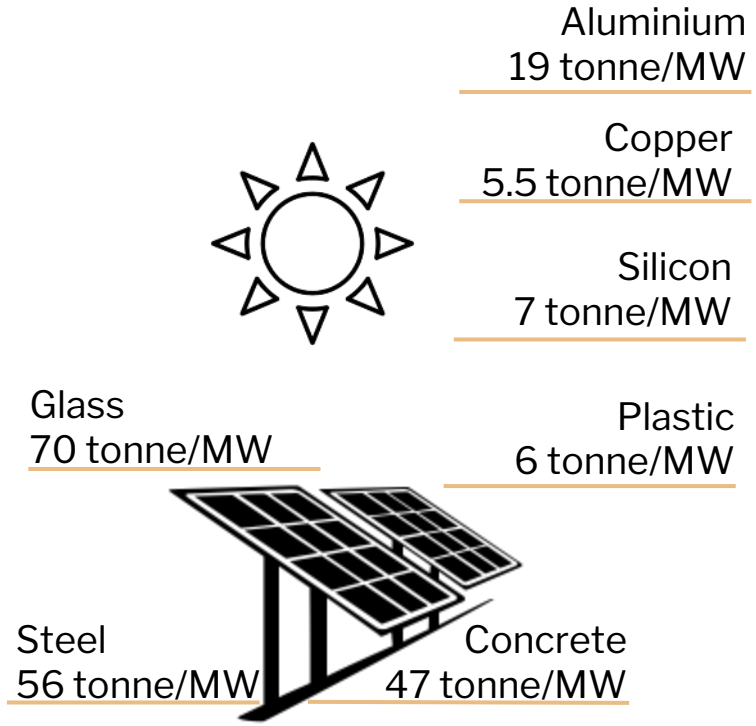
RAW MATERIALS NEEDED IN RENEWABLES



Onshore wind



Offshore wind



Solar

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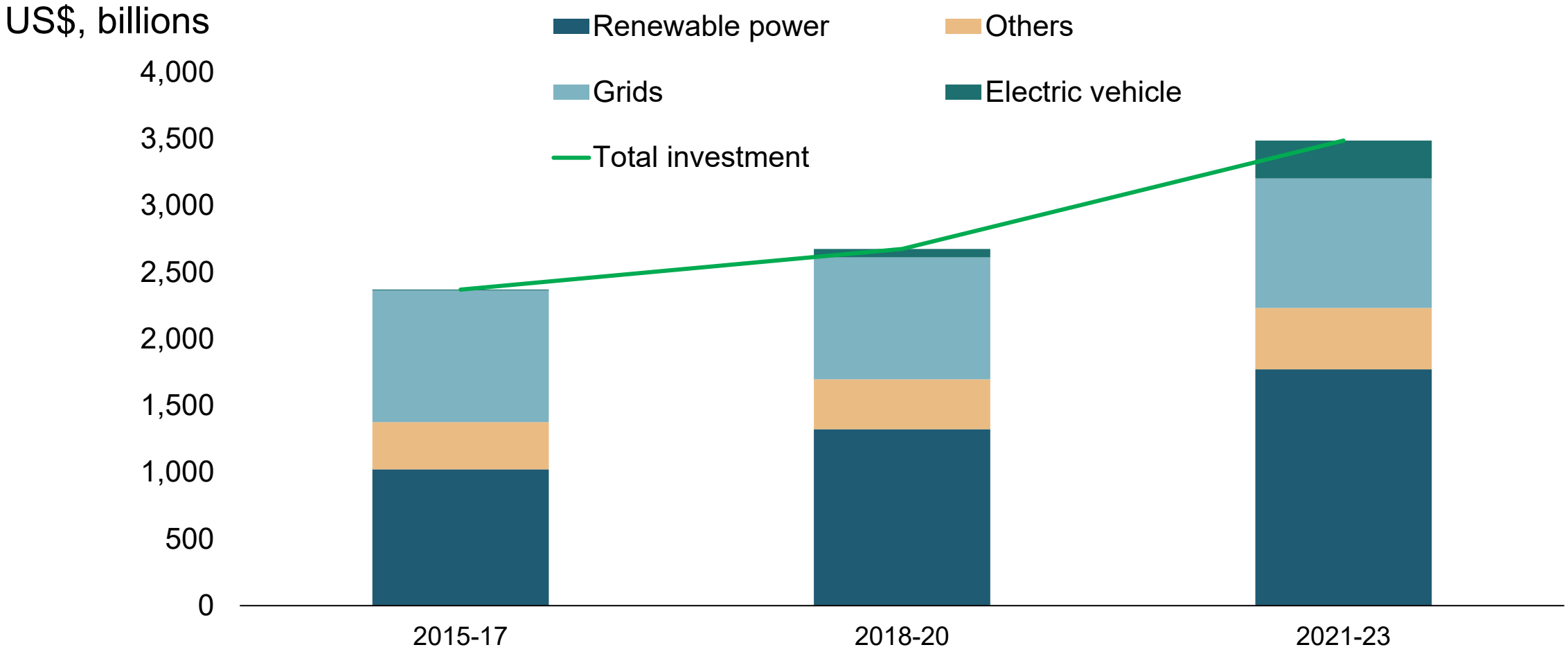
Sources: Mærsk Mc-Kinney Møller Centre for zero carbon shipping. (2023)

GLOBAL CLEAN ENERGY INVESTMENT



Sources: International Energy Agency (IEA); World Bank.

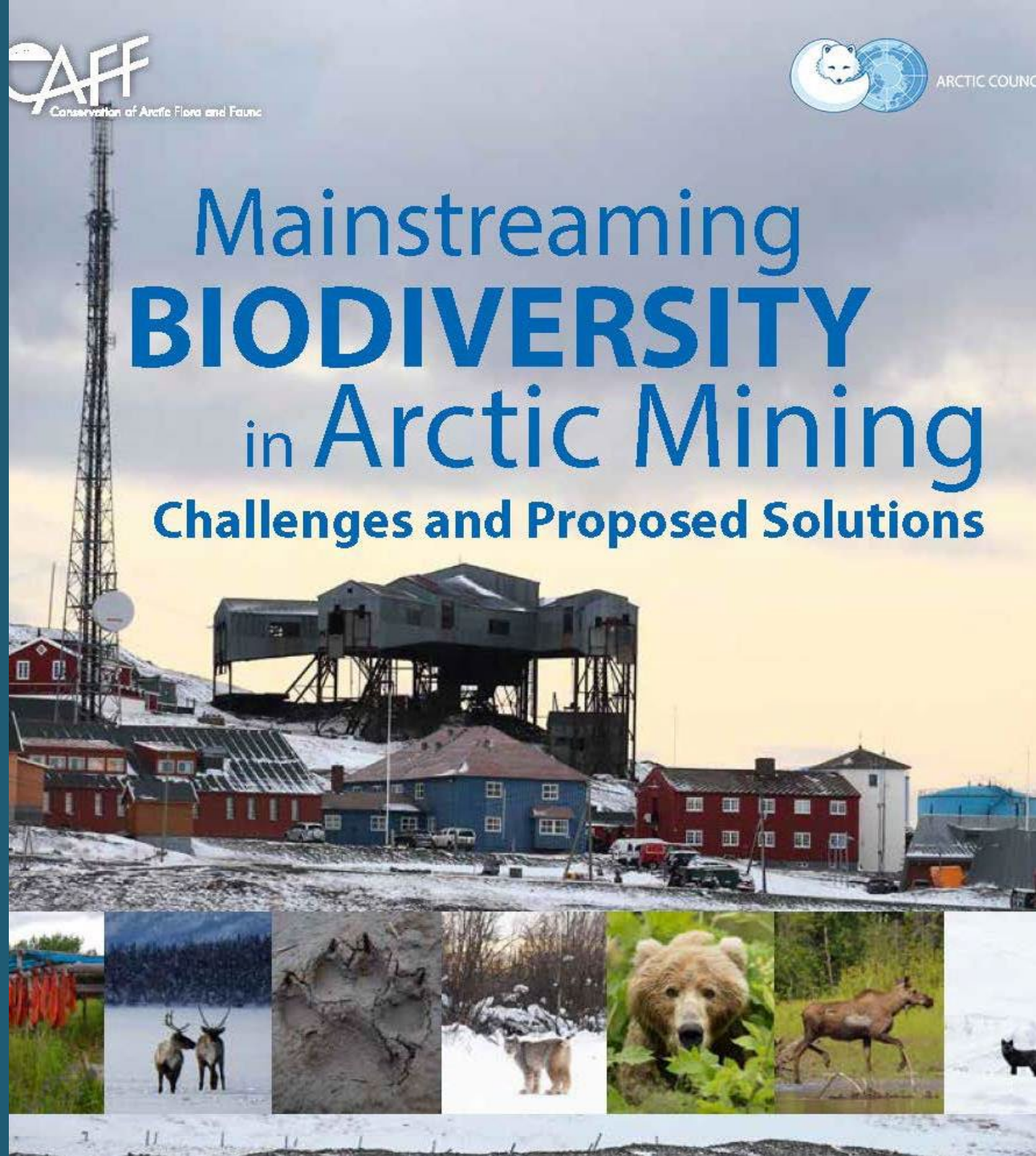
INDIGENOUS PERSPECTIVES

In 2019 a working group of the Arctic Council on Conservation of the Arctic Flora and Fauna CAFF prepared a report on how to integrate biodiversity considerations into mining operations in the Arctic. A report that strongly focused on Indigenous peoples perspectives mining operations.

One of the main challenges of mining in the Arctic is associated with balancing resource extraction and environmental protection, the main position of Indigenous peoples on mining, emphasizes the need for meaningful engagement and respect for traditional knowledge.

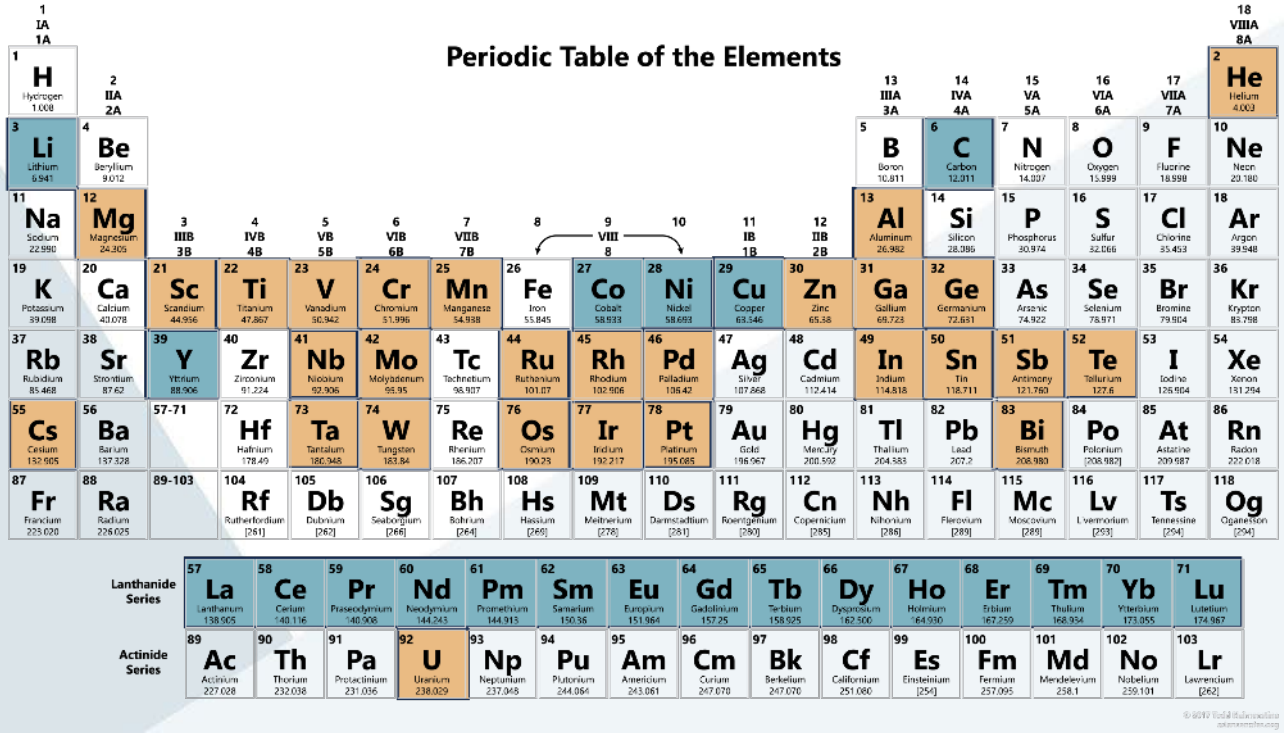
Indigenous communities recognize the potential economic benefits from mining but express concerns about its impacts on biodiversity, food security, and traditional ways of life. They advocate for early involvement in the decision-making process, co-management of resources, and long-term agreements that ensure their cultural practices and the environment are protected.

*The importance of trust-building, partnerships, and agreements, such as **Impact and Benefit Agreements (IBAs)**, is highlighted to ensure that Indigenous communities have a voice in mining projects. This includes the need for transparent communication, recognition of Indigenous rights, and integration of their knowledge systems alongside scientific methods.*



CANADA

CANADA'S CRITICAL RAW MATERIALS



Baryte	Bauxite	Borate	Coking Coal	Diamonds	Electrical Steel
Feldspar	Fluorspar	Groundwater	Natural gas	Oil	Phosphate Rock
Potash	Pure quartz raw materials	Rare earth elements (heavy)	Rare earth elements (light)	Silicon Carbide	

Legend:

most significant CRM for Canada's economic growth

Canada's CRM

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CANADIAN MINING GROUPS INVOLVING INUIT COMMUNITIES

Agnico Eagle Mines Limited (Agnico Eagle) is a Canadian based and led senior gold mining company and the third largest gold producer in the world, producing precious metals from operations in Canada, Australia, Finland and Mexico with close to 16,000 employees globally.

Agnico Eagle is deeply committed to and active in Canada's North with two mines in Nunavut – Meadowbank Complex and Meliadine mine in the Kivalliq region – and the Hope Bay project in the Kitikmeot region. They believe in the long-term potential of Nunavut, as have **invested over $9.9 billion since 2007** to build their Nunavut platform.

Agnico Eagle has developed an ESG strategy that encompasses both environmental sustainability goals, and indigenous and community participation and benefit sharing initiatives.

Following their ESG objectives, they have developed a Climate Change Strategy which is still an interim goal only, but they have completed a Climate change report for the first time in their history. The company is **seeking to achieve carbon neutrality by 2050.**

Regarding indigenous involvement and collaboration, they've "continued to adapt (their) processes based on feedback from Indigenous groups and governments".

It is important to note that Agnico Eagle signed an **Inuit Impact and Benefit Agreement for the Meadowbank mine with the local Kivalliq Inuit Association**, meaning that they need to ensure that work and education opportunities are available to the local Inuit population.

Today the employee base includes **over 400 Inuit employees and millions of dollars per year is invested in training**.

They've also committed to community development by implementing further internal training and "a scholarship development program targeted to advance women into leadership roles".

Agnico Eagle's two active mines account for 22% of Nunavut GDP and the company employs over 3500 people and is the Territory's largest private sector partner. Since 2007, Agnico Eagle has spent over $5.2B with Inuit owned business.

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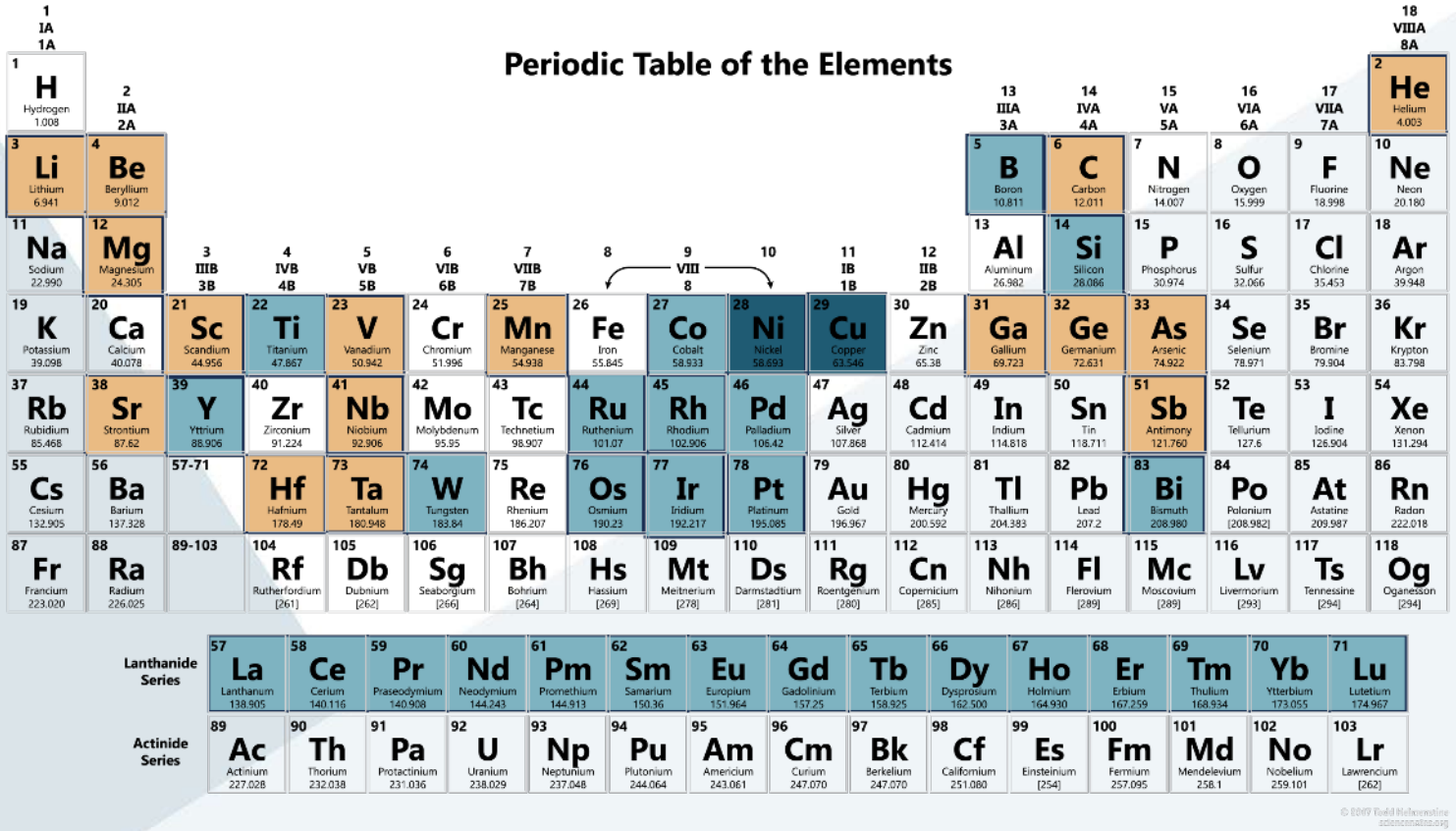
GREENLAND (KINGDOM OF DENMARK)

GREENLAND'S CRITICAL RAW MATERIALS (EU LIST)



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Legend:

- CRM that are also strategic
- EU CRM
- Materials that are only strategic

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CUTTING-EDGE TECHNOLOGY AND MILLIONAIRES IN GREENLAND

The Disko/Nuussuaq project is an exploration project on the Southwest coast of Greenland, which covers an area of 2,776 km2 - equivalent to the size of Luxembourg.

It hosts deposits of nickel, copper, platinum group metals and cobalt, all of which are generally considered to be critical raw materials.

Its potential has been confirmed by over 30 yers long explorations by Cominco and Falconbridge. The area shows similarities with the Norilsk-Talnakh mine in Siberia, which is the world's largest nickel-copper sulphide mine.

This project was initiated by the London-officed Bluejay Mining company, which focuses on projects in Greenland and Finland.

For the Disko-Nuusuaq project, their exploration process is funded by KoBold Metals, a mineral exploration company whose some of its biggest investors include the climate and technology fund Breakthrough Energy Ventures, with billionaire contributors Bill Gates, Micheal Bloomberg and Jeff Bezos backing it.

In 2021, KoBold was acknowledged as a Technology Pioneer by the World Economic Forum and was listed by CB Insights as one of the 100 most promising private artificial intelligence companies globally—the only one from the mining industry.

This company is a pioneer in using AI and machine learning in raw materials exploration and invested USD15 million in the exploration of the Disko project.

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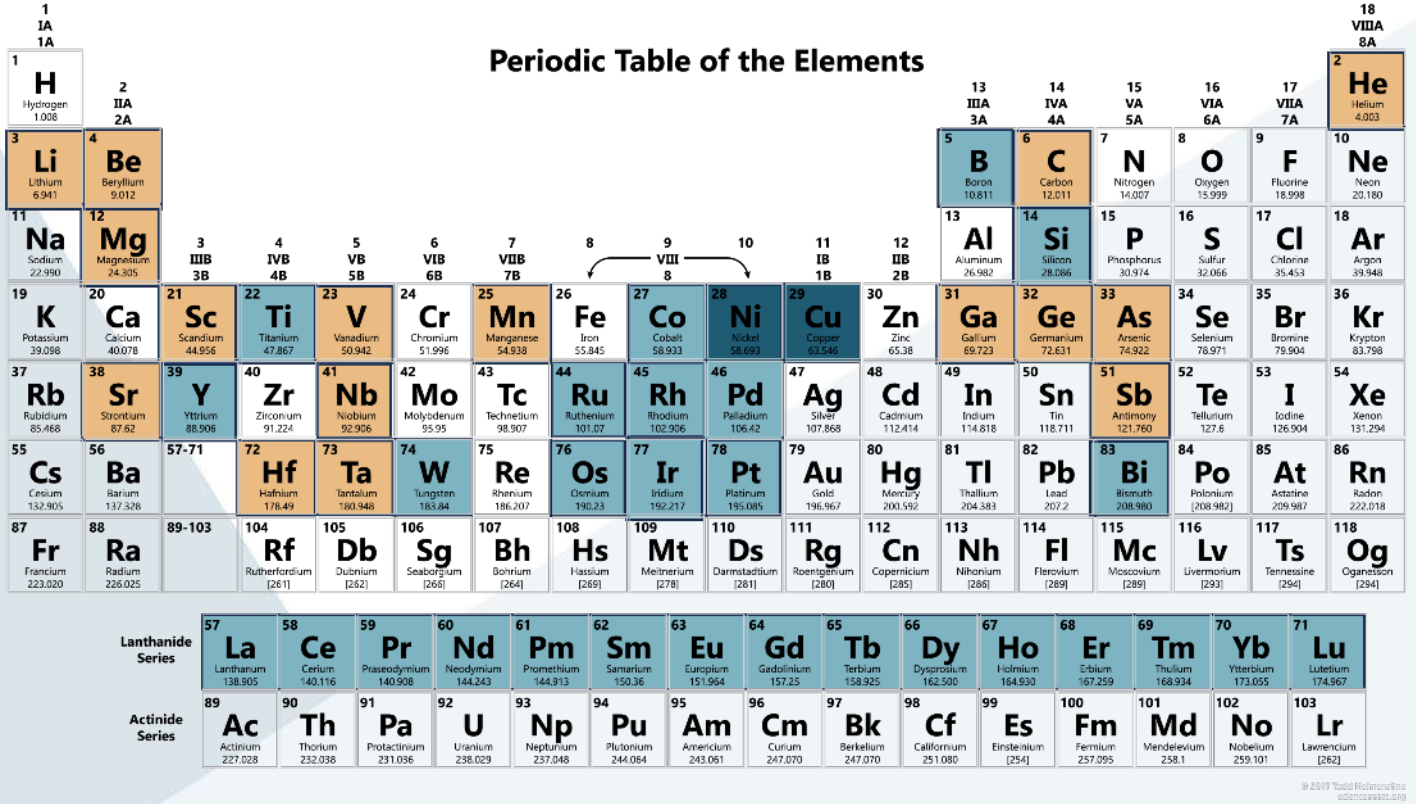
FINLAND

FINLAND'S CRITICAL RAW MATERIALS (EU LIST)

- CRM that are also strategic
- EU CRM
- Materials that are only strategic



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SHIFTING TO CRITICAL MINING: REVITALISATION AS AN OPTION

The Hautalampi project is a nickel-cobalt-copper underground mine in Finland.

The new project is located in the Outokumpu mining camp area, on historic Keretti mining grounds that has been developed during 1980s. The municipality has evolved from a mining town into a prominent industrial machinery and manufacturing center and has a lot of available infrastructure in place. There is a strong local support for mining activities as Finland consistently ranks at the top of the of mining jurisdictions

The pre-feasibility study has demonstrated a strong economic outlook. And now the project is being developed by FinnCobalt and Eurobattery Minerals, a company from Sweden that is active in mining operations and targets critical raw materials production for electric vehicle battery manufacturing.

It is an example of the possible revitalisation of old mining sites, as the demand for minerals has shifted towards said “critical” and “strategic” minerals.

FinnCobalt’s goal is to “produce traceable and responsible copper and nickel chemicals for the battery industry”, an industry which is quickly growing in Arctic Sweden and should soon be an important industry in Finland as well (FREYR’s Giga Factory project in Vaasa, Arctic Finland).

In January 2024, FinnCobalt was preparing the environmental permit application.

Photo credit: Euro Battery Minerals

ICELAND

ICELANDIC INVESTORS IN GREENLAND

Case study: Amaroq Minerals

Amaroq Minerals is a Greenland-focussed mining company engaged in the identification, acquisition, exploration and development of gold properties and other strategic mineral assets in Greenland. The CEO and founder is Eldur Ólafsson from Iceland.

The Company‘s licence portfolio covers an area of 6,072.5Km2 in South Greenland. The Company‘s asset closest to production is the past-producing Nalunaq gold mine, which Amaroq is in the process of redeveloping.

Mr Ólafsson started to research the mineral potential in Greenland in 2012 at a time when commodity prices were falling and several companies were pulling out of Greenland. Falling commodity prices often lead to companies stopping to research for new opportunities. Instead they either keep their current mines running or close them down all together.

However, with new technologies such as satellites Mr Ólafsson believes that their work can be done more cost effective.

Source: https://www.amaroqminerals.com/

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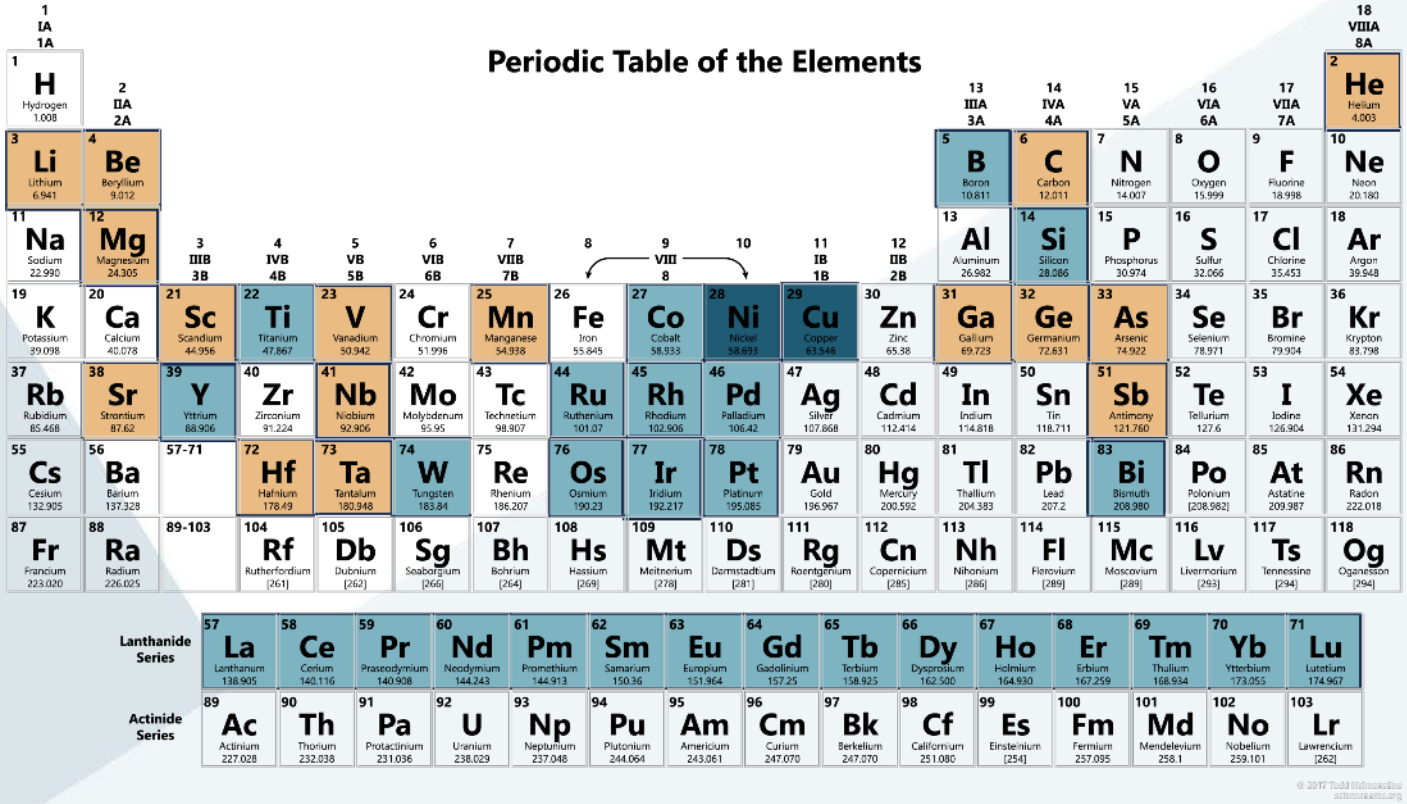
NORWAY

NORWAY'S CRITICAL RAW MATERIALS (EU LIST)

- CRM that are also strategic
- EU CRM
- Materials that are only strategic



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THE WORLD'S FIRST CARBON-FREE IRON ORE MINE

Case study: Rana Gruber

Rana Gruber has been exploiting mines North-east of Mo I Rana (Nordland, Northern Norway) for 60 continuous years, extracting iron ore in their different deposits. In 2023, Rana Gruber produced a record-high of 1.8 million metric tonnes of iron ore concentrates, all of which were exported, mainly to Europe. With numbers continuously growing, Rana Gruber employed 372 people, which are only a fraction of a dynamic **industry cluster of approximately 2500 employees**.

In 2023, Rana Gruber's carbon emissions were equal to 7.17 kg CO2 equivalents per tonne iron ore they produced. The company has overtime been able to become one of the world's least CO2 intensive iron ore producers. Thanks to hydropower, the processing of their iron ore is already relying on green energy.

The mines are also quickly connected to the port of Gullsmedvik and to the railway, which is an infrastructure that Rana Gruber relies on to transport their products. The mining company supports the **railway's electrification process, in their ambition to be truly carbon free.** The tracks are state-owned, but their electrification is considered by the government.

Rana Gruber's ambition is to become **the first iron ore mining company that is entirely carbon-free by 2025.** Therefore, they have started a large-scale electrification of their entire machinery and transport.

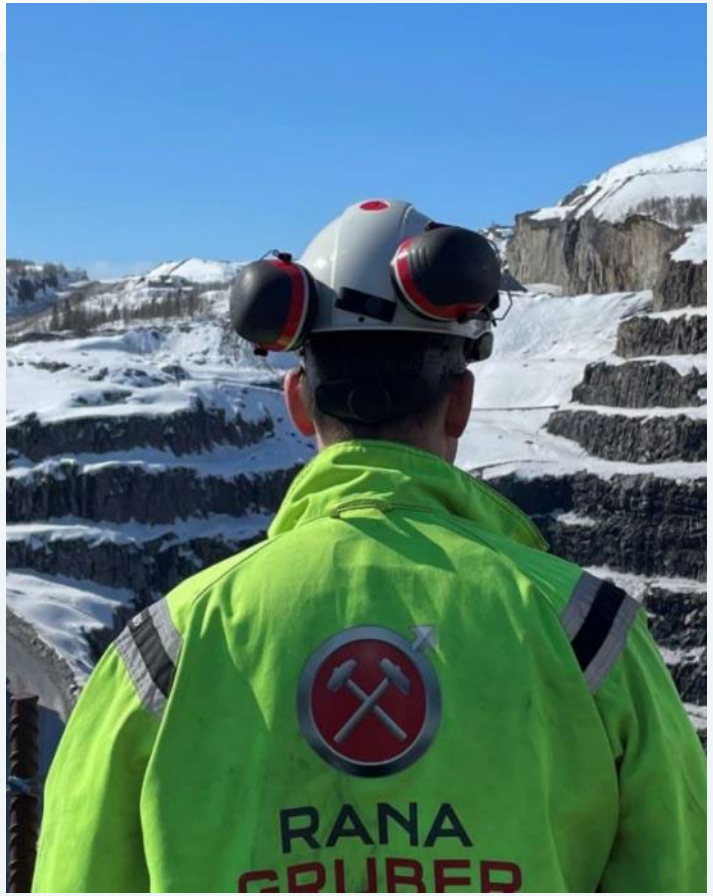

Photo credit: Rana Gruber

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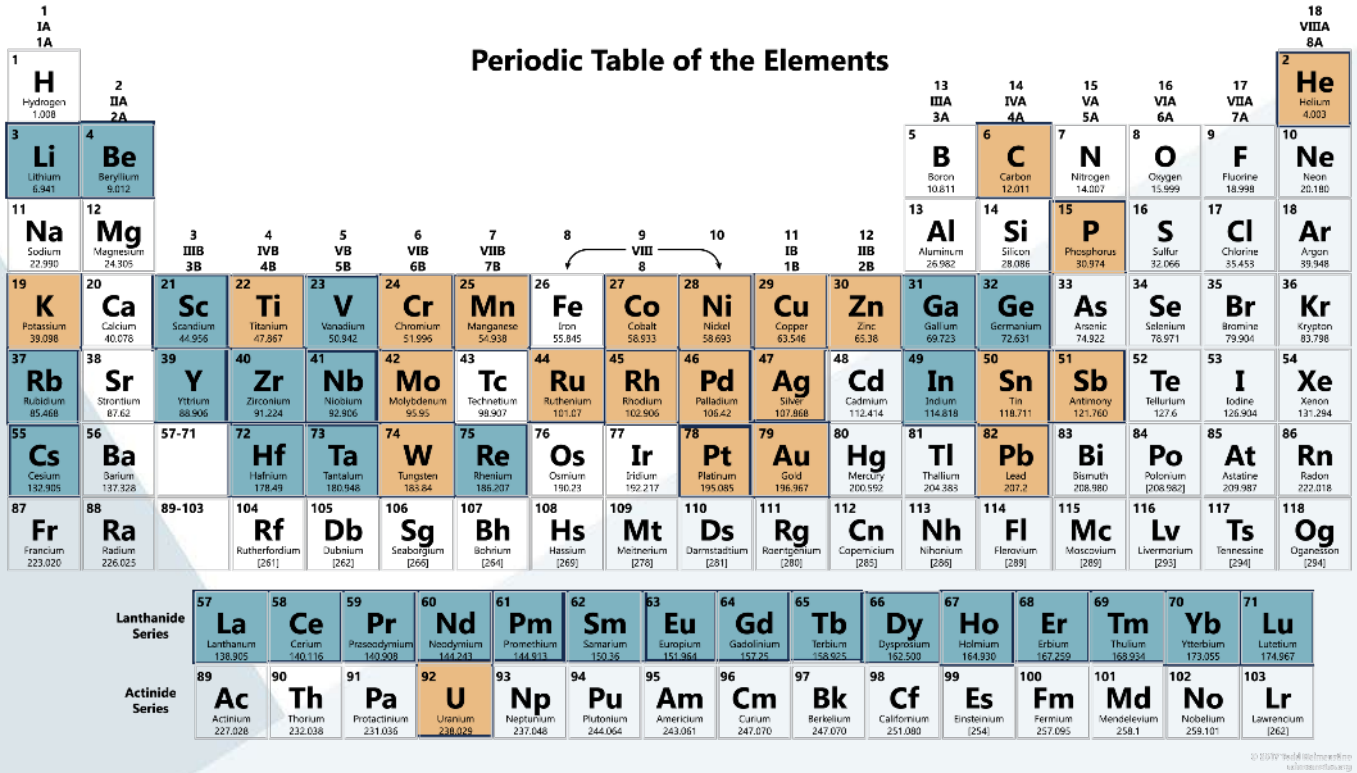
RUSSIA

RUSSIA'S CRITICAL RAW MATERIALS

- Rare metals
- Russia's CRM



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LAUNCHES SULFUR PROGRAM AFTER HISTORIC FINE FOR ARCTIC FUEL SPILL

Nornickel the world's leading producer of palladium and metallic nickel and a major global producer of platinum and copper. Its main operations are located in the Arctic in Norilsk, Taimyr peninsular and in Murmansk region on Kola peninsular. The company also runs a nickel refinery through its subsidiary in Harjavalta, Finland which is the one of the largest facilities of this kind in Europe.

Nornickel Faces Historic $2 Billion Fine for 21,000-Ton Diesel Spill in Arctic

In 2020 an aging fuel tank at a Nornickel subsidiary power plant collapsed near the city of Norilsk causing 21,000 tons of diesel fuel leake into the Ambarnaya and Daldykan rivers as well as surrounding waterways and soil. The state of emergency was declared in the region. Following this incident, Nornickel faced a the largest compensation for environmental damage in Russia's history. In early 2021, the company had to pay 146 billion rubles ($2 bil) for the environmental damage caused. Oil spill clean up and land remediation took two years.

Sulphur programme in Norilsk

Norilsk is a mining city located north of the Arctic Circle on the Taymyr Peninsula, with a population of around 180,000 people. For many years, it has been among the top ten most polluted cities because of its large metal smelting complex, which annually releases roughly 1.8 million tons of sulfur dioxide (SO2).

In 2023, Nornickel launched the Sulfur Program, an initiative to capture SO2 emissions at the Nadezhda Smelter facilities in Norilsk. This project utilizes a technological process that converts sulfur dioxide into sulfuric acid. The acid is then neutralized using limestone to produce gypsum waste, which is safely managed within a designated storage facility.

In 2023 Nornickel has reconfigured its metallurgical processes, established an advanced facility for SO2 utilization, and constructed essential infrastructure, trained and hired approximately 500 new personnel.

By 2025, it is expected that the smelter will reduce O2 emissions by 45% compared to 2015 levels.

Originally the Sulphur programme began on the Kola Peninsula. In 2021, the optimization of smelting operations along the Russia-Norway border and shutdown of the obsolete smelting shop in Nickel led to a 90% reduction in SO2 emissions compared to 2015.

Nornickel's total investment in the full implementation of the Sulfur Program will amount to RUB 180 billion ($2 billion).

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SWEDEN

SWEDEN'S CRITICAL RAW MATERIALS (EU LIST)

- CRM that are also strategic
- EU CRM
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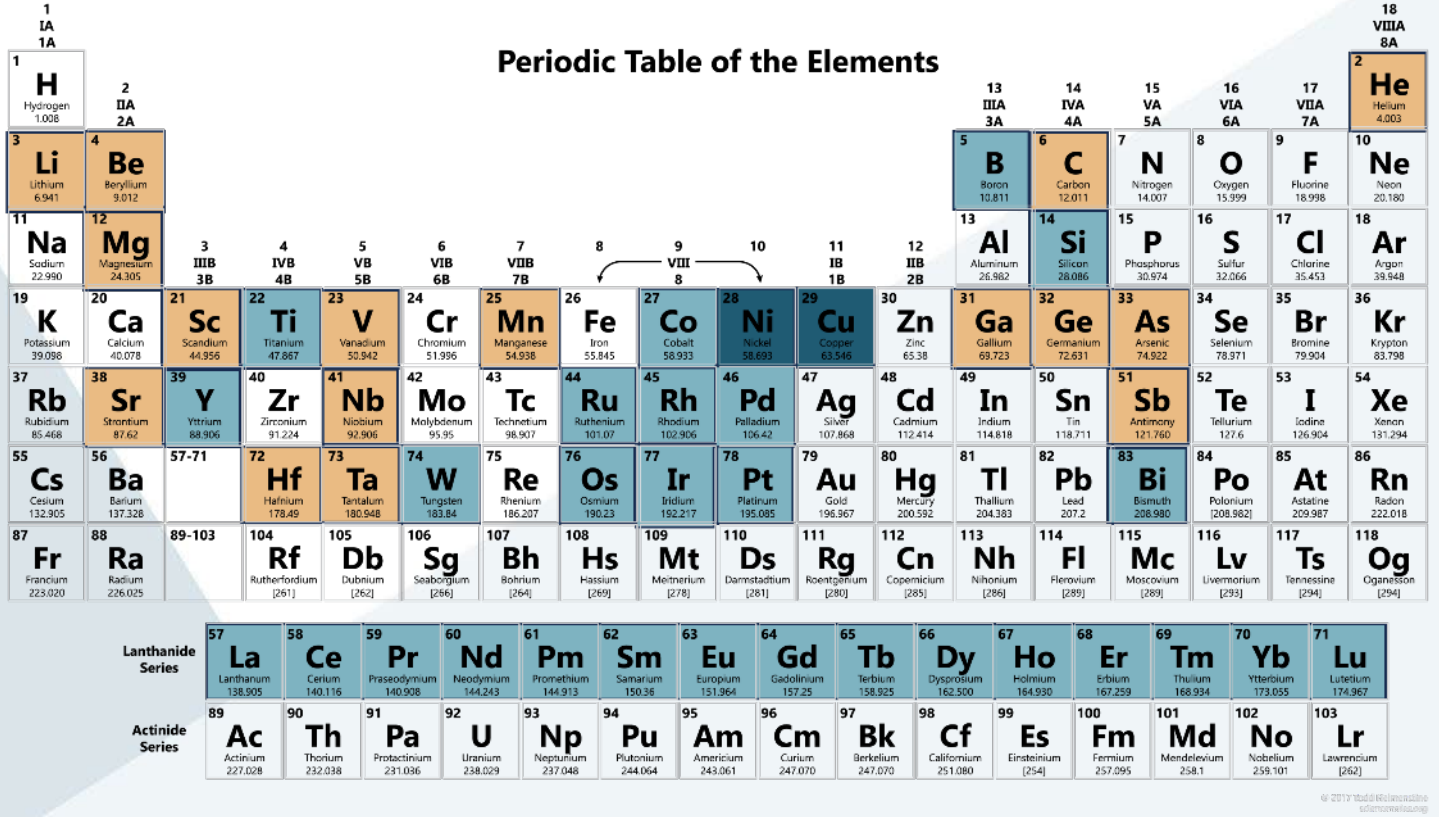

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A FUTURE OF FOSSIL-FREE IRON ORE AND STEEL PRODUCTION?

Case study: LKAB's HYBRIT Project

The HYBRIT project is a joint initiative led by LKAB, state-owned leading mine company in Northern Sweden, SSAB and Vattenfall and partly funded by the Swedish Energy Agency and the EU's Innovation fund. Its goal is to produce the world's first fossil-free iron ore and steel by 2026.

HYBRIT stands for Hydrogen Breakthrough Ironmaking Technology and is aiming to revolutionise steel production throughout the whole value chain, by changing the energy sources used during the production process. The production will rely on a direct reduction process using hydrogen produced with hydropower electricity instead of carbon and coke.

So far, a pilot direct reduction plant was built and is operating in Luleå since 2020. On LKAB's Malmberget site in Kiruna municipality, the world's first fossil-free iron ore pellets were produced at the end of 2020.

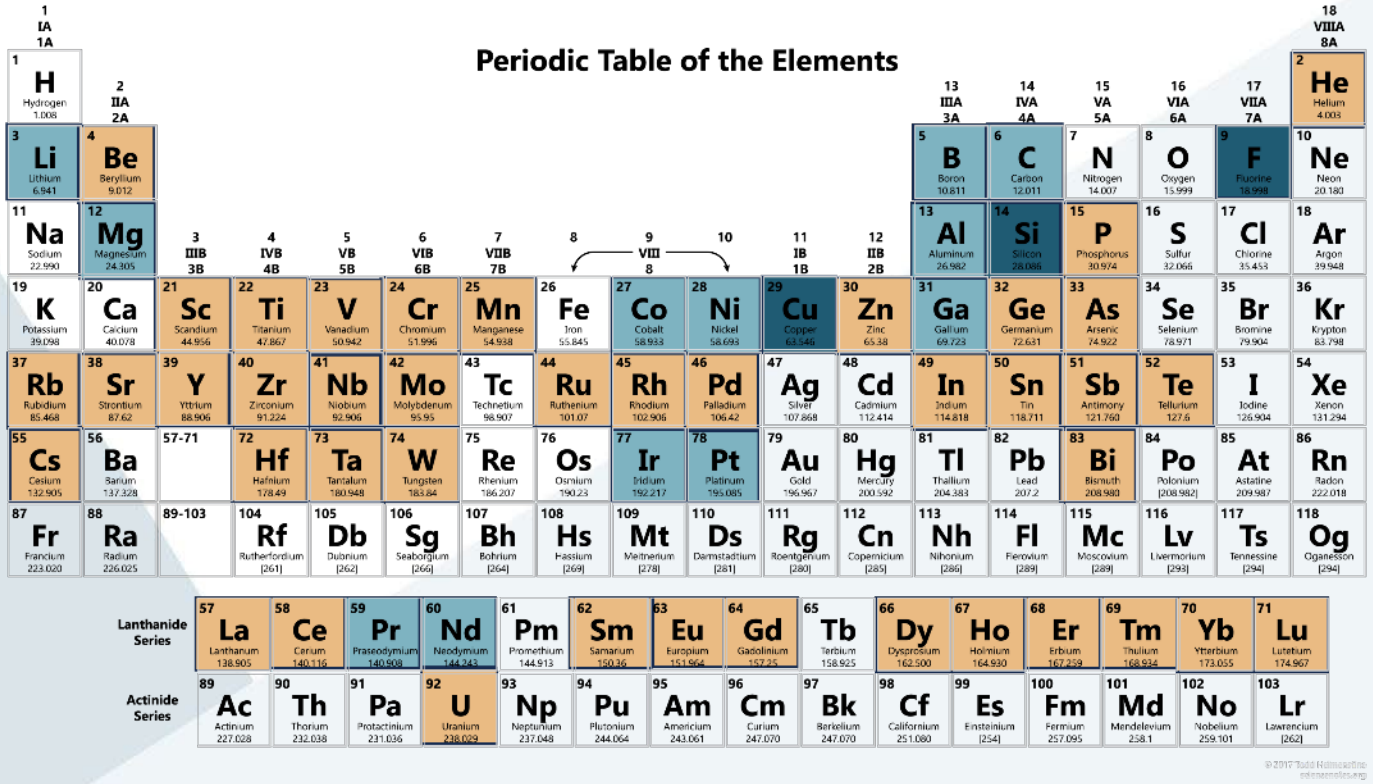
The last development in the project was the confirmation that the demonstration plant will be built in Vitåfors, Gällivare municipality, where hydrogen production, and the manufacturing of sponge iron using hydrogen-powered direct reduction will take place

Photo credit: LKAB

ALASKA (USA)

THE USA'S CRITICAL RAW MATERIALS

- CRM that are also critical for energy
- USA CRM
- Materials that are only critical for energy



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A WORLD-RENOWNED EXAMPLE OF INDIGENOUS-INDUSTRIAL PARTNERSHIP

Case study: Red Dog Operations

The Red Dog mine is one of the largest zinc mines in the world, located near Kotzebue, in northwest Alaska. The mine was created through an agreement between Teck Resources, a Canadian mining company, and NANA, a regional for-profit Alaska Native Corporation.

NANA is owned by Iñupiaq shareholders from 11 different communities, who live in or have ties with the region. This partnership is innovative and original in the way the indigenous communities are involved with mining, since NANA owns the mine and concentrator properties.

Teck Resources distributes its profits and gives hiring preference to NANA shareholders and their families. Additionally, NANA plays a role in overseeing the mine's operations as a partner.

Since mining started, NANA has received more than $1.2 billion in royalties from Red Dog and, based on requirements in the Native claims settlement act, has shared another $2 billion with other Indigenous owned corporations. The mine has contributed over quarter of the wage and in the local borough. Further more, it subsidises community stores and fuel businesses.

In 2020, 55% of employees were NANA shareholders, That same year, Red Dog also started an Accelerated Leadership Development Program, which was put into place to promote shareholder-employees to more senior roles within the company. The program was successful and therefore extended in 2022, following the organisation's goal to have a workforce of 100% local indigenous community workers.

The mine has been in operation since 1989 producing zinc, and also lead. Its exploitation is expected to last until 2031.

Putting new deposits that are about 10 miles away from the current site will allow to keep the production going for many decades. However, federal environmental permits to access the area have been delayed. A state agency's plan to build a new industrial road across remote Northwest Alaska to connect mining deposits have been rejected.

The majority of NANA sharehoders support continued mining in the Red Dog area.

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RECOMMENDATIONS

RECOMMENDATIONS INTRO

Given that most mines are polymetallic and that technology driving demand for minerals to power the energy transition is evolving rapidly, it is vital that we ensure policies designed to support the development of critical minerals in the Arctic take a broad lens and support the entire mining sector.

For a holistic strategy on critical minerals to succeed, Arctic governments will need to harness the skills and experience of its mining sector and supporting industries, which is world-renowned for its technical expertise, skilled workforce, capacity for innovation and globally recognized approach to sustainability and community relations.

Junior mining companies can play a role in the development of the critical minerals, but without the knowledge and investment of the larger established mining companies with experience in developing, operating and closing mines, there is a risk that many critical mineral projects won't get off the ground.

Global efforts have focused on enabling the construction of downstream battery facilities and retooling factories to make them ready for the future. While these are important investments, the upstream component of that supply chain – the mines that provide the minerals – also need support.

Innovative Arctic companies are creating and deploying new technologies and leading-edge expertise to mining operations around the world leading to billions in exports of mining technology and services.

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HOW TO START UP CRM IN THE ARCTIC

SPEED

SKILLS

SCALE

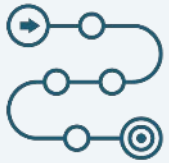
STRENGTHEN DIALOGUE

SECURITY

SHOWCASE

SCIENCE

STUDY



STRATEGIC PLANING

SOCIAL LICENCE

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HOW TO START UP CRM IN THE ARCTIC

SPEED

Speed is of the essence and we don't have much time left if we want to achieve of climate ambitions. We must recognise that the health of the mining economy and supply chain in the Arctic, the capacity and expertise of our workforce, and well-functioning regulatory processes that offer clear and reasonable timelines are the base case for any investment in new critical mineral developments. Faster responses on decisions from the public sector is key to develop CRMs in the Arctic.

SKILLS

A skilled and diverse workforce is key for the mining sector. Some mining jurisdiction puts very high demands on the need for local labour. However, that is not always possible because they compete with other sectors and because the competences might not always be there locally. In a sparsely populated region with worrying demographic trends we need to both invest in skills locally as well as attracting a workforce from outside the region. Policy makers must focus on skills development from early childhood education and onwards to further education. There should be a strong focus on vocational training and education.

SCALE

Governments need to make substantial investments in building the economic backbone of roads, ports, rail, power lines and communications that will attract private investments and benefit local communities. Investments in larger infrastructure projects will make the business case stronger for mining companies.

STRENGTHEN DIALOGUE

We must strengthen and ensure meaningful Indigenous and community consultation and participation to establish a comprehensive and inclusive economic, social and environmental development through the development of the critical mineral industry in the Arctic.

SECURITY

Critical Raw Materials are necessary for our national security and should be seen in that prism when making decisions. For the Arctic region to remain competitive we must develop domestic level of mineral production through investments in mining and mineral processing. To make investments more secure and attractive in the Arctic, we must determine a common framework to make investments in CRM.

Request the full version of the report via email

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