

# 2023 - 2025 Nevada Mining State of the State

**SME  
Northern Nevada Chapter**

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**Rob Ghiglieri  
Administrator**

May 12, 2025

**[Minerals.nv.gov](https://minerals.nv.gov)**

Photo: Rhvolite Ridge, by Michael Darin



# Nevada's Mining

>170 Years of Mining History

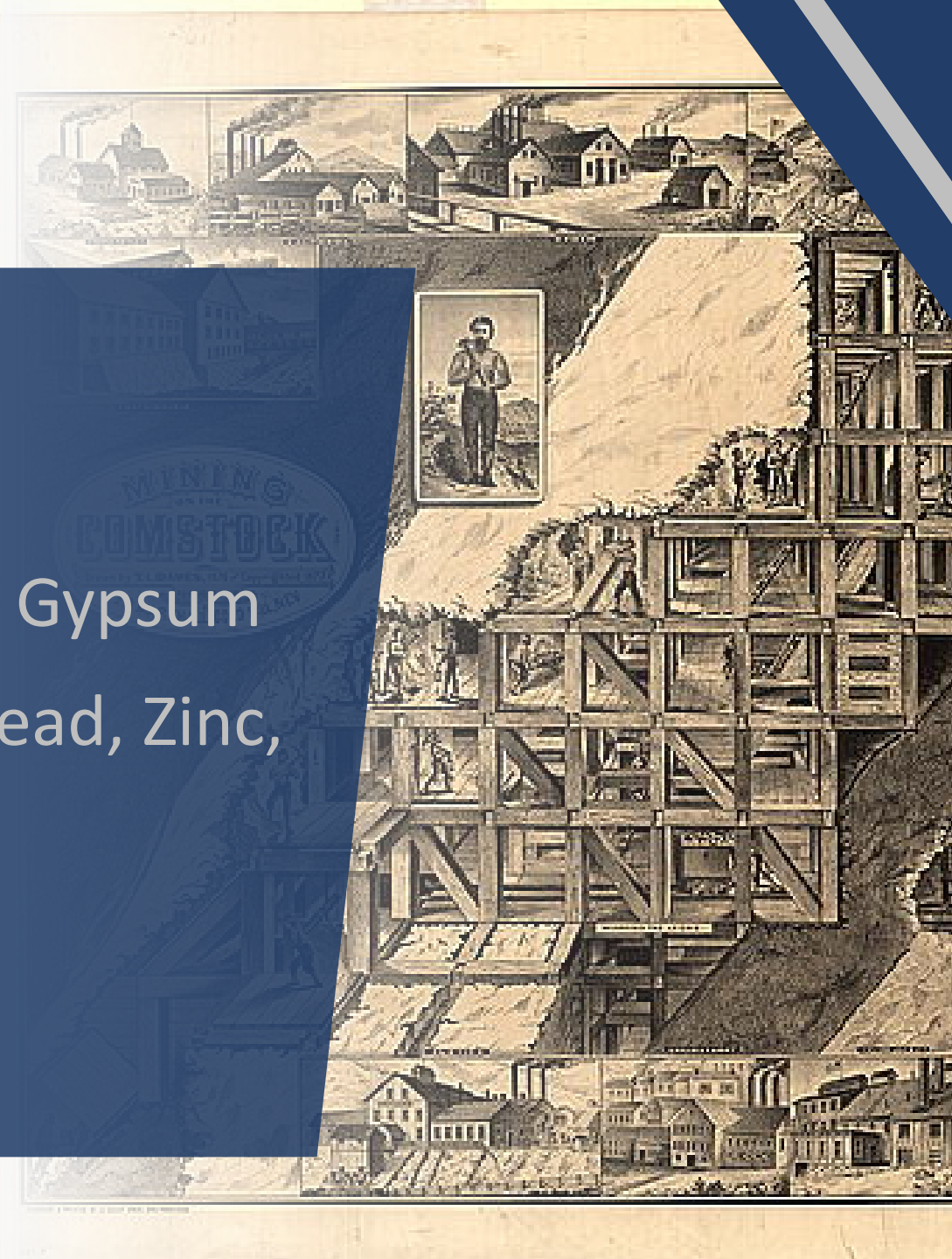
Current or Past Production of:

Gold, Silver, Copper, Lithium, Barite, Gypsum

Clays, Limestone, Magnesite, Iron, Lead, Zinc,  
and many more

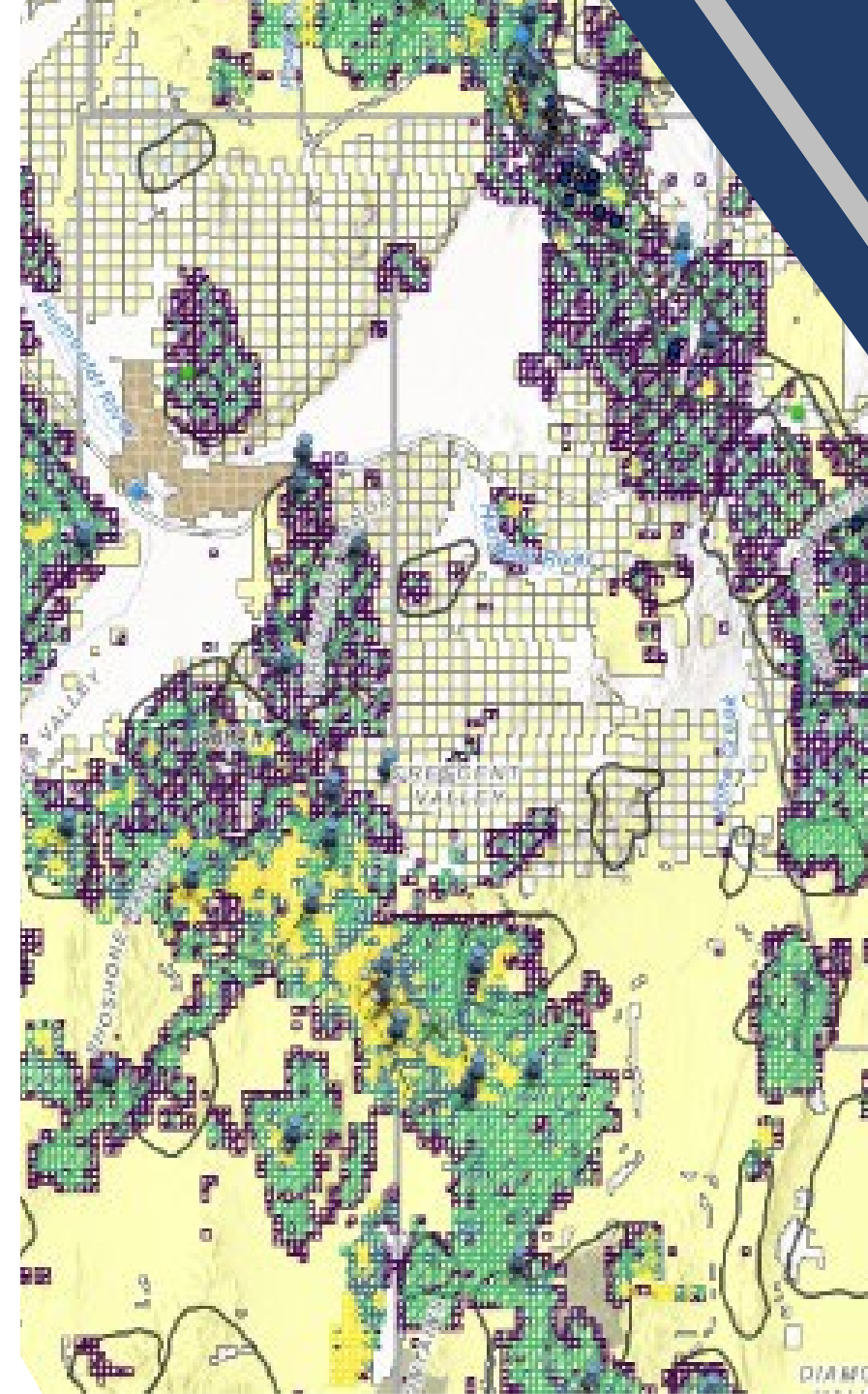
Stable Permitting Environment

World Renown Mineral Endowment



# Nevada Commission on Mineral Resources - Division of Minerals

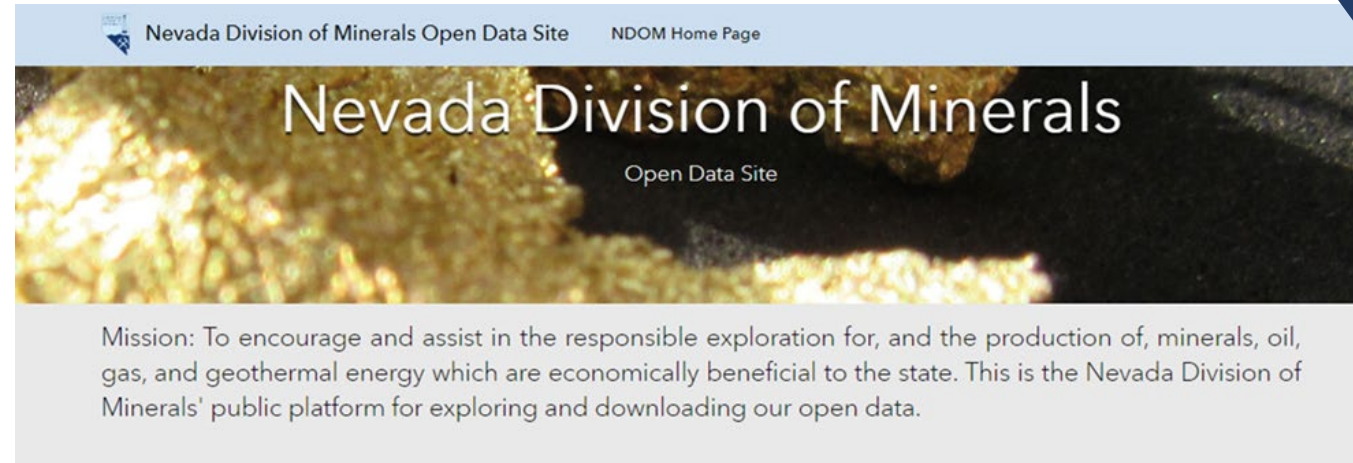
- NRS 513.073 requires the Division to collect and disseminate mineral production and educational materials.
- The Division and Commission are a resource to the Governor and Legislature on mineral related activities
- The Division does not pick or preference any company or project over another, rather only provide publicly available data
- The Division does not give preference or recommend any company over another in this presentation and acknowledges that this presentation has not included all exploration companies in Nevada.



# NDOMDATA.COM

Free and Downloadable

- Mining Claims
- Active and Historic Notices & Plans
- Production Statistics
- Land Resource Issues
  - Sage Grouse
  - Solar
  - Right of Ways
  - Withdrawals
- Oil & Gas
- Geothermal
- Lithium
- And Much More



## Disclaimer

*The Nevada Division of Minerals (NDOM hereafter) assumes no responsibility for errors or omissions. No warranty is made by NDOM as to the accuracy, reliability, or completeness of these data for individual use or aggregate use with other data; nor shall the act of distribution to contractors, partners, or beyond, constitute any such warranty for individual or aggregate data use with other data. In no event shall NDOM have any liability whatsoever for payment of any consequential, incidental, indirect, special, or tort damages of any kind, including, but not limited to, any loss of profits arising out of the use or reliance on this data.*

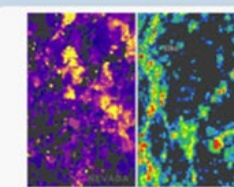
## Featured Content!



[Sage-Grouse Alternative Viewer](#)



[2023/2024 Utility-Scale Solar Energy...](#)



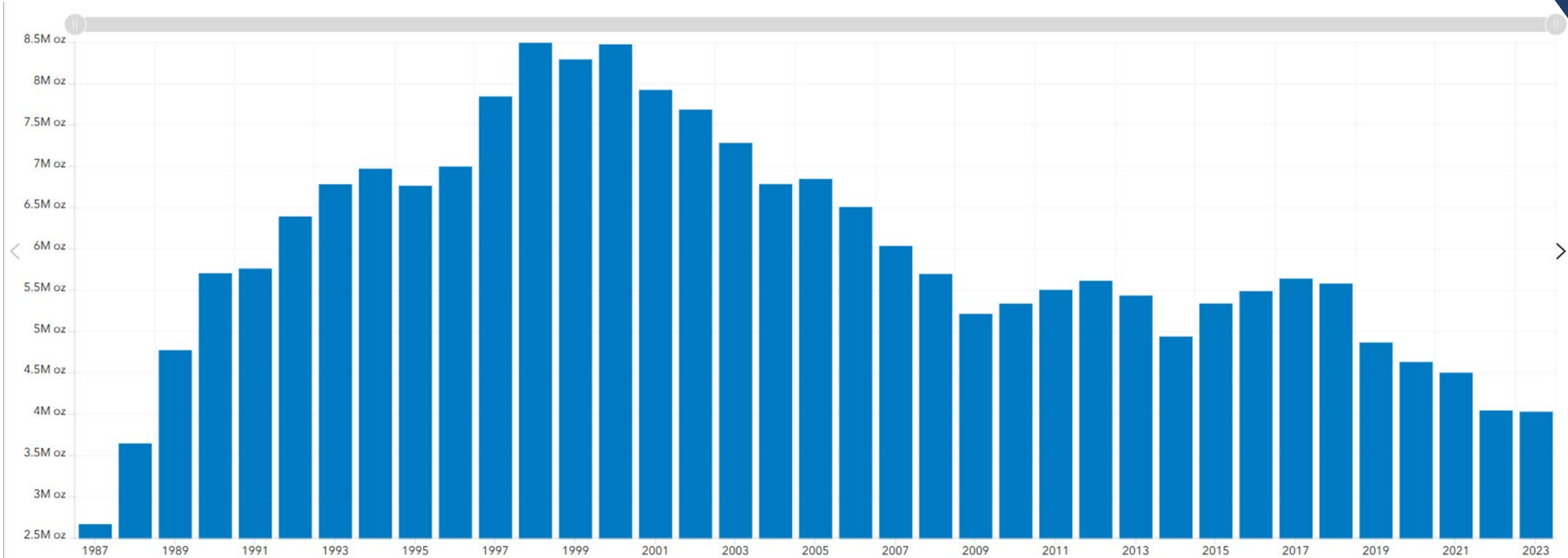
[C.H.I.M.E. Claims Habitation Interactive...](#)



[The Nevada Mineral Production Experience!!](#)



# Gold Production by Year



# Nevada Mining Summary - 2023

- NV produced 73% of U.S. Gold
- NV ranked 5<sup>th</sup> in world (behind China, Australia, Russia, and Canada)
- #2 mining jurisdiction based on the Investment Attractiveness Index (Fraser Institute, 2023)
- Continued interest in exploration for and production of critical minerals
- Employed >14,500 people with average yearly pay \$113,000
- USGS estimates 2024 @ \$9.9 billion

Summary of 2023 Nevada Mineral Commodity Production

Commodity	Production Amount	Unit	YOY Change (%)	Value (\$)	YOY Value Change (%)
Gold	4,030,556	ounces	-0.4%	\$7,790,419,859	8.2%
Silver	5,527,294	ounces	1.0%	\$130,603,988	8.7%
Barite (shipped from mills)	382,792	tons	-15.6%	\$40,835,574	13.8%
Copper	109,880,753	pounds	-22.5%	\$425,334,989	-16.2%
Diatomite	281,924	tons	-13.9%	\$58,797,196	-2.3%
Dolomite	59,382	tons	17.6%	\$5,678,533	23.3%
Gypsum	1,984,942	tons	-24.8%	\$47,345,465	-2.8%
Limestone (Incl. Lhoist Dolomite)	3,389,529	tons	-15.4%	\$35,081,882	12.1%
Lithium compounds (shipped)	7,166,000	pounds	-13.7%	\$172,197,316	65.2%
Magnesium compounds (shipped)	113,387	tons	-7.4%	\$9,816,903	4.4%
Molybdenite	135,796	pounds	-50.7%	\$2,512,226	30.3%
Perlite	2,064	tons	152.0%	\$132,600	61.9%
Salt (shipped)	19,626	tons	9.0%	\$1,138,040	-25.8%
Silica sand (mined)	752,158	tons	-2.5%	\$22,749,841	-2.4%
Specialty clays	99,592	tons	-7.8%	\$14,400,713	-4.3%
Geothermal energy (sold)	4,376,769	megawatt hours	10.4%	\$341,604,265	5.9%
Oil (sold)	203,076	barrels	-13.3%	\$14,400,713	-25.4%
Aggregates	38,400,000	tons	18.2%	\$413,000,000	28.7%
				<b>\$9,526,050,103</b>	

# Nevada Mineral Production 1987 - 2023

**Nonmetals**  
View production details by year.

[Explore](#)

**Metals**  
View production details by year.

[Explore](#)

**Major Mines**  
View Major Mines Publications

[Explore](#)

< 1 of 46 >

Year	2023
Silver (oz)	5,527,294
Gold (oz)	4,030,556
Copper (Lbs)	109,880,753
Molybdenum (Lbs)	135,796
Barite Shipped (Tons)	382,792
Clay (Tons)	76,900
Diatomite (Tons)	281,924
Dolomite (Tons)	309,382
Gypsum (Tons)	1,984,942
Limestone (Tons)	3,139,529
Lithium Carbonate (Tons)	7,166,000
Perlite (Tons)	2,064
Quartzite (Tons)	3,725
... (Tons)	...

- Sort By Operation
- 327 Apex Mine - Gold
  - 327 Apex Mine - Silver
  - Ach-dayton Joint Venture - Mercury
  - Adams Claim Gypsum Mine -
  - Adams Claim Gypsum Mine -
  - Adelaide Crown Mine - Gold
  - Adelaide Crown Mine - Silver
  - Alligator Ridge Mine - Gold
  - Alligator Ridge Mine - Silver
  - Alligator Ridge Mine - Mercury
  - Amargosa Clay Operation -
  - Amargosa Clay Operation - Sepiolite
  - Amargosa Clay Operation - Clay
  - Amargosa Clay Operation - Saponite
  - Amy Mine - Gold
  - Ana Mine - Copper
  - Ana Mine - Molybdenum
  - Apex Plant - Limestone

**Production Filter Map** | [Interactive Legend Map](#) | [Major Mines](#) | [Commodity Value Chart](#)

Select Year to Display Production Totals:

- All -

[Production Filter](#) | [Attribute Table](#) | [Legend](#)

**Production Filter**

Select Commodity if desired then filter on ONE year, the filter will not display correctly for more than one year.

Commodity is: - All -

1987

1988

Selected features: 0

Esri, USGS | California State Parks, Esri, TomTom, Garmin, FAO, NOAA, USGS, EPA, USFWS | NDOM, DETR | NDOM Powered by Esri



# Gold - 2024\* (missing one operator)

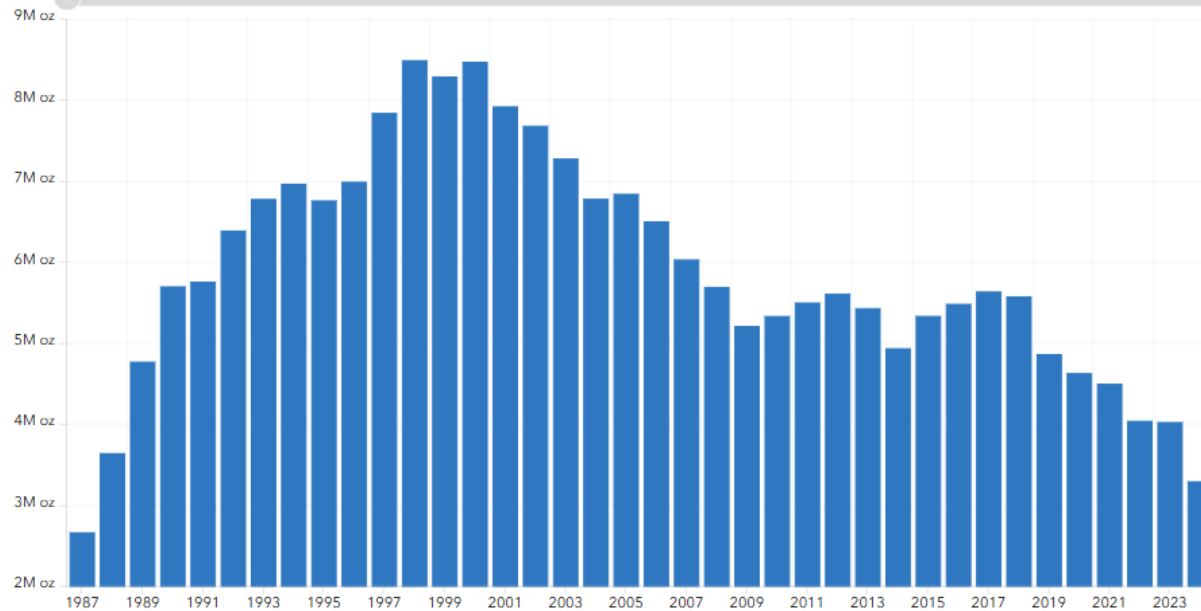
Year over Year Change, gauge shows change in production values from previous year.

No Value

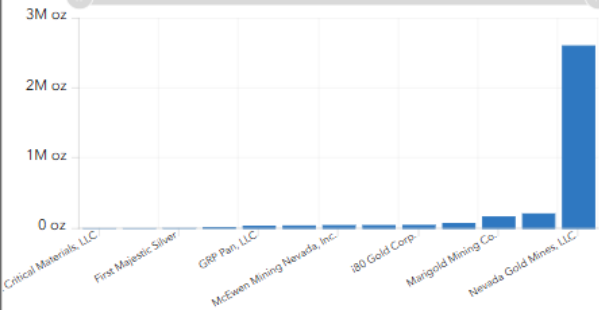
## Gold Production (Ounces)

# 3,299,088

Gold Production / Year



Production by Operator



Production by Operator (serial chart)

Map

Gold Mined/Year

- Arturo Mine
- Betze-Post Mine
- Borealis Mine
- Carlin Ops.
- Coeur Rochester Mine
- Cortez Hills Mine
- Cortez Pipeline Mine & Cortez Hills Mine
- Florida Canyon Mine
- Gold Bar Mine (Atlas)
- Goldrush
- Granite Creek Mine
- Isabella Pearl Mine
- Jerritt Canyon Mine

Op. Listing

Op. Details

Count of Distinct Company Names

# 13

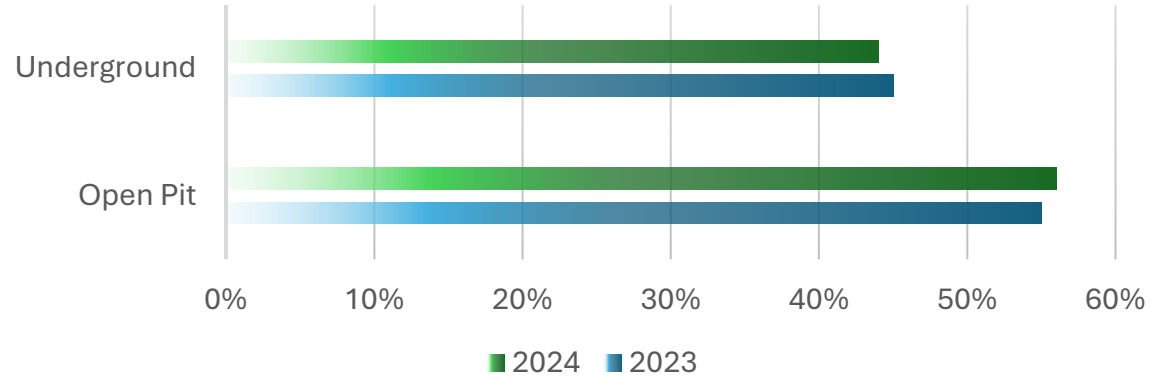
Count of Mining Operations

# 24

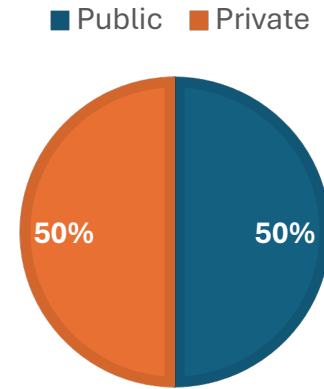


# Gold Production Statistics\* (Not completed data)

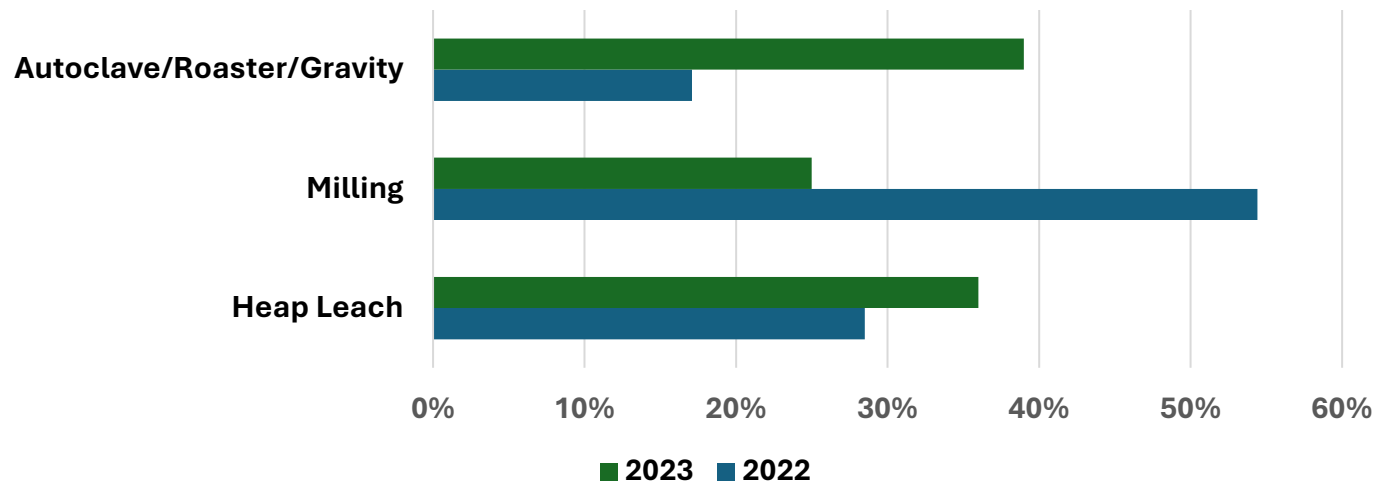
### AU % BY MINE TYPE



### 2024 AU % BY LAND OWNERSHIP

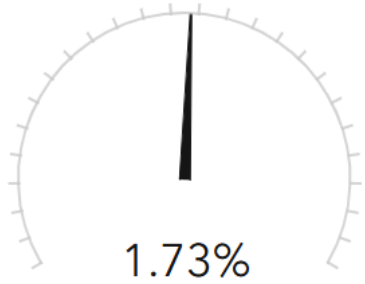


### % Au by Process (2022 vs. 2023)



# Silver - 2024

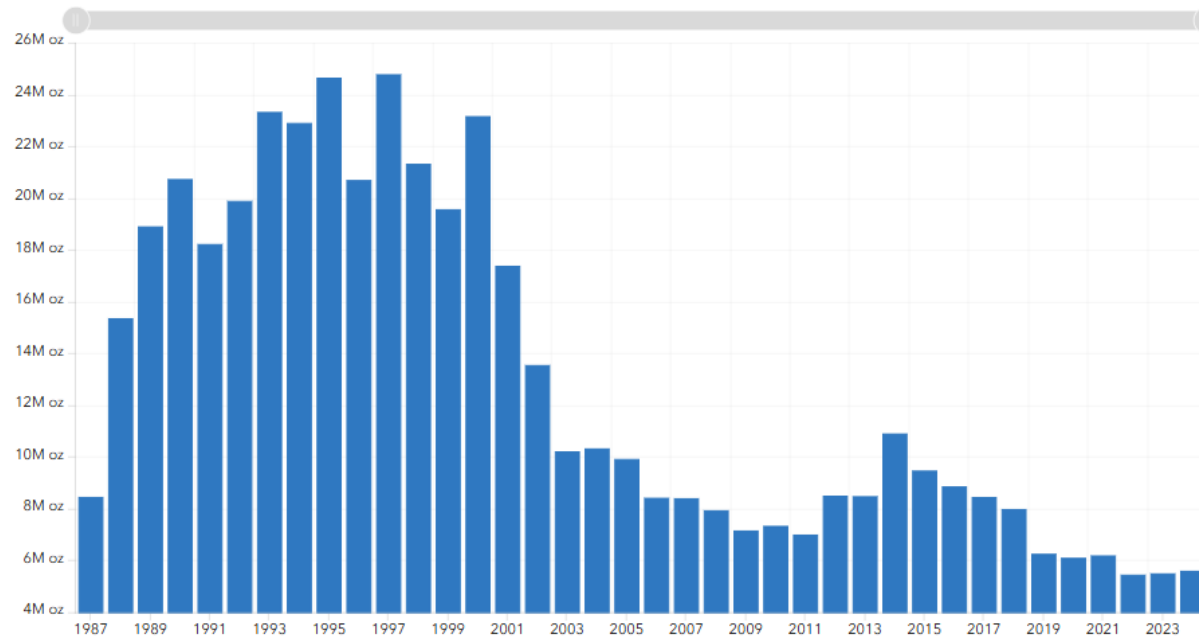
Year over Year Change, gauge shows change in production values from previous year.



## Silver Production (Ounces)

# 5,626,398

Silver Mined / Year



- Arturo Mine
- Betze-Post Mine
- Borealis Mine
- Carlin Ops.
- Coeur Rochester Mine
- Cortez Hills Mine
- Cortez Pipeline Mine & Cortez Hills Mine
- Florida Canyon Mine
- Gold Bar Mine (Atlas)
- Isabella Pearl Mine
- Long Canyon Mine

Op. List Op. Details

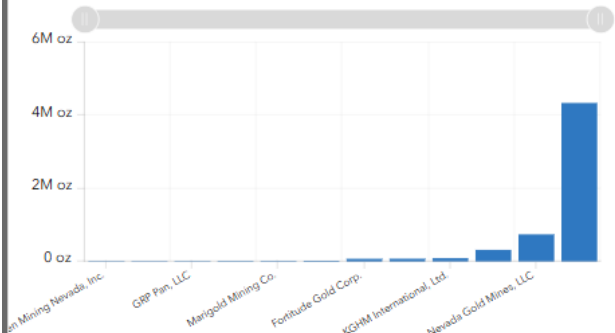
Count of Distinct Company Names

# 20

Count of Mining Operations

# 20

Production by Operator

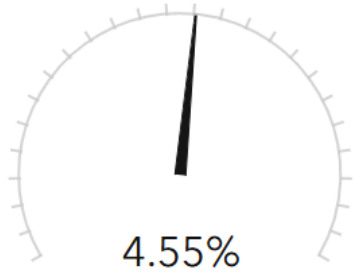


Production by Operator (serial chart)

Map Silver/Year

# Copper - 2024

Year over Year Change, gauge shows change in production values from previous year.

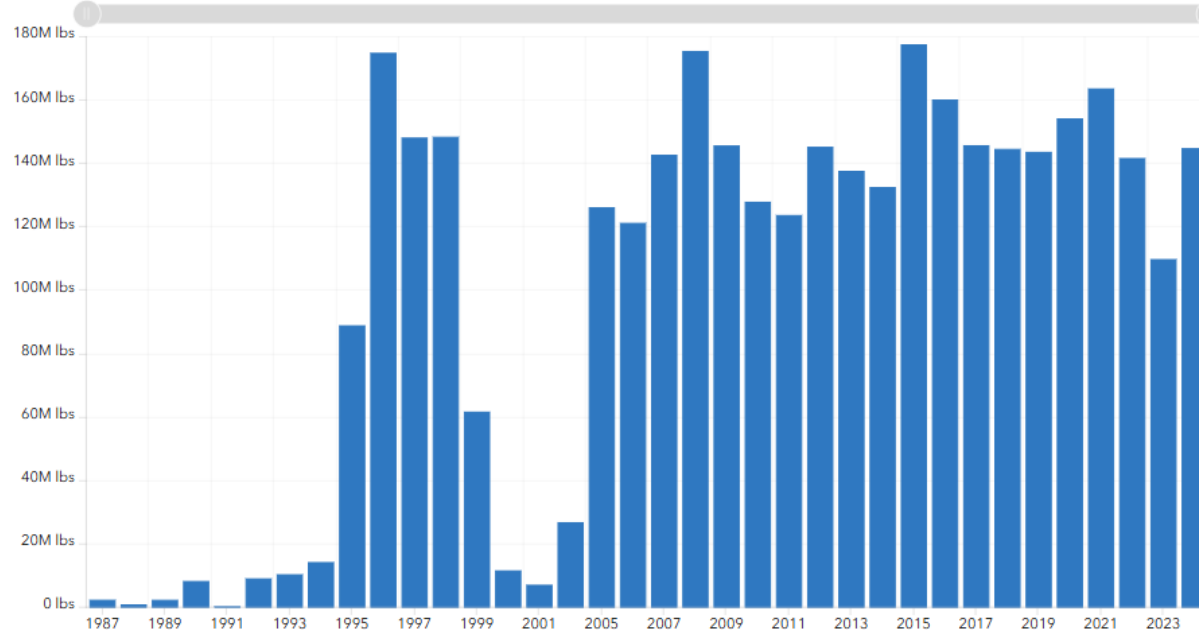


## Copper Production (Pounds)

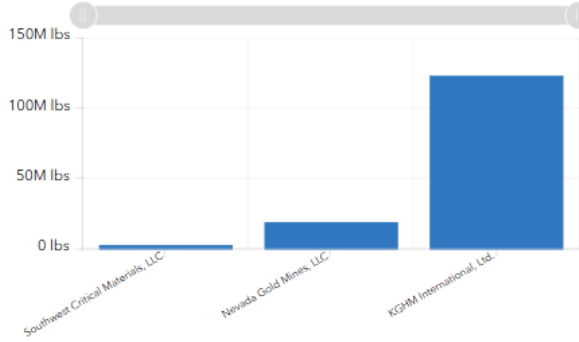
# 144,878,926

- Phoenix Mine
- Pumpkin Hollow
- Robinson Nevada Mining Company

Copper Mined / Year



Production by Operator



Op. List Op. Details

Count of Distinct Company Names

# 3

Count of Mining Operations

# 3

Production by Operator (serial chart)

Map Copper/Year

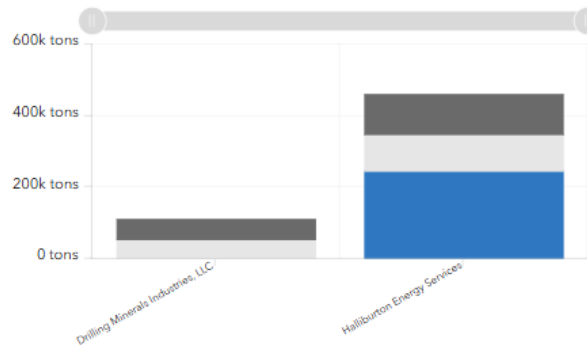
# Barite - 2024\* (not final)

Year over Year Change, gauge shows change in production values from previous year.

No Value

YOY change for Barite Shipped Amounts

Production by Operator



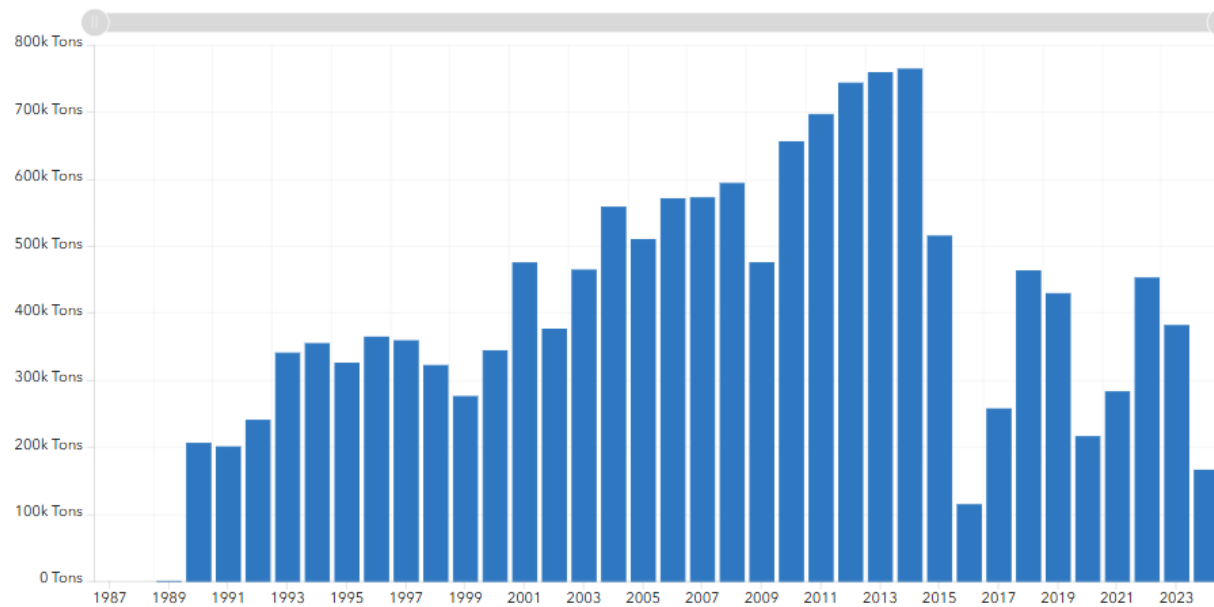
Production by Operator (serial chart)

## Barite Mined (Tons)

# 246,290

Mined Produced Shipped

Barite Shipped / Year



Map Barite Shipped/Year

- Big Ledge Mine/Osino Mill
- Rossi Mine And Dunphy Mill

Op. List Op. Details

Count of Distinct Company Names

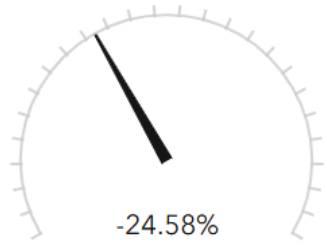
# 2

Count of Mining Operations

# 2

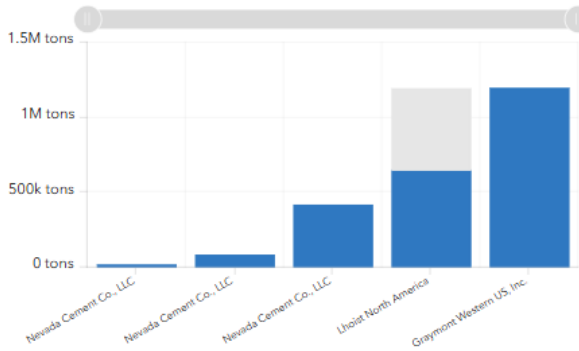
# Limestone - 2024

Year over Year Change, gauge shows change in production values from previous year.



YOY change for Limestone Mined Amounts

Production by Operator



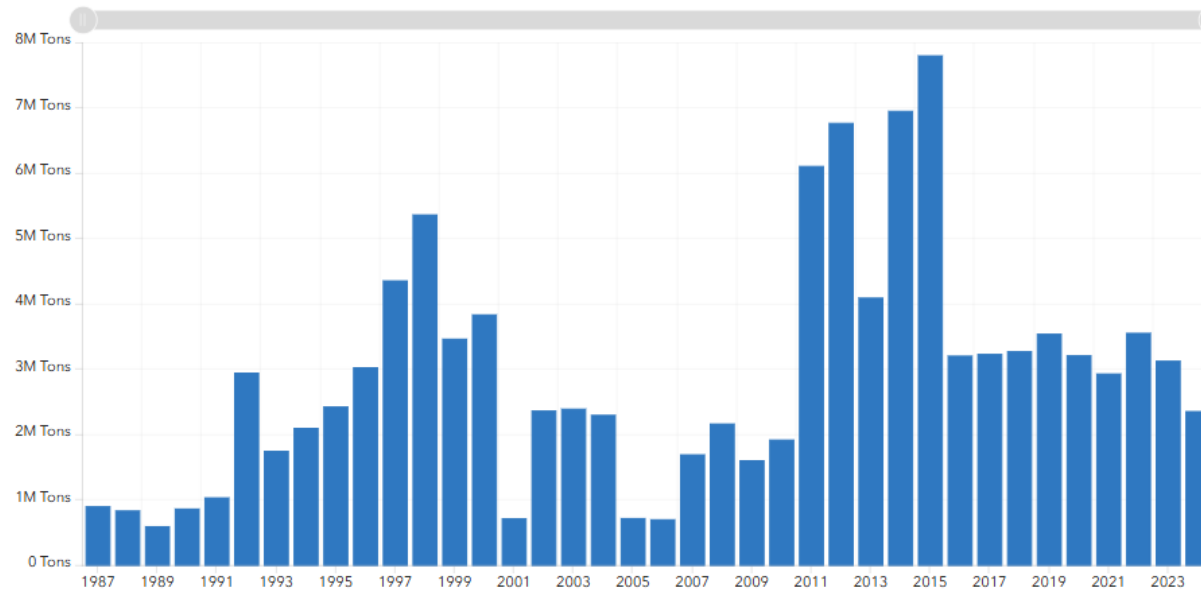
Production by Operator (serial chart)

## Limestone Mined (Tons)

# 2,366,371

Mined Produced Shipped

Limestone Mined / Year



Map Limestone Mined/Year

- Apex Quarry And Plant
- Pilot Peak
- Fernley Limestone
- Relief Canyon Limestone
- Churchill Limestone Quarry

Op. List Op. Details

Count of Distinct Company Names

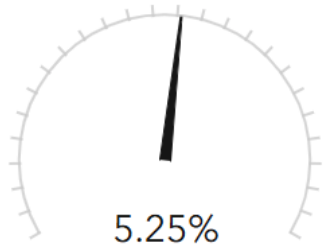
# 5

Count of Mining Operations

# 5

# Magnesite - 2024

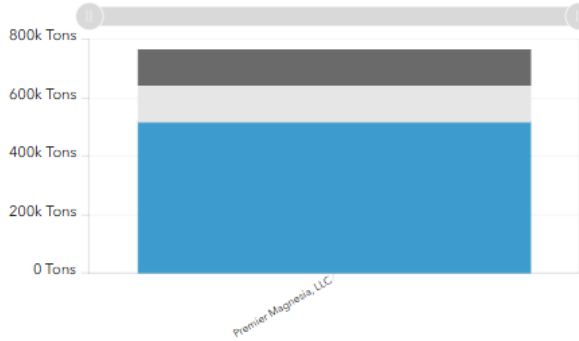
Year over Year Change, gauge shows change in production values from previous year.



5.25%

YOY change for Mg Product Shipped Amounts

Production by Operator



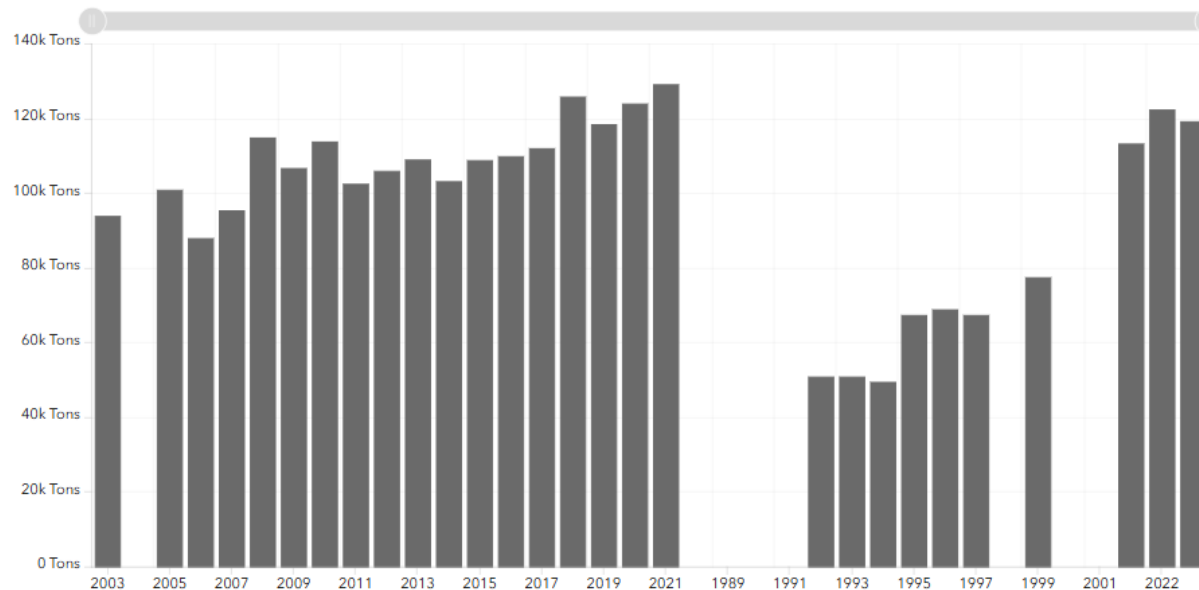
Production by Operator (serial chart)

## Magnesite-Brucite Mined (Tons)

# 519,540

Mined Produced Shipped

Magnesium Products (Magnesite, Brucite, Magnesium Oxide, Magnesium Compounds) Shipped / Year



Map Mg Products Shipped/Year

Premier Magnesia Mine

Op. List Details

Count of Distinct Company Names

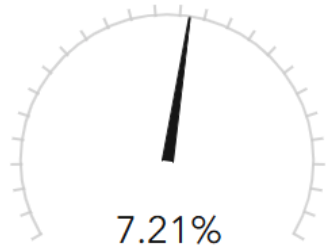
# 1

Count of Mining Operations

# 1

# Nevada's Lithium - 2024

Year over Year Change, gauge shows change in production values from previous year.



YOY change for Lithium Carbonate Shipped Amounts

Production by Operator



Production by Operator (serial chart)

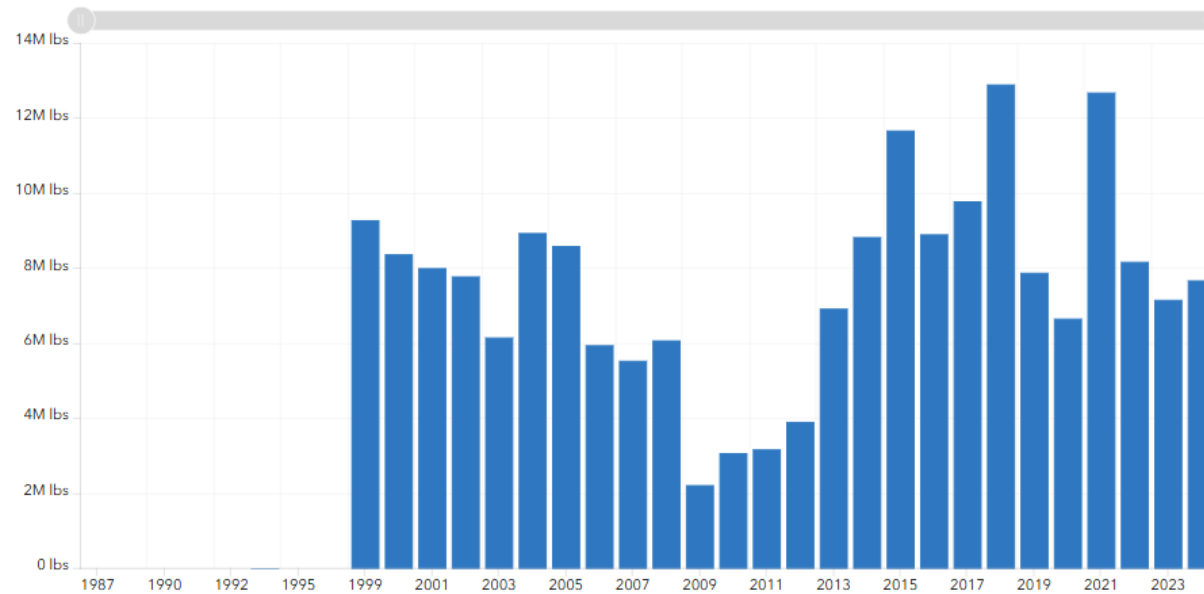
## Lithium Carbonate Produced (lbs)

# 7,815,422

Produced

Shipped

Lithium Carbonate Shipped / Year



Map

Li2CO3/Year

Silver Peak Operations

Op. List

Op. Details

Count of Distinct Company Names

# 1

Count of Mining Operations

# 1



# Nevada's Lithium

**Only** Lithium producer in United States

**Largest** lithium Mine in North America under development

**One** late-stage exploration project with completed permitting starting development

Estimated > **117 Million** Metric Tons of lithium in resources already discovered



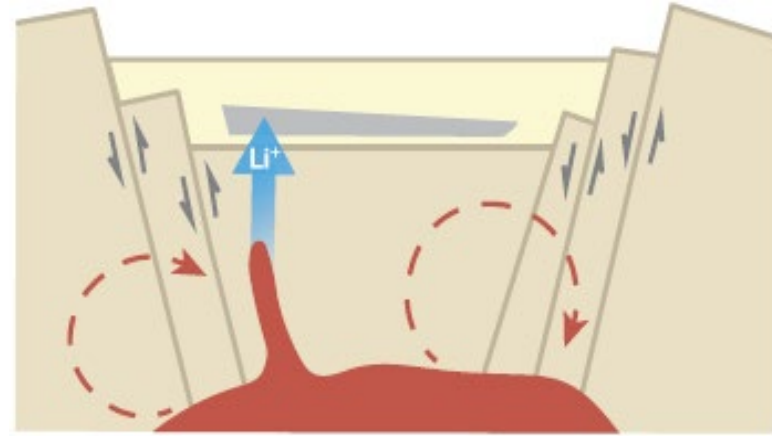
*Photo provided by Lithium Americas*

# Lithium Deposits

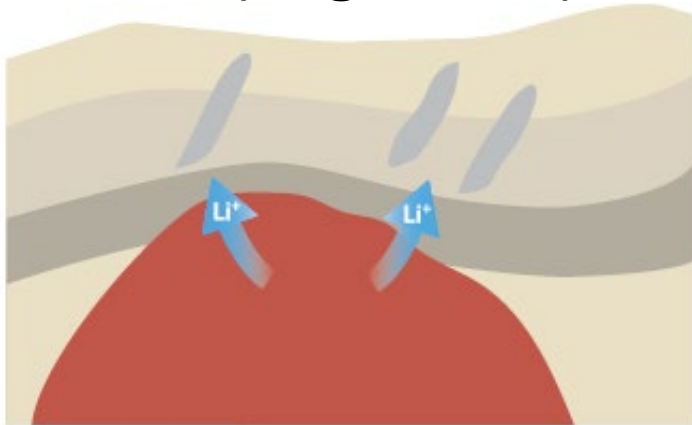
- Salar (Brine)



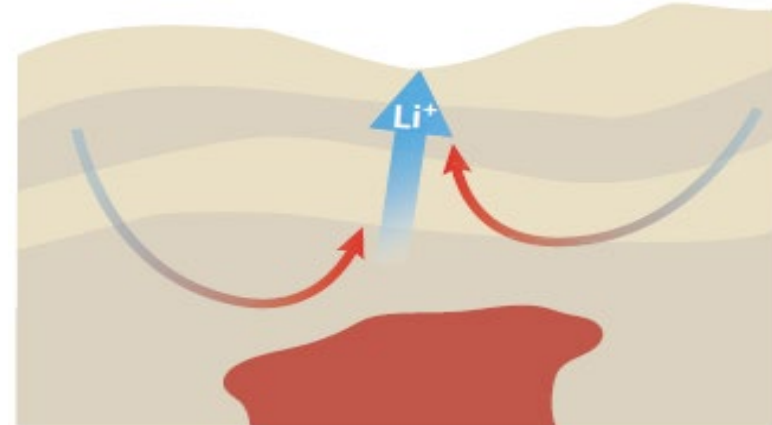
- Clay or Sediment



- Hardrock (Pegmatite)

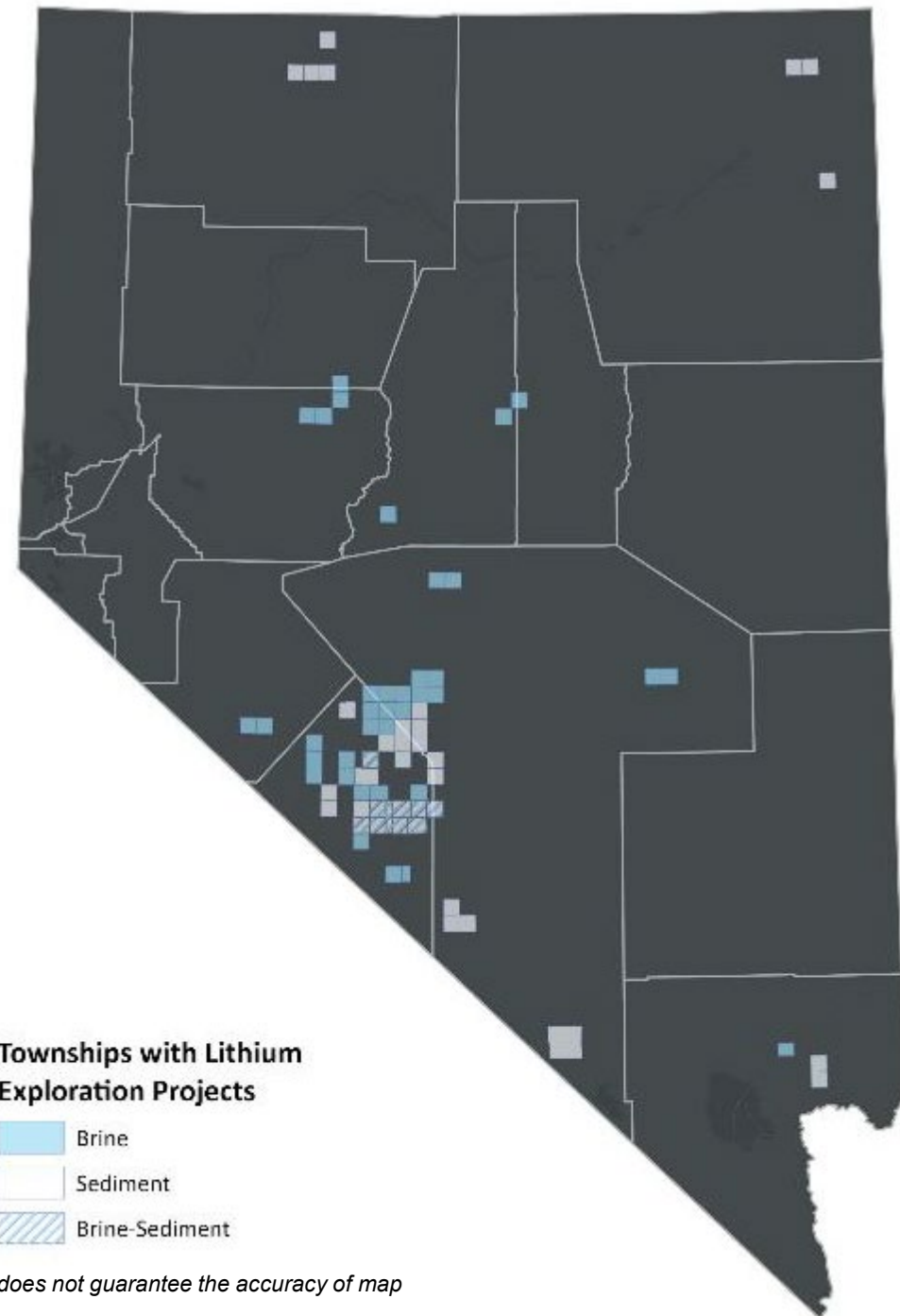


- Geothermal/Oilfield Brines

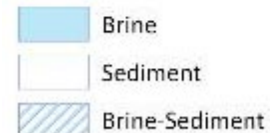


# Nevada Exploration

1074654 Nevada Corp	Intor Resources Corporation	Playa Minerals Co
3 Pl Operating Inc	Ioneer Usa Corporation	Powr Lithium Corp.
Albemarle Us Inc	Ionic Minerals (Bonaventure	Pure Energy Minerals Ltd
Altitude Lithium Usa Corp	Last Basin LLC	Rangefront Consulting LLC
American Battery Technology Company	Lithic Lithium LLC	Rangefront Mining Services
American Lithium Corp	Lithium Holdings Nevada LLC	Red Mountain Mining Company
Authium LLC	Lithium Nevada Corp	Rover Metals (Usa) Inc
Battery Mineral Resources Nevada Inc	Lithiumore Corp	Rubicon Explorer Corporation
Belmont Nevada Inc	Logan Resources Usa Inc	Schlumberger Technology Corporation
Bonaventure Nevada Inc	Lone Mountain Resources, LLC	Scotch Creek Ventures Nevada, Inc
Bronco Creek Exploration Inc	Mathers Lithium Corp	Sienna Resources (Us) Corp
Centerstone Resources LLC	Ml Nevada Corp	Sierra Lithium LLC
Cosmo E&P Usa Inc.	Morella Minerals Corporation	Stone Brothers Inc.
Cruz Battery Metals	Needles Holdings Inc	Surge Battery Metals Usa Inc
Cypress Holdings (Nevada) Ltd	Neolith Energy	Ultra Lithium Usa Inc
Dome Rock Resources, LLC	Nevada Lithium Exploration Inc	Us Energy Metals Corp
Fort Cady California Corp	Nevada Alaska Mining	Usha Resources Ltd.
Geoxplor Corp.	Nevada Li Corp	Waterleaf Minerals, LLC (WML)
Great Basin Resources Inc	Nevlith LLC	WC1 Nevada Lithium
Green Energy Resources Inc	Origin Minerals Exploration, LLC	Zanskar Geothermal & Minerals, Inc
Grid Battery Metals Usa Inc	Ormat Mineral LLC	
Halo Lithium LLC	Paradigm Minerals Usa Corp	
	Pilot Peak, LLC (Ppl)	



## Townships with Lithium Exploration Projects



Source: List of companies and map locations were derived by use of the BLM's MLRS database. The Division of Minerals does not guarantee the accuracy of map locations or if all companies looking for lithium were captured or if all companies listed are currently active

# SLB's Direct Lithium Extraction (DLE)

September 10, 2024, SLB Press Release:

- Produced lithium from DLE at scale
- “The proprietary integrated solution.... produces lithium 500 times faster than conventional methods while using only 10 percent of the land. Operating at approximately one tenth the size of a commercial-scale facility, the plant reached a verified recovery rate<sup>1</sup> of 96% lithium from brine.”
- “The entire SLB solution, from extracting lithium from brine to converting it to lithium carbonate, takes just hours. Traditional evaporation methods can take up to 18 months and have a much lower recovery rate of 50 percent or less.”
- Uses resin that selectively absorbs lithium ions while rejecting most undesired ions
- Uses less water and returns the spent brine, or the brine with a reduced lithium concentration, back to its source after the lithium is processed and separated.

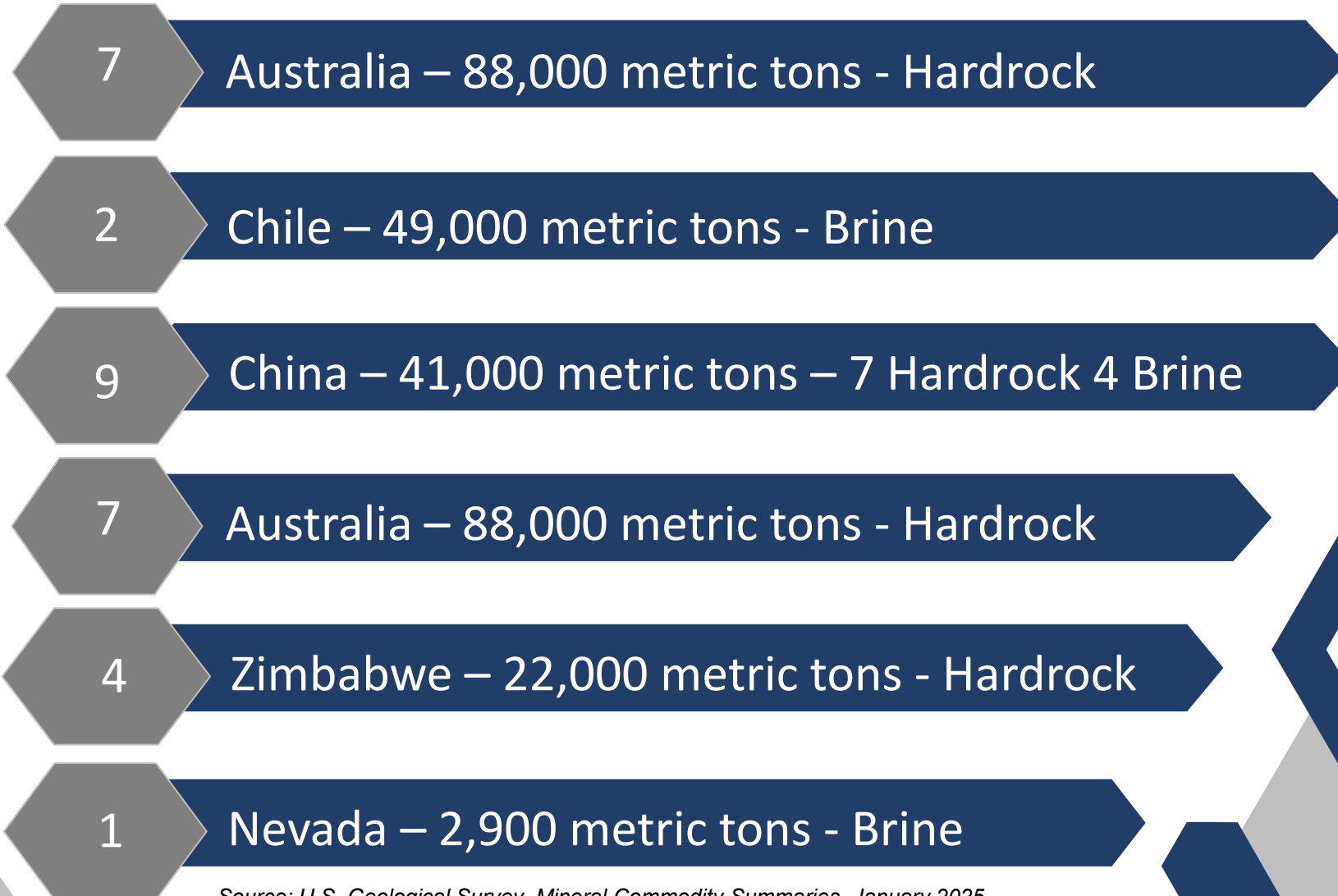


Photo from SLB Press Release: <https://investorcenter.slb.com/news-releases/news-release-details/slb-achieves-breakthrough-results-sustainable-lithium-production>

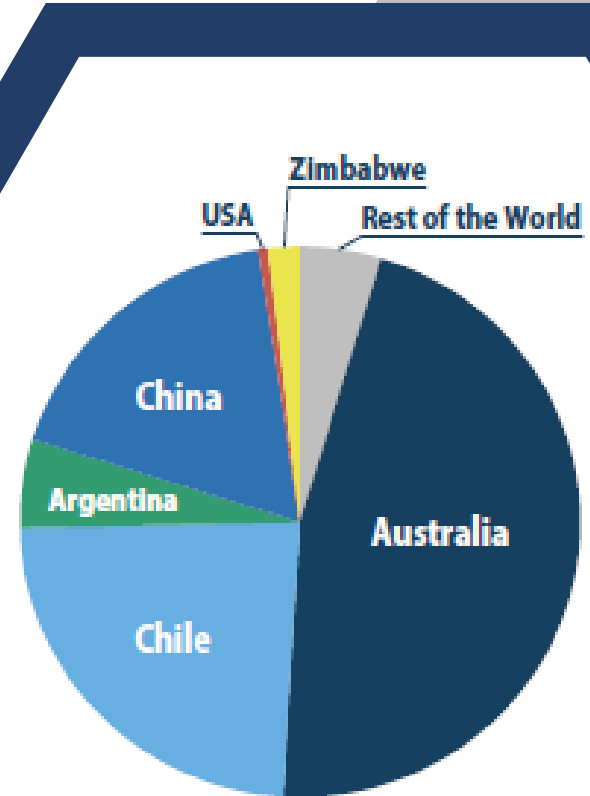
Source: <https://investorcenter.slb.com/news-releases/news-release-details/slb-achieves-breakthrough-results-sustainable-lithium-production>



# World's 2024 Lithium Mining



2024  
Worldwide  
Production  
240,000  
Metric Tons

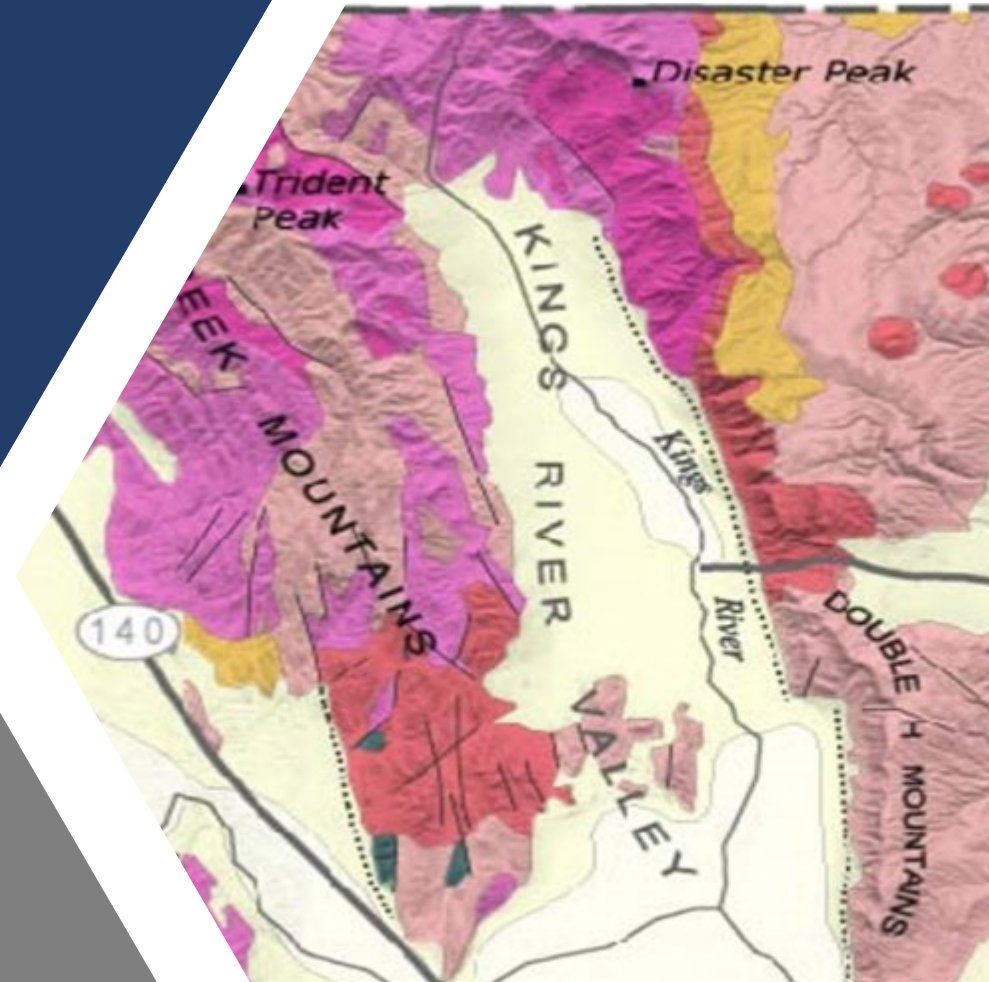


Source: U.S. Geological Survey, Mineral Commodity Summaries, January 2025, Division of Minerals: NDOMdata.com

# World Lithium Reserves

- Bolivia, 23 million tons – Primarily Brine
- Argentina, 23 million tons – Primarily Brine
- United States, 19 million tons – Various\*
- Chile, 11 million tons – Primarily Brine
- Australia, 8.9 million tons – Primarily Hardrock
- China, 6.8 million tons – Various
- Germany, 4 million tons – Primarily Hardrock
- Canada, 5 million tons – Primarily Hardrock

\*United States Estimates from continental brines, claystone, geothermal brines, hectorite, oilfield brines, and pegmatites



# Nevada Lithium Reserves

## NBMG Lithium Report, September 2024 – Table 1

- 17 individual projects
  - 14 clay/sediment
  - 3 brine
- Total Reserves
  - Clay 4.28 million tons
  - Brine 0.36 million tons
- Total Resources
  - Clay 117 million tons
  - Brine 1.52 million tons

## Thacker Pass – December 2024

- 14.3 million ton reserve
  - Up to 160,000 tons a year

## Rhyolite Ridge – April 2023

- 3.2 million tons
  - 22,000 tons a year

## Clayton Valley (Century Lithium) – April 2024

- 1.76 million tons

## Silver Peak – December 2023

- 0.36 million tons

Lithium Price was ~\$10,250 per ton at the end of 2024

Sources: <https://lithiumamericas.com/thacker-pass/overview/default.aspx> <https://rhyolite-ridge.ioneer.com/new-ioneer-mineral-resource-update/#:~:text=The%20updated%20report%2C%20conducted%20by,tonnes%20of%20boric%20acid%20equivalent. Century Lithium - NI 43-101 TECHNICAL REPORT ON THE FEASIBILITY STUDY OF THE CLAYTON VALLEY LITHIUM PROJECT Esmeralda County, Nevada, USA>

[https://s201.q4cdn.com/960975307/files/doc\\_financials/2023/q4/9aefa2f5-78dc-4015-bf20-b71aba0bb593.pdf](https://s201.q4cdn.com/960975307/files/doc_financials/2023/q4/9aefa2f5-78dc-4015-bf20-b71aba0bb593.pdf) Jowitt, S.M., Henry, C.D., Crespo Mena, J., Lindsey, C.R., Darin, M.H., Saftner, D.M., Heintz, K.M., and Hershey, R.L., 2024, Lithium in Nevada—origins, extent, role in the energy transition, and implications for economic development and national security: Nevada Bureau of Mines and Geology Special Publication 40, 48 p.



# Nevada Companies Federal Funding and Offtake Agreements

## Lithium Americas

- Offtake agreement with General Motors for 100% of production volumes from Phase 1 for 20 years, plus 38% of Phase 2 production volumes for 20 years, and a right of first offer on the remaining Phase 2 production volumes
- DOE Loan, \$2.26 Billion

## Ioneer

- Offtake agreements with Ford, Prime Planet Energy & Solutions (a joint venture battery company between Toyota Motor Corporation and Panasonic Corporation), and EcoPro Innovation
- DOE Loan \$996 Million

## ABTC

- \$144 million DOE Grant for Recycling Facility

Sources: <https://lithiumamericas.com/thacker-pass/overview/default.aspx> <https://www.reuters.com/markets/commodities/us-energy-dept-finalizes-226-billion-loan-lithium-americas-nevada-mine-2024-10-28/> <https://www.energy.gov/lpo/articles/doe-announces-996-million-loan-guarantee-ioneer-rhyolite-ridge-advance-domestic>





# Brine vs. Clay

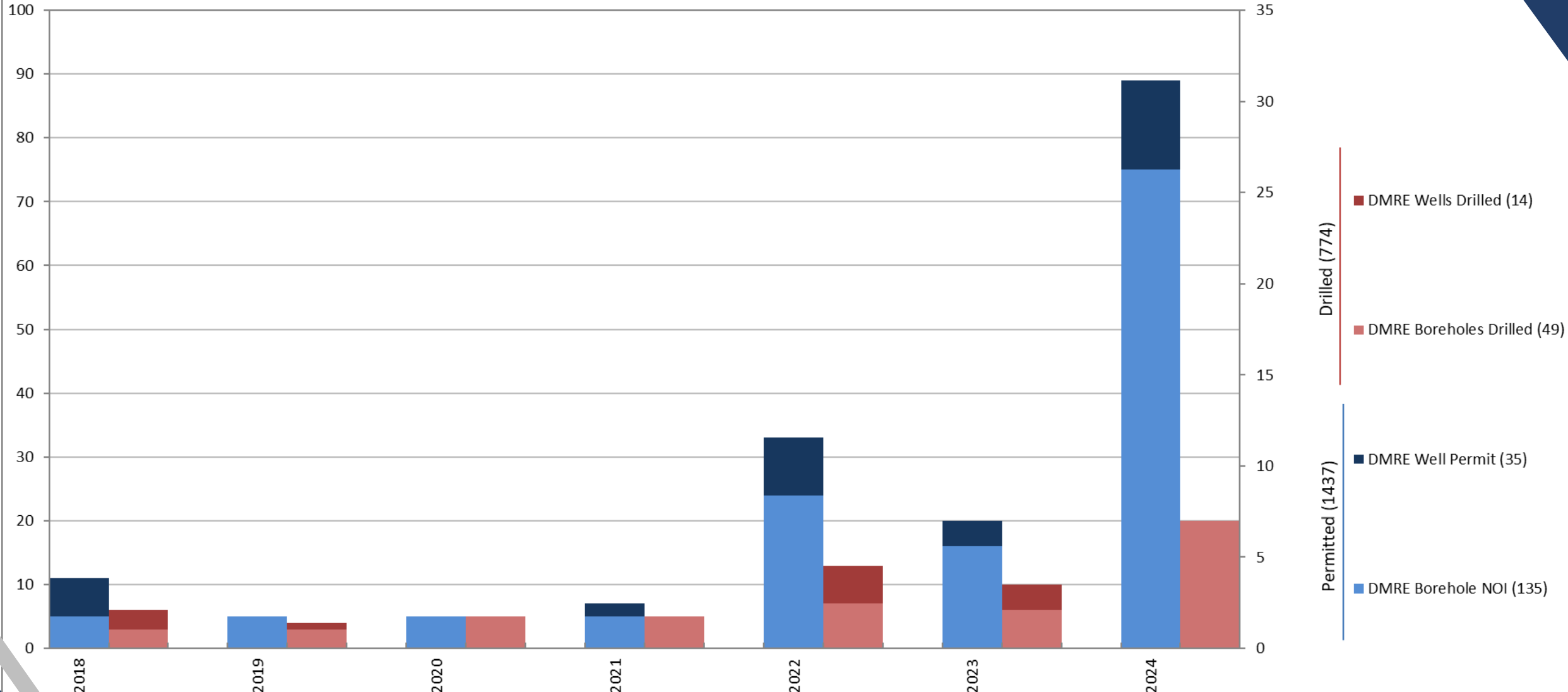
## Depends on locality

- In NV, Clay has taken a significant lead
- South America, Brine looks to dominate
- Technology advances can play a big role
  - DLE for traditional brine and spent oil and gas
    - Needed for low Li concentration, ~100ppm
    - Water availability
- Co-location with Geothermal
  - Possible, but would need to be able to handle the flow of water geothermal deals with
  - Need's DLE technology

*Photo provided by Jim Faulds*



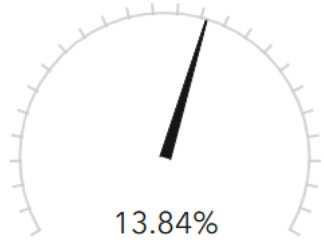
# Nevada Division of Minerals Permitted & Drilled DMRE Wells



- DMRE Wells Drilled (14)
  - DMRE Boreholes Drilled (49)
  - DMRE Well Permit (35)
  - DMRE Borehole NOI (135)
- Drilled (774)
- Permitted (1437)

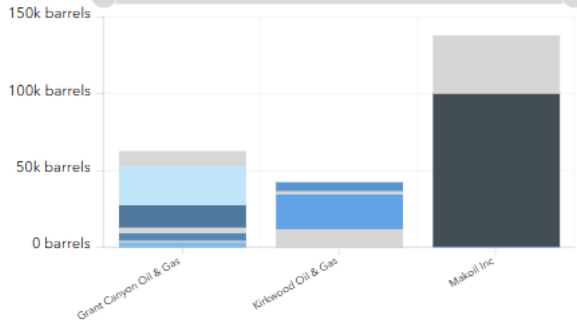
# Oil - 2024

Year over Year Change, gauge shows change in production values from previous year.



YOY change for Barrels of Oil Sold Amounts

Sum of Barrels Produced by Operator/Field



Oil Produced by Operator

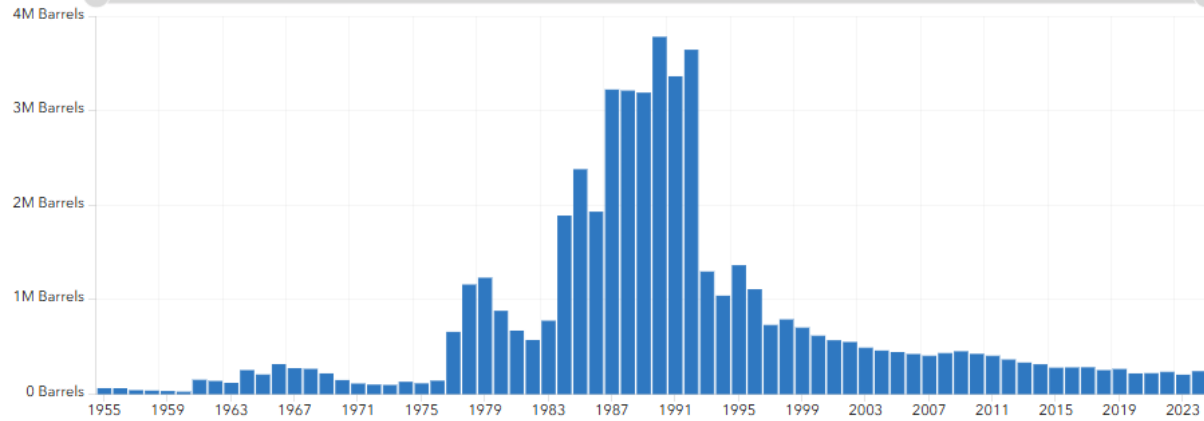
Oil Produced (Barrels)

243,326

Oil Produced

Oil Sold

Nevada Oil Production / Year



Map

Oil Production/Year

Count of Distinct Company Names

3

Count of Producing Wells

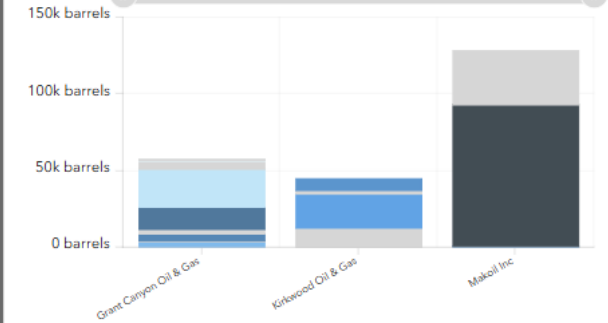
111

- Eagle Springs 35-35
- EagleSprings 15-35
- Eagle Springs 73-35
- Eagle Springs 74-35
- Eagle Springs 2-36
- Eagle Springs 43-36
- Eagle Springs 5-36
- Trap Spring 2 48-27
- Trap Spring 3

Well List

Well Details

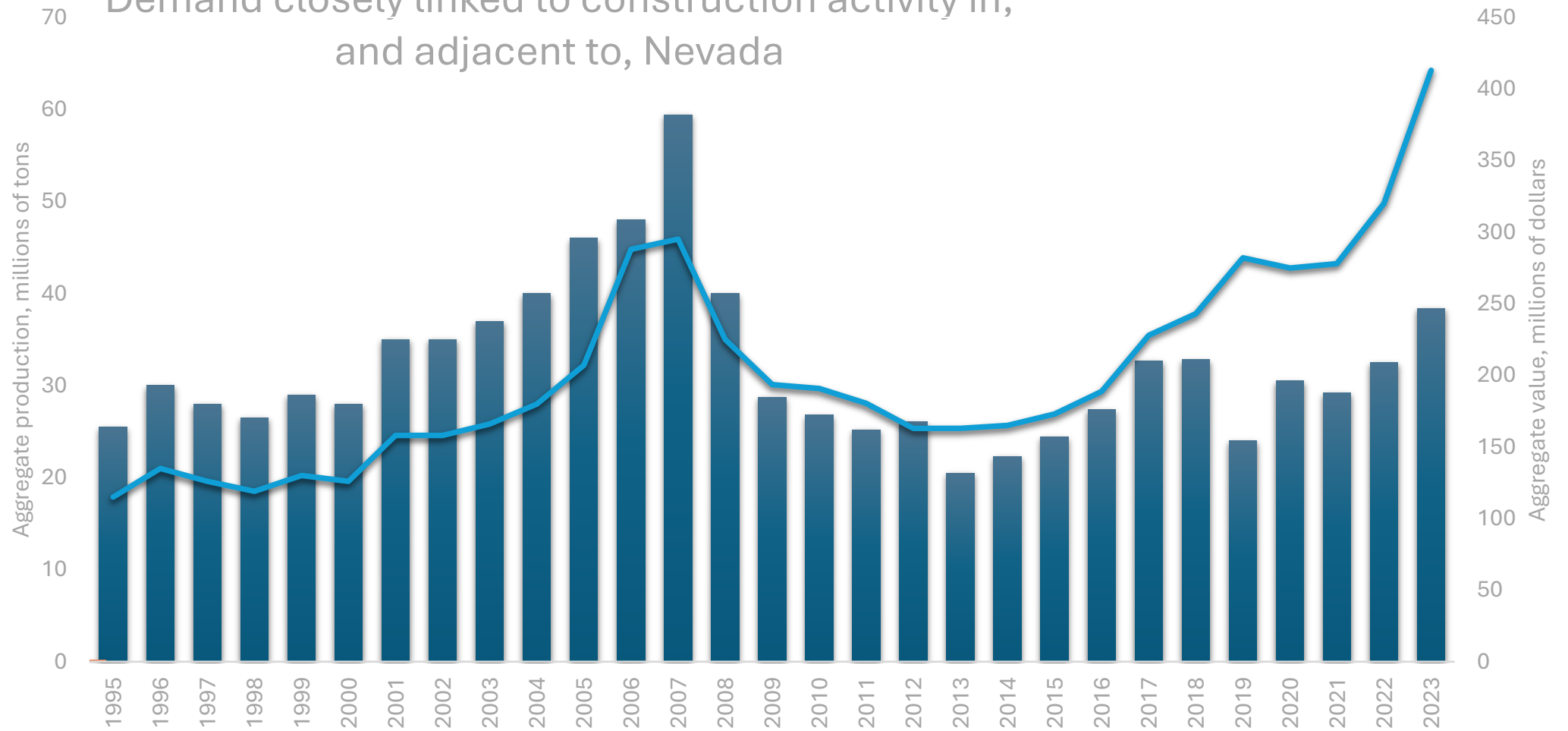
Sum of Barrels Sold by Operator/Field



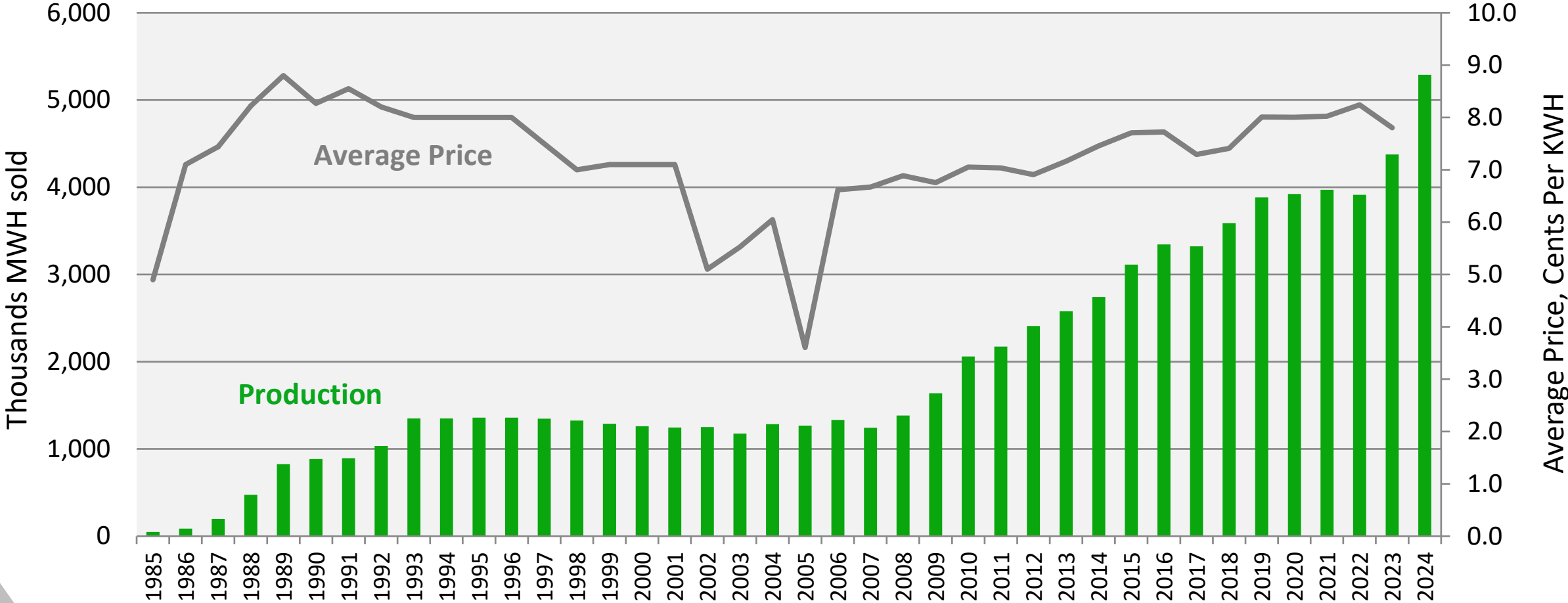
Barrels Sold by Operator

# Aggregates – 2023

Demand closely linked to construction activity in, and adjacent to, Nevada



# Geothermal - 2024



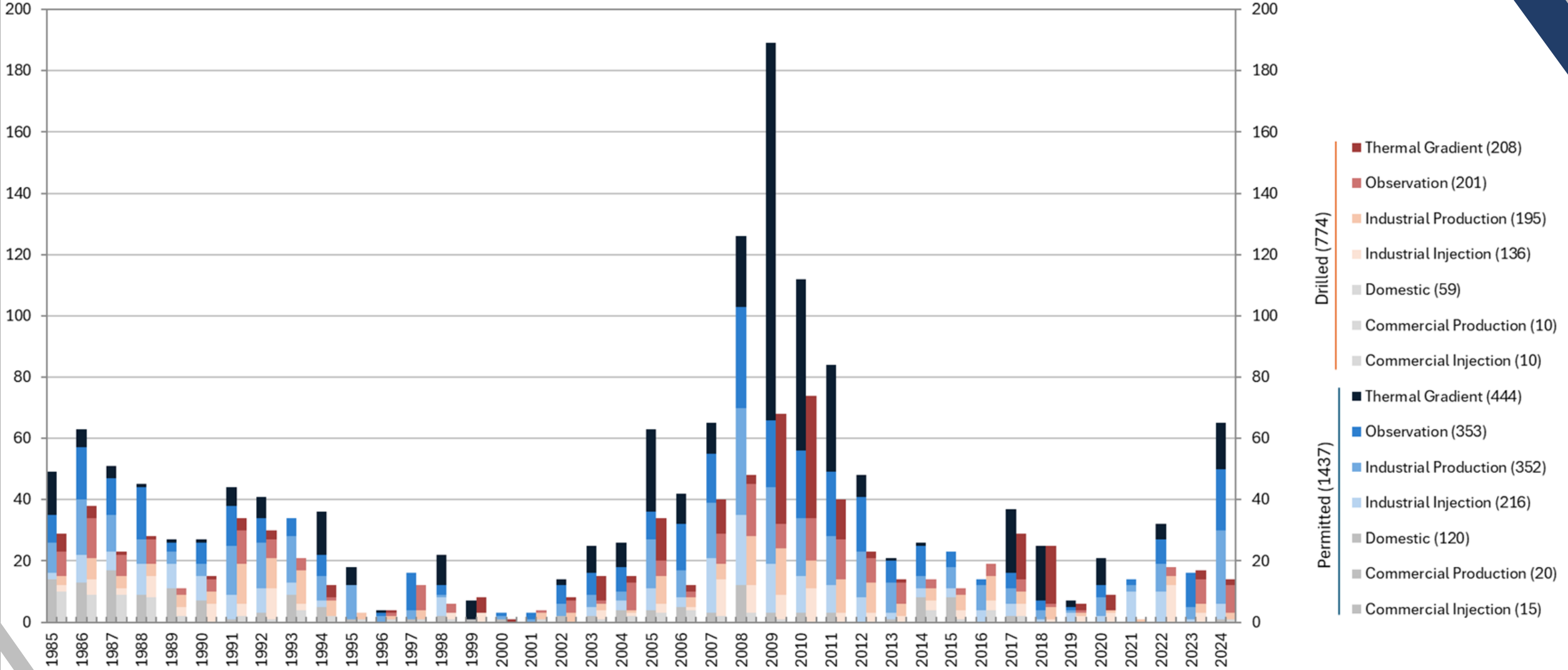
# Geothermal

- New BLM Categorical Exclusions
- Record Geothermal Lease Sale in October 2024
- New Geothermal Technologies
  - Enhanced Geothermal Systems (EGS)
  - Deep/Supper Hot
  - Mobile unit on spent wells
  - Single well designs
  - Others
- Increased traditional permitting
- New companies

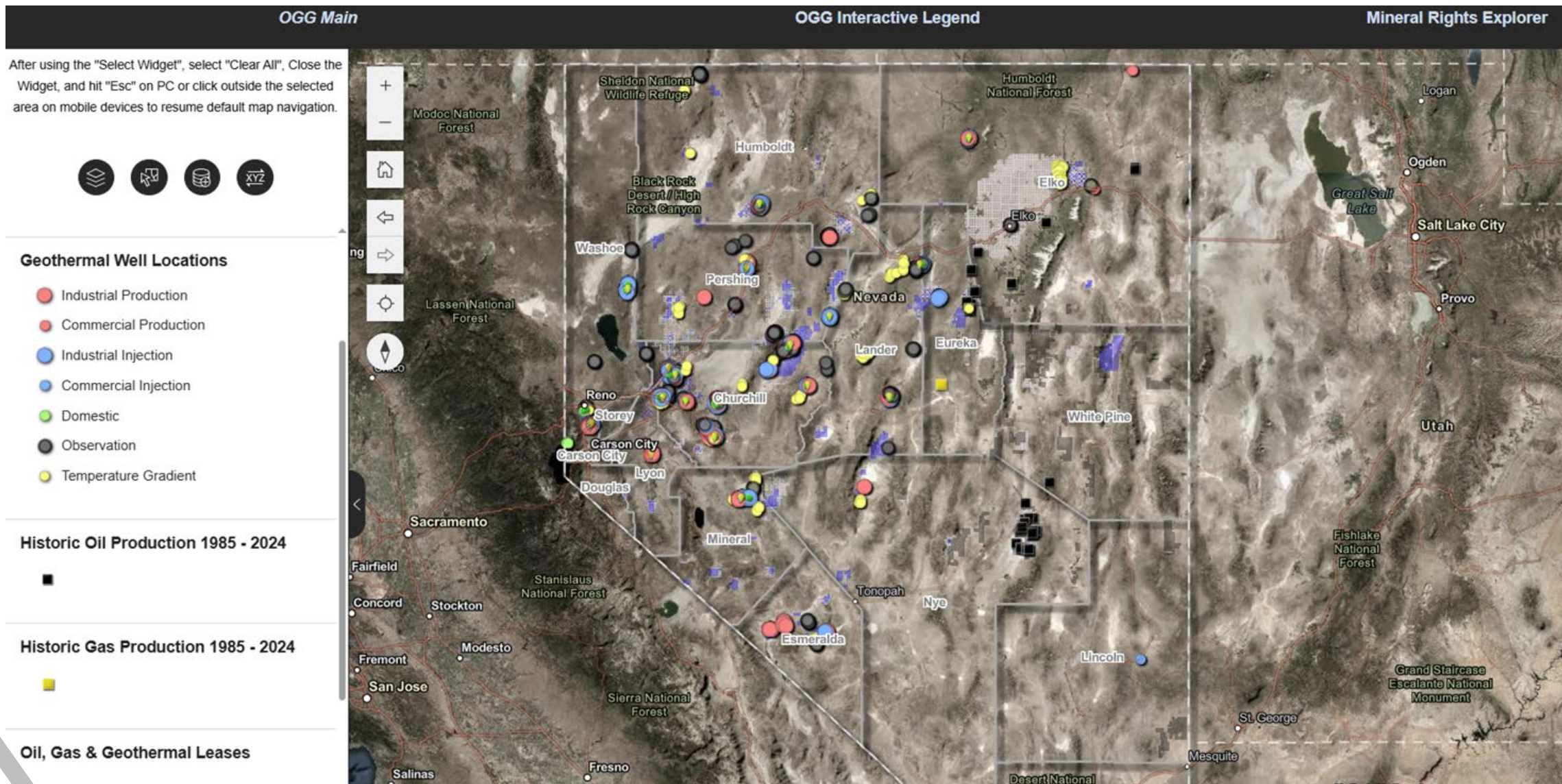


*Photo of Geothermal Power Plant, Owned by NDOM*

# Nevada Division of Minerals Permitted & Drilled Geothermal Wells



# Oil, Gas, & Geothermal





# Unpatented Mining Claims by Year

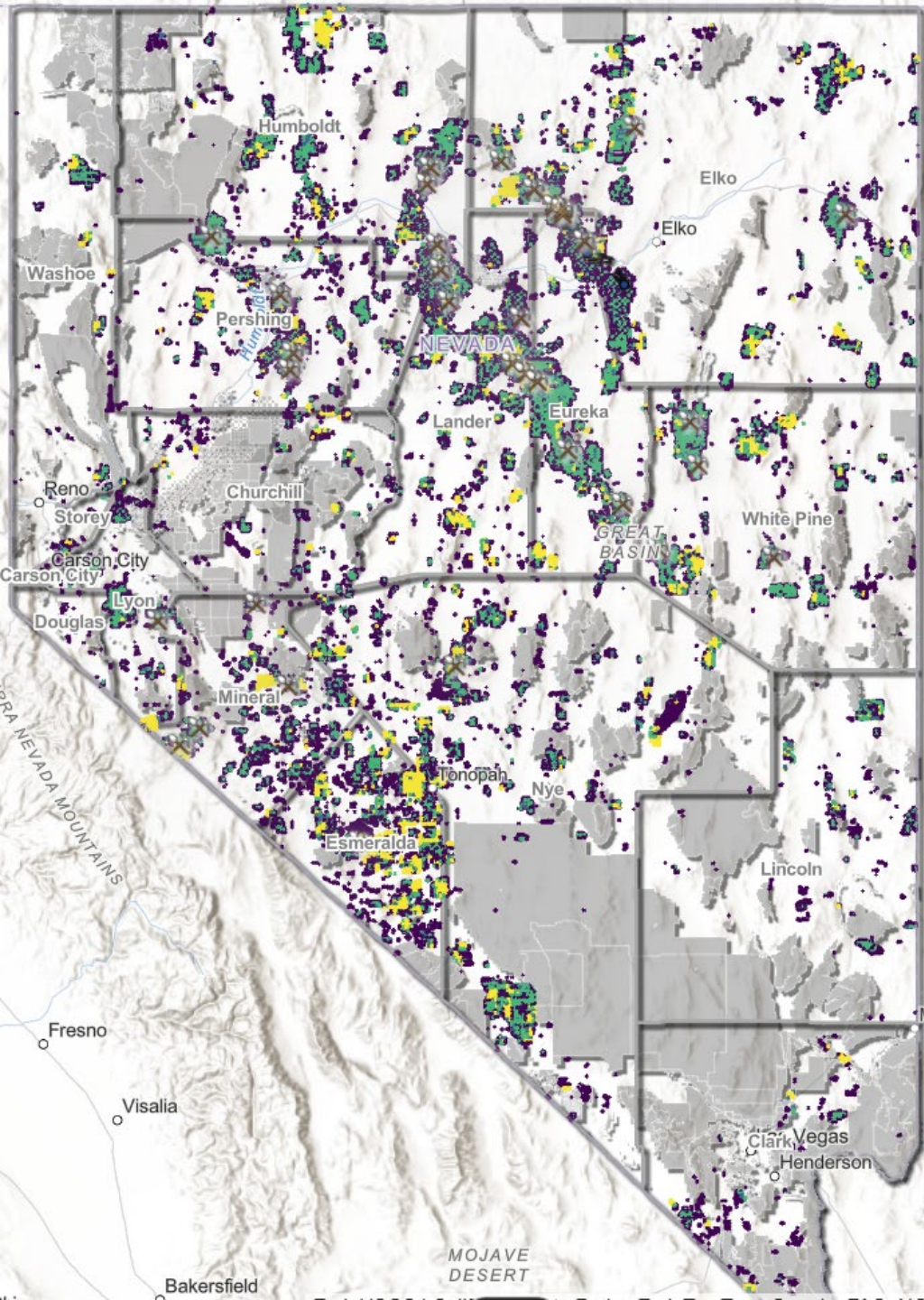


NDOM has been gathering active claim data from LR2000/MLRS at the end of October for the last nine years. The purpose of this graph is to show claims data and statistics from the same snapshot in time.

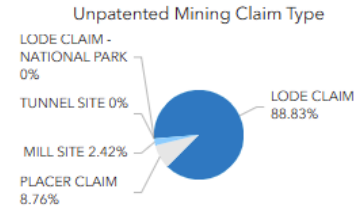
\*In October of 2024, there were some issues with MLRS which resulted in many claims being set as "Closed" that were in fact still "Active". As a result, claim listing count data from this point comes from January-February claim pulls.

# Mining Claim Distribution

Arizona California Colorado Idaho Montana **Nevada** New Mexico Oregon & Washington Utah >



## Mining Claims



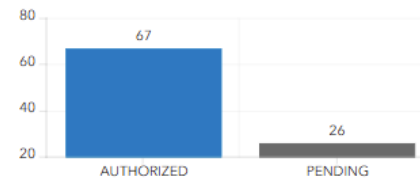
## Unpatented Mining Claims

# 258,569

Active, Filed, Submitted, Under Review

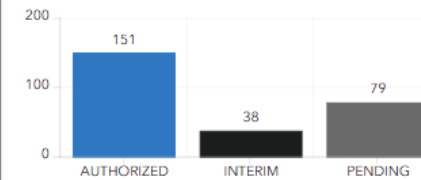
## Surface Management Notices & Plans

### Nevada Exploration Plans



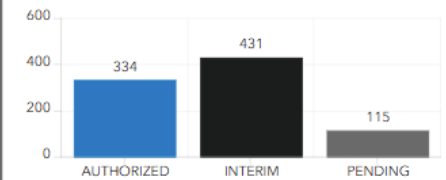
EX Plan Case Count    EX Plan Acreage

### Nevada Mining Plans



MP Case Count    MP Acreage

### Nevada Surface Management Notices

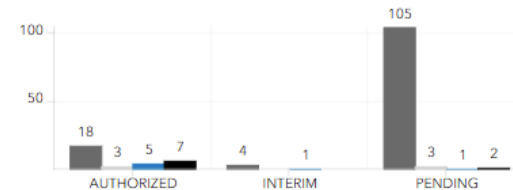


NT Case Count    NT Acreage

*Interim = Expired - Plans & Notices: Acreages presented DO NOT represent actual disturbance numbers, in most cases, the area permitted is substantially larger than the actual disturbance.*

## Solar & Wind Rights-of-Ways

### Solar ROW's



SOLAR DEVELOPMENT GRANT    
  SOLAR DEVELOPMENT LEASE  
 SOLAR PROJECT AREA TEST    
  SOLAR SITE TEST

Solar ROW Case Count    Solar ROW Acreage

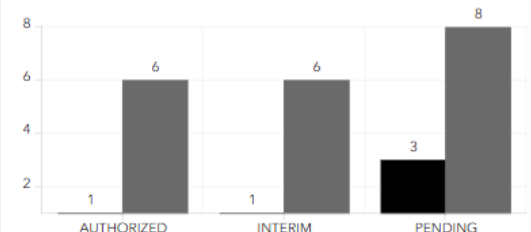
### Acreage Perspective

1 Football Field = 1.32 Acres

#### Major Cities:

Phoenix = 331,693 Acres  
 Albuquerque = 120,492 Acres  
 Denver = 97,968 Acres  
 Seattle = 90,925 Acres  
 Las Vegas = 90,784 Acres  
 Salt Lake City = 70,918 Acres  
 Reno = 69,670 Acres  
 Sacramento = 62,515 Acres  
 Boise = 53,779 Acres  
 Salem = 31,648 Acres  
 Cheyenne = 20,717 Acres  
 Helena = 10,790 Acres

### Wind ROW's



WIND DEVELOPMENT GRANT    
  WIND PROJECT TEST

Wind ROW Case Count    Wind ROW Acreage

# New Types of Mineral Producers

- Redwood Materials
- ABTC
- Comstock
- Aqua Metals
- Others



Photo from Redwood Materials Press Release:  
<https://www.redwoodmaterials.com/news/sustainable-battery-materials-process/>

# Nevada's Mining Production History

## Nevada Historic Production Values

Select a Year  
2008

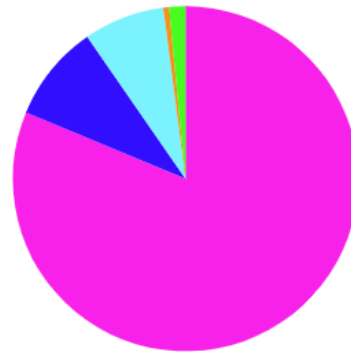
### All Values in Millions

Select a by typing in a year value or using the slider from the box in the upper right hand corner. A scroll bar is available at the top of the Nevada Mineral Production Values chart that can be used to zoom in on the chart. Hover above a column to view values.

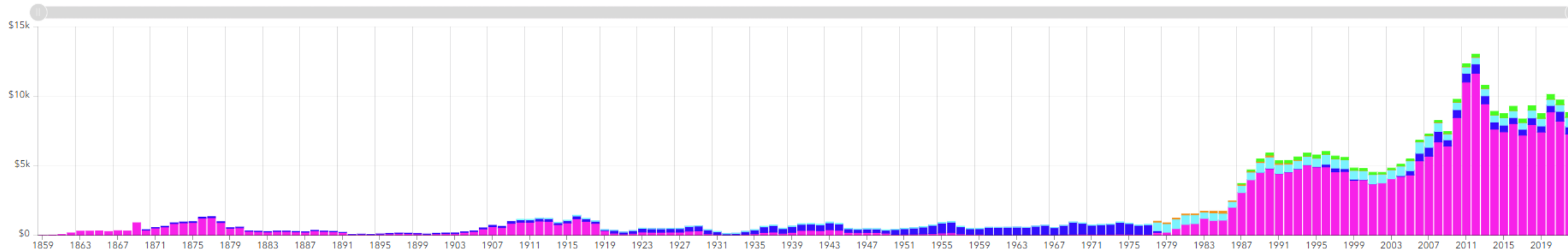
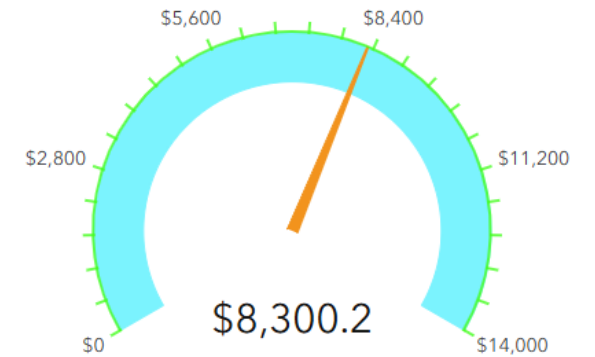
[See references section for data sources](#)

Search...

Gold \$21,300,000.00/mt  
 Gold \$873.50/oz  
 Silver \$365,000.00/mt  
 Silver \$15.00/oz  
 Copper \$5,330.00/mt  
 Copper \$31.92/lbs  
 Molybdenum \$47,700.00/mt  
 Antimony \$4,670.00/mt  
 Iron \$53.32/mt  
 Lead \$2,010.00/mt  
 Lithium \$3,360.00/mt  
 Magnesium \$391.00/mt  
 Manganese \$1,800.00/mt  
 Mercury \$13,200.00/mt



Precious Metals \$6.7k  
 Base Metals \$754.2  
 Industrial Minerals \$628.6  
 Oil Gas \$44.2  
 Geothermal \$126.1



Geothermal Oil Gas Industrial Minerals Base Metals Precious Metals

# Ongoing Impacts to Minerals Industry

- Rule Making
- Executive Orders
- Land Bills
- RMPs
- Reports
- Trade Relations



# Public Lands Rule (Conservation Rule)

- The rule recognizes conservation as an essential component of public lands management, on equal footing with other multiple uses of these lands.
- Final Rule June 2024
- Area of Critical Environmental Concern (ACEC) – “ACECs must meet three criteria: relevance, importance, and need for special management attention. The rule clarifies that an ACEC can be designated to protect ecological intactness and habitat connectivity, emphasizing the role of ACECs in maintaining resilient lands and waters.”
- Restoration & Mitigation Leases – “To sustain the health of public lands, the BLM is working to protect lands where they are healthy and to restore those that are not. Offering leases for restoration or mitigation will support durable land restoration and provide a long-sought tool for developers to offset their impacts by protecting and improving the health of public lands.”

# Public Lands Rule (Conservation Rule)

October 2024

- The Bureau of Land Management is seeking nominations for a new Federal advisory committee that will help inform how the Bureau implements the Public Lands Rule. The Committee will advise on outreach and engagement, best management practices, and the development and refinement of agency guidance to support implementation of the Rule across the country.

No guidance provided so far

Does not align with E.O. Immediate Measures to Increase American Mineral Production

- Funding cut from presidents' budget

# Council on Environmental Quality (CEQ) NEPA Rule

- 1978 CEQ first guidelines
- Amendments in 1986 & 2005
- 2020 Final Rule with first change under Trump
- 2023 “Bipartisan Permitting Reform Implementation Rule” to revise its regulations for implementing the procedural provision of NEPA
- May 2024: Phase 2 Final Rule
  - Effective July 1, 2024
- BLM Guidance for mineral projects available in August 2024



# CEQ NEPA Rule

- Implies agencies must consider selecting the Environmentally Preferred Alternative
- Allows for public comment after the comment period, but they should not be accepted after ROD.
- 2 years for EIS and 1 Year for EA
- Agencies to use projections including climate related effects where appropriate
- Agency must ID authority for enforceable mitigation and be published
- 2 years for EIS and 1 Year for EA and 150/300 page limit with the requirement more information

# CEQ and E.O.

- On January 20, 2025, President Trump issued Executive Order (E.O.) 14154, Unleashing American Energy, which directed CEQ to propose rescinding CEQ's NEPA regulations and to provide guidance on implementing NEPA. CEQ published an Interim Final Rule on February 25, 2025 in response to this direction and is requesting public comments through March 27, 2025.
- While these revisions are ongoing, agencies should continue to follow their existing practices and procedures for implementing NEPA consistent with the text of NEPA, E.O. 14154, and this guidance. Agencies should not delay pending or ongoing NEPA analyses while undertaking these revisions
  - Will require rulemaking

# E.O. Immediate Measures to Increase American Mineral Production

- Focus to increase domestic “mineral production” which means “mining, processing, refining, and smelting of minerals”, as well as “production of processed critical minerals and other derivative products.”
- “Mineral” means a “critical mineral” as defined on the USGS list, as well as uranium, copper, potash and gold, and any other element, compound or material determined by the chair of the NEDC.
- Definitions for “Processed minerals” and “derivative products” are broad and include products that use processed minerals, making this E.O. generally applicable to midstream production and beyond.
- BLM to provide a list of all proposed mineral production projects, identify priority projects and include some on the FAST-41 list
- Does not eliminate NEPA requirements

# E.O. Immediate Measures to Increase American Mineral Production

- Request for Information for industry feedback: NEDC shall solicit information from industry on “regulatory bottlenecks and other recommended strategies for expediting domestic mineral production.”
- Evaluates Rosemont Case and seeks to identify solution
- Accelerating Private and Public Capital Investment
- The Secretary of the Interior is to identify Federal lands with mineral reserves to the NEC and NSC. The Secretary of the Interior is to prioritize mineral production on those lands, including through amending land use plans under the Federal Lands Policy Management Act (FLPMA) as necessary.
- DoD Financial Assistance Programs - Title III of DPA & IBAS/ICAM
- DPA Loans
- DoD Offtake Facilitation

# Department of the Interior Implements Emergency Permitting Procedures to Strengthen Domestic Energy Supply

Designed to expedite the review and approval, if appropriate, of projects related to the identification, leasing, siting, production, transportation, refining, or generation of energy within the United States.

- The new permitting procedures will take a multi-year process down to just 28 days
- Applies to: Crude oil, Natural gas, Lease condensates, Natural gas liquids, Refined petroleum products, Uranium, Coal, Biofuels, Geothermal energy, Kinetic hydropower, Critical minerals
- Endangered Species Act: An expedited Section 7 consultation process will be implemented
- National Historic Preservation Act: Bureaus will follow alternative procedures for compliance with Section 106

# E.O. Immediate Measures to Increase American Mineral Production

Current list of projects:

- Resolution Copper Project
- Stibnite Gold Project
- Warrior Met Coal Mines
- McDermitt Exploration Project
- South West Arkansas Project
- Caldwell Canyon Mine Project
- Libby Exploration Project
- Lisbon Valley Copper Project
- Silver Peak Lithium Mine
- Michigan Potash
- NorthMet
- La Jara Mesa
- Roca Honda
- Greens Creek Surface Exploration
- Stillwater Mine
- Polaris Mine
- Becky's Mine Modification
- 3PL Railroad Valley Exploration
- Grassy Mountain Mine
- Amelia A&B
- Separate EPA List

# E.O. Zero-Based Regulatory Budgeting to Unleash American Energy Executive Order

The Executive Order directs the following agencies to review existing regulations and, to the extent permitted by law, issue a sunset rule, effective not later than September 30, 2025, that inserts a “Conditional Sunset Date” into each of their Covered Regulations:

- Environmental Protection Agency (EPA);
- Department of Energy (DoE);
- Federal Energy Regulatory Commission (FERC);
- Nuclear Regulatory Commission (NRC);
- Office of Surface Mining Reclamation and Enforcement (OSMRE),
- Bureau of Land Management (BLM),
- Bureau of Ocean Energy Management (BOEM),
- Bureau of Safety and Environmental Enforcement (BSEE),
- United States Fish and Wildlife Service (FWS); and
- United States Army Corps of Engineers (ACE)

# E.O. ENSURING NATIONAL SECURITY AND ECONOMIC RESILIENCE THROUGH SECTION 232 ACTIONS ON PROCESSED CRITICAL MINERALS AND DERIVATIVE PRODUCT

- The Secretary of Commerce shall initiate an investigation under section 232 to determine the effects on national security of imports of processed critical minerals and their derivative products
- Identification of United States imports of all processed critical minerals and derivative products incorporating such processed critical minerals;
- The foreign sources by percent and volume of all processed critical mineral imports and derivative product imports, the specific types of risks that may be associated with each source by country, and those source countries deemed to be of significant risk
- The Secretary of Commerce shall submit a final report and recommendations to the President within 180 days of the investigation's commencement.



# Rosemont Case

- The Rosemont interpretation of the Mining Law has already affected proposed mining projects in Nevada
- Currently the BLM is operating under a Solicitors Opinion for determining rights associated with a “valid” claim.
- The Rosemont case ruling states “But amendment of the Mining Law is a task for Congress, not for the Service, and certainly not for us.”
  - HR. 1366 - Mining Regulatory Clarity Act of 2025; Rep. Amodei & Horsford
  - S. 554 - Mining Regulatory Clarity Act of 2025; Sen. Cortez Masto Mr. Risch, Ms. Rosen, Mr. Crapo, and Ms. Murkowsk
  - E.O. Immediate Measures to Increase American Mineral Production
  - E.O. Zero-Based Regulatory Budgeting to Unleash American Energy Executive Order

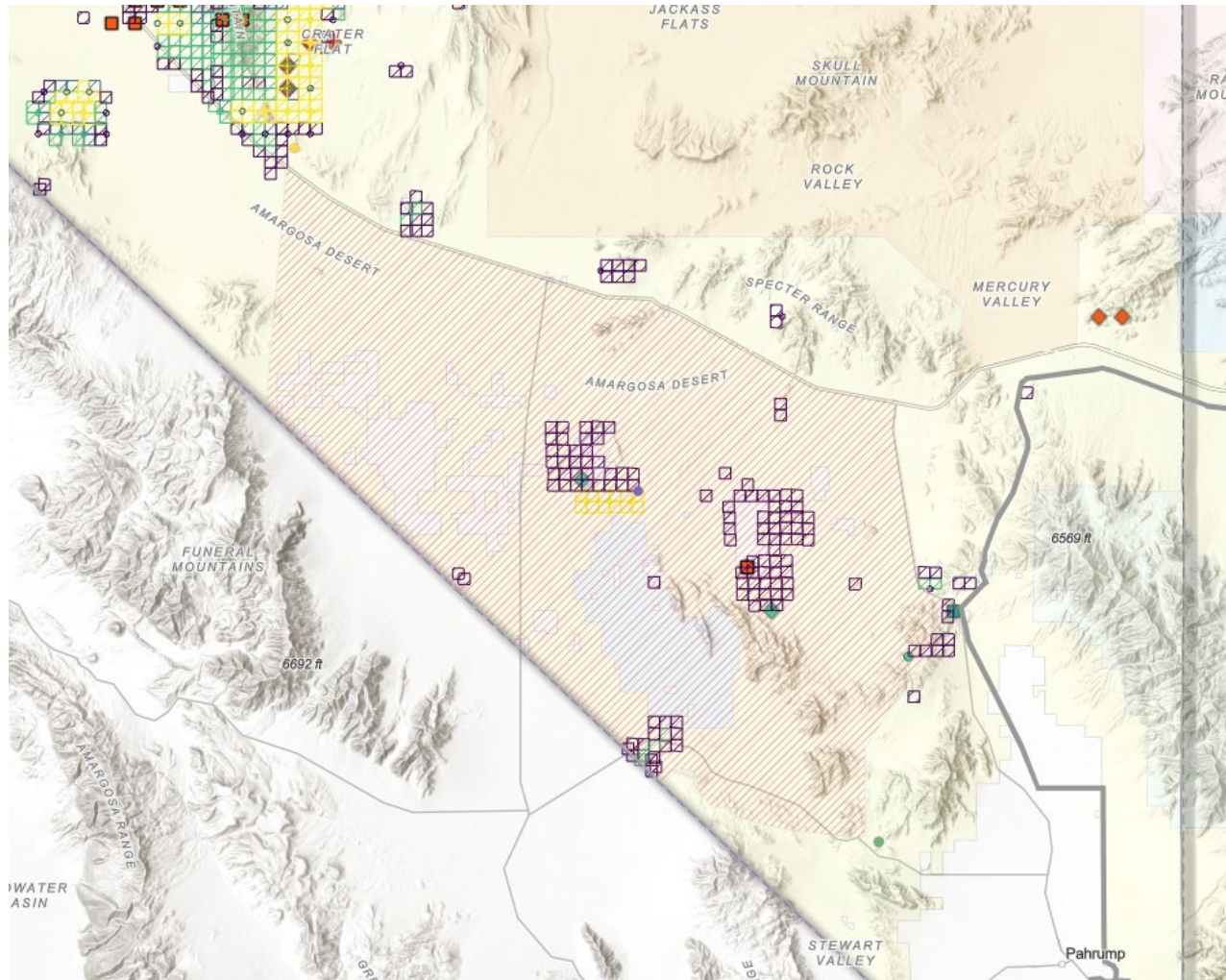
# Rosemont Case – Why it Needs a Fix

- According to the Greater Sage-Grouse Draft Resource Management Plan Amendment-Appendix 13-3-15, A validity exam could take several years to complete and cost at least \$50,000 per claim.
- The BLM has indicated that there are 11 Certified Mineral Examiners in the entire U.S. Currently there is over 270,000 claims in Nevada alone and over 450,000 in the western US.
- Even if we only set a goal of validating 10% of the claims in Nevada only, it would cost over \$1.3 billion to complete and consume over 600 years.
- Using existing State Guidance and Solicitor opinion to validate proposals

# Mining Regulatory Clarity Acts

- HR. 1366 - Mining Regulatory Clarity Act of 2025; Rep. Amodei & Horsford
- S. 554 - Mining Regulatory Clarity Act of 2025; Sen. Cortez Masto  
Mr. Risch, Ms. Rosen, Mr. Crapo, and Ms. Murkowski
  - Passed Committee with amendment proposed and removed
- Both Bills create a new millsite claim and the fees will fund the Abandoned Hardrock Mine Cleanup Program

# Amargosa Withdrawal

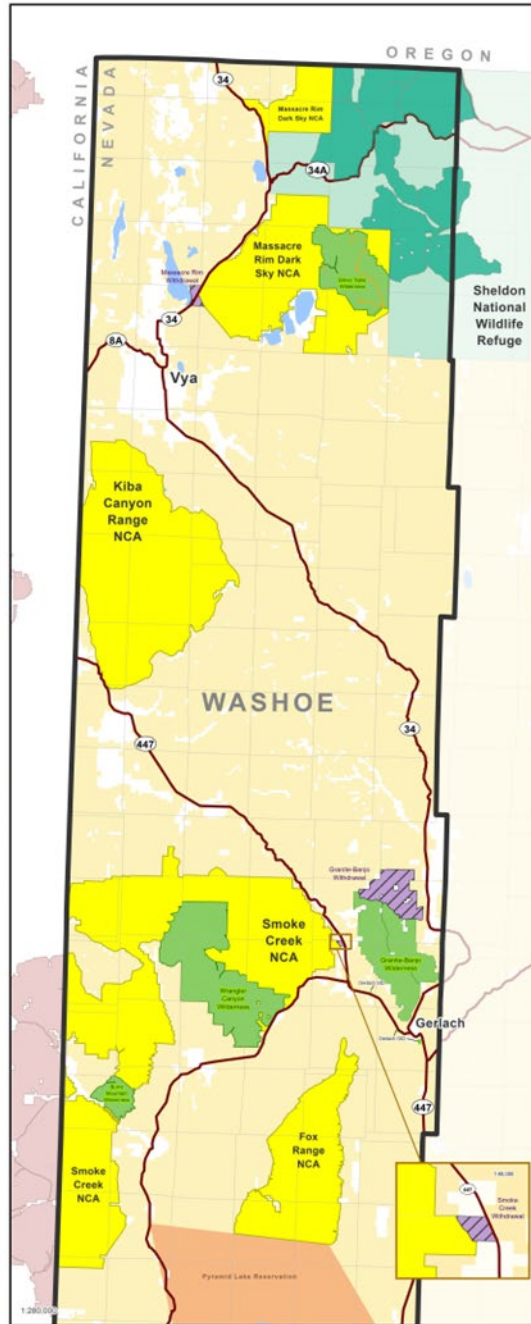
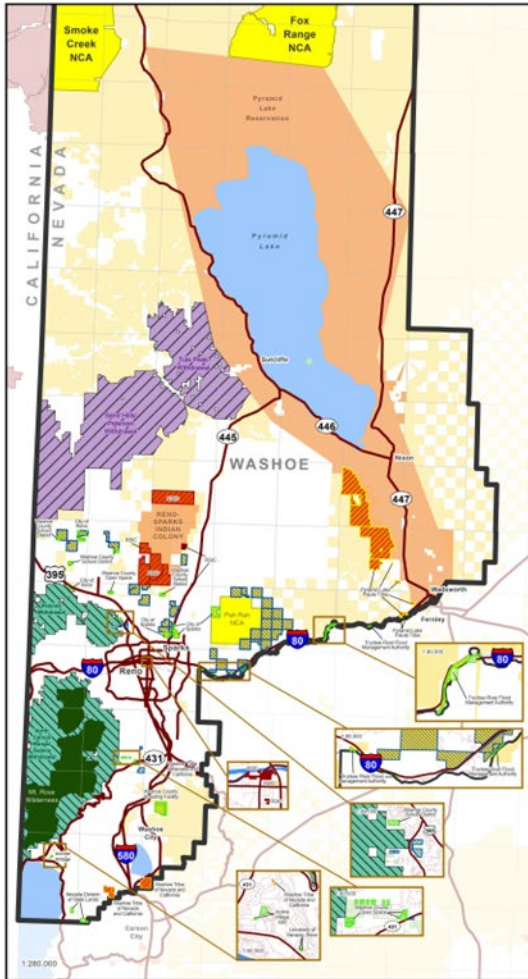
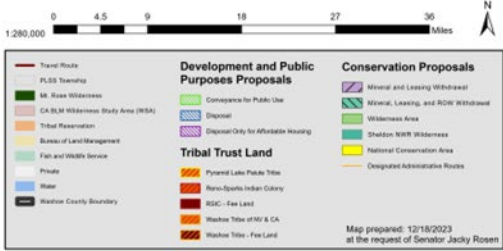


- 308,000+ acres
- Encompasses one active mining operation
- Focused on need for additional protection of Ash Meadows National Wildlife Refuge
- Stemmed from Lithium exploration
- Pending BLM Decision

# Amodei's Land Bill

- Reintroduced in March 2025 – May 6<sup>th</sup>, 2025, amendment to Republican Bill
- Affects Carson, Clark, Douglas, Elko, Lyon, Pershing, & Washoe counties
- Includes acreage for flood management, open space, State Parks, housing, economic development and more
- Pershing County Checkerboard Resolution Area
- 356,100 acres of land to be exchanged at a 1:1 ratio
- Authorizes the sale of the surface estate to an owner of a mining claim, a mill site, or a tunnel site that exists in the Checkerboard Resolution Area on the date of enactment for fair market value
- It also designates approximately 148,000 acres of wilderness in Pershing and Douglas Counties

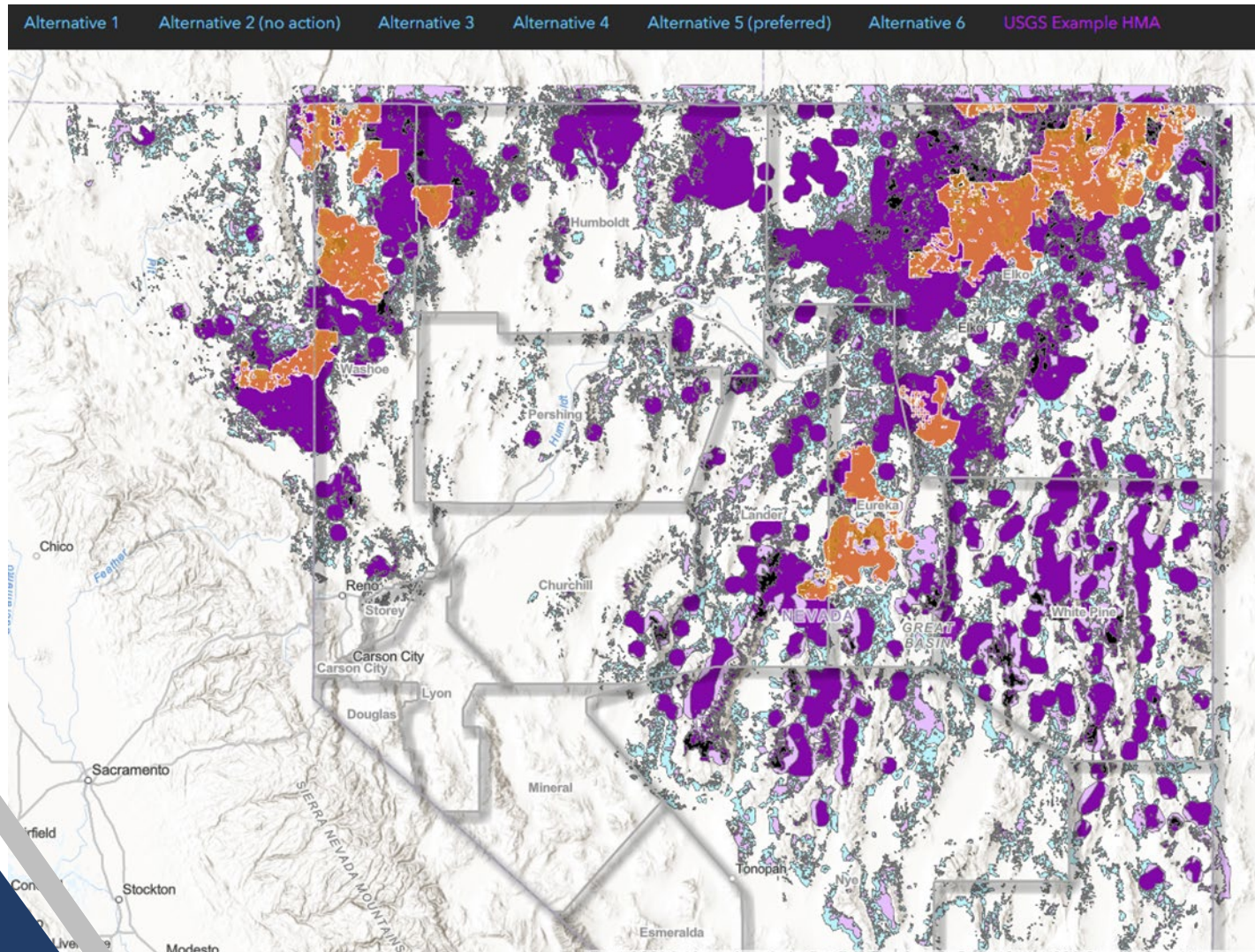
## Truckee Meadows Public Lands Management Act: Proposed Development and Conservation



# Truckee Meadows Public Lands Management Act

- 1,053,895 acres proposed for withdrawal within the act including wilderness and NCA designations
- NCA's and wilderness overlap existing WSA designations but not entirely
- It is not clear if WSAs become NCA/WSA and if the "leftover" WSA designations stay "as is". There is no specification of any WSA release (but read this again)

# Sage Grouse Approved Resource Management Plan Amendment (ARMPA)



## Alternative 1

- 2015 HMA Boundaries (18.6 M Ac\*)
- Includes SFA and withdrawal recommendation

## Alternative 2

- No Action Alt.
- 2015 HMA Boundaries (18.6 M Ac\*)

## Alternative 3

- 2024 HMA Boundaries (28.8 M Ac\*)
- Rec. Withdrawal of ALL 28.9 M Ac
- ACEC designation (11.1 M Ac)

## Alternative 4

- 2024 HMA Boundaries (28.8 M Ac\*)
- More restrictions on Mitigation and less flexibility for fluid mineral and disturbance caps.

## Alternative 5 (Preferred Alt.)

- 2024 HMA Boundaries (25.7 M Ac\*)
- Fewer restrictions on Mitigation opportunities and more exceptions to fluid mineral stipulations and disturbance cap.

## Alternative 6 (No Action)

- Same as 5 but ACEC (11.1 M Ac)

# Sage Grouse AMRPA

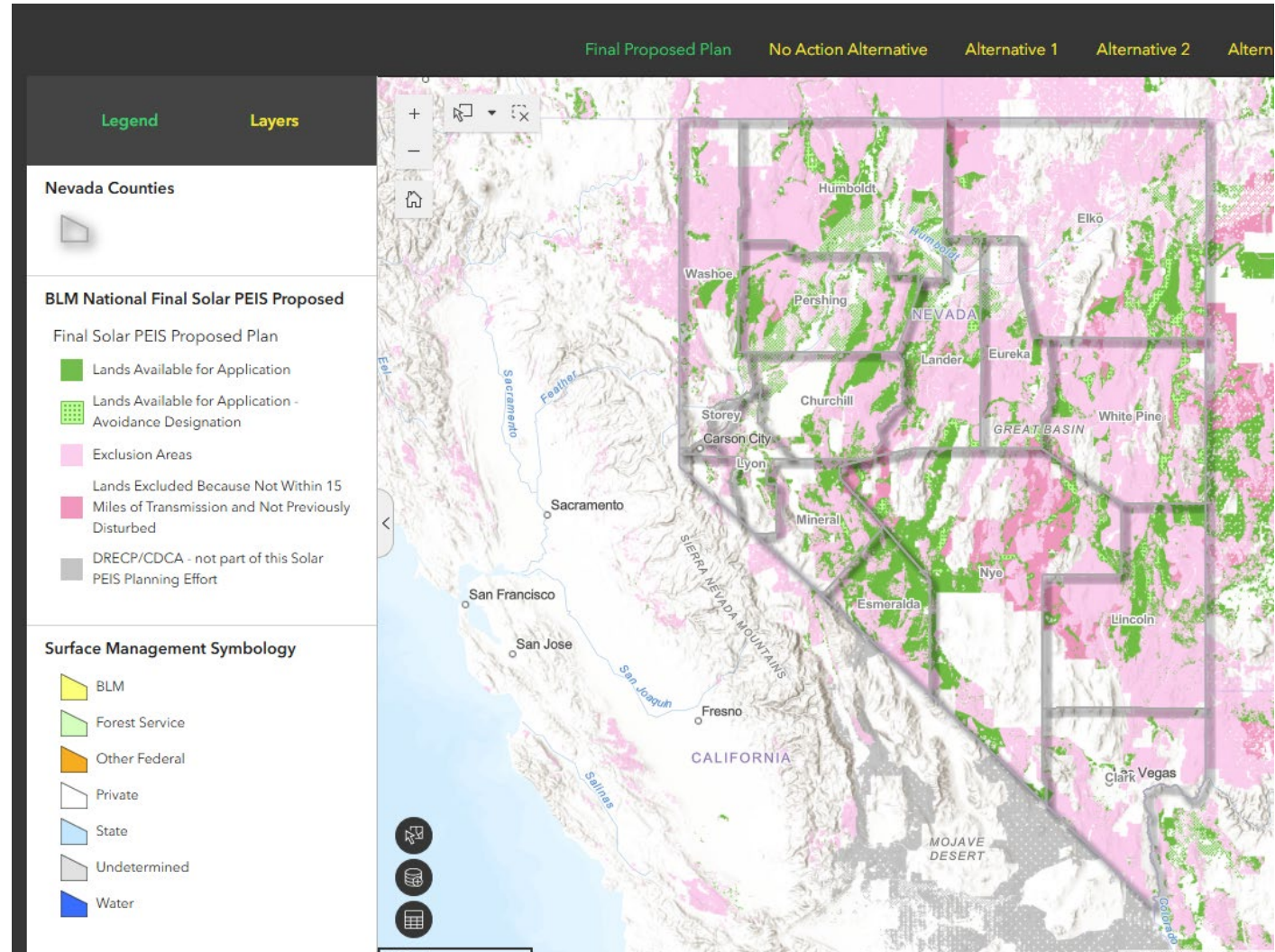
- Nevada State Plan under Sage Grouse Ecosystem Council
- State is in coordination with BLM on Record of Decision
- Focus on multiple uses in habitat areas:
  - Locatable Minerals
  - Leasable Minerals
  - Mineral Materials
  - Solar
  - Transmission
  - Grazing
  - Disturbance Caps
  - New (2024) USGS Data



# 2023/2024 Utility Scale Solar Energy Development EIS/RMPA

The intent of the Approved Plan is to limit impacts associated with utility-scale solar energy on lesser-disturbed lands and focus development into areas closer to the transmission grid.

- 11,840,100 acres identified in NV alone
- Approved Plan applies:
- Resource-based exclusions
- Lands with slopes 10% or greater are excluded.
- Includes the same avoidance areas as the Proposed Plan
- Areas are also excluded unless they are either within 15 mi of a qualifying existing or planned transmission line with a capacity of 69 kV or greater or most Section 368 energy corridors, or qualify as “previously disturbed” lands
- All remaining public lands are available for solar development.



# Biden-Harris IWG Mining Reform Report



Contains 60 Recommendations for reform of mining laws, regulations, and the permitting process

- Key Recommendations
  - Reestablish Bureau of Mines
  - Funds mining schools
  - Highlights Nevada as Gold Standard
  - Creates funding mechanism for abandoned hardrock mines
  - Increase mining claim fees
  - Identify areas suitable for mining
  - Transition to leasing system
  - 4-8% net royalty
  - 7 cents/ton fee for mined material
  - Abandoned Hardrock Mine Good Samaritan Program

# Additional Items to Watch

- China's restrictions on critical minerals
- Tariffs
- Politico - DOE official floats government-built minerals processing facilities
  - Potential influx of Federal funding for mineral projects
- Water
  - NV 2025 Legislative bills
  - WOTUS
- Endemic Species – NGO petitions
  - Sandhill Skipper Butterfly
  - Kings River Pyrg
  - Oasis Valley DPS of the Amargosa Speckled Dace
  - Ect.

# Featured Content!

The Nevada Mineral Production Experience!!  
View and filter annual production data for Nevada.  
Explore

Historic Mineral Production in Nevada  
To spatially display historic mineral production in Nevada.  
Explore

Nevada Mining Claims

OGG Production and Well

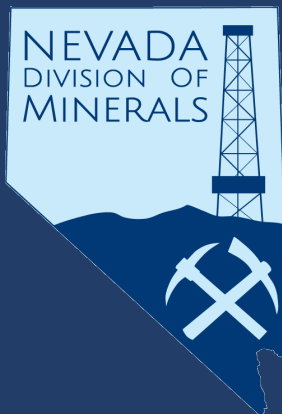
# Nevada's Open Data Site

## All Publicly Available Data in ONE Location

[ndomdata.com](http://ndomdata.com)

- Claims
- Notices
- Plans
- Production
- Critical Minerals
- Oil & Gas
- Geothermal
- Historic Data
- Public Land Issues
- Education and Outreach
- Links to other important sites
- FREE  
DOWNLOADABLE  
DATA

# Questions



[MINERALS.NV.GOV](http://MINERALS.NV.GOV)

[NDOMDATA.COM](http://NDOMDATA.COM)

