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MINE Update

MINING INDUSTRY NEWS E-COMM UPDATE

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This Week in The News

As the Congressional summer recess winds down, Trump administration trade and regulatory actions continue to roll out. The National Mining Association (NMA) remains focused on actively engaging to advance mining's interests at both ends of Pennsylvania Avenue. Plus, we have updates on how the mining and energy markets are faring.

Safety Share

The American Red Cross has 20 tips for a [safe Labor Day weekend](#).

USGS Releases Draft 2025 Critical Minerals List



Yesterday, the U.S. Geological Survey (USGS) released the draft 2025 Critical Minerals List, linked [here](#). Please also find a link to the USGS presentation on the draft list and updated methodology [here](#). The draft list now includes copper, lead, potash, rhenium, silicon and silver. The USGS noted that it does not include uranium or metallurgical coal, as both are considered “fuels,” which are currently excluded from the list. Additionally, there are other minerals and metals not included on the draft list. However, the Secretary of the Interior has the discretion to add additional minerals and materials (including uranium and metallurgical coal) to the list when it is finalized. Please find a link to the NMA press release on the draft list [here](#).

Now that the draft list has appeared in the Federal Register, there will be a 30-day public comment period to receive input on the draft list and updated methodology. During this time, the NMA will collect feedback from members to help shape draft comments. Any comment submissions will be made public and reviewed by the USGS. The USGS is then required to issue the final 2025

Critical Minerals List within 45 days of the public comment period closing, with the final list expected sometime in November.

EPA's Latest TRI Analysis Includes Notable Shift in Mining Data Presentation

Last week, the U.S. Environmental Protection Agency (EPA) released its [2023 Toxic Release Inventory \(TRI\) National Analysis](#). In previous years, EPA prominently featured the metal mining industry's data in this report. However, EPA this year limited the narrative regarding the mining industry's reported TRI data. Notably, EPA did not include a detailed metal mining sector profile in this report as previously done for many years. We previously worked with EPA to improve the language used in this sector profile, including the development of a [metal mining interactive diagram](#) featured in this profile since 2020. That diagram is now linked in a section of the National Analysis discussing the mining industry's land disposal data.

In EPA's [announcement](#) of the report, EPA highlighted a 54 percent reduction in releases of TRI-listed chemicals—such as lead, mercury, dioxins and PFAS—between 1998 and 2023, a period during which the U.S. gross domestic product grew by 74 percent. Nancy Beck, EPA's Principal Deputy Assistant Administrator for the Office of Chemical Safety and Pollution Prevention, stated that, "with this analysis, EPA is showing how American industry continues to improve its environmental performance while growing the economy." EPA's press release is focused on the chemical industry and highlights a feature profile on automotive manufacturing.

The 2023 report's overall numbers show a slight increase of 1 percent, driven by on- and off-site disposal or other releases from metal mines compared to 2022. Despite this slight increase from 2022, total releases of TRI chemicals

are 21 percent lower than 2014 releases, primarily due to reduced disposal to land from metal mines and electric utilities. Additionally, the metal mining sector accounted for 45 percent of total releases (1.50 billion pounds), primarily through on-site land disposal, which accounted for 66 percent of total land disposal quantities. The TRI chemicals disposed of on land by metal mines in 2023 were primarily lead (43 percent), zinc (31 percent) and arsenic (8 percent). EPA recognizes that metal mining facilities handle large volumes of material and that ore composition can result in large fluctuations in quantities of TRI chemicals managed in waste. EPA is holding a [public webinar](#) on Sept. 30, 2025 to provide an overview of the 2023 TRI National Analysis. The NMA will participate in this webinar.

EPA Reveals Additional Details on Power Plant ELG Reconsideration

EPA recently filed a [motion](#) in the U.S. Court of Appeals for the Eighth Circuit litigation challenging the [2024 steam electric power generating effluent limitation guidelines](#) (2024 ELG Rule) that reveals additional details on the agency's approach to reconsidering this Clean Water Act regulatory cornerstone of the Biden administration's power plant strategy. EPA requested that the court continue to hold the consolidated cases in abeyance until 30 days after completion of a rulemaking "to extend certain compliance deadlines in the challenged rule, and allow for transition between compliance alternatives." EPA states that "it would be most reasonable to tie the abeyance period to the date-extension rulemaking," after which the parties can decide whether to continue to hold the case in abeyance or propose a plan for resolving the cases. For the near term, EPA is planning two reconsideration rulemakings on this important matter. EPA has already sent a proposed rule to the Office of Management and Budget (OMB) for interagency review titled "Effluent Limitations Guidelines and Standards for the Steam Electric Power Generating

Point Source Category - Initial Notification Date Extension." This proposed rule will: (1) "extend the compliance deadlines for the zero-discharge effluent limitations and pretreatment standards in the 2024 [ELG] Rule;" (2) extend the Dec. 31, 2025, date for facilities to notify the EPA of their intention to opt into a retirement compliance subcategory created in EPA's 2024 ELG Rule that allows power plants to comply with the less stringent limits in the 2020 ELG Rule in exchange for permanent cessation of coal combustion by Dec. 31, 2034; and (3) solicit additional information on zero-discharge technologies, recognizing that regulated parties have raised concerns about the availability and cost of these technologies. Additionally, EPA intends to initiate a second rulemaking to potentially revise: (1) "requirements for discharges of unmanaged combustion residual leachate;" and (2) "the challenged rule's zero discharge limitations and standards." This rulemaking will occur after the first rulemaking is finalized.

DOI Reopens Comment Period on Request for Information to Reduce Regulatory Burdens



The U.S. Department of the Interior (DOI) yesterday published a notice reopening the comment period on the May 20, 2025, request for information (RFI) to identify existing regulations that can be modified or repealed to

achieve a meaningful reduction in regulatory burden. The NMA responded to the initial RFI on July 21, 2025. Our [comments](#) addressed several mining industry priorities such as: (1) the streamlining of Federal Register reviews for National Environmental Policy Act documents; (2) reducing scope creep of other environmental statutes; (3) reviewing practices for the designation of Areas of Critical Environmental Concern; (4) reviewing the application of the patented non-mineral (surface) estate regulations to the Stock-Raising Homestead Act privatized surface; (5) and revising the regulations implementing the Native American Graves Protection and Repatriation Act. This RFI extends the comment period indefinitely, and Interior will review comments on a continuing basis. The NMA is seeking input from members on any additional regulatory reform priorities that should be sent to Interior.

House Natural Resources Chairman Leads Delegation to Alaska



This week, House Natural Resources Committee Chairman Bruce Westerman (R-Ark.) led a bipartisan delegation of ten House members to Alaska where

they toured NMA member Hecla's Greens Creek mine, mill and tailings facilities. In addition to Chairman Westerman, Representatives Pete Stauber (R-Minn.), Harriet Hageman (R-Wyo.), Tom Tiffany (R-Wisc.), Nick Begich (R-Alaska), Celeste Maloy (R-Utah), Rob Wittman (R-Va.), Paul Gosar (R-Ariz.), Sarah Elfreth (D-Md.) and Val Hoyle (D-Ore.).

The delegation also participated in a mining roundtable hosted by Deantha Skibinski, head of the Alaska Miners Association. Several NMA members participated in the roundtable including Lorali Simon (Usibelli Coal Mine), Mike Satre (Hecla Mining), Cal Craig (Ambler Metals) and Mike Heatwole (Pebble Partnership). Industry participants discussed their experiences and challenges working with the federal government, permitting reforms, as well as Chairman Westerman's recently introduced National Environmental Policy Act reform legislation, called the [SPEED Act](#).

Register for the NMA Fall Board of Directors and Members Meeting

Fall Board of Directors and Annual Members Meeting



Registration for this year's NMA Fall Board of Directors and Members Meeting, which will be held Sept. 21-23, 2025, at The Broadmoor, in Colorado Springs, Colo., is now open; [register here](#). We are developing a robust agenda including speakers who will lead thoughtful discussions, NMA business meetings and plenty of time for visiting, networking and socializing with colleagues and their families. A more detailed agenda will be provided in the coming weeks.

Hotel rooms in the NMA block are on a first-come, first-serve basis. The group rate (\$409/night) will be available until August 29, 2025, or until the block is

full. Click [here](#) to reserve a room at The Broadmoor.

Members are invited to bring their families, and there will not be an additional charge for family members who attend, although individuals who work in the industry cannot be registered as family.

Should you have any questions, please contact [Katie Coon](#).

NMA and Third Parties In the News

Rich Nolan is quoted by [Bloomberg](#), [E&E Greenwire](#), [Washington Examiner](#) and others on the U.S. Geological Survey draft 2025 List of Critical Minerals.

The NMA is quoted by the [Pittsburgh Post-Gazette](#) on black lung disease.

From our third parties, the [Duluth News-Tribune](#) (Minn.) carries an op-ed by Syd Peng, the Charles E Lawall Chair of Mining Engineering emeritus in the Department of Mining Engineering at West Virginia University, in which he argues more efficient, more flexible and lower-emission coal plants are the future.

Mining and Energy News

[Mining Journal](#) and others reported that the U.S. Department of Commerce is expanding tariffs on steel and aluminum imports by implementing the current 50 percent tariff on hundreds of derivative products, effective Monday, 18 August.

[**Climatewire**](#) reported that the White House wants to close the independent agency investigating a deadly explosion at the U.S. Steel Clairton coal-processing plant that killed two people and injured others last week.

[**Mining.com**](#) reported that the U.S. signaled a renewed interest in partnering with Pakistan on critical minerals and hydrocarbons.

[**Argus**](#) reported that coal generation in the Electric Reliability Council of Texas (ERCOT) rose from year-earlier levels for an eighth consecutive month in July as natural gas power slipped and overall electricity demand grew.

[**Mining.com**](#) reported that ore from American Rare Earths' Halleck Creek project in southeast Wyoming has for the first time been made into light and heavy rare earth oxide concentrates for a Department of Defense-linked agency. These oxides are used in the production of permanent magnets.

[**Argus**](#) reported that domestic thermal coal supplies to Indian cement makers rose in July by almost 31 percent this year because of increased availability and competitive prices, partly curbing their demand for imported petroleum coke.

[**Mining.com**](#) reported that China's exports of rare earth products surged in July to levels not seen since January, underscoring Beijing's easing of export restrictions and tensions with the U.S. Volumes rising 69 percent to 6,422 metric tons, according to customs data compiled by *Bloomberg*.

[**Reuters**](#) and others reported that Peabody withdrew its \$3.78 billion bid for Anglo American's Australian steelmaking coal business, citing a "material adverse change" due to the shutdown of a mine central to the deal.

[**Greenwire**](#) reported that a federal appeals court temporarily paused a land

exchange in Arizona just hours before it could have been completed, halting construction of Resolution Copper's underground mine on tribal land.

[**Energywire**](#) reported that an Ohio law that took effect recently ended a decadelong subsidy program buttressing the Kyger Creek and Clifty Creek coal plants from volatile power markets.

[**Argus**](#) reported that shipping from the U.S. east coast Port of Baltimore resumed after it was temporarily halted when a vessel carrying thermal coal reported an explosion as it departed early last week. The explosion took place in the Fort McHenry Channel as the bulk vessel, W Sapphire, was in route to Mauritius. No injuries were reported, and the explosion is under investigation.

[**Mining.com**](#) reported that President Trump met with the CEOs of the world's two biggest mining companies, Rio Tinto and BHP to discuss a copper project that could supply the U.S. with a quarter of its demand for decades to come.

[**Argus**](#) reported that U.S. steelmakers will be limiting the length and number of seasonal outages through the end of this year compared to 2024, according to an *Argus* analysis of mill downtime schedules.

[**Utility Dive**](#) reported that the Department of Energy has issued a second emergency order directing the Midcontinent Independent System Operator (MISO) and Consumers Energy to continue running the 1,420-MW J.H. Campbell coal plant in West Olive, Michigan. The new order runs to November 19 of this year.

[**World Steel Association**](#) reported that world crude steel production for the countries reporting was 150.1 million metric tons in July 2025, a 1.3 percent decrease compared to July 2024.

[**Greenwire**](#) reported that Administration officials are considering using unspent

funds tied to laws like the CHIPS Act to expand the mining, processing and recycling of critical minerals.

[**Mining.com**](#) reported that the U.S. Defense Department is seeking to buy cobalt for its strategic stockpiles for the first time in decades, the latest move to bolster domestic supplies of critical metals.

[**Greenwire**](#) reported that the Bureau of Land Management is advancing the proposed NTEC West Antelope III coal lease-by-application project that would encompass 3,500 acres in Wyoming's Powder River Basin.

[**New Scientist**](#) reported that an analysis of active U.S. mines finds they already collect virtually all of the minerals the country needs for batteries, solar panels and wind turbines – but these critical minerals mostly go to waste.

[**Greenwire**](#) reported that the Trump administration is considering using unspent money tied to Biden-era laws — from the CHIPS Act to the Inflation Reduction Act — to boost critical minerals and counter China's dominance.

[**Argus**](#) reported that coal exports out of Hampton Roads, Virginia, dropped from a year earlier for a fourth straight month in July because of muted seaborne demand and infrastructure upgrades and construction at the Dominion Terminal Associates terminal.

[**AP**](#) reported that China's Ministry of Industry and Information Technology released new interim measures Friday tightening controls on the mining and processing of rare earths that are used in many high-tech products. Companies must have government approval to deal with rare earths and must accurately report RE products handled or they will face legal penalties and have RE quotas reduced.

[**Greenwire**](#) reported on USGS' draft 2025 critical minerals list with USGS

proposing to add six minerals: potash, silicon, copper, silver, rhenium and lead. Two materials — tellurium and arsenic — would be removed. The move that was immediately welcomed by the mining industry. The proposal released Monday is open to public comment for 30 days.

The [International Copper Study Group's](#) preliminary monthly data for June indicates that world copper mine production increased by about 2.7 percent over the first half of 2025, with concentrate production increasing by 2.8 percent and solvent extraction-electrowinning (SX-EW) by 2.3 percent.

Trade Corner

This week we are monitoring significant trade developments affecting mining and related industries. President Trump warned of 200 percent tariffs on rare-earth magnets if China restricts exports, while the U.S.–China tariff truce remains extended 90 days, keeping current rates in place. To help understand current tariff implications, reference our tariff staking guide here included in last week's trade update presentation.

The EU will move forward with eliminating tariffs on U.S. industrial goods despite Trump's threat to penalize countries with "digital taxes." Meanwhile, the U.S. Court of International Trade struck down a Biden-era solar tariff moratorium, reopening the door to new duties. In tech trade, a new House bill would require Congressional approval for advanced chip sales to China, following recent policy shifts.

Looking ahead we are keeping our eye on potential announcements on Section 232 investigations affecting semiconductors and copper derivative products, continued trade negotiations, and possible rulings under the International Emergency Economic Powers Act expected in September. New product import investigations could also affect sectors reliant on steel and critical minerals,

including wind turbines and other industrial equipment.

Stay informed by joining the NMA Weekly Trade Call every Wednesday at 1:00 PM Eastern for the latest updates.

Commodity Prices

Commodity Prices - Snapshot				
Metals Prices	Date	Price	Date	Price
Cobalt Spot Price (\$/lb)	8/19/25	\$15.12	8/26/25	\$15.12
Copper Spot Price (\$/lb)	8/19/25	\$4.41	8/26/25	\$4.44
Gold Spot Price (\$/ounce)	8/19/25	\$3,337.90	8/26/25	\$3,372.90
Lead Spot Price (\$/lb)	8/19/25	\$0.89	8/26/25	\$0.90
Lithium Spot Price (\$/kg)	8/19/25	\$11.78	8/26/25	\$11.41
Molybdenum Spot Price (\$/kg)	8/19/25	\$69.65	8/26/25	\$72.63
Nickel Spot Price (\$/lb)	8/19/25	\$6.81	8/26/25	\$6.93
Silver Spot Price (\$/ounce)	8/19/25	\$38.07	8/26/25	\$38.42
Steel HRC Price (\$/mt)	8/19/25	\$831.82	8/26/25	\$825.00
Steel Rebar Price (\$/mt)	8/19/25	\$433.74	8/26/25	\$434.96
Zinc Spot Price (\$/lb)	8/19/25	\$1.25	8/26/25	\$1.27
Energy Prices	Date	Price	Date	Price
Coal Price - Austr. Prem. Coking Coal Futures (\$/mt)	8/19/25	\$192.50	8/26/25	\$216.00
Coal Spot Price - Central Appalachian (\$/st)	8/15/25	\$78.00	8/22/25	\$78.00
Coal Spot Price - Newcastle futures (\$/mt)	8/19/25	\$111.01	8/26/25	\$111.01
Coal Spot Price - Rotterdam futures (\$/mt)	8/18/25	\$100.25	8/26/25	\$99.75
Natural Gas Spot Price - Henry Hub (\$/mmbtu)	8/13/25	\$2.92	8/20/25	\$2.81
Uranium Spot Price (\$/lb)	8/19/25	\$73.40	8/26/25	\$74.80

Sources: publically available data from eia.gov, dailymetalprice.com, tradingeconomics.com, sgxgroup.com, investing.com

CORESafety



In the August edition of CORESafety TV, we discuss CORESafety's Module Number seven, Management of Change.



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