

MINING: THE FOUNDATION OF U.S. MANUFACTURING

Minerals are vital to manufacturing the products and technologies that make U.S. companies world leaders in innovation, propel our economy and enable U.S. industries to compete globally. The growing global population and the development of new technologies and products that rely on greater combinations of minerals have increased the manufacturing industry's demand for raw materials.



Minerals and metals are critical to high-tech products like computers and electric vehicles

About the survey:

To examine the importance of minerals to the U.S. manufacturing industry and overall U.S. competitiveness, the National Mining Association (NMA) commissioned Edelman Berland to conduct a survey of more than 400 senior executives in the manufacturing industry. All executives surveyed have familiarity with their companies' supply chain operations.



MORE THAN **90%** of U.S. manufacturers are concerned about supply disruptions

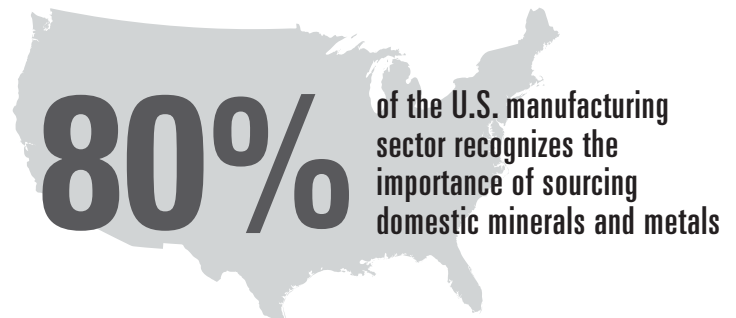
U.S. Minerals and Metals Supply

The issue of minerals and metals supply is a growing concern among U.S. businesses, as U.S. manufacturers currently rely on foreign countries for more than half of the minerals and metals they use. Without a stable domestic supply chain, their access to critical and strategic minerals and metals is susceptible to disruption.

More than 90 percent of executives are concerned about supply disruptions outside of their control, citing geopolitics and increasing global demand as the most pressing factors. Most executives surveyed also believe minerals and metals demand will only increase in the next five to 10 years. Without access to minerals and metals, the items we depend on every day—ranging from medical devices and transportation to communication, energy and even national defense—would cease to exist.

Importance of Domestic Mining

Eighty percent of business leaders within the U.S. manufacturing sector recognize the importance of sourcing minerals and metals from the United States, noting decreased dependence on foreign minerals and metals and strengthened national security as reasons for doing so. Nearly 85 percent also believe a strong domestic supply chain of critical minerals and metals will ensure job creation and economic growth in America. The United States' \$6.2 trillion worth of minerals and metals could be yet another reason manufacturers continue to choose to reshore their operations, as these raw materials are key inputs to nearly every manufacturing vertical.



80% of the U.S. manufacturing sector recognizes the importance of sourcing domestic minerals and metals



Domestic supplies of minerals and metals strengthen U.S. national security



Nearly 85% of manufacturers believe a strong domestic supply of minerals and metals will ensure job creation

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Streamlining the Minerals Mining Permitting Process

U.S. business leaders in the manufacturing sector strongly support the need to streamline the permitting process for new mines, thereby fostering timely access to vital domestic minerals and metals. While some factors, such as geopolitics, are difficult if not impossible to predict or avoid, permitting inefficiencies are a factor that we can and should address to put America on equal footing.

Other developed nations, such as Canada and Australia, complete the permitting process in two to three years compared to the burdensome seven to 10 years it takes in the United States. Of those surveyed, approximately three out of four executives believe the existing mine permitting process timeline is too long, and 95 percent are concerned that delays in the permitting process have a serious impact on U.S. competitiveness.

Nearly 90 percent of business leaders in the manufacturing industry support streamlining the permitting process to less than three years and 89 percent say this can be done without sacrificing necessary environmental reviews.



U.S. manufacturers believe the existing permitting process is too long



U.S. permitting for new mines take five times longer than Canada, Australia and other similarly developed countries

The Path Forward:

These findings further confirm the need for legislation that provides for a more predictable and efficient permitting process to feed the manufacturing supply chain. The U.S. House of Representatives passed “The Strategic and Critical Minerals Production Act” and NMA urges the Senate to take up similar legislation to bolster domestic manufacturing industries.