

USA

ENGINEERED RESOURCES. A STRATEGIC MINERAL ECONOMY.

The United States is one of the world's leading mining jurisdictions with a diverse resource base, advanced technology, and strong regulatory framework. From critical minerals to industrial materials, U.S. resources power domestic industries and global supply chains.



ABUNDANT RESOURCES

Rich in critical minerals, metals, industrial minerals, and energy resources.



STRONG ECONOMIC IMPACT

\$112 billion in nonfuel mineral production in 2025, supporting high-value industries across the nation.



SECURE & RELIABLE SUPPLY

Strengthening domestic supply chains for critical minerals and reducing import reliance.



INNOVATION & SUSTAINABILITY

Investing in technology, responsible mining and sustainable resource development.



“ Our mineral resources are the foundation of America’s industrial strength and global leadership.”

USA AT A GLANCE (2025)



\$112 BN

NONFUEL MINERAL PRODUCTION

Total value in 2025



\$38.1 BN

METALS PRODUCTION

Total value in 2025



\$73.7 BN

INDUSTRIAL MINERALS

Total value in 2025



373K+

MINING & QUARRYING JOBS

Direct employment in 2025



\$4.09 TN

DOWNSTREAM ECONOMY

Supported by U.S. minerals

AMERICA'S RESOURCE BASE

METALS

Copper, Gold, Silver, Zinc, Lead, Aluminum, Steel, Titanium, Nickel and more.



INDUSTRIAL MINERALS

Limestone, Sand & Gravel, Gypsum, Salt, Clay, Phosphate Rock, Magnesite and more.



CRITICAL MINERALS

Lithium, Cobalt, Rare Earths, Graphite, Nickel, Manganese and other strategic minerals.



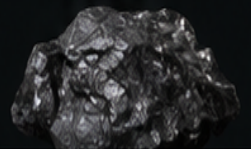
NATURAL STONE

Granite, Marble, Sandstone, Limestone, Slate and Dimension Stone.



ENERGY MINERALS

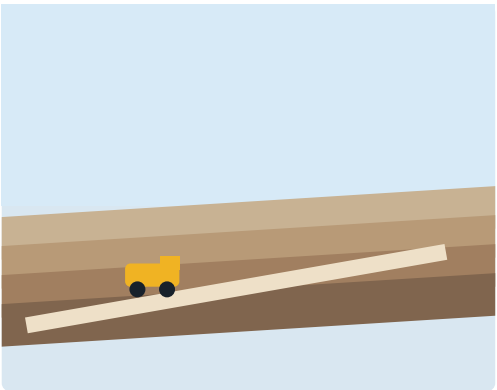
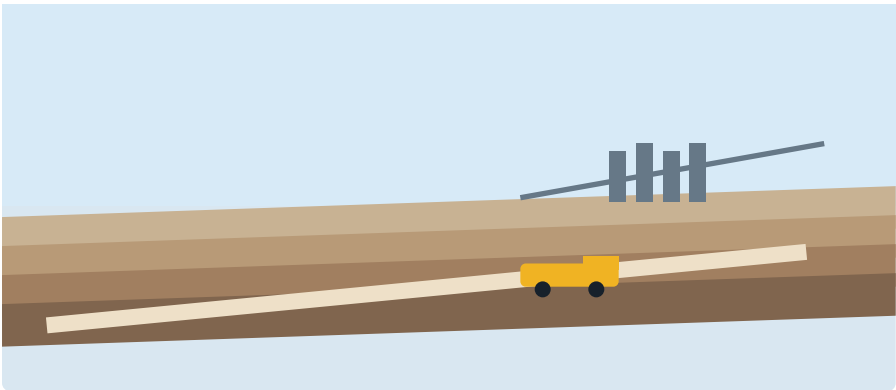
Coal, Uranium, Potash and other minerals essential for energy security.



COUNTRY OVERVIEW

A RESOURCE ECONOMY BUILT ON SCALE

The United States has one of the world's largest and most diversified mineral-consuming economies. In 2025, the estimated value of nonfuel minerals produced at U.S. mines reached \$112 billion. Domestic raw materials and recycled materials were transformed into about \$950 billion of mineral materials, which - together with \$185 billion in net imports of processed mineral materials - supported downstream industries valued at an estimated \$4.09 trillion.



\$112B

MINE OUTPUT
2025

\$950B

MINERAL MATERIALS
domestic + recycled

\$185B

NET PROCESSED IMPORTS
2025

\$4.09T

DOWNSTREAM VALUE
2025

TOP PRODUCING STATES

NEVADA

Gold and lithium

ARIZONA

Copper

TEXAS

Industrial minerals

ALASKA

Metals

CALIFORNIA

Aggregates & minerals

FLORIDA

Phosphate & construction

UTAH

Copper & industrial minerals

MISSOURI

Lead & aggregates

MINNESOTA

Iron ore

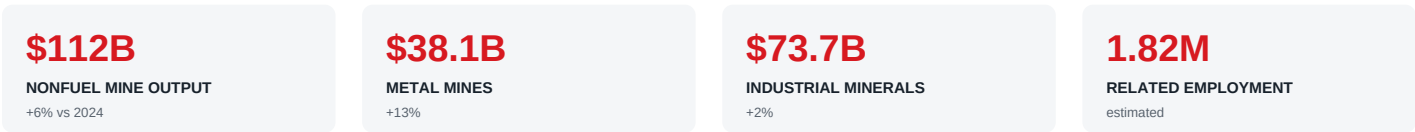
MICHIGAN

Iron ore & minerals

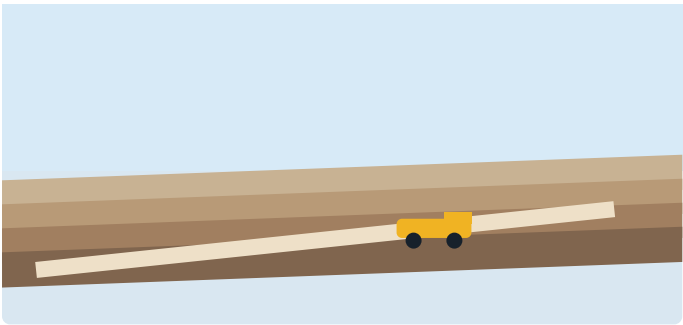
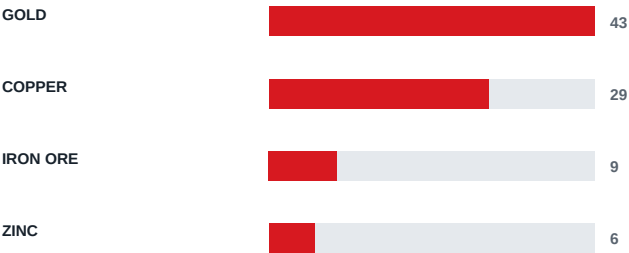
KEY STATISTICS & NUMBERS

THE NUMBERS BEHIND U.S. MINING

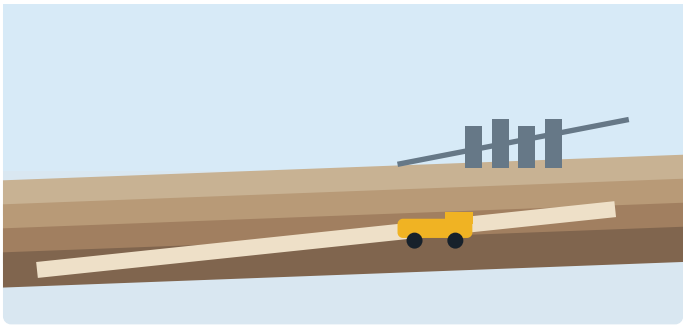
The headline production figure understates the role of minerals in the wider economy. Mining feeds construction, metals, chemicals, aerospace, electronics, energy systems and manufacturing. USGS estimates that 14 mineral commodities each exceeded \$1 billion in U.S. production value in 2025 and together accounted for 92% of total nonfuel mineral production value.



METAL MINE VALUE MIX



INDUSTRIAL MINERAL VALUE MIX



WHAT DRIVES VALUE

Precious-metal prices lifted the value of metal mine production. Gold alone represented 43% of U.S. metal mine value, while copper contributed 29%.

THE QUIET GIANT

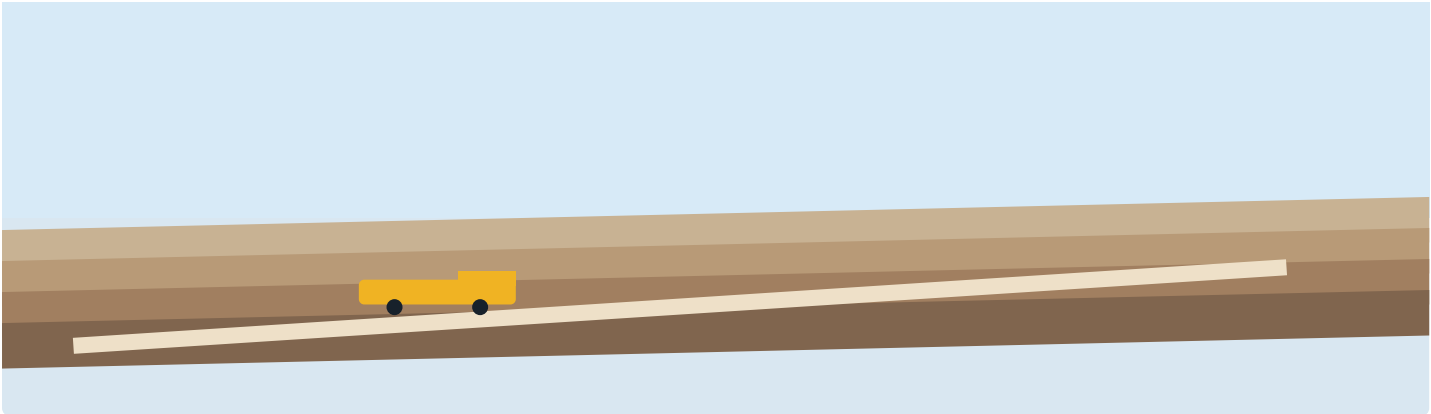
Industrial minerals remain the larger production-value category. Aggregates and cement are foundational to roads, housing, factories and infrastructure.

EDITORIAL TAKEAWAY

The U.S. mining story is simultaneously local and global: construction materials are predominantly regional, while many high-tech and critical-mineral supply chains remain exposed to international trade and processing capacity.

MINING LANDSCAPE - PART 1

DOMESTIC EXTRACTION: SCALE, SECURITY AND CHANGE



U.S. mineral production is geographically concentrated according to geology and infrastructure. The West led metals and metallic-mineral production in 2025, while the South led industrial minerals excluding crushed stone and construction sand and gravel. The top ten producing States were Nevada, Arizona, Texas, Alaska, California, Florida, Utah, Missouri, Minnesota and Michigan.

COMMODITIES ABOVE \$1 BILLION IN 2025

CRUSHED STONE Major U.S. production-value commodity.	GOLD Major U.S. production-value commodity.	CONSTRUCTION SAND & GRAVEL Major U.S. production-value commodity.
PORTLAND CEMENT Major U.S. production-value commodity.	COPPER Major U.S. production-value commodity.	INDUSTRIAL SAND & GRAVEL Major U.S. production-value commodity.
LIME Major U.S. production-value commodity.	IRON ORE Major U.S. production-value commodity.	SALT Major U.S. production-value commodity.
ZINC Major U.S. production-value commodity.	MOLYBDENUM Major U.S. production-value commodity.	PHOSPHATE ROCK Major U.S. production-value commodity.
SODA ASH Major U.S. production-value commodity.	SILVER Major U.S. production-value commodity.	

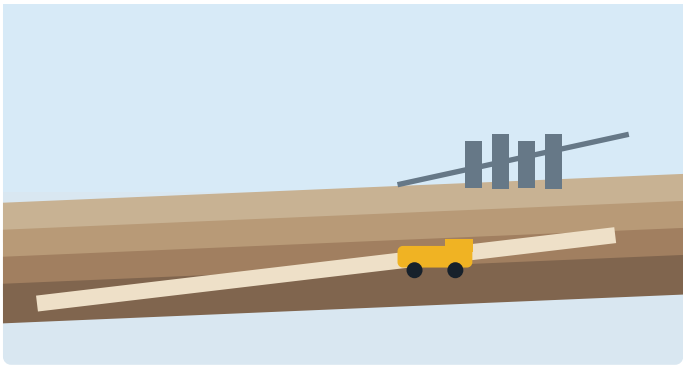
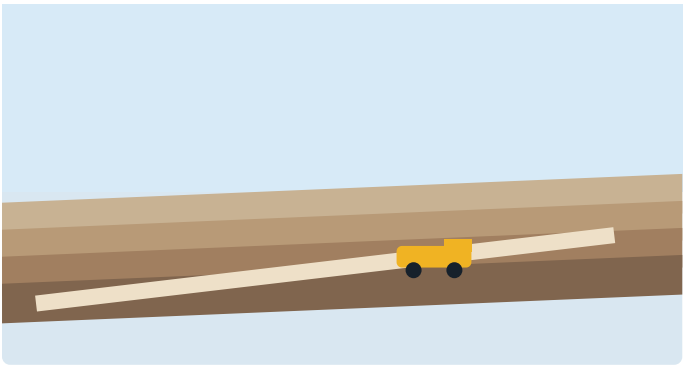
REGIONAL LOGIC

Mining competitiveness depends on more than ore grade. Power, water, rail, roads, processing, skilled labor, permitting and proximity to end users all influence project economics.

MINING LANDSCAPE - PART 2

FROM RESOURCE TO INDUSTRIAL VALUE

The commercial opportunity expands when extraction is connected to processing and manufacturing. The U.S. market rewards technologies that improve recovery, reduce energy and water intensity, increase safety, and create reliable domestic or allied supply chains.



VALUE-CREATION LAYERS

EXPLORATION

Geophysics, drilling, modeling and resource definition.

MINE DESIGN

Automation-ready layouts, selective mining and fleet optimization.

PROCESSING

Crushing, grinding, sorting, separation and hydrometallurgy.

REFINING

High-purity metals, chemicals and specialty materials.

LOGISTICS

Rail, port, road and secure storage networks.

OFFTAKE

Long-term links to manufacturers and strategic buyers.

WATER

Closed-loop systems, treatment and tailings management.

ENERGY

Electrification, renewables and power-quality solutions.

DIGITAL

Sensors, AI, predictive maintenance and remote operations.

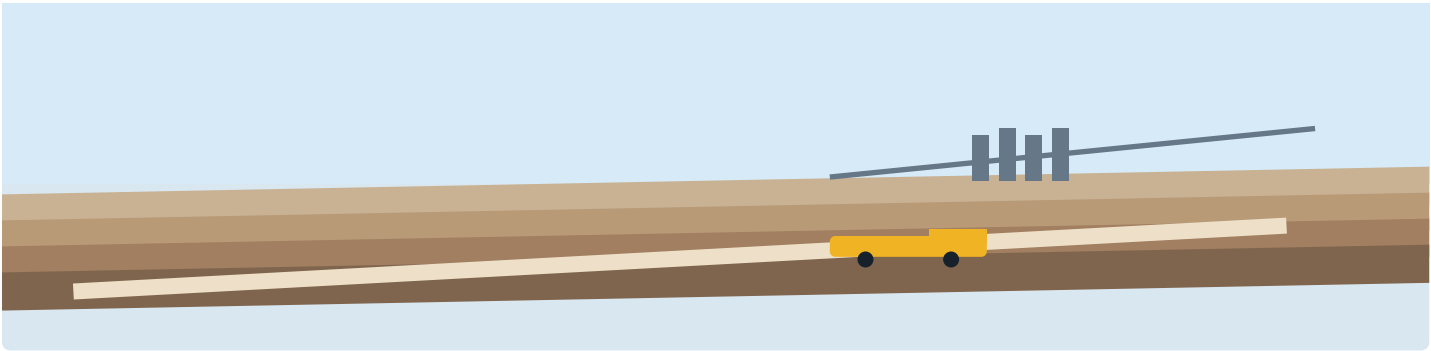
RECYCLING

Scrap, batteries, electronics and mine-waste recovery.

CRITICAL MINERALS - PART 1

CRITICAL MINERALS: IMPORT RISK, INDUSTRIAL STAKES

The final U.S. 2025 Critical Minerals List contains 60 minerals. These materials are important to national security and the economy, and many support batteries, electronics, aerospace, defense, fertilizers, high-performance alloys and advanced manufacturing. USGS reports that the United States remained dependent on imports for a range of critical minerals and that China was a major source for 14 of the 33 critical minerals for which U.S. import dependence was highest.



LITHIUM

Batteries & storage

RARE EARTHS

Magnets & motors

GALLIUM

Semiconductors

GERMANIUM

Fiber optics & infrared

GRAPHITE

Battery anodes

TUNGSTEN

Tooling & defense

NIObIUM

High-strength steel

MAGNESIUM

Light alloys

POTASH

Fertilizer

ANTIMONY

Flame retardants & alloys

NICKEL

Alloys & batteries

COBALT

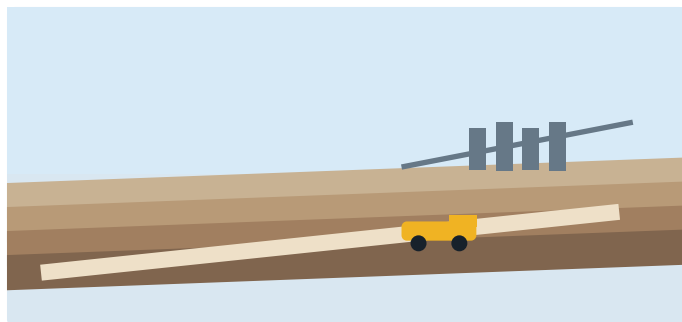
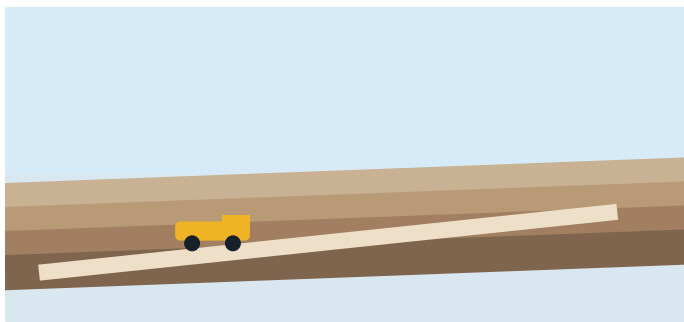
Superalloys & batteries

RESILIENCE MODEL

A resilient mineral strategy combines selective domestic mining, diversified imports from reliable partners, more midstream processing, substitution where practical, stockpiling for high-risk materials and stronger recycling systems.

CRITICAL MINERALS - PART 2

BUILDING RESILIENCE WITHOUT LOSING COMPETITIVENESS



Critical-mineral resilience is increasingly a portfolio problem rather than a single-mine problem. Supply can be disrupted at extraction, separation, refining, component manufacturing or trade. For investors and suppliers, this creates opportunity across the entire chain - especially where projects solve both a material shortage and a processing bottleneck.

MAP & ASSESS

Improve geological knowledge and resource characterization.

PERMIT PREDICTABLY

Reduce uncertainty while maintaining environmental standards.

DE-RISK METALLURGY

Use pilot plants and demonstration facilities before scale-up.

BUILD MIDSTREAM

Expand separation, refining and specialty-material capacity.

DIVERSIFY IMPORTS

Reduce concentration in any single supplier country.

LINK TO BUYERS

Secure offtake with manufacturers and strategic users.

RECOVER SCRAP

Scale recycling of metals, batteries and electronics.

REPROCESS WASTE

Evaluate tailings and legacy waste as secondary resources.

TRAIN WORKFORCE

Develop skills for automated and data-rich operations.

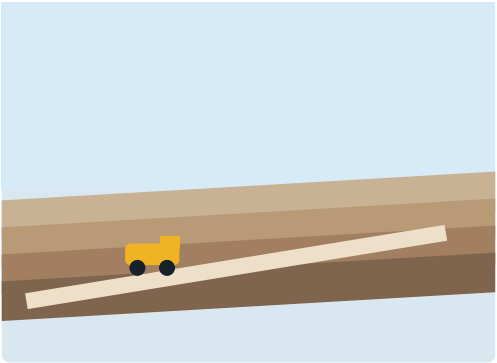
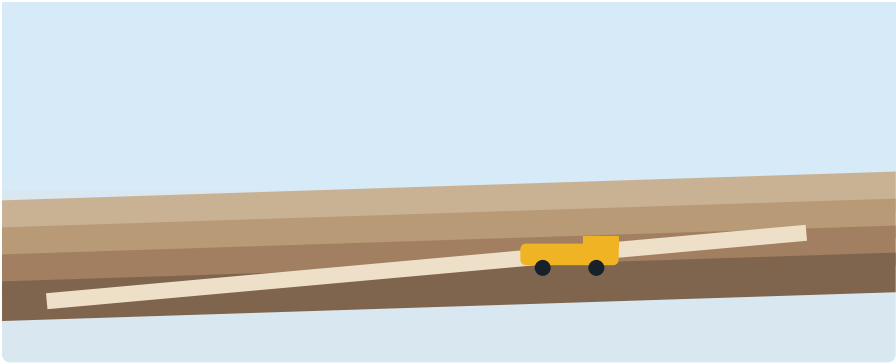
TRACE MATERIALS

Improve provenance, chain-of-custody and compliance data.

INDUSTRIAL MINERALS

INDUSTRIAL MINERALS: THE QUIET GIANT

Industrial minerals generated an estimated \$73.7 billion of U.S. production value in 2025, substantially more than metal mines. Crushed stone represented 36% of industrial-mineral value, cement 18%, construction sand and gravel 17%, and industrial sand and gravel 6%. These materials underpin construction, infrastructure, manufacturing, chemicals, glass and agriculture.



CRUSHED STONE

Road base, concrete, asphalt and infrastructure.

CEMENT

Buildings, transport infrastructure and industrial construction.

SAND & GRAVEL

Concrete, roads and regional construction markets.

INDUSTRIAL SAND

Glass, foundry, filtration and specialized industrial uses.

LIME

Steel, chemicals, environmental treatment and construction.

PHOSPHATE ROCK

Fertilizer and agricultural productivity.

SODA ASH

Glass, chemicals and detergents.

SALT

Chemicals, food, water treatment and winter maintenance.

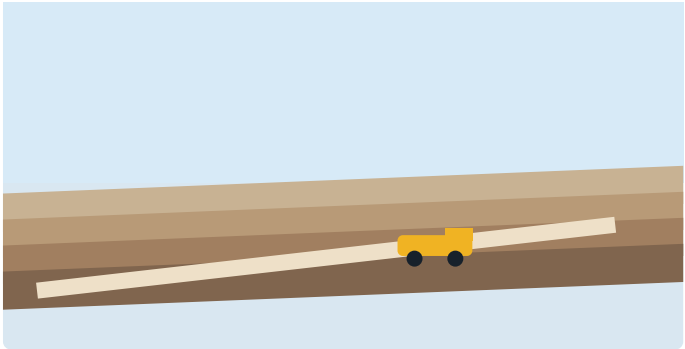
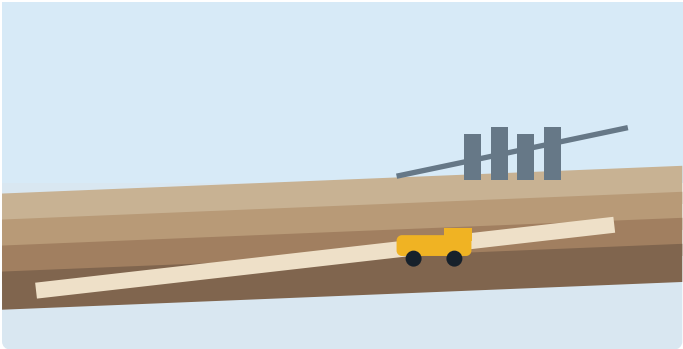
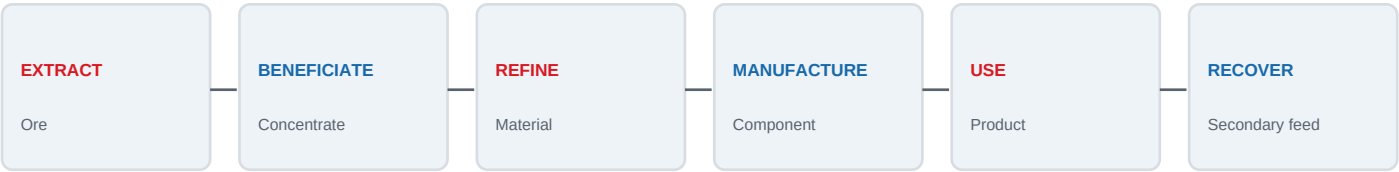
LOCAL ECONOMICS

Because many bulk minerals have high transport cost relative to unit value, proximity to customers and infrastructure can matter as much as geological abundance.

VALUE, DESIGN & CIRCULARITY

FROM MINE TO MANUFACTURING - AND BACK AGAIN

Mineral security is strengthened not only by producing more primary material, but also by using materials more efficiently and recovering them after use. Recycling can provide domestic feedstock, reduce waste and lower exposure to external supply disruptions. The strongest circular models connect product design, collection, sorting, metallurgy and certified secondary materials.



DESIGN FOR RECOVERY

Make products easier to disassemble and recycle.

TRACEABILITY

Know composition, origin and chain of custody.

SCRAP COLLECTION

Capture end-of-life metals and mineral-bearing products.

MINE-WASTE RECOVERY

Assess tailings and waste for residual value.

SUBSTITUTION

Use alternative materials where performance allows.

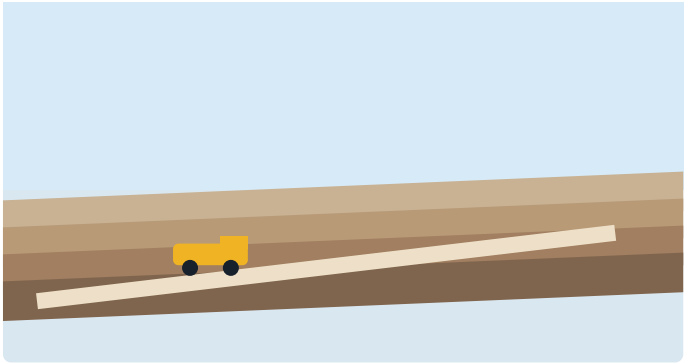
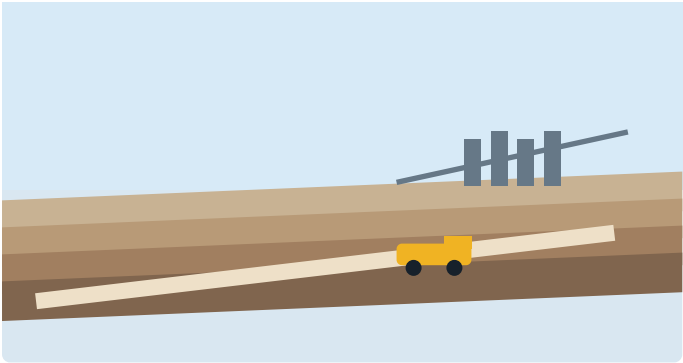
SECONDARY STANDARDS

Certify quality so recycled feed can re-enter industry.

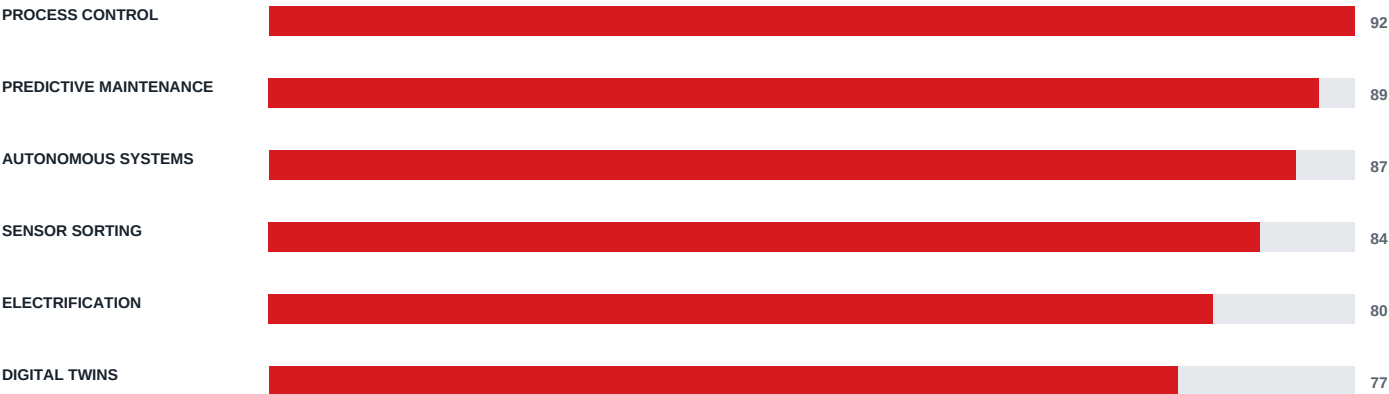
INVESTMENT & TECHNOLOGY - PART 1

TECHNOLOGY IS THE PRODUCTIVITY ENGINE

Technology investment in mining is increasingly aimed at a combined objective: higher productivity with lower operating risk. Automation, sensors, advanced process control and predictive maintenance can increase equipment utilization and recovery, while electrification and water technology address cost, environmental performance and operational resilience.



EDITORIAL PRIORITY INDEX



AI & ANALYTICS

Geology, fleet optimization, maintenance and process decisions.

REMOTE OPERATIONS

Centralized expertise and reduced exposure in hazardous areas.

ORE SORTING

Reject waste earlier and reduce downstream energy use.

ENERGY MANAGEMENT

Optimize power demand, reliability and cost.

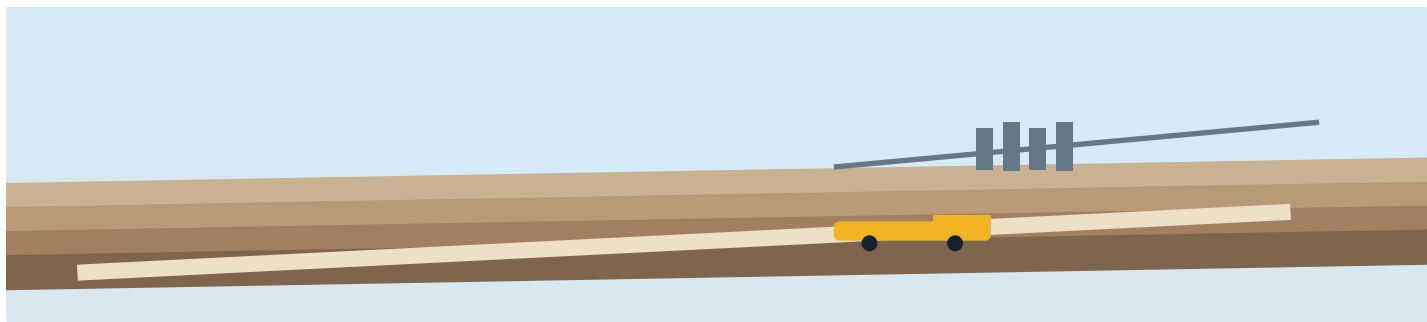
WATER SYSTEMS

Treatment, recycling and lower freshwater intensity.

CYBERSECURITY

Protect increasingly connected operational technology.

DATA, PROCESSING AND THE NEXT MINE



A strong resource does not automatically become a strong project. Metallurgy, permitting, infrastructure, capital intensity, workforce, processing capacity and customer qualification can all determine commercial success. This is especially important for critical minerals, where small markets and specialized processing can create bottlenecks.

MINE MODERNIZATION

Retrofit fleets, sensors, energy systems and digital controls.

PROCESSING PILOTS

De-risk separation and refining before commercial scale.

CRITICAL-MINERAL PROJECTS

Target materials with strategic demand and credible offtake.

RECYCLING FACILITIES

Recover batteries, electronics, metals and industrial scrap.

INFRASTRUCTURE

Power, rail, roads, water and secure storage.

DIGITAL SERVICES

Software, remote operations, modeling and cybersecurity.

ENGINEERING

Mine planning, process design and project integration.

TRAINING

Build skills for automation, maintenance and advanced processing.

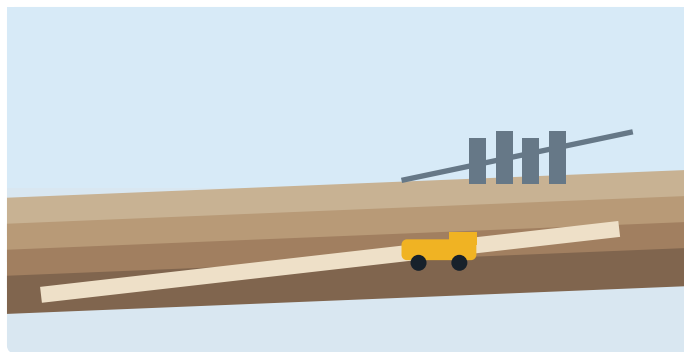
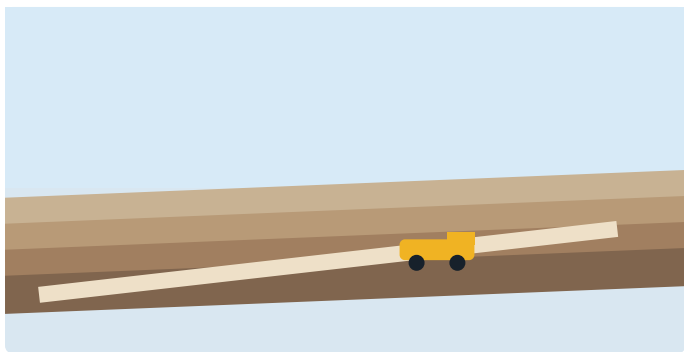
INVESTOR LENS

The most defensible projects often combine four elements: a credible resource, proven metallurgy, infrastructure access and a realistic customer pathway. Technology can improve each layer, but it cannot substitute for weak fundamentals.

OPPORTUNITIES & CONNECTIONS

POWERING GLOBAL GROWTH

The United States offers a deep market for mining equipment, processing technology, industrial minerals, critical-material partnerships and advanced services. For international companies, the opportunity is not limited to selling into mines: it extends to processors, recyclers, engineering firms, manufacturers, infrastructure developers and strategic buyers.



MINING TECHNOLOGY

Equipment, automation, sensing, safety and software.

MINERAL PROCESSING

Crushing, grinding, separation, refining and recovery.

CRITICAL MATERIALS

Projects, processing and secure supply partnerships.

INDUSTRIAL MINERALS

Construction, glass, chemicals and agriculture.

CIRCULAR ECONOMY

Recycling, traceability and mine-waste recovery.

BUSINESS DEVELOPMENT

Partner, customer and distributor identification.

MARKET INTELLIGENCE

Country, sector and opportunity analysis.

CROSS-BORDER ACCESS

Commercial bridges between U.S. and global markets.

GSR ANALYTIX

Insights • Analysis • Opportunities • Partnerships

TOGETHER, WE MINE TODAY FOR A SAFER TOMORROW.

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