Testimony of
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before the
U.S. Senate
Energy and Natural Resources Committee

Legislative Hearing on S. 4410 and H.R. 4090

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Good morning, Chairman Barrasso, Ranking Member Cortez Masto and the members of the subcommittee. I am Katie Sweeney, Executive Vice President and Chief Operating Officer of the National Mining Association (NMA). I appreciate the opportunity to testify before you today on behalf of the mining industry and specifically in support of S. 4410 and H.R. 4090.

America's mining industry supplies the materials necessary for nearly every sector of our economy – from technology and healthcare to energy, transportation, infrastructure and national security. The NMA is the only national trade organization that serves as the voice of the U.S. mining industry and the hundreds of thousands of American workers it employs before Congress, the federal agencies, the judiciary and the media, advocating for public policies that will help America fully and responsibly utilize its vast natural resources. We work to ensure America has secure and reliable supply chains, abundant and affordable energy, and the American-sourced materials necessary for U.S. manufacturing, economic and national security, all delivered under world-leading environmental, safety and labor standards.

The NMA has a membership of nearly 300 companies and organizations working in the U.S. to mine and explore for energy and minerals. With this in mind, we continue to support the important efforts of this committee to pursue policies that provide needed solutions, like those found in S. 4410 and H.R. 4090, to enhance U.S. economic competitiveness and national security objectives.

Energy and Mineral Demand Outlook

The NMA appreciates the support for our nation's mining industry from not only this committee, but from Congress and the Trump administration, and we agree that reestablishing the U.S. as an industrial powerhouse begins with ensuring that the materials that feed our supply chains are mined in America. There is widespread recognition that we are in one of the most energy and mineral intensive eras in human history. We can only fully and reliably feed our supply chains, maintain America's global competitive edge, and underpin our national security by sourcing necessary energy and mineral materials here at home.

Coal is increasingly needed to address rapidly growing electricity demand and to maintain grid reliability, especially during periods of peak demand or weather or fuel transport disruptions for other energy sources. U.S. electricity demand is projected to increase more than 75 percent by 2050, with a remarkable jump in demand already underway.[1] This skyrocketing demand is driven by the use of artificial intelligence, conversion to electric heating, construction of data centers, and uptake of electric vehicles (EVs).

According to the International Energy Agency, for data centers alone, global electricity consumption is expected to more than double by 2030.[2] Here in the U.S., utilities and grid operators are forecasting the strongest period of electricity demand growth in decades with summer and winter peak demand expected to jump by over 225 gigawatts (GW) and 245 GW, respectively, over the next decade—enough electricity to power 150 million homes.[3] While demand for electricity is skyrocketing, updating and expanding our energy infrastructure faces permitting delays and supply chain constraints. In the face of these diverging trends, which are becoming more alarming every day,[4] reliable coal-fueled electricity is needed now more than ever.

Fortunately, the U.S. has the world's largest coal reserves—making up nearly 90 percent of U.S. fossil energy reserves on a Btu basis. At current consumption rates, the U.S. has more than 250 years of remaining coal reserves. In 2024, our member companies represented 73 percent of U.S. coal production in 16 states. Coal currently accounts for nearly 17 percent of

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[1] Axios, Exclusive: Electricity demand to rise 78% by 2050, study says (May 25, 2025), available at https://www.axios.com/2025/05/20/electricity-demand-projection-2050-icf.

[2] International Energy Agency, Energy and AI, 2025, available at https://www.iea.org/reports/energy-and-ai/energy-demand-from-ai.

[3] North American Electric Reliability Corporation, Long-Term Reliability Assessment, Jan. 2026 available at https://www.nerc.com/globalassets/our-work/assessments/nerc_ltra_2025.pdf.

[4] Department of Energy, Resource Adequacy Report: Evaluating the Reliability and Security of the U.S. Electric Grid, July 2025, available at https://www.energy.gov/sites/default/files/2025-07/DOE%20Final%20EO%20Report%20%28FINAL%20JULY%207%29.pdf

U.S. electricity generation[5] and is the leading source of electricity generation in eight states.[6]

Similarly, demand for minerals and derivative products is expected to increase dramatically with the United Nations' political chief Rosemary DiCarlo estimating that demand could "triple by 2030 and quadruple by 2040."[7] Unfortunately, these mineral supply chains are highly concentrated in China and are increasingly vulnerable to disruption despite the U.S. being home to vast mineral resources that could be developed on U.S. soil, under world-leading environmental and labor standards. According to U.S. Geological Survey, when it comes to key minerals in the U.S., what is left to be discovered is almost as much as what is already found. With today's advanced mapping techniques, there is no doubt that we can pinpoint these domestic resources faster and with more precision than in the past.

With over $6 trillion worth of known domestic mineral resources, it is not a question of whether we could source more of our needs at home but whether we have the right policies to unlock these resources and process them here at home. The bottom line is that if we want to win the AI, energy, manufacturing, and national security supply chain race, we need more minerals and we need them to be sourced here at home.

National Mining Association Support for S. 4410 and H.R. 4090

<u>S. 4410</u>

This important legislation, introduced by Public Lands, Forests, and Mining Subcommittee Chairman John Barrasso (R-Wyo.), would amend the Mineral Leasing Act to reform the payment schedule for bonus bids on federal coal leases. Under current law, coal producers leasing federal resources must pay bonus bids through an accelerated schedule of five installments over the first four years of a lease. Since federal permitting and mine development timelines often extend well beyond that period, these payments frequently occur before projects generate any revenue, creating significant financial barriers to investment.

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[5] U.S. Energy Information Administration, Electric Power Monthly, Table 1.1 Net Generation by Energy Source: Total (All Sectors), 2015-June 2025, *available at* https://www.eia.gov/electricity/monthly/epm_table_grapher.php?t=table_1_01.

[6] U.S. Energy Information Administration, Electric Power Monthly, Table 1.4.B. Utility Scale Facility Net Generation from Coal, *available at* https://www.eia.gov/electricity/monthly/epm_table_grapher.php?t=table_1_04_b

[7] https://fortune.com/2026/03/06/united-nations-forecast-outlook-critical-minerals-cobalt-lithium-rare-earth/

The accelerated payment period also fails to take into account the realities facing the U.S. coal industry. While coal demand and use is on the rise, targeted federal policies over the past decade and a half have severely impacted the industry's ability to absorb costs and payment timelines initially established when coal use was significantly higher. As such, S. 4410 provides a commonsense solution by allowing bonus bids to be paid through ten equal installments over a longer timeline, reducing upfront costs while ensuring the federal government's expected revenue. This change complements other congressional and agency actions and provides a reset to allow coal to be more competitive.

Meeting America's rapidly increasing demand for reliable and affordable energy requires significant, long-term investment in domestic energy projects. By providing greater flexibility for project financing, this bill supports the development of critical domestic resources while strengthening our supply chains and the communities that depend on them.

<u>H.R. 4090 – The Critical Mineral Dominance Act</u>

For decades, domestic mineral producers have operated in a regulatory environment marked by uncertainty, as permitting priorities and interpretations have changed from administration to administration. This lack of consistency has disincentivized long-term capital investment and, in some cases, discouraged development opportunities in the U.S.

The Critical Mineral Dominance Act, introduced by House Energy and Mineral Resources Subcommittee Chairman Pete Stauber (R-Minn.), will provide greater stability and predictability for mine developers and promote job creation by codifying key provisions of President Trump's executive orders related to domestic hardrock mining. The bill also enhances U.S. economic competitiveness and takes direct aim at our strategic vulnerabilities by providing a more efficient, predictable and durable federal permitting framework.

Developing domestic mining and onshoring mineral supply chains are foundational to advancing U.S. economic and national security priorities. By reducing our reliance on mineral imports, especially those from geopolitical adversaries, this bill improves supply chain resilience, protects military readiness and ensures the U.S. can meet current and future needs while maintaining world-leading environmental, labor and safety standards. H.R. 4090 is an important step forward to ensure America can responsibly and efficiently develop its vast domestic mineral resources.

Conclusion

The U.S. has all the ingredients necessary to create our own energy and mineral supply chain dominance. That said, there can be no supply chain security — no meeting the enormous energy and mineral demand at our doorstep — without fundamental recognition that we need more domestic mining and processing, combined with responsible policies to achieve it.

Armed with these policies, the U.S. can reduce reliance on China and other foreign sources, increase our global competitiveness, and create high-paying American jobs that provide our manufacturing and defense sectors with a stable supply of the energy and minerals they need. Solutions must be comprehensive, government-wide approach to achieve a secure supply chain.

The mining industry supports S. 4410 and H.R. 4090 and looks forward to working with this committee to advance lasting and effective policies that enable responsible resource development to meet growing supply chain needs. Thank you for the opportunity to testify before you today and I look forward to answering your questions.