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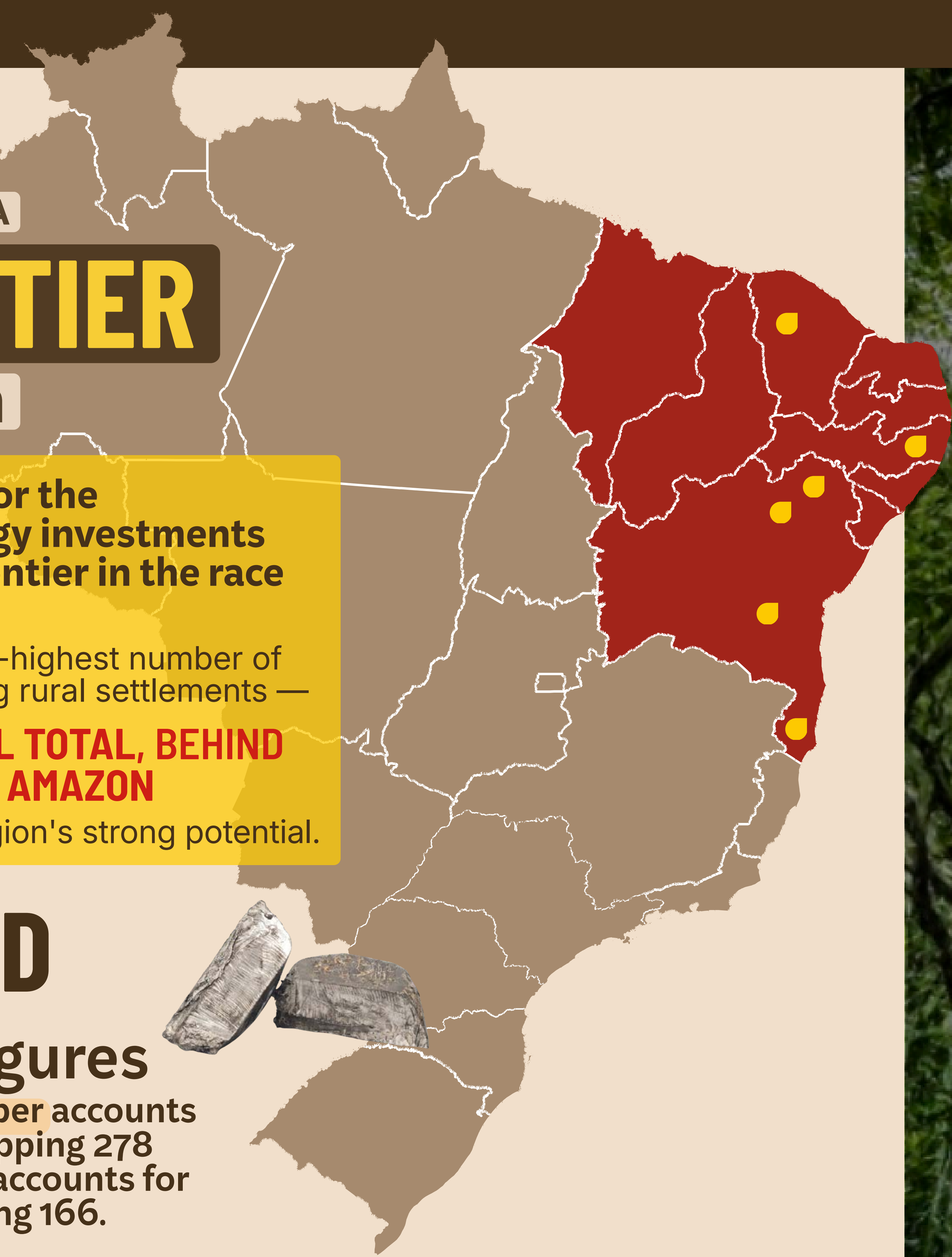
NORTHEAST
MINING OBSERVATORY

TERRITORIAL CONFLICTS

Mining Observatory



OVERVIEW • GENERAL DATA

NEW FRONTIER of the transition

The Northeast accounts for the country's renewable energy investments and has become a new frontier in the race for critical minerals.

It is the region with the second-highest number of mining applications overlapping rural settlements —

40% OF THE NATIONAL TOTAL, BEHIND ONLY THE LEGAL AMAZON

An SGB study reinforces the region's strong potential.

COPPER AND LITHIUM in figures

Across the nine states, copper accounts for 536 applications overlapping 278 settlements, while lithium accounts for 288 applications overlapping 166.

The copper race is led by Chile's **Codelco** (126 applications), followed by **Nexa/Votorantim** (91) and Australia's **Fortescue** (52); lithium applications are widely dispersed. In the background, **the IEA projects copper and lithium supply deficits through 2035**, with the copper shortfall at ~25% of demand.

Rare earths:

Of the **187 rare earth** applications overlapping **96 settlements in the country**, **Bahia** leads (**88**), followed by **Pernambuco** (**21**) and **Paraíba** (8).

More than half are in the Northeast.

States under the greatest pressure:

Across transition minerals, **Bahia has 426 applications** in **188 settlements** rare earths, copper and lithium), while **Ceará** has **358** in **177**.

Bahia has a state-owned exploration company, Companhia Baiana de Pesquisa Mineral (CBPM), which is unusual in Brazil.

Semiarid region and coast:

- **In the semiarid region:** copper in Curaçá and Jaguarari (BA), lithium in Bahia's hinterland and Paraíba's Seridó, uranium and phosphate in Santa Quitéria (CE), nickel in southern Piauí, and scheelite/tungsten in Rio Grande do Norte's Seridó.
- **On the coast:** rare earths in ion-adsorption clay in the far south of Bahia (Itamaraju), and cement mining on Paraíba's southern coast.

Curaçá (BA)

Copper overlapping a settlement. The only copper mining concession overlapping a settlement affects the **Centro-Oeste tract of Cacimba da Torre (created in 2010, 24 families)**; the concession was granted in 2018, after the settlement was established. Caraíba, owned by Canada's Ero Copper since 2022, leads the search for copper in Bahia (106 applications, up to 43 settlements).

Fundo de pasto (BA)

A study in the journal Geosul (2023) on the Surubim copper mine concluded that the activity "poses risks to the use, possession and management of collective areas" and reveals "environmental injustice" in the **traditional Fundo de Pasto territory (15 thousand ha, more than 90 families)**, with few outsourced jobs and the closure of local businesses.

Itamaraju (BA)

Rare earths over the oldest brazilwood tree. The two most advanced rare earth applications in settlements are in the **Reunidas Pau Brasil Sustainable Development Project (48 families since 2009)**, held by Multiverse Mineração, which reported "excellent concentrations" in ion-adsorption clay across nearly 30 thousand ha.

The settlement conserves the country's **oldest brazilwood tree (~600 years).**

Paraíba

Semiarid region and coast. There are 81 applications in 51 settlements (Nexa 13, Fortescue 7; 33 for copper and 25 for lithium). A UFPB thesis (2021) mapped **109 settlements (129.5 thousand ha) targeted by mining companies.** On the southern coast, mining has already caused deforestation, erosion, sedimentation and pollution, and three Incra areas have been replaced by cement plants.

Santa Quitéria (CE)

Uranium and phosphate disputed for 20 years. The **INB–Galvani** consortium wants to exploit the Itataia colophanite deposit (phosphate with uranium). **The project's licenses have already been annulled, and Ibama shelved it in 2019**; a new application has been under review since 2021.

The **Environmental Impact Assessment went through eight revisions** and, in 2025, Ibama requested 37 corrections — the central issue is water demand (89 water trucks per hour) in a water-scarce territory.

The National Human Rights Council recommended suspending the licensing process. Even with a preliminary license in 2026, operations would begin only around 2030.

Chapada Diamantina (BA)

Quilombola communities against a British mining company. Brazil Iron operates 24 hours a day in Piatã, Abaíra and Jussiape, selling iron ore as "green steel".

The **Bocaina** and **Mocó Quilombola** communities report sedimentation and pollution at the headwaters of the Bebedouro River, cracks and dried-up springs. The company omitted the existence of the Quilombola community, denying prior consultation, and operates with authorization from the National Mining Agency (ANM) but without an adequate environmental license.

A **British court** agreed to hear the lawsuit (103 Quilombola plaintiffs) and prohibited contact with the communities; state-owned CBPM is accused of favoring the company. In Brazil, the **Federal Public Defender's Office (DPU) has filed a civil action against the company and ANM**, seeking suspension and R$5 million.

AFFECTED COMMUNITIES

Density of peoples and communities

Bahia is home to Indigenous peoples:

- nearly **900 Quilombola communities**
- about **600** Fundo e Fecho de Pasto **communities, fishers, riverine communities**
- **~530 settlements**

Multiplying the points of **conflict with mining.**

Reports from the MST

According to MST leaders in Bahia, the settlements already face land grabbing, harassment and threats, and mining **"may aggravate land grabbing, threats and hired-gun violence,"** in addition to damaging the Caatinga.

Zona da Mata and Seridó

In Pernambuco, Fetape fears that mining will aggravate the **loss of planted area in the Zona da Mata.**

In Paraíba, Fetag-PB reports impacts from scheelite, asbestos, iron and limestone in the Seridó and predicts **"the expulsion of families, groundwater contamination, rural exodus and violence".**

Santa Quitéria: Indigenous and Quilombola communities

The lack of free, prior and informed consultation is identified as a central illegality: the **Potiguatapuia Indigenous Movement** submitted a consultation protocol in 2024 and resubmitted it in 2025, but reports attempts by Funai to delegitimize it.

The **DPU** is monitoring the case.

Southern Piauí: nickel in the semiarid region

The **Piauí Nickel Project** (Brazilian Nickel, United Kingdom) calls for US$1.4 billion, construction beginning in the 2nd half of 2026 and operations in 2029, producing nickel and cobalt for batteries through heap leaching without a wet tailings dam.

Potential water and social impacts will require close monitoring.

Seridó, Rio Grande do Norte: old mining, new demand

The resurgence of tungsten mining (scheelite from the Brejuí mine, the largest in South America) is occurring in a region undergoing **desertification**, with growing conflicts over water aggravated by mining.

GOVERNANCE GAPS

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THE REGULATION THAT OPENS SETTLEMENTS TO MINING

Incra Normative Instruction (IN) 112/2021, issued during the Bolsonaro administration and still in force, is the legal basis used by mining companies to explore and apply for mining rights in settlements.

The DPU filed a civil action (Jun/2025) seeking its repeal. To date, however, **the Incra instruction remains in force**.

PRIOR CONSULTATION SYSTEMATICALLY ABSENT

In the documented cases — Brazil Iron, Santa Quitéria, and applications overlapping **Quilombola communities and settlements** — prior consultation (Convention 169) did not occu or was circumvented.

Regulatory loopholes and the new licensing law facilitate **extraction without consultation.**

ANM WITHOUT SCREENING AND IN CRISIS

Almost all applications in the Northeast are at the exploration stage, **granted without prior social and environmental analysis.**

The **crisis** aggravates the situation:

In June 2026, the **PF indicted ANM's director-general and senior officials for criminal organization offenses (Rejeito and Parcours)**, while auctions enabled operations such as 3D Minerals, financed by **Banco Master**, which **acquired hundreds of areas for R$126 million — 60 overlapping settlements.**

STATES AS BUSINESS PROMOTERS

State governments act primarily as facilitators: Bahia signed a protocol with Borborema (Brazilian Rare Earths) for concentrate and separation plants (R$3.5 billion projected).

- **CBPM** is accused of supporting Brazil Iron.
- **Bahia's Secretariat for Economic Development (SDE)** says mineral titles fall under federal jurisdiction.

INVISIBILITY IN THE DATA

Cross-referenced datasets underestimate the extent of the impacts: territories more than 8 km from projects become “invisible,” and there is no integrated registry among ANM, Incra, Fundação Palmares and Funai to block titles overlapping traditional territories.

COMPANIES AND FEATURED PROJECTS

Company (origin)	Mineral/Project	Location	Status
Ero Copper / Mineração Caraíba	Cu Curaçá Valley and Surubim	Curaçá, Jaguarari (BA)	Active mining; 106 applications in BA, 43 settlements potentially affected
Codelco do Brasil (Chilean state-owned company)	Cu Exploration	Northeast (several states)	126 applications, regional leader by number of applications
Nexa Resources (Votorantim)	Cu + others	Paraíba and other states	91 applications in the Northeast; 30 overlapping settlements nationwide
Fortescue	Cu Eexploration	Paraíba and others	52 applications in the Northeast
Indústrias Nucleares do Brasil (INB) + Galvani (consortium)	U phosphate Santa Quitéria Project	Santa Quitéria/Itatira (CE)	Preliminary license under review by Ibama; EIA in its 8th revision; strong social opposition
Brazilian Nickel / Piauí Níquel Metais (PNM)	Ni + Co Piauí Project	Capitão Gervásio Oliveira (PI)	US$1.4 billion; construction planned for the 2nd half of 2026, operations in 2029
Brazilian Rare Earths / Borborema (Hancock/Gina Rinehart among its shareholders)	**Rare earths** Rocha da Rocha and others	Bahia (16 applications overlapping 7 settlements)	Advanced exploration; protocol with the BA state government (R$3.5 billion projected)
Multiverse Mineração	Rare earths in **ion-adsorption clay**	Itamaraju (BA), overlapping the Pau Brasil Sustainable Development Project	Right to apply for a mining concession; ~30 thousand ha declared
Brazil Iron	**Iron ore** for “green steel”	Piatã/Abaíra/Jussiape (BA)	Operating; lawsuit filed by Quilombola communities in the United Kingdom
Alpha Minerals Brazil	**Rare earths** exploration	Pernambuco and Goiás	28 active applications

UNCERTAINTIES and medium-term outlook

Santa Quitéria as a test case

Ibama's decision on the preliminary license — pending after requirements issued in April 2026 — will be a milestone: approving a uranium project with this level of water demand in the semiarid region would create a regional precedent; denying it would establish water infeasibility as a limit.

Transnational litigation

The British court's acceptance of the lawsuit filed by the Bocaina and Mocó Quilombola communities is significant: foreign parent companies may be held liable in their home countries for damage in Brazil, creating a new risk for the British, Australian and Canadian companies that dominate the projects.

Speculation / mining

Most applications are at the exploration stage and may never become mines, but the speculative effect is already inflating land values, driving land grabbing, exposing communities to harassment and creating legal uncertainty. **The key indicator to monitor is the conversion of exploration permits into mining concessions, as in Curaçá.**

PNMCE and the Northeast

The new National Critical Minerals Policy tends to accelerate projects without resolving the identified gaps — IN 112/2021, prior consultation and ANM oversight. **Social and environmental organizations warn of incentives without reciprocal obligations.**

What remains unknown

The absence of independent monitoring of the nickel project in Piauí is a concern. Overlap data do not capture impacts on traditional communities located more than 8 km away; and the outcome of Brazil–United States negotiations could change the pace of rare earth projects in Bahia and Pernambuco.

Findings from STUDIES AND REPORTS (2025-2026)

Potential mapped by SGB

An **SGB study (Dec/2025)** points to strong critical mineral potential in the Northeast; in 2025, SGB and CETEM signed a four-year technical agreement to produce a reference document on the subject.

Global outlook

The **Global Critical Minerals Outlook 2026 (IEA)** projects copper and lithium supply deficits through 2035 and shifts the focus from “meeting demand” to “supply chain security,” a situation that underpins the race for frontiers such as the Northeast.

Public capture and speculation

A **Transforma/Unicamp brief (2026):** reports that only 0.49% of critical mineral applications are in actual production and 88.55% remain in the initial exploration stage; federal tax exemptions from 2017 to 2024 (R$47.35 billion) nearly equaled CFEM revenue (R$46.1 billion), and public capture amounts to no more than 3% of the value produced.

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