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EXPOSURE RISKS

Greenland, China, and economic security in the North American Arctic

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TRUE NORTH IN CANADIAN PUBLIC POLICY

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China is not an Arctic nation – but it has a tremendous influence on the region's future.

In May 2025, US President Donald Trump warned of China's economic and security designs on Greenland. Trump claimed that "... we have Chinese boats, gunships all over the place ... going up and down the coast of Greenland." US Vice President J.D. Vance echoed Trump's warning, saying that Greenland is vulnerable to "very aggressive incursions" from China, and alongside "military threats" he gestured towards "economic pressures" on the island as part of China's "firm interest."

For Canada, too, security is a leading concern in the Arctic. However, the picture is somewhat different than the one presented by the US administration. China's challenge for Greenland is primarily economic security – the threats posed by China's coercive trade policies and geoeconomic ambitions – not a direct military threat.

Understanding the dynamics of Greenland's economic security has lessons for the rest of the North American Arctic, not least for northern Canada, because economic security is not just a matter of staving off suspect investments or politically backed foreign ownership.

Sharpening policymakers' awareness of where the Arctic sits in the global flows of supply and value – and how those relate to the competition between Canada, the US, and its allies on one side, and China and its partner Russia on the other – is crucial. In short, to understand the economic security vulnerabilities of Arctic governments and societies, you need to look through the lens of downstream risks in natural resource sectors.

The Kingdom of Denmark, of which Greenland is a part, has so far staved off proposed investments by Chinese companies in strategic air and seaports on the island. Chinese mining firms' projects there have fizzled, mostly for commercial reasons. For China, it is getting more difficult to swim upstream in strategic supply chains to sources in the North American Arctic.

The trouble is that China has powerful positions downstream in two areas crucial to Greenland's future and the whole North American Arctic – fisheries and mining strategic minerals.

China can – and is – politicizing these positions in parts of the world. While China faces hurdles to own mines in Greenland, it can disrupt these industries downstream through its dominance in processing their ores. China has no plans to relinquish that dominance, a key lever in its competition with the United States. Moreover, the rural, coastal economies of Greenland frequently depend on foreign markets to sell their fish products – sales essential to livelihoods across the region. In Greenland's case, it exports about half of its fish to China. China has been quick to limit access for foreign fish to its markets when tensions have arisen in its foreign relations, notably with Canada, Australia, and Taiwan. There is no good reason to assume the Arctic would be exempt should turbulence arise in China's relations with the region's governments.

Greenland is Canada's northern neighbour. It warrants keen attention. Canada has a real opportunity to collaborate with Greenland to build security on the North American continent. Canadian leaders should visit the island to hold wide-ranging consultations with Greenlandic and Danish counterparts on security, defence, and prosperity, gathering the leaders of the governments, societies, and business communities of Northern Canada and Greenland.

Advancing an economic security partnership with Greenland and Denmark is a distinct Canadian interest – as is doing so in ways that respect Greenlanders' right to self-determination and the current constitutional arrangements of the Kingdom of Denmark. That, ultimately, is something that Canada can, through independent initiative, impress on our closest ally, the United States, to create a safer, more prosperous North American continent. It's time for Canada to lead by example. **MLI**

La Chine, un pays pourtant non arctique *– a une énorme influence sur l'avenir de la région.*

En mai 2025, le président des États-Unis, Donald Trump, a signifié un avertissement contre les intentions de la Chine en matière de projets économiques et de forces de sécurité au Groenland. Il a soutenu que : « … des navires de guerre chinois patrouillaient partout dans les eaux jouxtant le Groenland… ». Son vice-président, J. D. Vance, a réitéré l'avertissement en soulignant la vulnérabilité du Groenland face aux « incursions particulièrement agressives » de la Chine. Et, tout en dénonçant ses « menaces militaires », il a désigné ses pressions économiques sur l'île comme partie intégrante de ses « intérêts affirmés ».

Pour le Canada également, la sécurité en Arctique est une priorité. Cependant, le portrait diffère quelque peu de celui présenté par l'administration américaine. Le défi de la Chine pour le Groenland est surtout la sécurité économique – les menaces posées par ses politiques commerciales coercitives et ses ambitions géoéconomiques – et pas une menace militaire directe.

Étudier la dynamique de la sécurité économique du Groenland peut éclairer tout l'Arctique nord-américain, et en particulier le nord du Canada, car la sécurité économique va au-delà des investissements jugés suspects et des intérêts politiques étrangers.

Il est essentiel de sensibiliser les décideurs politiques à l'importance de l'Arctique dans les chaînes d'approvisionnement et de valeur mondiales – et à l'impact de ces chaînes sur la concurrence entre, d'une part, le Canada, les États-Unis et leurs alliés et, d'autre part, la Chine et son partenaire russe. En bref, afin de bien saisir les vulnérabilités des gouvernements et des entreprises de l'Arctique en matière de sécurité économique, il faut analyser les risques en aval liés aux ressources naturelles.

Le Royaume du Danemark, dont le Groenland fait partie, s'est toujours opposé aux investissements chinois dans les infrastructures aéroportuaires et navales stratégiques. Mais si les projets miniers chinois là-bas ont échoué, ce fut surtout pour des raisons commerciales. La Chine a de plus en plus de difficulté à remonter les chaînes d'approvisionnement stratégiques vers les sources situées dans l'Arctique nord-américain.

L'ennui, c'est que la Chine détient des positions prépondérantes en aval dans deux secteurs essentiels pour l'avenir du Groenland et celui de tout l'Arctique nord-américain : la pêche et l'extraction des minéraux stratégiques.

La Chine a le pouvoir – et est en voie – de politiser ses positions dans certaines parties du monde. Elle éprouve des difficultés à acquérir des mines au Groenland, mais a le loisir de perturber les industries en aval, car elle domine la transformation, un atout auquel elle n'envisage pas de renoncer. En effet, cette domination est cruciale pour rivaliser avec les États-Unis. En parallèle, les économies rurales et côtières du Groenland dépendent souvent des marchés étrangers pour écouler les produits marins essentiels à leur survie et, effectivement, la Chine en importe environ la moitié. Dans le passé, la Chine n'a pas tardé à restreindre l'accès à ses marchés en réponse aux tensions, notamment avec le Canada, l'Australie et Taïwan. Aucune justification raisonnable ne permet donc d'envisager que l'Arctique sera épargné en cas de désaccords entre gouvernements.

Le Groenland, voisin nordique du Canada, mérite donc qu'on s'y intéresse. Notre pays doit saisir l'occasion de collaborer avec ce dernier afin de renforcer la sécurité en Amérique du Nord. Ses dirigeants devraient se rendre sur l'île pour y conduire de vastes consultations auprès de leurs homologues groenlandais et danois sur les enjeux de sécurité, de défense et de prospérité, et y réunir les chefs de gouvernements, les personnalités influentes et les gens d'affaires du nord du Canada et du Groenland.

Indéniablement, il est dans l'intérêt du Canada de promouvoir un partenariat en matière de sécurité économique avec le Groenland et le Danemark – tout en veillant au respect du droit des Groenlandais à l'autodétermination et des dispositions constitutionnelles en vigueur au Royaume du Danemark. En définitive, il s'agit d'une problématique que le Canada peut, par le biais d'une initiative autonome, faire comprendre à son plus proche allié, les États-Unis, dans le but de construire un continent nord-américain plus sûr et plus prospère. Il est désormais opportun pour le Canada de se positionner en tant qu'exemple à suivre. **MLI**

Introduction

China declared itself a "near Arctic state" in 2018. That has set off a steady stream of attention to the threats that might emerge from its polar ambitions among leaders and the general public. The most consequential response has been from the administration of US President Donald Trump. Citing threats of Chinese and Russian military presence in the waters around Greenland, the air over it and the infrastructure within it, the US administration has embarked on a controversial effort to tie Greenland closer to the US, going as far as stating that annexation by force is one of the options. Sharpening rivalry between the US and China has made Arctic geopolitics more unpredictable – and made determining the nature and scale of the Chinese threat that exists in the region more important than ever.

China's near and in-Arctic ambitions face strong headwinds. In all the Arctic countries except Russia, its position has been deteriorating, especially over the last decade (as exemplified in Edstrøm, Hauksdóttir, and Lackenbauer 2025). Greenland, the North American part of the Kingdom of Denmark, is a case in point. Greenland – or Kalaallit Nunaat to most of its inhabitants – may have a micro-economy, but it holds strategically valuable natural resources that have drawn the interest of China (and of the US and European Union). Only a few ventures have emerged so far, and China itself has come up empty, thwarted in strategic sectors by the Kingdom. Nonetheless, China's goals for the next decade are likely to mostly be economic and political in Greenland, and it will undoubtedly seize any opportunities that arise.

That means understanding the China threat in Greenland – and the North American Arctic – through the lens of economic security. While China owns no stakes in infrastructure or natural resource projects, it retains powerful downstream economic influence. China holds positions in markets and supply

chains crucial to Greenland's economic prosperity. These are in natural resource sectors, namely fish and minerals.

Greenland's largest single destination for fish exports is the Chinese market. Its hopes for prosperity and potential independence hinge on mining strategic minerals, but China dominates the globe's processing industry for many of them. Add in China's documented use of economic coercion, and its geoeconomic strategies to maintain supply chain dominance, and a picture emerges of the vulnerabilities and risks that face Greenland's and Denmark's authorities – a picture that has implications for Canada, as Greenland's most immediate neighbour.

Security in Greenland – and, by extension, in Northern Canada and Alaska – is thus not solely a military matter. Rather, there is a need for a comprehensive security strategy integrating market diversification and supply chain resilience, alongside discussions of how Greenland fits into defence institutions like the North American Aerospace Defence Command (NORAD). These are not either/or choices: a strong economic agenda infused with a security sensibility will build public confidence for new defence and intelligence partnerships with the Kingdom of Denmark's North American and European neighbours. These areas need trust to advance, which can be built by showing mutual concern for the economic futures of the regions of northern North America.

Geopolitical and geological Greenland

The situation starts with Greenland's geopolitical relevance. Geography and geology are the main factors, shaped by the current politics of natural resources and national self-determination. First, Greenland is the first point of contact to North America along many air and sea routes from the Arctic, notably from over the North Pole, and the North Atlantic; and secondly, it has large (largely untapped) mineral deposits. These interact with the politics of national self-determination in Inuit-majority Greenland and the many effects of climate change.

Aerospace was the primary concern for the US and Canada in the decades after the Second World War (US Military 2024). The US military

presence and infrastructure there since the early stages of the Cold War reflected a threat picture in Washington and Copenhagen (Jacobsen and Olsvig 2024) that Greenland itself was not a target but that its airspace was a potential avenue for Soviet nuclear attacks on the US (Bonhert and Savitz 2022). Dropping in importance after the fall of the Soviet Union in 1991, its strategic significance has now returned, mostly because of Russian advances and aggressive posturing in its strategic warfare capabilities – new types of high-speed missiles and torpedo technologies, among others – and heightened hostility to Europe and North America (Fink 2024).

Close behind aerospace, Greenland also is important to North Atlantic maritime defence security, especially for European countries looking to protect supply routes from North America on the North Atlantic Ocean. Two dimensions stand out. First, Greenland is the most westerly part of the "Greenland-Iceland-United Kingdom (GIUK) gap" in the North Atlantic, a NATO concept framing the primary waterways to the Atlantic Ocean from Soviet and now Russian bases in that country's northwest on the Kola Peninsula. Russia's modernized submarine fleet, associated weaponry, and its potential use of grey-zone warfare techniques by military and civilian surface ships have revived the strategic importance of the GIUK gap for NATO planners (Bonhert and Savitz 2022; Savitz 2021).

Second, evolving sea ice conditions because of warming atmospheric and oceanic temperatures along Greenland's coasts are broadening the maritime defence and security picture. Historically, Greenland's maritime security faced east, towards Europe, but now the west towards North America and north towards the Arctic Ocean are factoring into calculations. Difficult ice conditions on much of Greenland's east and north coasts (Dawson et al. 2024; Divine et al. 2023) will hinder hostile military and intelligence operations. But monitoring the waters of the high North Atlantic and Arctic oceans will gain importance for Nuuk and Copenhagen, as well as for Canada and the US. That will entail new or enhanced missions that cut across military and civilian agencies, with navies, coast guards, and fisheries patrols all having important roles.

Greenland's abundance of mineral resources augments its geographical location in terms of international relevance. It has large potential as a source of critical minerals, including the rare earth elements (REEs), needed for computing hardware and renewable energy generation and storage (Nordic Innovation 2021). These are central to the geoeconomic competition pitting

North America and the EU on one side against China and Russia on the other (Hanson et al. 2020). Climate change is not only melting Greenland's glaciers and sea ice but is raising its value as a source of digital and energy security. In addition, Greenland provides food security through its fish exports. This paper will explore the fisheries and mining sectors in more detail below.

Finally, domestic politics in Greenland are changing Nuuk's relationship to the world. Since 2009, Greenland has been self-governing, under the division of authorities in the *Greenland Self-Government Act* in the Kingdom of Denmark. The aspiration of a portion of Greenlanders is to see their homeland become independent. For foreigners that means close attention to the ebb and flow of Nuuk-Copenhagen relations is essential. While Copenhagen retains responsibility for Greenland's defence and foreign policy and Nuuk controls resource and economic development, the demands of contemporary security do not neatly respect clear institutional dividing lines between national security and economic affairs, and those lines are at times fuzzy (Olsvig 2022; McGwin 2022). Moreover, the desire for greater if not full independence has fuelled a quest to attract investments in large projects in order to provide Greenland the revenue base to replace the Danish transfers that currently fund much of the island's government, infrastructure, and social welfare system (Nielsen et al. 2024).

In addition, Copenhagen has accommodated a more visible role for Greenland in the Kingdom's foreign and defence affairs, despite these formerly being outside of Nuuk's areas of responsibility. For instance, Greenland is the lead of the Kingdom's chairship of the Arctic Council (Kingdom of Denmark 2025); a Greenlandic official is now a part of Denmark's representation at NATO headquarters in Brussels. Nuuk has also taken a larger role in defence and security discussions with the primary guarantor of its sovereignty, the US, reflected in the 2004 Igaliku agreement, a revised renewal of the 1951 US-Denmark defence agreement on Greenland, to which the government in Nuuk is now a third signatory (Jacobsen and Olsvig 2024). Greenlanders now have more direct say in most dimensions of their affairs, domestic and foreign. But its allies need to be conscientious about respecting the delineation of authorities and the attendant politics in the Kingdom of Denmark (Gad 2022). This reality will shape the necessity of direct engagement with Greenlandic authorities and society and Copenhagen for any country looking to involve the island in their international relations.

The background of Greenland and China's relations

Like many countries, Greenland since the end of the Cold War has seen economic opportunity in China and moved to seize it. As one group of authors has put it (Gad et al. 2018), China occupied a central position in Greenland's quest to "diversify dependence." Furthermore, the pursuit of its own international policy agenda has been a way to signal "independent agency" to the rest of the world. Skepticism exists about warning off Greenland from such interaction with China: some constituencies there allege that the strategic concerns of Copenhagen about China as Danish attempts to maintain its presence and power on the island.

Greenland has experienced bumps on the road in its relations with China. For instance, its government has made gestures over the years to the people of Tibet, which has attracted Beijing's ire (Gad et al. 2018). Greenland's 2017 decision to employ workers from China in fish plants, due to its persistent labour shortages, created another point of tension (Fang 2023). The island's small population and its experience of colonialism shape aspects of its attitudes toward any large external country, including China.

This has not dissuaded Greenland from reaching out to the world. As Greenland's 2024 foreign policy paper states, it wants strong ties with Europe and North America. Nonetheless, the policy also reaffirms that Greenland will pursue relationships and seek to expand markets in East Asia, a fact reflected by the decision in 2021 to open a representative office in Beijing. Nuuk frames the approach as a matter of competitiveness (Naalakkersuisut 2024). Even in a context of pressure from the US presidential administration, Greenland's foreign minister, Vivian Motzfeldt, reaffirmed in March that her government was "eager to strengthen" co-operation with China (Tatlow 2025). At a business level, building people-to-people ties is seen as crucial to maintaining market access in China. Both points suggest that China will have opportunities to develop its relations with Greenland in the future, for better or worse.

Greenland has also seen China as a source of investment for the mega-projects – projects without which the prospect of independence will retreat (Breum 2018). These have primarily been in mining, and so far have come to naught (Edstrøm, Hauksdóttir and Lackenbauer 2025; Andersson 2025).

Pressure from Washington and Brussels has certainly been one reason, but lukewarm interest and risk aversion on the Chinese side has also been a factor (Jiang 2021). Unfavourable market, sectoral and geopolitical conditions – unpredictable commodity prices and wariness about Chinese direct investment – make ownership of a major mine by PRC interests less likely at this time (Andersson and Zeuthen 2024; Kalvig and Lucht 021).

> *Canada should see co-operation with Greenland as a central component of its Arctic grand strategy.*

Danish authorities, however, are not sanguine. According to the Danish Defence Intelligence Service (2023 and 2025), China's interest in Greenland and its resources is long-term and, despite the reversals to date, will persist in seeking "possibilities" as a part of its polar ambitions. PET, the Danish internal security service, identifies the threat of Chinese intelligence activities, primarily from targeting government officials for sensitive information and influence activities (2023). Because of the blurry line between business enterprises and government agencies in China, PET assessed that trade is one area where geostrategic or security goals may be present.

These assessments suggest that increased access to Greenland, for instance through the island's growing tourism sector, will create more opportunities for China to conduct intelligence collection and malign influence activities. In addition, China's interest in scientific endeavours on the icecap or in the waters around Greenland is likely to be high (Gad et al. 2018; DDIS 2025), with the usual attendant risks of the data collected also having military applications. Denmark's Centre for Cyber Security (DCFCS) has pointed to a "very high" threat of cyber espionage against Greenland from Chinese agencies (2023).

Downstream dynamics: Greenland's economy and China

As the cyber threat implies, some of the threats to Greenland are offshore. Similarly in economic security, understanding the broad scope of the threat picture entails widening the lens from threats that occur because of presence in Greenland to ones that emerge from the pathways of the island's export sector.

Fisheries are central to Greenland's economy now and mining is a core piece of Greenland's economic development plans. Both have dimensions that expose Greenland to political risks in China. While tourism, infrastructure construction and scientific research are also areas of potential Greenland-China collaboration, these present different challenges. The prospects for Chinese investment in infrastructure are poor and likely to remain so for the coming years, it having been sidelined by Danish investments in important infrastructure like air and seaports (see sidebar, *Airports: Denmark vs. China*). Tourism from China will likely become a bigger segment of the Greenlandic industry (Visit Greenland 2024), but what threats it does reflect in terms of economic coercion are in Greenland – that is, upstream. Offers of scientific co-operation from China, so far rebuffed (Lipin 2022), are nonetheless still likely to be considered seriously in Nuuk, which will make counterespionage more important, given China's use of "military-civilian fusion" in its research activities, trying to deliver strategic industrial and military gains to China and its military, the People's Liberation Army (PLA) (Stone and Wood 2020; DDIS 2023 and 2025).

But the centrality of fishing and mining to Greenland's economic development demand the most attention. In these, it is the downstream risks that need

Airports: Denmark vs. China

Danish initiatives have shut out major Chinese investments, and China has had no success entering bidding for Greenland's signature infrastructure projects. This was most notable in the construction of three new airports in each of Nuuk, Ilullisat, and Qarotoq. A Chinese company had initially been among the bidders but was blocked in 2019 when the Danish government offered an investment counterproposal to Nuuk. In one sense, China's influence has been significant: motivating Copenhagen to step up to finance infrastructure development in Greenland because of security factors (Sejersen 2024).

to be addressed, due to China's track record of economic coercion in handling disagreements with small and medium-sized states. It has shown it will exploit interdependencies. The Greenlandic example is illustrative of the likely course of the A7-China relationship in the next five to 10 years.

Fisheries: Risk exposure

In a given year, seafood can account for as much as 98 per cent of exports and over half of the economy (Naalakkersuisut 2021) of Greenland. Shrimp and Greenland halibut are the main catches. As Chart 1 indicates, the fishery is a primary employer and revenue generator for the population, government, and industry. The structure of the Greenlandic industry, with its offshore and inshore components, also supports rural livelihoods in a widely dispersed coastal society. Fish is a staple of the national diet and Inuit foodways, culture, and family life (Hauptmann 2024).

CHART 1: Snapshot of Greenlandic fish exports

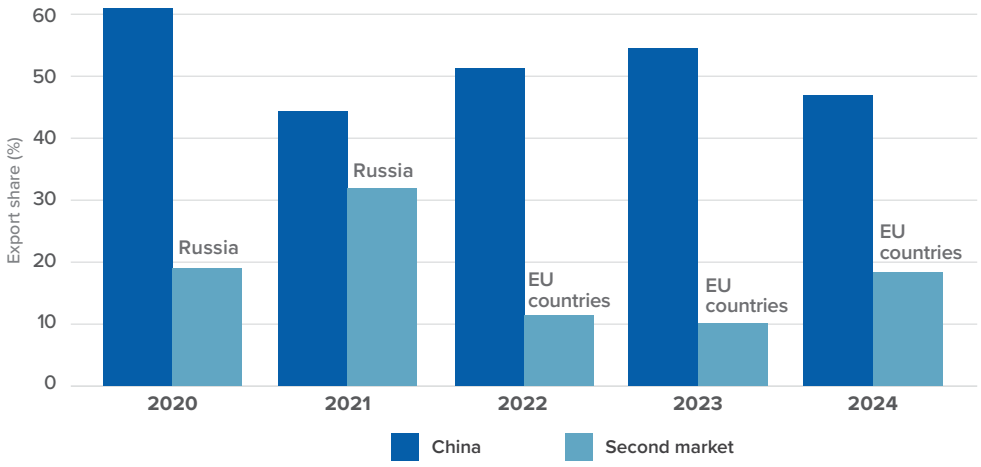
Total fish exports (2023):	114,200 metric tonnes
Export earnings (2023):	C$1.06 billion (5.28 billion Danish krone)
Government revenue from fishery (2022):	C$94 million (480 million Danish krone)
Employment:	3,000 to 4,000 people
Employment earnings:	C$314 million (1.6 billion Danish krone)

Sources: *Naalakkersuisut 2024b; Statbank Greenland 2024.*

China is a primary market. According to data from Statbank Greenland, China has been Greenland's largest export market for its fish since 2020, constituting a high of 60.9 per cent in 2020 and as low as 44.4 per cent in 2021 of total fish exports (see Figure 1). They have been growing steadily since 2014 and have been at a consistent high level since 2022 (Trading Economics 2024a).

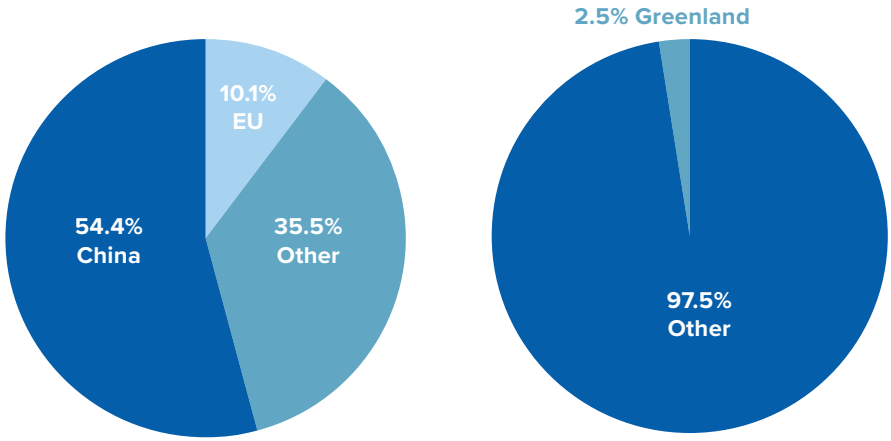
To use 2023 as an example, Greenland exported some 114,200 metric tonnes of seafood (frozen fish and crustaceans) to China. When integrated with data from the US Department of Agriculture on China's total fish imports

FIGURE 1: Far and away: China's leading position in Greenland's fish export portfolio



Source: *Statbank Greenland 2024.*

FIGURE 2: Fishing for trouble – Greenland's fish export exposure



Greenland's fish export markets (2023)

Chinese imports of Greenlandic fish as share of total imports (2023)

Sources: *Statbank Greenland 2024; US Department of Agriculture 2024.*

that year (see Figure 2), China accounted for 54.4 per cent of Greenland's fish export share, but Greenland only accounted for 2.5 per cent of China's fish imports of 4.6 million metric tonnes (US Department of Agriculture 2024; Statbank Greenland 2024). The Kingdom of Denmark continues to develop the market, signing a deal liberalizing fish exports to China in April (*High North News* 2025). China will almost certainly figure in Greenland's fish exports for the long term.

When seen through an economic security lens, the vulnerability here is clear (see Figure 2). In a country with a population of about 57,000, maintaining access to China's market is currently crucial to Greenland's economic and social well-being. Its small market share mean that China could easily turn to other sources to replace Greenlandic fish. That is obvious leverage – if China chooses to use it.

Caught in the net: China's economic coercion in the fisheries sector

China can be a problematic upstream player in terms of the conduct of its high-seas fishing fleet, a challenge that Greenland may face in the longer term, given China's stated interest in fishing in the Arctic Ocean and potentially in negotiating access to quotas of fish in Greenland's extended economic zone (EEZ). Overfishing and illegal and poor labour practices are among the activities revealed by recent investigations (Urbina 2023). But in the next decade, it is the downstream risks of market access to China – of economic coercion by hampering Greenlandic exports and of becoming entangled in China's manipulation to maintain its dominance in the critical minerals sector - that present economic security considerations for Greenland.

The analysis in the previous section indicates that Greenland would be susceptible to economic coercion should it or other parts of the Danish Realm irritate Beijing. Based on studies from other parts of the world, China uses a number of economic tools along an escalating spectrum of severity in its coercive diplomacy. One has been informal trade restrictions, in some cases by alleging health concerns and food-mislabelling issues, as was the case in canola and beef from Canada in 2019. Seafood has been repeatedly targeted: China has blocked Australian lobster from its market after political tensions arose in 2020; it blocked Taiwanese seafood in 2022 after Nancy Pelosi, then the speaker in the US House of Representatives, visited the island (Johnson 2024; Zhang 2022). Negative publicity campaigns have also applied, including boycotts of specific companies (rather than states). While China attempts to

evade international trade arbitration by denying that these campaigns are tied to political grievances, case studies reveal a strong correlation between political tensions and the deployment of coercive economic tools (Hanson et al. 2020).

Given Greenland's market presence in the food industry and the preponderance of its fish exports, Greenland would be susceptible to differing approaches (Hanson et al. 2020). It has already faced the threat of such coercion: recall China's angry response to a potential Greenland-Tibet soccer game in 2001, mentioned above. At that time, China threatened restrictions on imports of Greenlandic shrimp (Gad et al. 2018). More recently, another part of the Danish Realm faced threats regarding exports of its fish, when the Chinese ambassador in 2019 applied pressure on the Faroe Islands about their decision on whether to include Huawei in the bidding for telecommunications infrastructure there (Cristiani et al. 2022).

For China to undertake such pressure on Greenland would require a political trigger. A variety of issues could prompt it: sensitivities around the status of Taiwan, Tibet, Hong Kong, and Xinjiang; incidents involving its citizens; and the adoption of policies that disadvantage Chinese firms. Given that the overall trajectory of the China-Denmark relationship has deteriorated, the likelihood of such an event has grown. Greenland sits in a particular space here: as a small, Inuit-majority country, Beijing might be more cautious to avoid being seen as picking on it. But because it is a part of NATO with close ties to North America and Europe, China could exploit its exposure in the fisheries sector to send a message to it about the need to acknowledge China's interests.

There are ways to prepare for such threats. Trade diversification is the most obvious one. That is occurring after a volatile decade in markets. Geopolitical and COVID-19 upheavals were two major factors; China's aggressive domestic shutdowns to fight COVID-19 disrupted Greenlandic exports there, and Russia's full invasion of Ukraine in 2022 shuttered a lucrative market that had accounted for around 20 to 30 per cent of Greenland's exports (Breum 2022; see Figure 1). In addition, Brexit cost Greenland an important export market, as a new trade agreement needed to be negotiated (Greenland is outside of the EU common market, thus the requirement for a separate deal).

Progress is being made. Greenlandic fishing companies are seeking to diversify their purchasers. The next biggest established markets are in the EU, which imported €760 million of Greenlandic fish products in 2023 (European Commission 2024a). Other markets in Asia, like Japan and Taiwan, also

figure in the export market (Organization for Economic Complexity 2024; Agriculture and Agri-food Canada 2022). Market presence in Canada and the US are, however, negligible (USAID; Trading Economics 2024). A new bilateral free trade agreement should restore the UK to being a major market, as it was before "Brexit" (Gov.UK 2022). The paper's final section will look further at how Canada and its allies might bolster Greenland's resilience in the fisheries sector.

Mining: Processing risks

Greenland's fledgling mining industry is the launch pad for accelerating economic growth on the island. It is also a key point of economic security, for Greenland itself and for its North American and North Atlantic neighbours. Its mining potential is tantalizing but largely untapped. As projects are examined, their economic security will be an essential consideration in the cost-benefit analysis.

In general, government and geological surveys indicate Greenland has large upside potential, with the extent of most reserves unknown due to a lack of exploration and detailed knowledge (Naalakkersuisut 2020; see Map 1). Among the valuable minerals Greenland possesses are rare earth elements (REEs), nickel, graphite, molybdenum, and platinum metals. Table 2 provides some details on Greenland's deposits, current projects and their geoeconomic significance.

However, there are countervailing forces slowing the Greenlandic mining sector. Foremost among them are the high costs of extraction from remote locations that lack infrastructure. Domestically, concerns about the environmental costs have often led to resistance from communities that derive a large part of their nutrition from hunting and fishing; concerns about uranium and its consequences for the environment and for international peace (due to uranium's use in nuclear weapons) have led to the demise of a large project (Cox Alomar and Gad 2024; Jamasmie 2021). Nonetheless, Greenlandic interest in attracting investment is likely to remain high, for reasons of economic development and, for some, aspirations for ways to

TABLE 2: Greenland's potential strategic mineral resources power

Mineral	Greenland's deposits	Geoeconomic significance
Rare earth elements	Known deposits of 34,792,000 tonnes; more finds anticipated	• Greenland as a major potential source in a sector heavily dominated by China
Nickel	An estimated 3.8 million tonnes and its geology is considered promising for more finds	• Nickel mostly comes from Indonesia and the Philippines and is refined in China and Russia • Alternate refineries exist in Canada, Finland, and Norway
Graphite	"Promising" signs for "additional major potential"	• China currently produces 60 per cent of the world's output
Molybdenum	A Canadian-owned mine in eastern Greenland is nearing production, with an offtake agreement in place with a Finnish company	• The mine will supply as much as 30 per cent of EU demand • China currently dominates the sector
Platinum group metals	"Promising, world-class" deposits of platinum group metals	• Most supply comes currently from Russia and parts of Africa

Sources: *Geological Survey of Denmark and Greenland 2018a, 2018b, 2019; Mining Technology 2023; Nordic Innovation 2021; US Geological Survey 2024.*

replace the Danish block-grant of annual fiscal transfers and move towards independence (Breum 2018). But it will drive hard terms.

Geopolitical conditions are not ripe for Chinese firms to invest in Greenland. Investors are wary of partnering with PRC firms that might draw the attention of regulators wary of the security implications of foreign investments from authoritarian states. The relationship between Chinese mining enterprises and the Chinese Communist Party (CCP) complicates China's position in Greenland. The demands of the one-party state on Chinese companies often make them appear as political agents to Western audiences and not solely profit-seeking enterprises. Domestic dynamics in China often encourage private firms to partner with state-owned enterprises or to frame their investments overseas as contributing to signature policies of the Chinese Communist Party (CCP). In addition, the US and EU have put counteroffers on the table to draw Greenlandic mines into their own

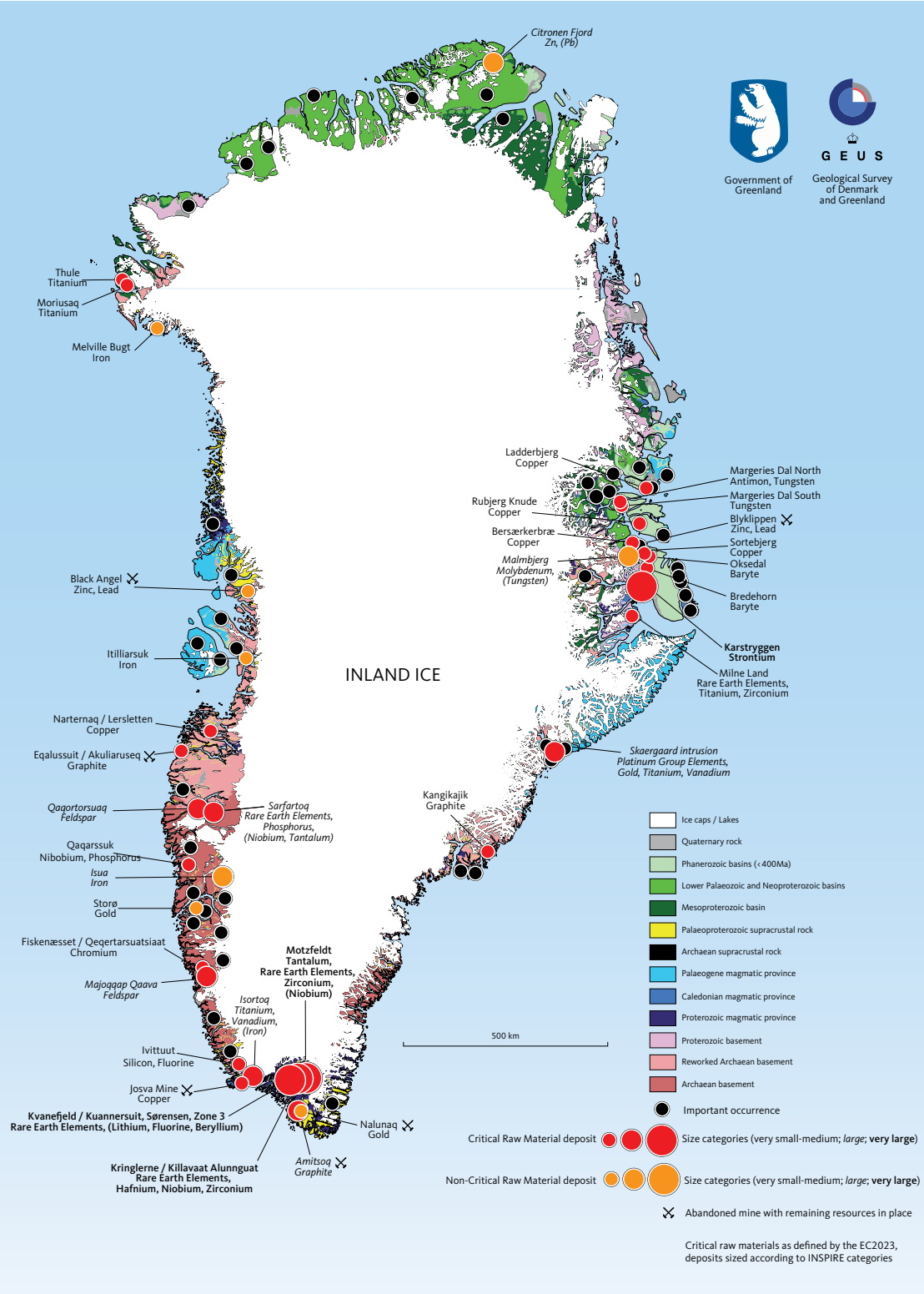
supply chains (see section 4). These policies further diminish the interest of PRC-based companies in owning Greenlandic mining rights (Andersson and Kalvig 2022; Jiang 2021).

As this suggests, contemporary geopolitics shapes the risk profile for the sector. Greenland as a part of allied supply chains therefore has the potential to compete with China in many strategic mining sectors and increase the resilience of North American and European supply chains. For the US and EU, mines in Greenland would lower geopolitical risk by shortening supply lines, reducing dependence on Russia, China, and other dominant producers, and provide "offtake" for (the limited set of) refineries in Europe and North America, both extant facilities and those to come (See "Counter moves: Greenland in North American and EU supply security.") Amid the current geoeconomic struggle to secure supply chains for the manufacture of digital hardware, renewable energy generation and electricity storage, Greenland figures as a potentially large source of critical minerals, and a key factor in North America's and the EU's ability to meet their economic and political objectives – which China does not want to see them achieve.

When Greenland and Denmark (and Canada and the US) are considering economic security, Chinese investment and mine ownership are no longer the major challenge (Andersson and Zeuthen 2024). Chinese firms have shown interest in investing in Greenlandic projects in the past, but China now has poor prospects to own or hold shares in Greenlandic mining projects and Chinese firms likely understand this reality. After involvement in four potential mining projects failed, Chinese interest in investing in Greenland's mining sector appears to have largely dried up (Andersson and Zeuthen 2024). The investments on the table included a large iron ore mine near Nuuk and the substantial REE deposit at Kuannersuit/Kvanefjeld. For a variety of reasons, these projects failed to come to fruition; the participation of Chinese companies is one reason for the failure, but others were much weightier, such as low commodity prices and domestic concerns about pollution.

It is by looking downstream in the critical mineral supply chains that the potential threats to Greenland become clearer. First are state interventions by China and its ruling Communist Party to tip the table in favour of China. In a climate of geoeconomic competition, China is aggressively protecting the dominance of critical mineral processing sector (Exner-Pirot 2024). China sees it as a strategic sector, and its position in processing (90 per cent) of the

FIGURE 3: Green Fields: Map of Greenland's geology and raw material deposits



Source: *Geological Survey of Denmark and Greenland and Naalakkersuisut 2025.*

world's raw critical minerals – also known as mining "offtake" – creates an interdependency vulnerable to market manipulation and economic coercion (Castillo and Purdy 2022). Without significant investments in processing capabilities by Canada and its allies, China will remain the primary potential purchaser of the offtake from Greenlandic mines, regardless of the nationality of the owners (Kalvig and Lucht 2021; Andersson and Kalvig 2022; Dubois and Gagaridis 2018). The CCP will throw copious state resources into protecting its firms' sectoral dominance.

China has weaponized its presence in the critical minerals sector's supply chain.

In the face of the US and EU's efforts to diversify their sources of these minerals, China is using its market position to force down prices to drive competitors into their arms or out of the market. We have seen this in the Canadian North, where Chinese mining interests looked to invest in a struggling REE mine in order to either redirect its output to refineries in China or shut them down entirely (Exner-Pirot 2024). Over the next decade, Greenlandic mining projects that go into production will not be exempt from such pressures.

Like in the fisheries sector, economic coercion is another downstream risk. China has weaponized its presence in the critical minerals sector's supply chain. Notable examples are its recent retaliation against US tariffs by trimming supply of tech-important minerals (Baskaran and Schwartz 2025) and the earlier case when China invoked export restrictions of two critical minerals to Japan over a territorial dispute in the East China Sea (Nguyen and Onstad 2013). By either capturing offtake or denying Greenlandic mines access to China-based processing facilities, China has the capability and motive, should it wish, to hamper Greenland's role in global mineral supply chains.

Counter moves: Greenland in North American and EU supply security

Thus, Greenland needs a resilient mining sector. To deal with the potential for Chinese malign interventions, integration into European and North American supply and value chains is the best geopolitical bet. Nuuk has emphatically endorsed that direction (while clearly stating it will still seek ties in Asia, prominently but not exclusively in China). Greenland's relationship with the EU, the US and Canada are key elements of building resilience. The EU has cemented strategic agreements with Greenland. The US, which had been moving in this direction during the first Trump and then Biden presidencies, has changed course in the second Trump administration, making progress less certain on supply security. For its part, Canada is now making positive signals but has failed to grasp the unique opportunities for partnership that it has for partnership with Greenland and the rest of the Kingdom of Denmark.

The United States:

Economic security is a key factor of the US's relationship with Greenland's government. Previously, the US has framed itself as a "geopolitical partner" to Greenland, which it has described as potentially having a "key role" in securing US supply chains (US Department of State 2019 and 2024). In 2019, the US and Greenland signed a Memorandum of Understanding on mineral development. Several US government agencies are supporting exploration and extraction projects through loans, debt financing, credit insurance and other financial tools. These agencies are the International Development Finance Corporation (DFC), Trade Development Agency (USTDA), the Department of Energy and the US Export-Import (EXIM) Bank (US Department of State 2024). In addition, improving the general climate for business in Greenland was a focus for USAID, and improving region-wide investment screening, including with the Kingdom of Denmark, was an objective cited in the 2023 Implementation Plan for the US's Arctic strategy, giving CFIUS – the US's investment screening agency – a role (White House 2023).

That position has taken a radical turn during Donald Trump's second presidency. Statements about "buying" the island from Denmark were followed by threats of outright annexation, with the possibility of force put

on the table. These, unsurprisingly, have attracted the most attention; more elaborate discussions about Greenland's becoming a territory like Puerto Rico or entering into a Compact of Free Association (COFA) with the US have animated backers of the idea (Gray 2024; Gray, Arha, and Dans 2024). Most of these ideas have met with opposition from Greenlanders. In public opinion polling done in January, 85 per cent of respondents said they were against joining the US (Verian Group 2025). That reflects a growing skepticism towards the US and China among the Greenlandic population, reflected in public opinion research conducted in 2021 and 2024 (mostly before President Trump's statements). In those polls, 79.5 per cent of Greenlanders were against following US policy on China, while 57.6 per cent saw China as a negative influence in the world. A majority (55.4 per cent) wanted to co-operate less with China, but support for co-operation with the US dropped from 69.1 per cent in 2021 to 59 per cent in 2024 (Nielsen and Ackrén 2024). Advancing co-operation has become harder in the North American Arctic – a dynamics Canada needs to address.

The European Union:

From the other side of the Atlantic Ocean, the European Union is fully in the mix. In 2024, the EU put into law the *Critical Raw Materials Act* (European Commission 2024c), one of Brussels' signature efforts to improve the EU's geoeconomic competitiveness and resilience. Part of that act involves establishing reliable supply chains with likeminded partners – such as those found in the Kingdom of Denmark. It and Greenland signed in late 2023 a Memorandum of Understanding (MoU) that aims to build a comprehensive relationship in critical mineral exploration, extraction, and refining. The MoU emphasizes mutual benefit from the value chain and environmental, social and governance (ESG) standards and specifies co-operation in trade, project development, infrastructure, skills training, and research (Naalakkersuisut 2023). Although now behind schedule (Benchmark Source 2024), the sides committed to producing a roadmap to chart the MoU's progress. The EU followed up the move by opening an office in Nuuk in 2024, further expressing its commitment to raising the profile of the EU's relationship with Greenland (European Commission 2024). Greenland can also expect interest from individual EU member states. Many have their own programs to stimulate supply-chain diversification, for instance France and Germany.

Outlook and policy implications: An action plan for Canada

China will remain a factor in Greenland's future. Over time, the situation will evolve. China is likely pursuing a "wait and see" strategy (Sørensen 2024), but there is little doubt that Greenland will be a subject of interest to China, to revitalize the Polar Silk Road dimension of the Belt and Road Initiative and give it more opportunities to pursue scientific research and people-to-people contact. China is likely to see Greenland as one bit of its engagement in the Arctic (Jiang 2021). It will not want to depend exclusively on Russia to develop its polar power.

Canadian leadership can be part of the solution. The government in Nuuk has signalled its goal of expanding ties with Canada (Naalakkersuisut 2024a). Canada has its own distinct comparative advantages, as Greenland's most proximate neighbour and as part of the transnational Inuit homeland, Inuit Nunaat. The connections of the Inuit people and Canada's position in mining, fishing, and maritime security (notably coast guard, search and rescue and fisheries patrol) are among the factors that can shape the relationship. Canada's alliance with the US and Denmark in NATO and tightening co-operation in trade, defence, and security with the European Union further augments the range of the doable.

Canada's Arctic Foreign Policy strategy (Government of Canada 2024), released in December, mentions Greenland 21 times – up from nine times in the 2019 *Arctic and Northern Policy Framework*. Among the headline items was the plan to open a new consulate in Nuuk, as well as important language on integrating the Canadian Coast Guard into Canadian diplomacy and security, building northern "strategic resilience" with Greenland and Alaska, and developing a "more coordinated approach" to build on the momentum of agreements between Greenland and Nunavut. This positions Canada to pursue a multilayered strategy, placing economic security at its core, complemented by a robust defence and national security agenda. Because these cut across the responsibilities of Denmark and Greenland (see Section 1), careful diplomacy and thorough knowledge of the Danish Realm's division of authorities will be crucial (Gad 2022).

To that end, Canada should see co-operation with Greenland as a central component of its Arctic grand strategy, developing it in ways that build readiness to counter Chinese economic coercion and supply manipulation, and draw the US and EU in for a robust economic security framework in northern North America and the North Atlantic. Much can also be done to reshape and expand the scope of Canada's defence co-operation with the Kingdom of Denmark, but an economic security agenda deserves its own development as a line of effort. Key recommendations for advancing the economic security pillar in the relationship between Canada, Greenland and Denmark are:

- A signal of high-level commitment to initiating such an agenda through a visit by Prime Minister Mark Carney to Greenland, to open the Canadian consulate in Nuuk and hold discussions with his Greenlandic and Danish counterparts on security in the Arctic, including through strengthening the resilience of northern economies.
- Initiate steps toward a northern North America economic security and prosperity summit, with governments, civil society and the private sector from northern Canada, Greenland, Denmark, the US, and its state of Alaska.
- Launch Greenland-Canada sectoral working groups on mining and fisheries to build competitiveness and resilience in a geopolitically uncertain context, for example through jointly identifying new markets and supply chain initiatives.
- Make clear the importance of Greenland's security and prosperity to Canada in enhanced engagement with the Nordic countries, EU, and NATO, as a means to fuse the Arctic and North American perspective in transatlantic economic relations.
- In all these recommendations, involve the Northern Indigenous governments, the three Canadian territories, and the provinces of Quebec and Newfoundland and Labrador in conceiving the agenda for these contacts, with support from the federal government's Public Safety, National Defence, and Global Affairs departments, as well as the Canadian Coast Guard and Industry, Science and Economic Development Canada.

Canada should not hold back from an unapologetically bilateral strategy with Greenland and Denmark. Canada, Greenland, and Denmark are all navigating a period of turbulence with their essential US partner. That calls

for, rather than precludes, initiative to undertake a Canadian-interests-and-values-driven approach. The challenge for Canadian policymakers is to develop a line that is "plug and play" with US partners, able to run independently with Greenland and Denmark but which would seek to leave space for US federal and Alaskan state, Indigenous, and private interests, should they signal interest in participating. A concerted effort to assert a democratic, rules-based, self-determined and prosperous Arctic demands Canada's leadership. Forging stronger economic security co-operation is the place to start. MLI

About the author

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