



Ontario's Mining Equipment

Profile of Opportunities for Joint Ventures

*Buyers – Sellers Session
International Mining and Machinery Exhibition
November 5, 2008
Kolkata, India*

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Modern Mining in Ontario

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- 100 years
- Incremental Steps
- Cycles of ups & downs
- Macro Economy based on supply and demand
- Transition from exportation from raw material to value-added products and services
- Formation of highly dynamic cluster of mineral related industries and organizations



North ★ Pole

Arctic Ocean

Alaska (USA)

Yukon Territory

Northwest Territories

Nunavut

Atlantic Ocean

CANADA

Hudson Bay

Newfoundland and Labrador

Pacific Ocean

British Columbia

Alberta

Saskatchewan

Manitoba

Quebec

Prince Edward Island

New Brunswick

Nova Scotia

Ocean

United States of America

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Atlantic Ocean

Ontario's GDP compared to other countries

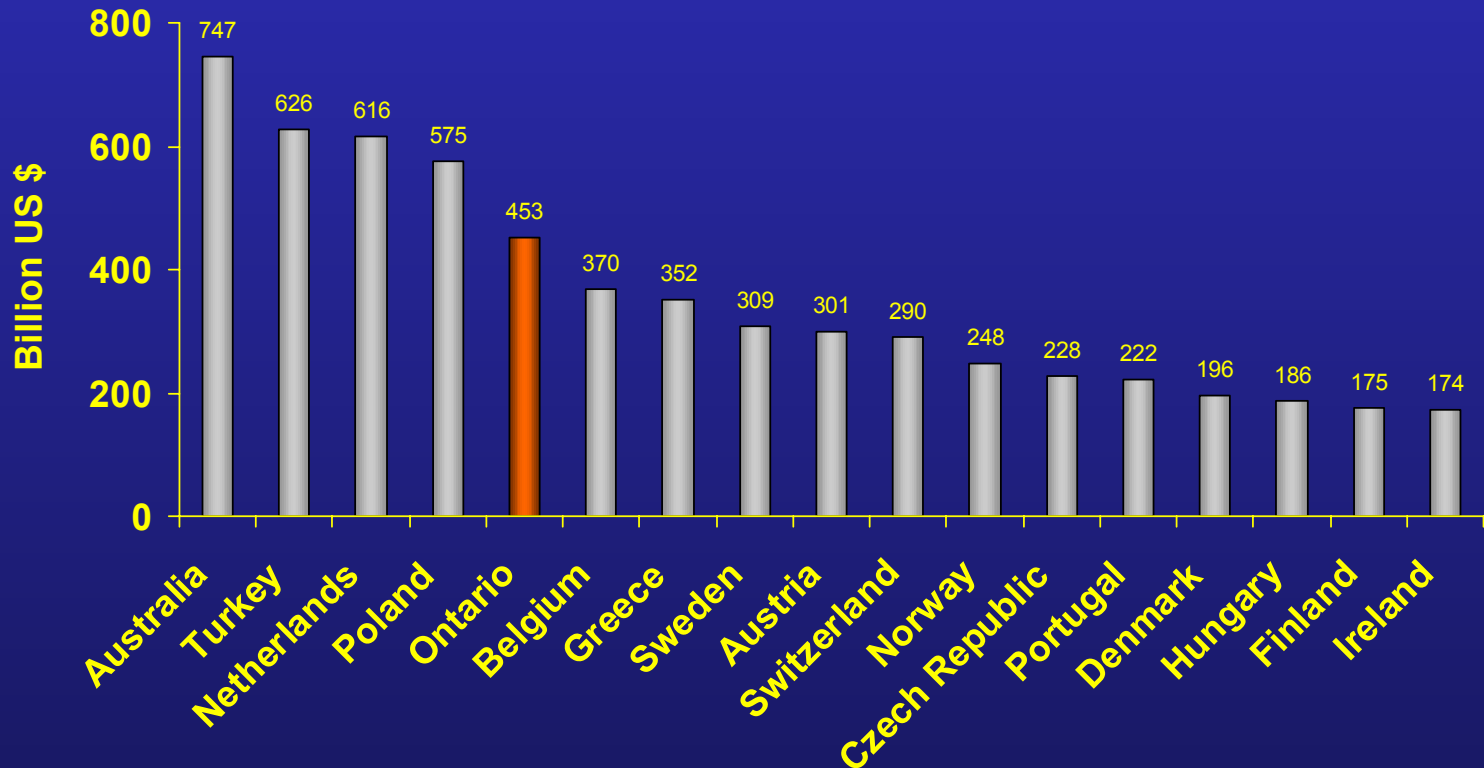


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Larger than those of many countries



Latest figures at PPP for all OECD countries are available for 2006. Estimates for Australia, Ontario and Ireland
Source: Ontario Ministry of Finance, OECD



Mining in Ontario – Rich Mineral and Metal Endowment

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- # 1 in Canada in Platinum and Nickel Production
- On The World Stage...
 - # 3 in Palladium
 - # 4 in Platinum
 - # 5 in Nickel
 - # 9 in Cobalt
 - # 9 in Gold
 - # 16 in Copper
 - # 6 in Silver
 - # 17 in Zinc



Mining in Ontario - Operations

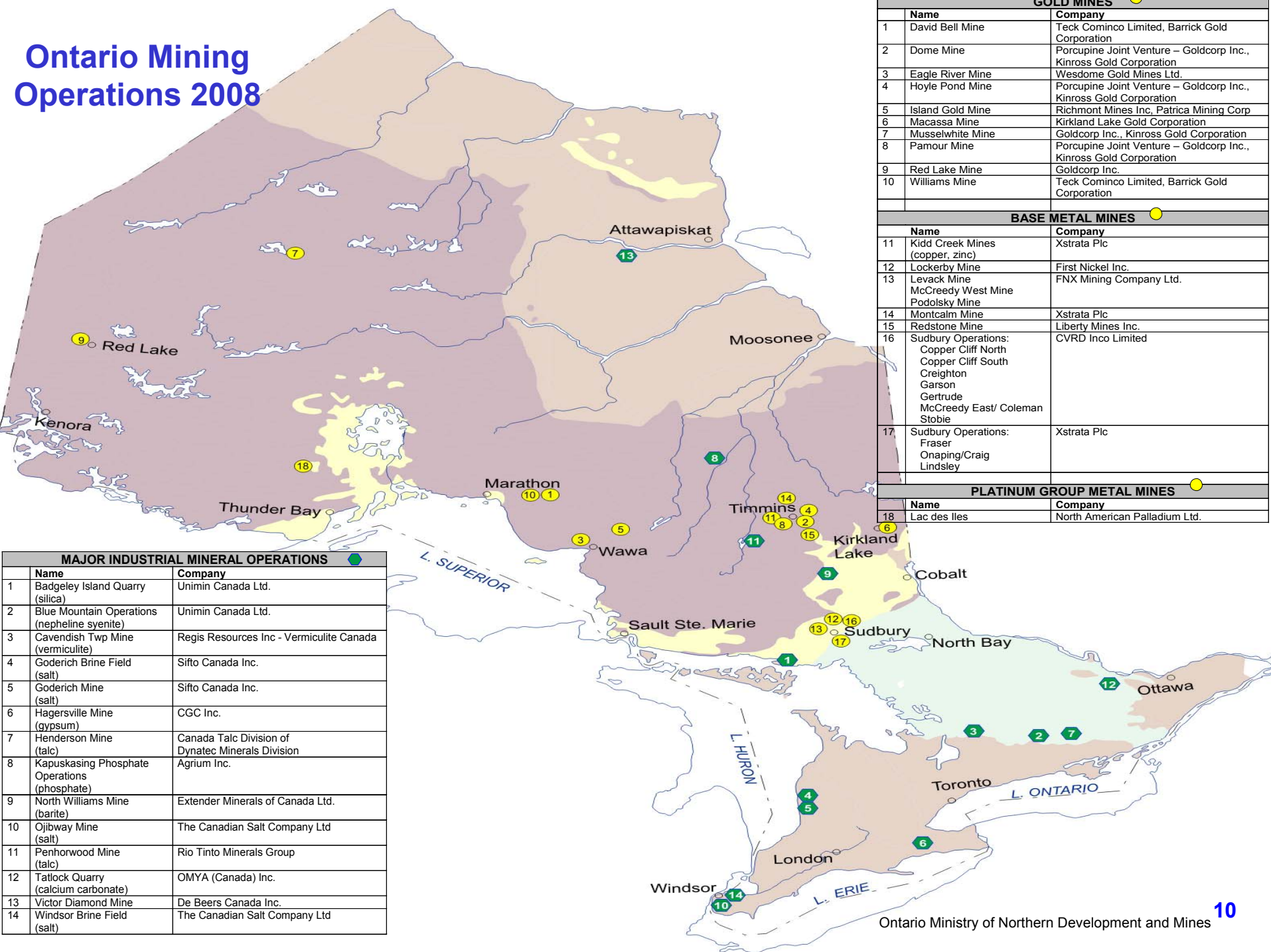


41 Operating Mines

- 15 Base Metal – 6 new base metal mines on the horizon
- 9 Gold – 3 new gold mines on the horizon
- 1 Platinum Group Metals (PMG) (Lac des Iles)
- 1 Magnesium, Calcium & Strontium (Timminco Metals)
- 1 Diamond (Victor) – testing more kimberlite pipes
- 14 Industrial Minerals (salt, gypsum, phosphate, talc, nepheline syenite, calcium carbonate, silica)
- 140 Stone Quarries (dimension stone, crushed aggregate)

800 Exploration Projects

Ontario Mining Operations 2008



GOLD MINES		
Name	Company	
1 David Bell Mine	Teck Cominco Limited, Barrick Gold Corporation	
2 Dome Mine	Porcupine Joint Venture – Goldcorp Inc., Kinross Gold Corporation	
3 Eagle River Mine	Wesdome Gold Mines Ltd.	
4 Hoyle Pond Mine	Porcupine Joint Venture – Goldcorp Inc., Kinross Gold Corporation	
5 Island Gold Mine	Richmont Mines Inc, Patrica Mining Corp	
6 Macassa Mine	Kirkland Lake Gold Corporation	
7 Musselwhite Mine	Goldcorp Inc., Kinross Gold Corporation	
8 Pamour Mine	Porcupine Joint Venture – Goldcorp Inc., Kinross Gold Corporation	
9 Red Lake Mine	Goldcorp Inc.	
10 Williams Mine	Teck Cominco Limited, Barrick Gold Corporation	

BASE METAL MINES		
Name	Company	
11 Kidd Creek Mines (copper, zinc)	Xstrata Plc	
12 Lockerby Mine	First Nickel Inc.	
13 Levack Mine McCreeedy West Mine Podolsky Mine	FNX Mining Company Ltd.	
14 Montcalm Mine	Xstrata Plc	
15 Redstone Mine	Liberty Mines Inc.	
16 Sudbury Operations: Copper Cliff North Copper Cliff South Creighton Garson Gertrude McCreeedy East/ Coleman Stobie	CVRD Inco Limited	
17 Sudbury Operations: Fraser Onaping/Craig Lindsley	Xstrata Plc	

PLATINUM GROUP METAL MINES		
Name	Company	
18 Lac des Iles	North American Palladium Ltd.	

MAJOR INDUSTRIAL MINERAL OPERATIONS		
Name	Company	
1 Badgeley Island Quarry (silica)	Unimin Canada Ltd.	
2 Blue Mountain Operations (nepheline syenite)	Unimin Canada Ltd.	
3 Cavendish Twp Mine (vermiculite)	Regis Resources Inc - Vermiculite Canada	
4 Goderich Brine Field (salt)	Sifto Canada Inc.	
5 Goderich Mine (salt)	Sifto Canada Inc.	
6 Hagersville Mine (gypsum)	CGC Inc.	
7 Henderson Mine (talc)	Canada Talc Division of Dynatec Minerals Division	
8 Kapuskasing Phosphate Operations (phosphate)	Agrum Inc.	
9 North Williams Mine (barite)	Extender Minerals of Canada Ltd.	
10 Ojibway Mine (salt)	The Canadian Salt Company Ltd	
11 Penhorwood Mine (talc)	Rio Tinto Minerals Group	
12 Tatlock Quarry (calcium carbonate)	OMYA (Canada) Inc.	
13 Victor Diamond Mine	De Beers Canada Inc.	
14 Windsor Brine Field (salt)	The Canadian Salt Company Ltd	



Ontario Mineral Industry Cluster



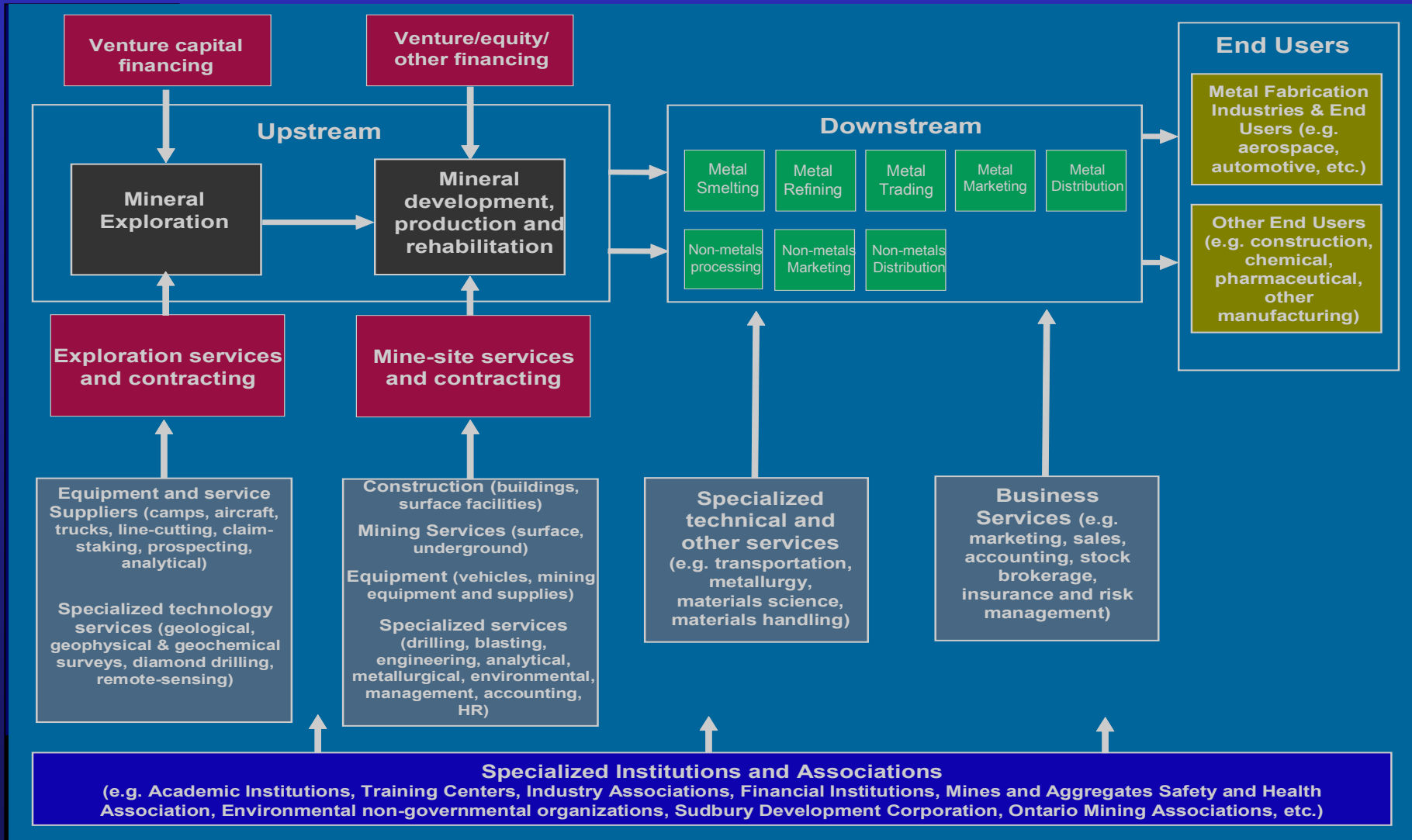
A cluster is a group of industries and institutions that drive wealth creation, primarily through innovation and the export of goods and services. Clustered industries mutually reinforce and enhance each others competitive advantage. The Ontario Mineral Industry Cluster includes major mine operators, exploration companies, financiers, equipment suppliers, research and education institutions.

Examples of famous clusters:

- *Houston's Oil and Gas*
- *California's Wine*
- *India's Diamond Drilling and Polishing*
- *Finland's Mining Equipment and Services*
- *Hollywood's Movie Production*
- *Canada's Telecommunication*



Ontario Mineral Industry Cluster



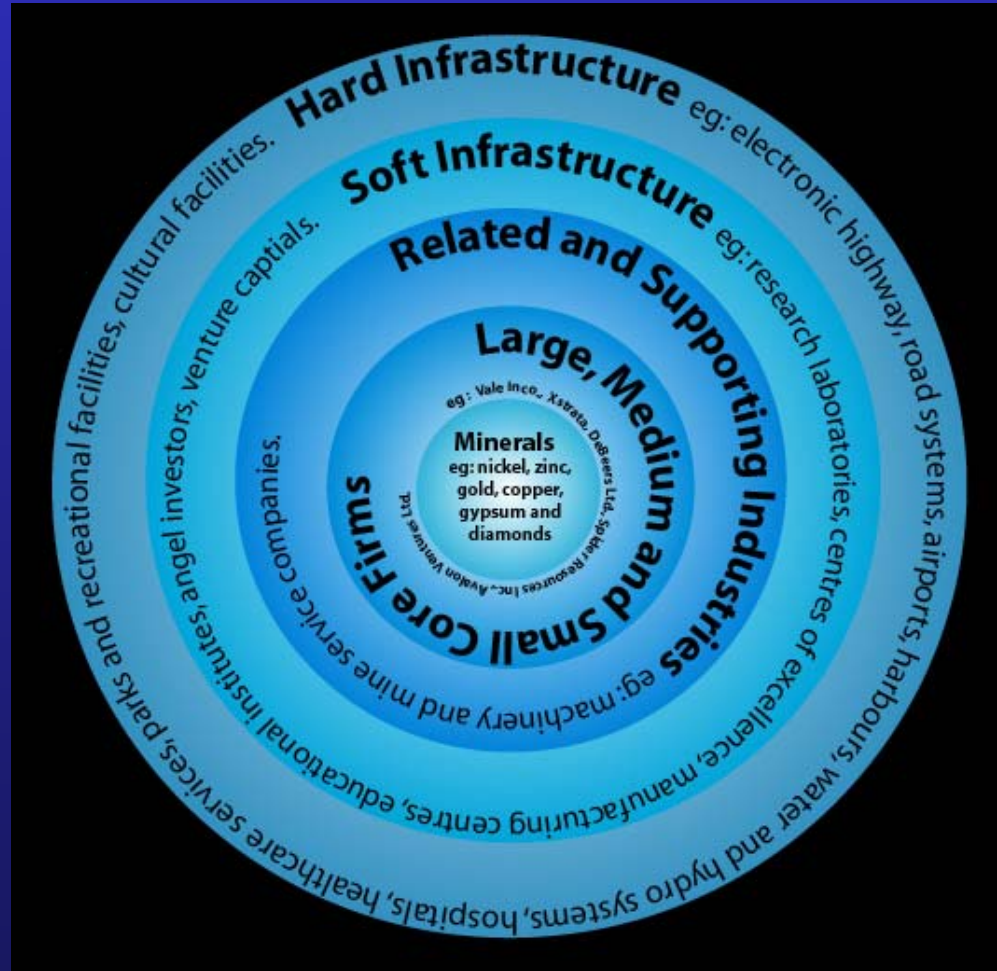


Ontario Mineral Industry Cluster

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Source: Design Adopted from Cluster Navigators Ltd.



Mining Equipment and Services - An Overview

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- Over 40% of mining equipment suppliers are from Ontario.
- Sudbury, North Bay and Timmins constitute 35-40% of mining supply equipment and services for underground mines operating in Canada.
- The mining suppliers are both home grown and international.
- Significant number of suppliers provide mining related equipment and services in 75 countries. Ontario companies are thriving by serving the growing needs of mines across Canada, the U.S., Latin America, Asia, Africa, Australia, Eastern Europe and the Middle East.
- Mining companies have a commanding international presence in geophysical instruments capturing 90% of the world market.



Mining Equipment and Services An Overview (cont'd)

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- **Bulk Materials Handling** – conveyors, crushers, storage, conveyance systems
- **Steel Fabrication** – skips, cages, hoisting, stainless steel technology
- **Environment** – environmental controls and monitoring, tailings, water treatment, rehabilitation and remediation
- **Exploration** – Aerial mapping services, borehole surveying, data management, drilling equipment
- **Mineral Processing** – feeders, filtration, metallurgical engineering, process control equipment
- **Surface and Underground Mining** – communication equipment, ventilation, underground transport
- **Health and Safety** – fall arrest, mine rescue expertise
- **Mine Development Contracting Expertise** – sinking shafts, sedimentation
- **Mine Engineering** – contract management, consulting services

Note: A "Profile of Ontario Mining Equipment and Suppliers" is available at www.omicc.ca/resrouces.html



Share of Mining Equipment and Services

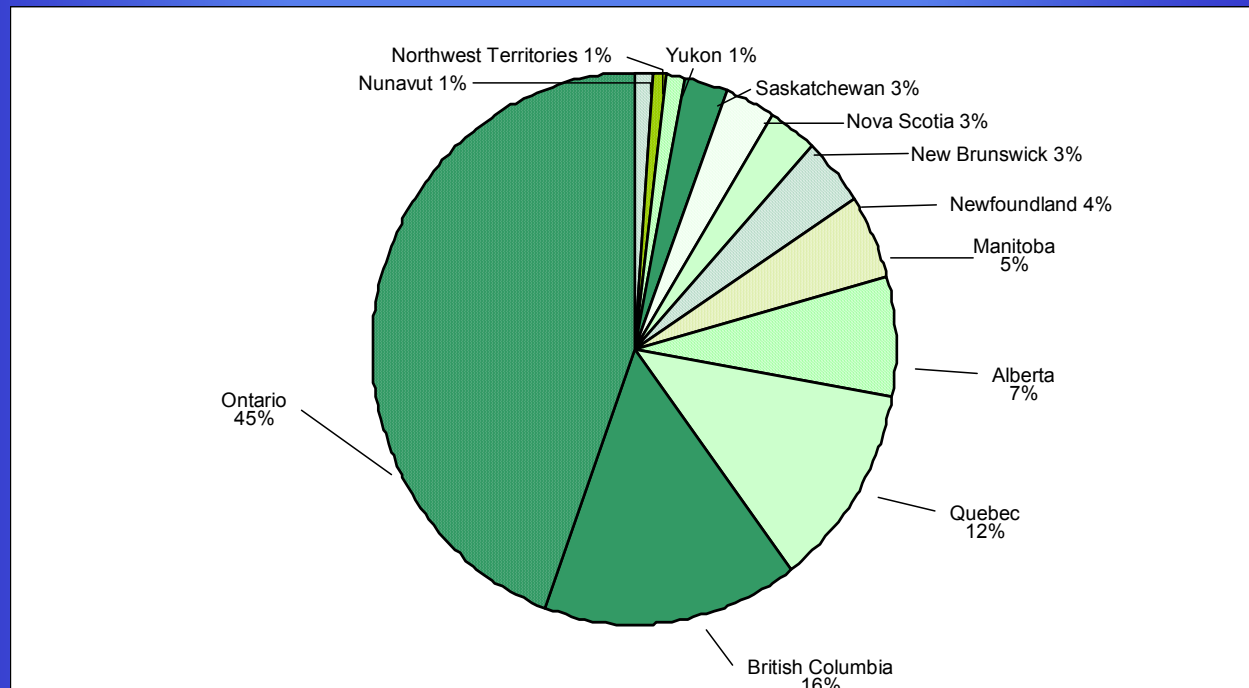
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CANADIAN SUPPLIERS OF SPECIALIZED MINING GOODS AND SERVICES

Distribution of Head Offices in Canada, by Province and Territory



Source: Natural Resources Canada, based on advertising by 2195 companies from trade publications



Mining Innovations & Technologies

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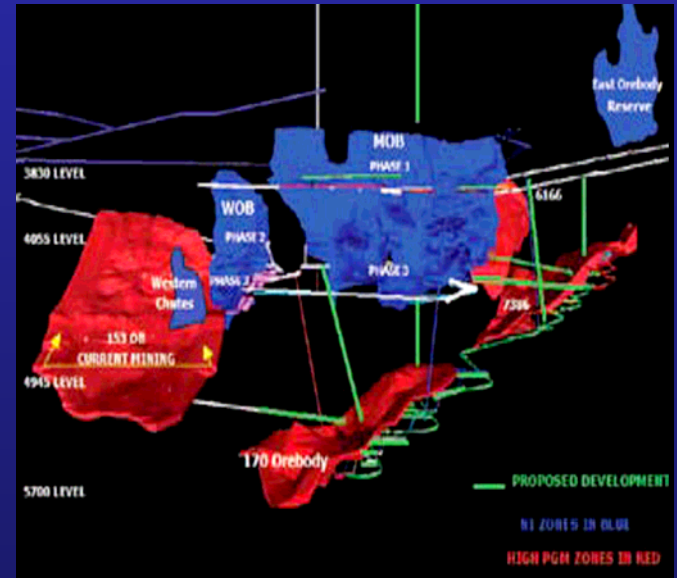


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Ontario is the birthplace for a long list of innovations with worldwide impact, from heart pacemakers to BlackBerry wireless devices and Academy award winning 3-D animation software.

New technologies for processing nickel and copper ores and minerals

- Lowering SO₂ emissions
- Lowering engine emissions and energy consumption
- Robotic and remote mining technology
- 3D visualization and computer process modeling
- Laser surveying technology
- GPS applications to mining equipment and open-pit mines
- Innovative ground control measures and paste back-fill technology





Why Leading Mining Equipment and Service Companies Choose Ontario



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- Rich mineral endowments – leads to exportation, mine development
- Competitive cost advantages and generous R&D incentives
- A dynamic Ontario Mineral Industry Cluster - Critical Mass of mining suppliers, education and vocational institutions
- A strategic location to serve North American and global customers



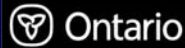
How India can develop its local mining equipment suppliers



- **Major mine operators** – procure from local supplies; focus on core businesses and outsource equipment and services to local suppliers
- **Local suppliers** – establish close links with the operators, develop joint ventures, act as distributor of international equipment supplier, form Association of suppliers
- **Government** – play ‘facilitator role’ by bringing major mine operators and local suppliers together to encourage dialogue and interaction, provide tax incentives to start-ups, legislation encouraging procurement from local suppliers, encourage Trade Missions where buyers and suppliers connect.

India & Ontario

A Match Making Session



- It is proposed that Indian mining companies (buyers and sellers) come to Ontario and meet with the Ontario mining equipment and service suppliers.
- The Ministry of Northern Development and Mines working closely with the Ministry of International Investment and Trade would be pleased to host a Match Making Session.
- Benefits of such a session would include:
 - networking opportunities and face to face interaction opportunities
 - business development and joint venture opportunities
 - exposure to Ontario's mining equipment and expertise



Ontario is Open for Business



For information on the mining equipment and technology, opportunities for Joint Ventures and import and export, please contact the following:

Mining Equipment and Services, Trade and Investment:

Stephan Poulin, Sector Lead – Mining Equipment and Services
Ontario Ministry of Northern Development and Mines

> Stephan.poulin@ontario.ca

Gregory Wootton, Manger – Manufacturing Sector
Ontario Ministry of International Trade and Investment

> Gregory.wootton@ontario.ca

Corie McDougall, Area Director, South and Southeast Asia, International Trade Branch
Ontario Ministry of International Trade and Investment

> Corie.mcdougall@ontario.ca

Shirley Townsend, Counsellor (Commercial-Ontario), Canadian High Commission
Ontario International Marketing Centre in New Delhi

Tel: +91 11 41782630

> Shirley.townsend@international.gc.ca

Joint Venture Opportunities:

Canadian Federal Contact in the Mining Sector:

Dhruv Bhalla, Trade Commissioner, Canadian High Commission
Tel: +91 33 23354010

> dhruv.bhalla@international.gc.ca



Sudbury Areas Mining Supplies and Services Association (SAMSSA)



SAMSAA is a non profit organization whose mandate is....

“... finding opportunities globally and domestically on behalf of its members”

SAMSSA represents over 100 members of mining equipment and suppliers from Northern Ontario

SAMSSA members are looking for business opportunities in India to export mining equipment or develop equipment in India or Ontario

SAMSSA proposes to work with agents and distributorship that are mutually beneficial

SAMSSA website www.samssa.ca provides a one-stop shop for mining related clients and member Directory with a range of products and services

Thank You





Key Links



Ministry of Northern Development and Mines (MNDM)

www.mndm.gov.on.ca

Ontario Mining Association (OMA)

www.oma.on.ca

Ontario Mineral Industry Cluster (OMIC)

www.omicc.ca

Ontario Prospectors Association (OPS)

www.ontarioprospectors.com

Ministry of Economic Development and Trade (MEDT)

www.ontariocanada.com

Mining Innovation, Rehabilitation &

Applied Research Corporation (MIRARCO)

www.mirarco.org

Sudbury Area Mining Supply &

Service Association (SAMSSA)

www.samssa.com

Centre for Excellence in Mining Innovation (CEMI)

www.cemi.laurentian.ca

Mining Association of Canada (MAC)

www.mining.ca

Prospectors & Developers Association

of Canada (PDAC)

www.pdac.ca

Natural Resources Canada (NRCan)

www.nrcan-rncan.gc.ca


Canadian Association of Mining Equipment &

Services for Export (CAMESE)

www.camese.org



Ontario a Leader Geophysical Exploration Technology

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Ontario a Leader – Mining Innovation

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Bolter manufactured by
MacLean Engineering



Vertical conveyance
system manufactured
by Wabi Iron of New
Liskeard



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Ontario a Leader – Mining Innovation



Vertical conveyance system
manufactured by Minesteel
Fabricators of North Bay



Vertical conveyance system
manufactured by Stainless
Steel Technologies in
Sudbury





Ontario a Leader – Mining Innovation

Scissor lift truck manufactured by MacLean Engineering



Hybrid diesel electric loader manufactured by Mining Technologies International



Super jack manufactured by B & D Manufacturing in Sudbury, used for jacking up haul trucks