

MINING IN ONTARIO

TECHNOLOGY & INNOVATION

PUBLIC SUPPORT

INVESTMENTS

SMART REGULATIONS

COMPETITIVE ELECTRICITY PRICE

SAFETY AND ENVIRONMENTAL EXCELLENCE

A DEPENDABLE ENGINE OF GROWTH



LOCAL BENEFITS

- 01 90% OF GDP STAYS INSIDE ONTARIO
- 02 \$35.4 M IN PROPERTY TAXES FUNDS LOCAL PUBLIC PRIORITIES
- 03 INDUSTRY PAYROLL IN EXCESS OF \$1.6 BILLION DRIVES EMPLOYEE SPENDING IN THE COMMUNITY
- 04 78,000 MINERAL PRODUCTION EMPLOYEES

LARGEST PRIVATE SECTOR EMPLOYER FOR INDIGENOUS COMMUNITIES
\$90 MILLION CONTRIBUTED TO INDIGENOUS GOVERNMENTS AND COMMUNITIES

MINES IN ONTARIO MAKE PURCHASES OF MORE THAN \$1 BILLION PER YEAR FROM LOCAL SUPPLIERS

SMALL FOOTPRINT

MINING CREATES MORE ECONOMIC VALUE FOR THE ENERGY IT USES THAN MOST OTHER INDUSTRIES

ALREADY PART OF THE LOW CARBON ECONOMY, ONTARIO'S MINING INDUSTRY HAS LOWER GHG EMISSIONS THAN MOST OTHER SECTORS. MINING ACCOUNTED FOR ONLY 3.3% OF INDUSTRIAL GHG EMISSIONS IN 2013

MINING COMPANIES CONTINUE TO INVEST BILLIONS OF DOLLARS IN SOLUTIONS TO REDUCE SULFUR DIOXIDE WITH FAVOURABLE OUTCOMES - DECREASING SO2 EMISSIONS 77% SINCE 1990

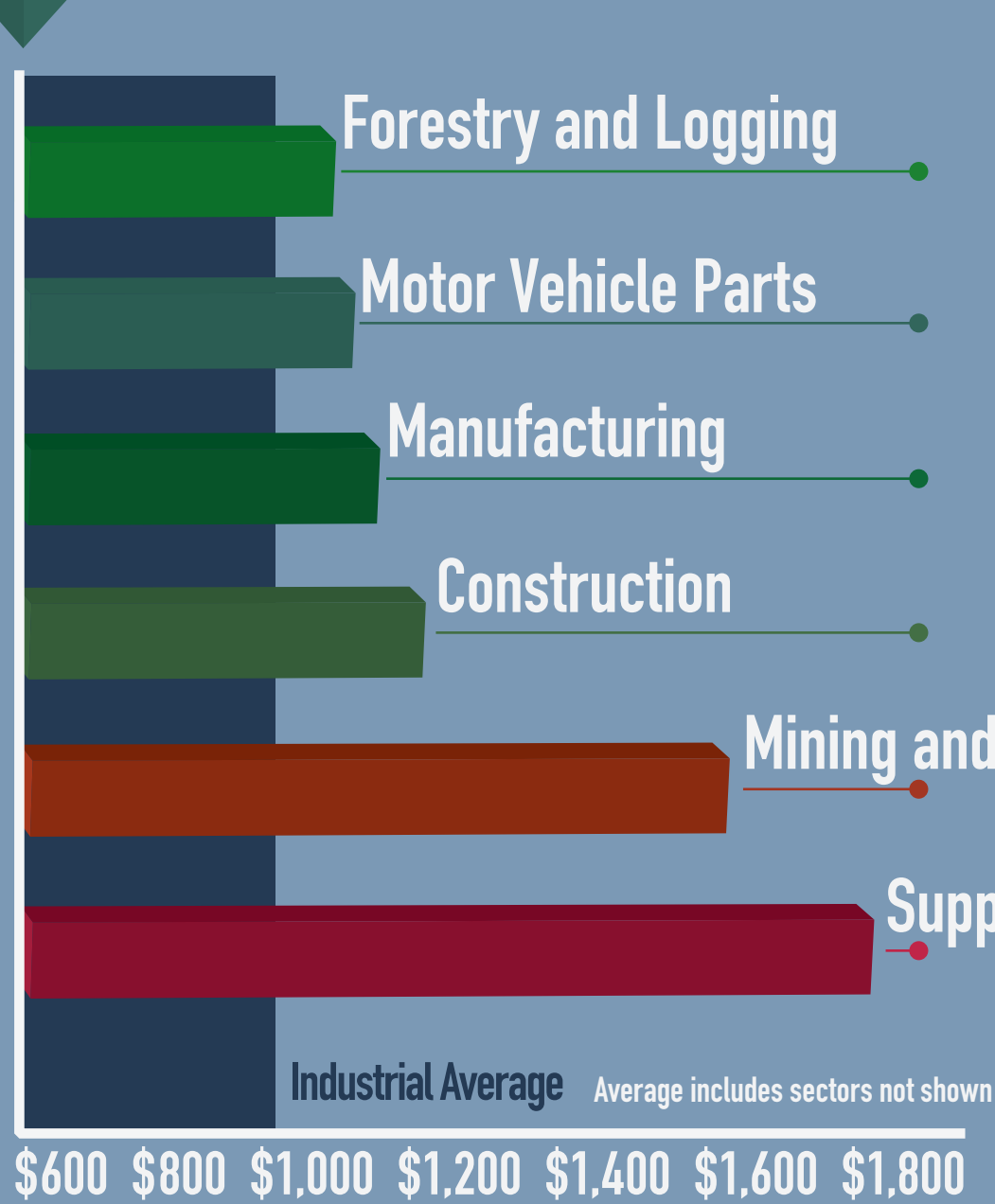
AN ESTIMATED \$103 MILLION PER YEAR ON ENVIRONMENTAL PROTECTION, RECLAMATION AND DECOMMISSIONING

CASCADING EFFECTS ON OTHER INDUSTRIES.

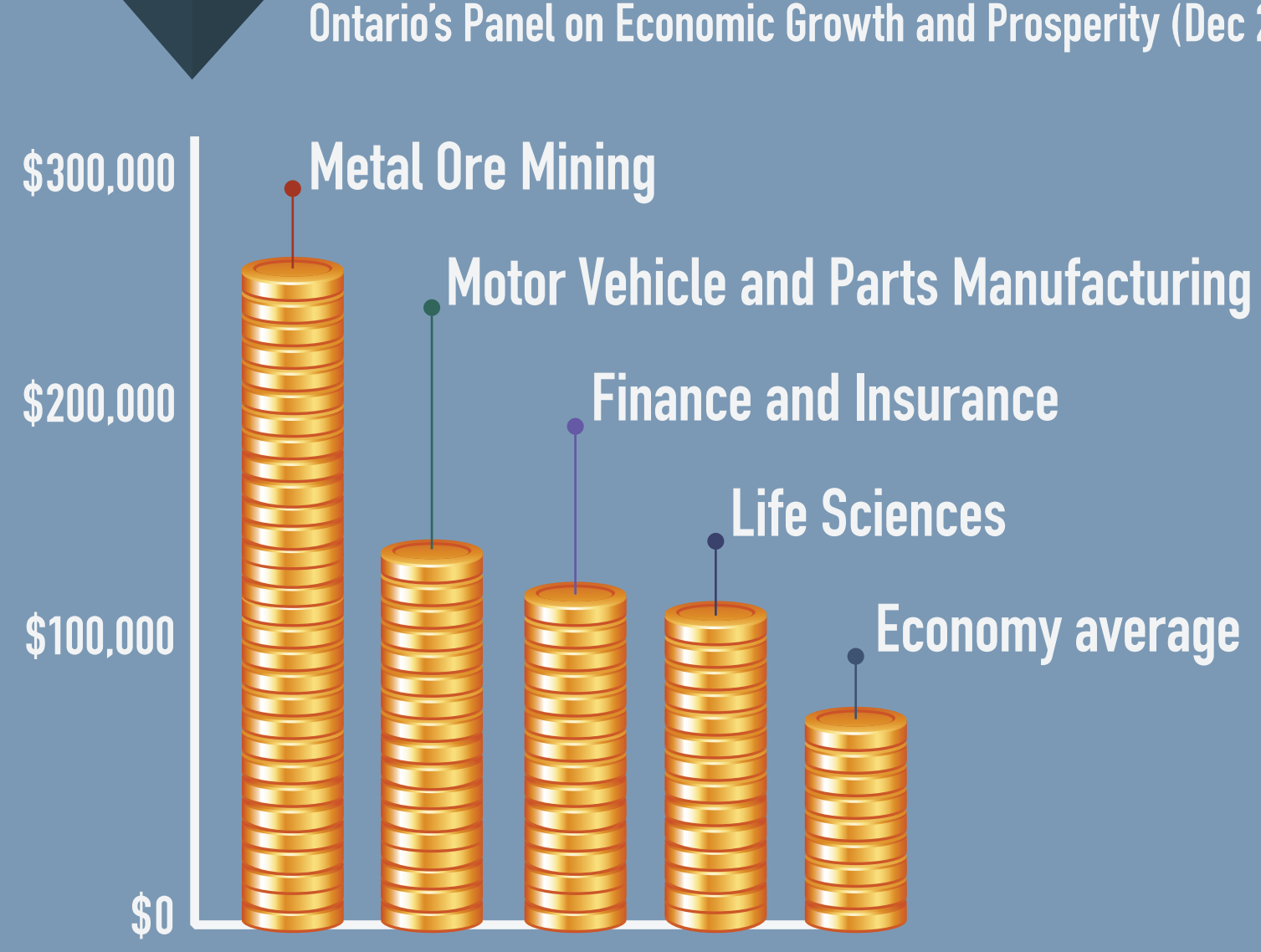
BENEFITS TO MANY OTHER INDUSTRIES. MINING SPURS ENTREPRENEURIAL ACTIVITY AND SIGNIFICANT SPOFF TO SECTORS ACROSS THE ECONOMY.

BIG ECONOMIC IMPACT

AVERAGE WEEKLY EARNINGS



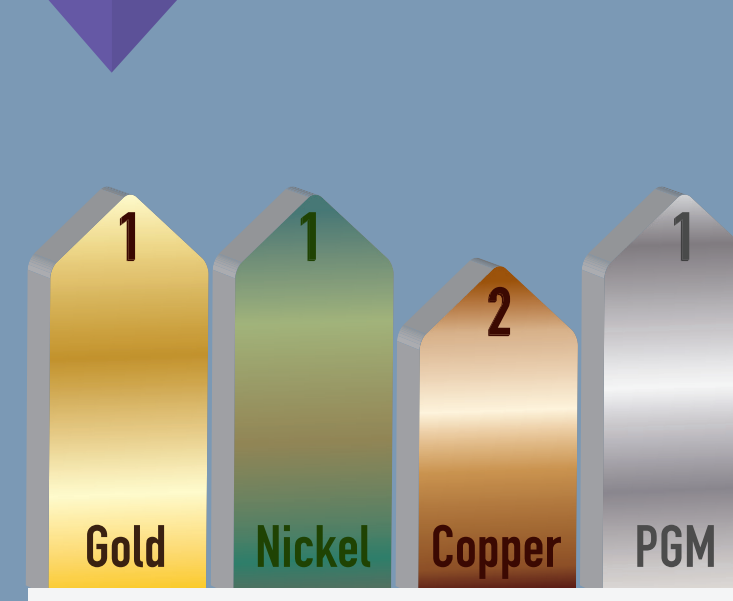
ANNUAL GDP PER WORKER IN 2015



\$10.8 BILLION THE VALUE OF ONTARIO'S MINING PRODUCTION IN 2015 IS THE HIGHEST IN CANADA.

900 SUPPLY AND SERVICE COMPANIES EMPLOY MORE THAN 40,000 PEOPLE AND HAVE AN ESTIMATED DIRECT ECONOMIC IMPACT OF \$6.6 BILLION.

ONTARIO'S RANK IN CANADA

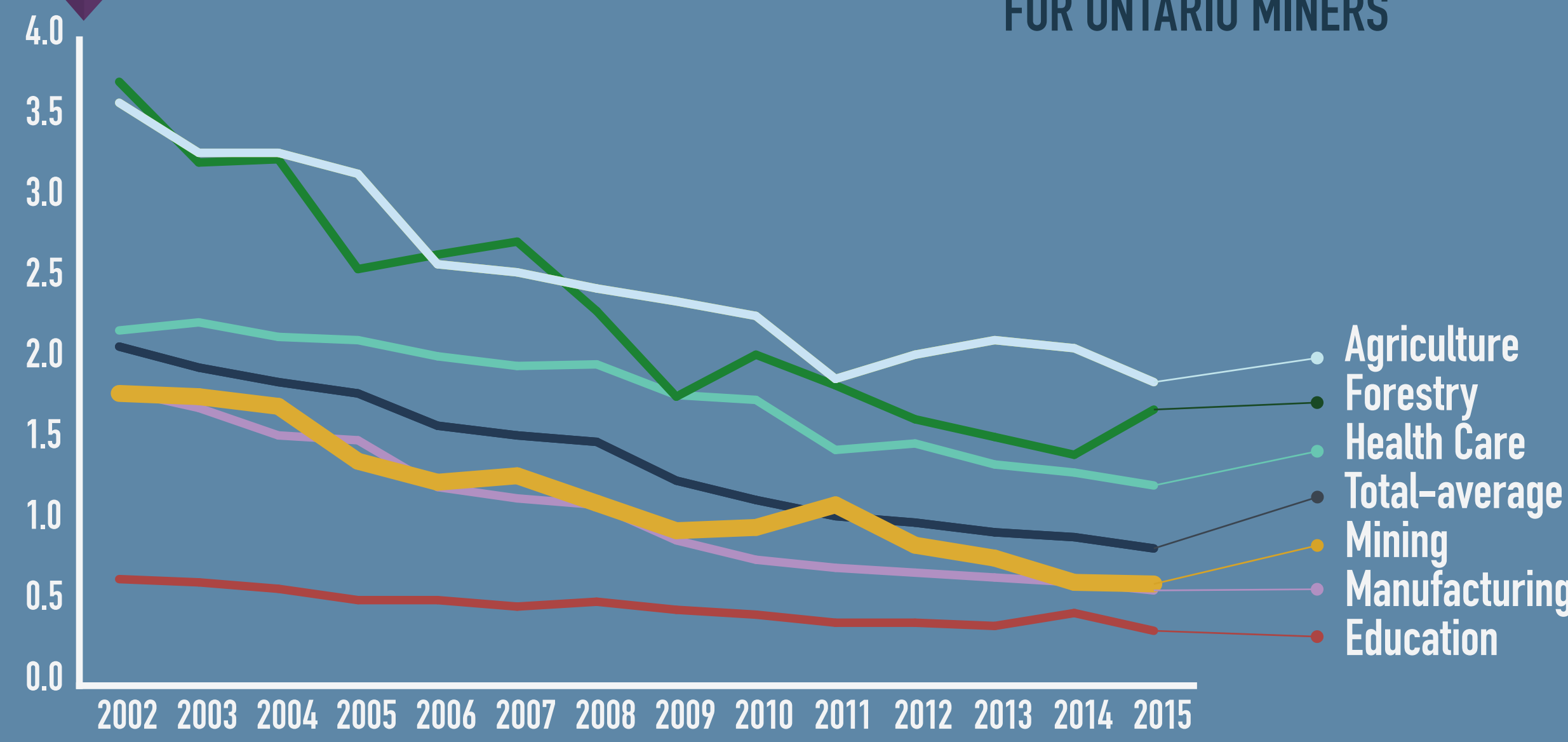


PRECIOUS METALS AND STONES CONTINUES TO RANK IN ONTARIO'S TOP FIVE INTERNATIONAL EXPORTS

SAFETY FIRST

With the goal of zero harm in the workplace, mining health and safety continues to evolve and improve. Progress is achieved through technological innovation, new research, better engineering and training, as well as advances in equipment, mechanization, digital analytics and robotics.

LOST TIME INJURY RATES (By Industry Sector)



#1 SAFETY IS PRIORITY FOR ONTARIO MINERS

BUILDING BLOCKS OF MODERN LIFE

AND GREEN ECONOMY

- VENTILATION ON DEMAND
- BATTERY STORAGE
- AUTOMATION
- 3D PRINTING
- ARTIFICIAL INTELLIGENCE
- SMART CONTROL TECHNOLOGIES
- VIRTUAL AND AUGMENTED REALITY
- DIGITALIZATION
- AND OTHER LEADING EDGE TECHNOLOGIES
- ELECTRIC VEHICLES



Our minerals and metals make modern life and innovation possible. We are focused on creating value, but it is our values that define us. They are the bedrock on which our culture of safety, respect and sustainability is built, and the reason we are striving to be a global leader.