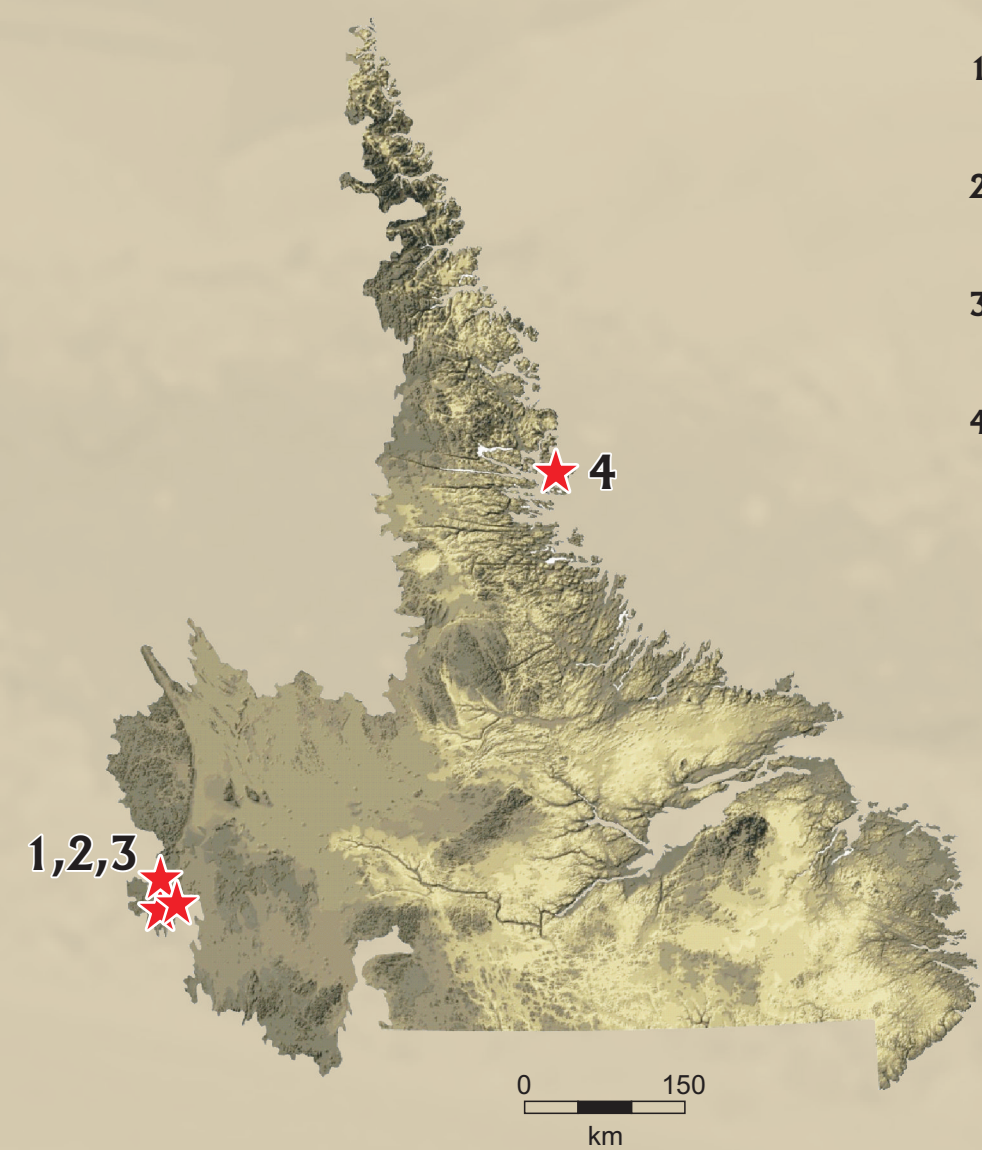


# MINERAL INDUSTRY ANALYSIS

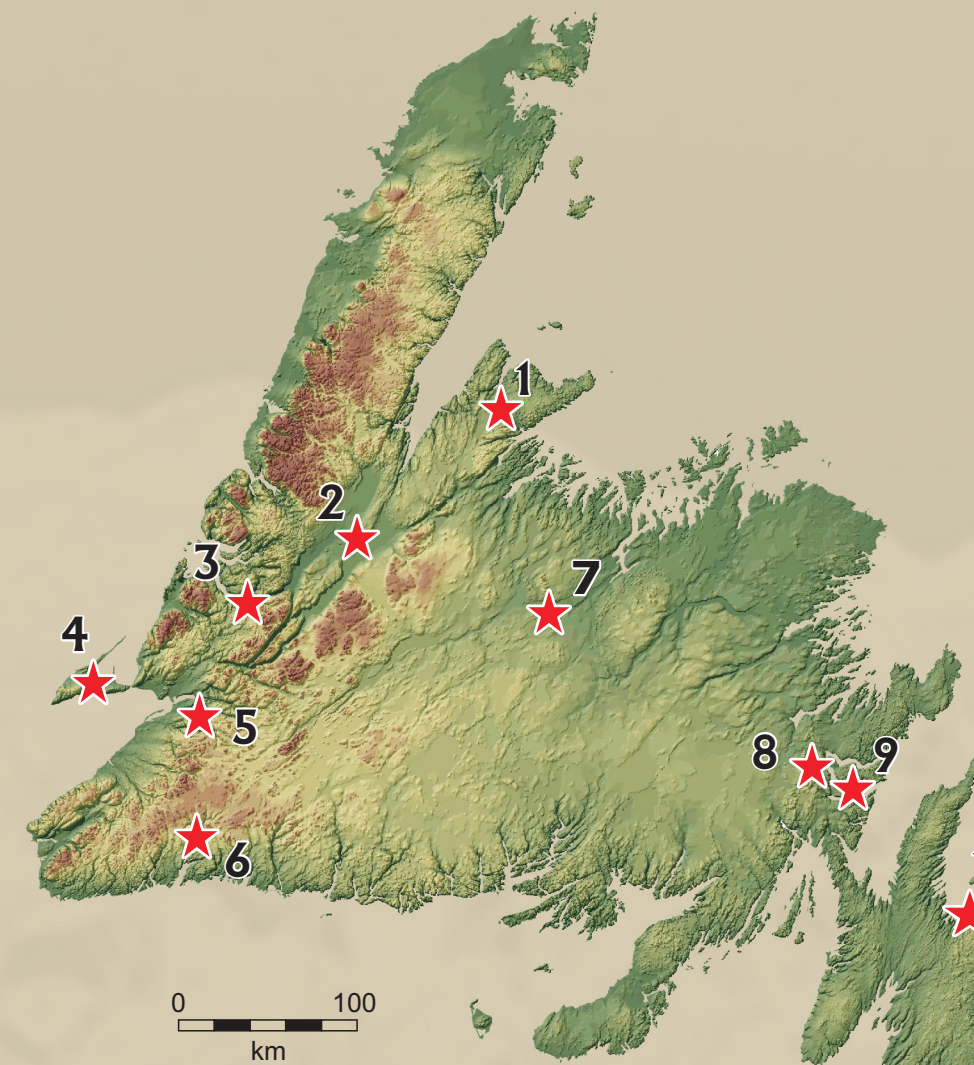
## Looking Back, Looking Ahead: The NL Mining Sector 20 years after the Voisey's Bay Discovery

Producing Mines – Labrador – 1993



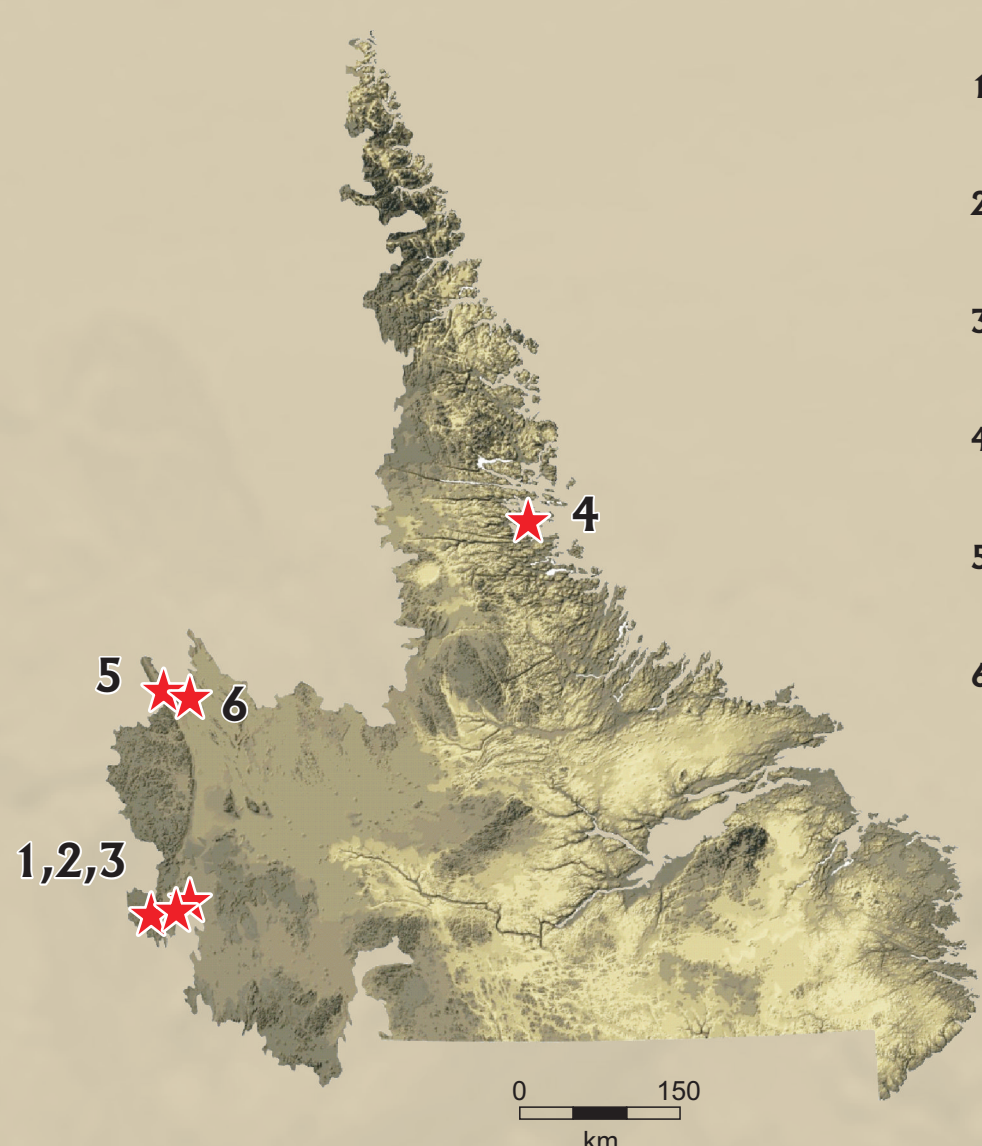
- 1) Iron Ore Company of Canada  
Labrador City – Fe
- 2) Iron Ore Company of Canada  
Labrador City – Dolomite
- 3) Wabush Mines  
Wabush – Fe
- 4) TUC  
Paul's Island – Labradorite

Producing Mines – Newfoundland – 1993



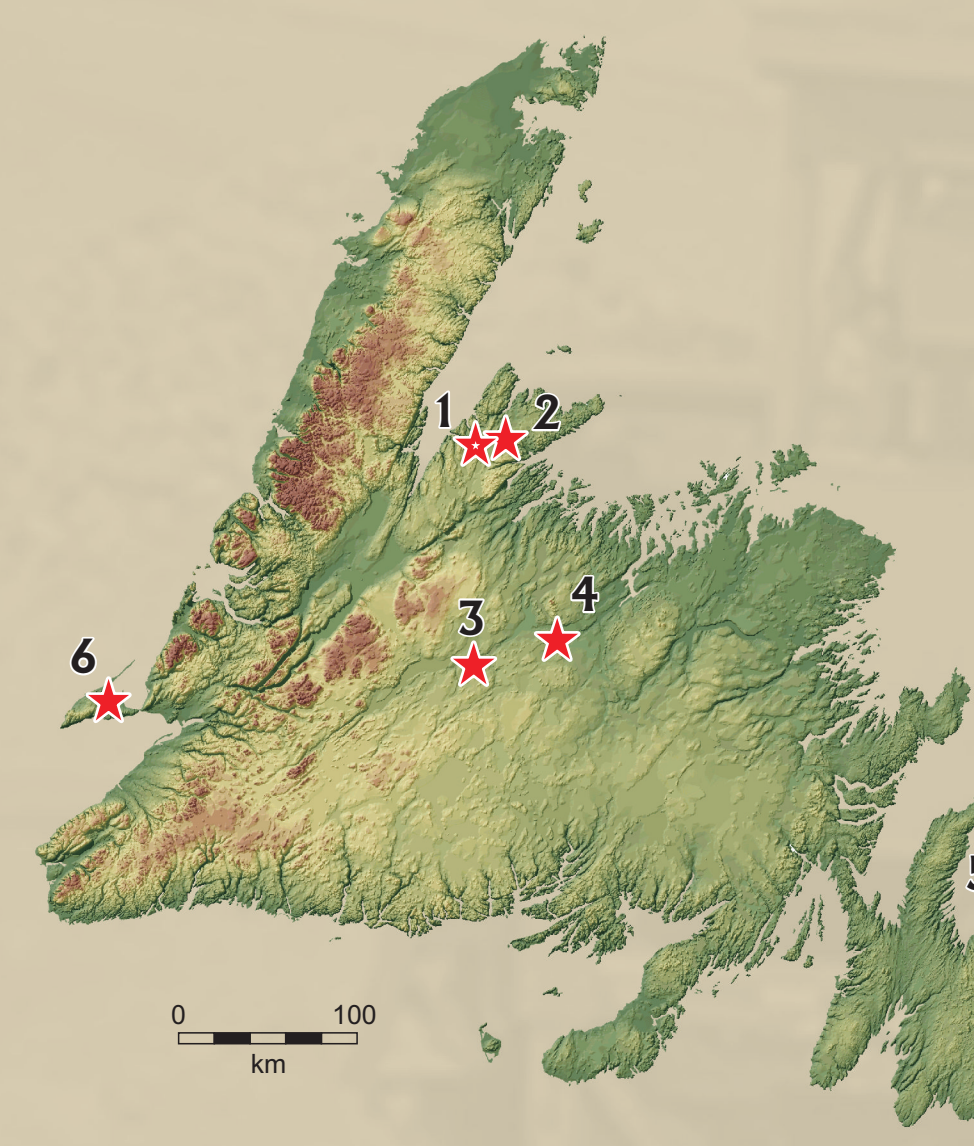
- 1) Terranov Mining Corp.  
BaieVerte – Asbestos
- 2) Havelock Lime  
Cormack – Limestone
- 3) North Star Cement  
Corner Brook – Cement
- 4) Nfld. Resources and Mining  
Lower Cove – Limestone
- 5) Domtar Inc.  
Flat Bay – Gypsum
- 6) Royal Oak Mines Inc.  
Hope Brook – Gold
- 7) Hi-Point Industries (1991) Ltd.  
Bishop's Falls – Peat
- 8) Trinity Brick Products  
Milton – Brick from Clay/Shale
- 9) Nfld. Slate Inc.  
Nut Cove – Slate
- 10) Armstrong World Industries Canada Ltd.  
Manuels – Pyrophyllite

Producing Mines – Labrador – 2013



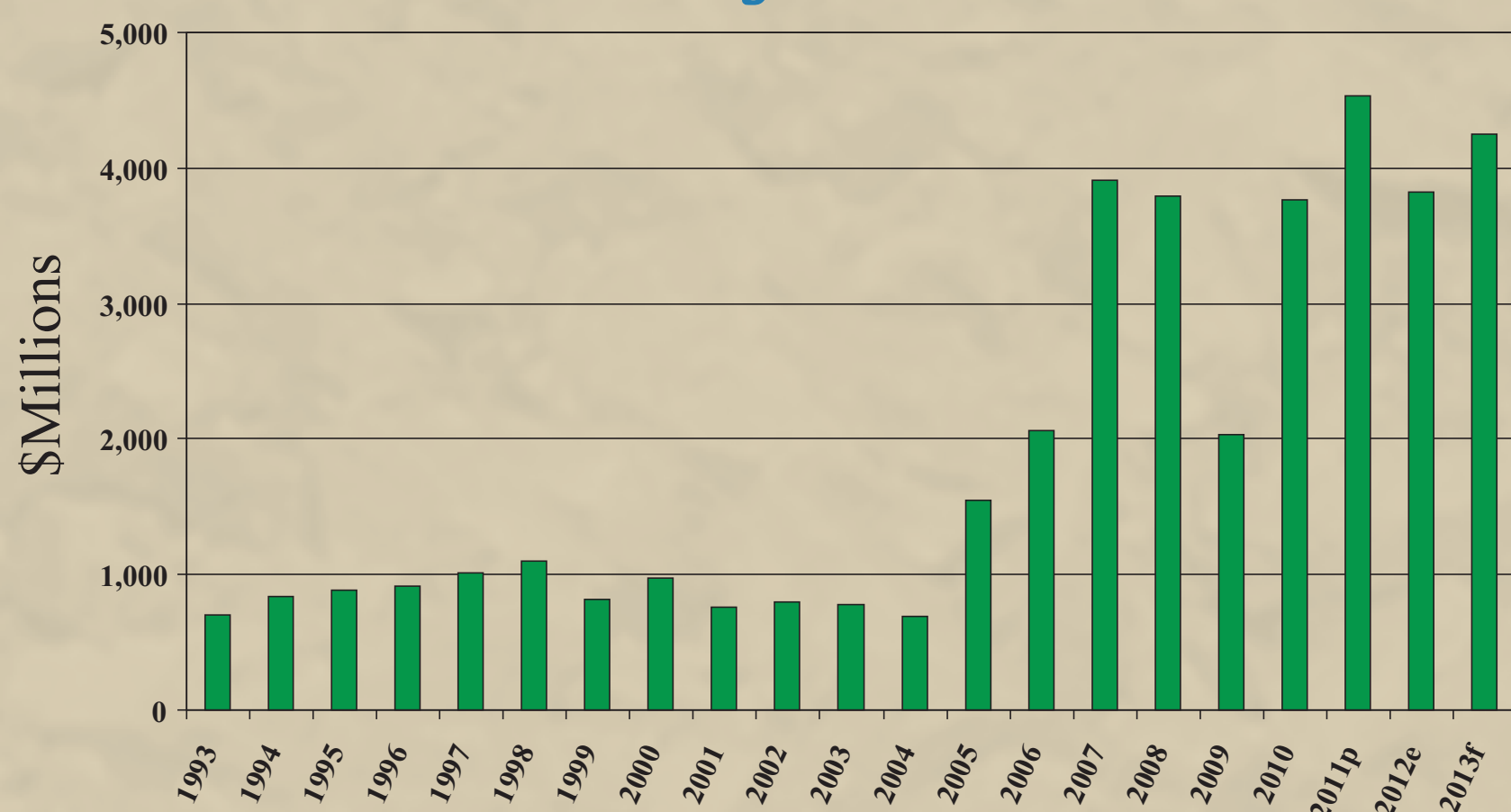
- 1) Iron Ore Company of Canada  
Labrador City – Fe
- 2) Iron Ore Company of Canada  
Labrador City – Dolomite
- 3) Wabush Mines  
Wabush – Fe
- 4) Vale Newfoundland and Labrador Limited  
Voisey's Bay – Ni – Cu – Co
- 5) Labrador Iron Mines Ltd.  
Menihok – Fe
- 6) Tata Steel Minerals Canada Ltd.  
Menihok – Fe

Producing Mines – Newfoundland – 2013



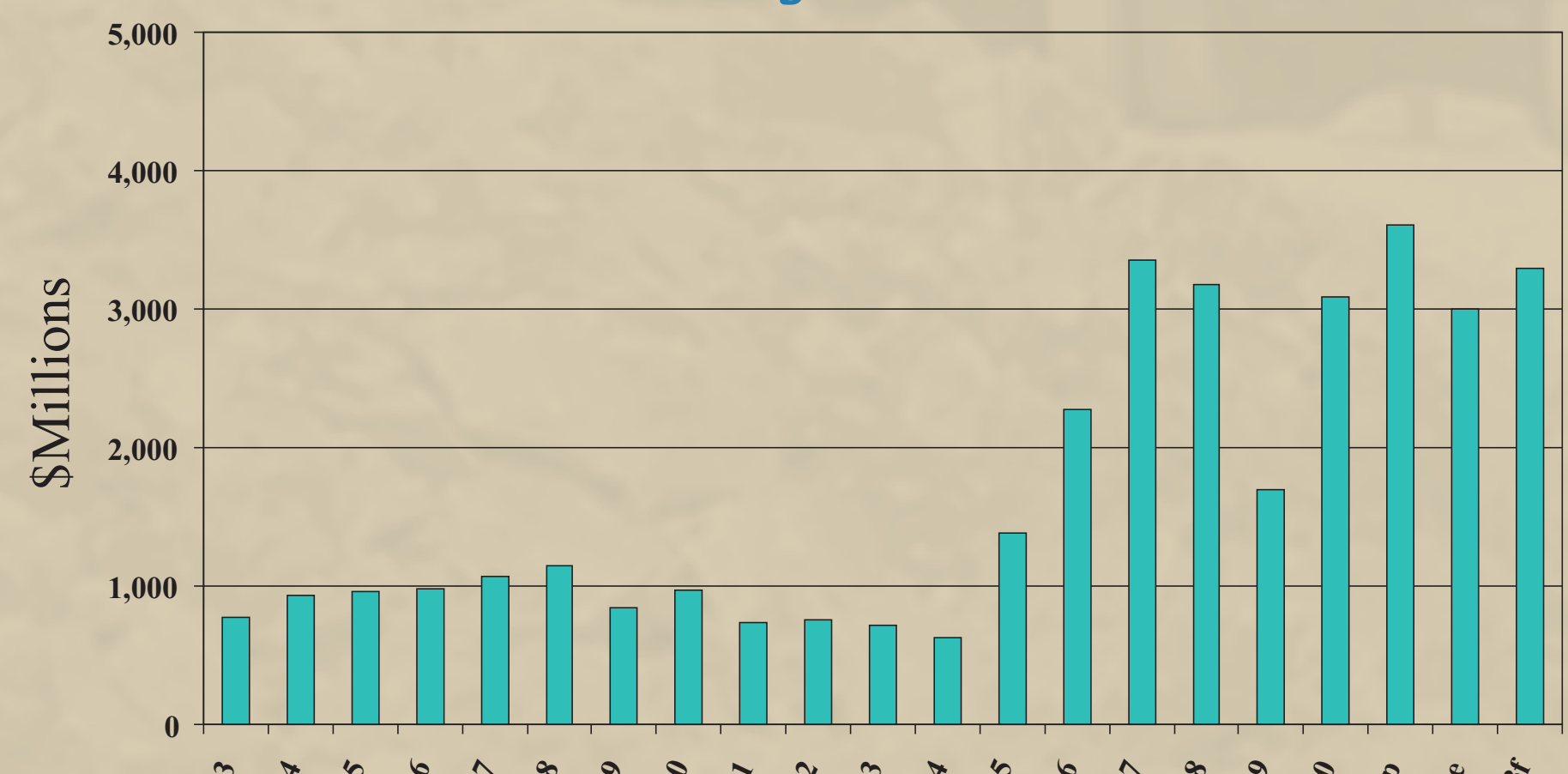
- 1) Anaconda Mining Inc.  
Pine Cove – Au
- 2) Rambler Metals and Mining Canada Ltd.  
Baie Verte – Cu – Au
- 3) Teck Duck Pond Operations  
Duck Pond – Zn – Cu – Au
- 4) Hi-Point Industries (1991) Ltd.  
Bishop's Falls – Peat
- 5) Trinity Resources Ltd.  
Manuels, Conception Bay South – Pyrophyllite
- 6) Atlantic Minerals Limited  
Port au Port – Limestone/Dolomite

Value of Mineral Shipments in Nominal Dollars  
Looking Back 20 Years

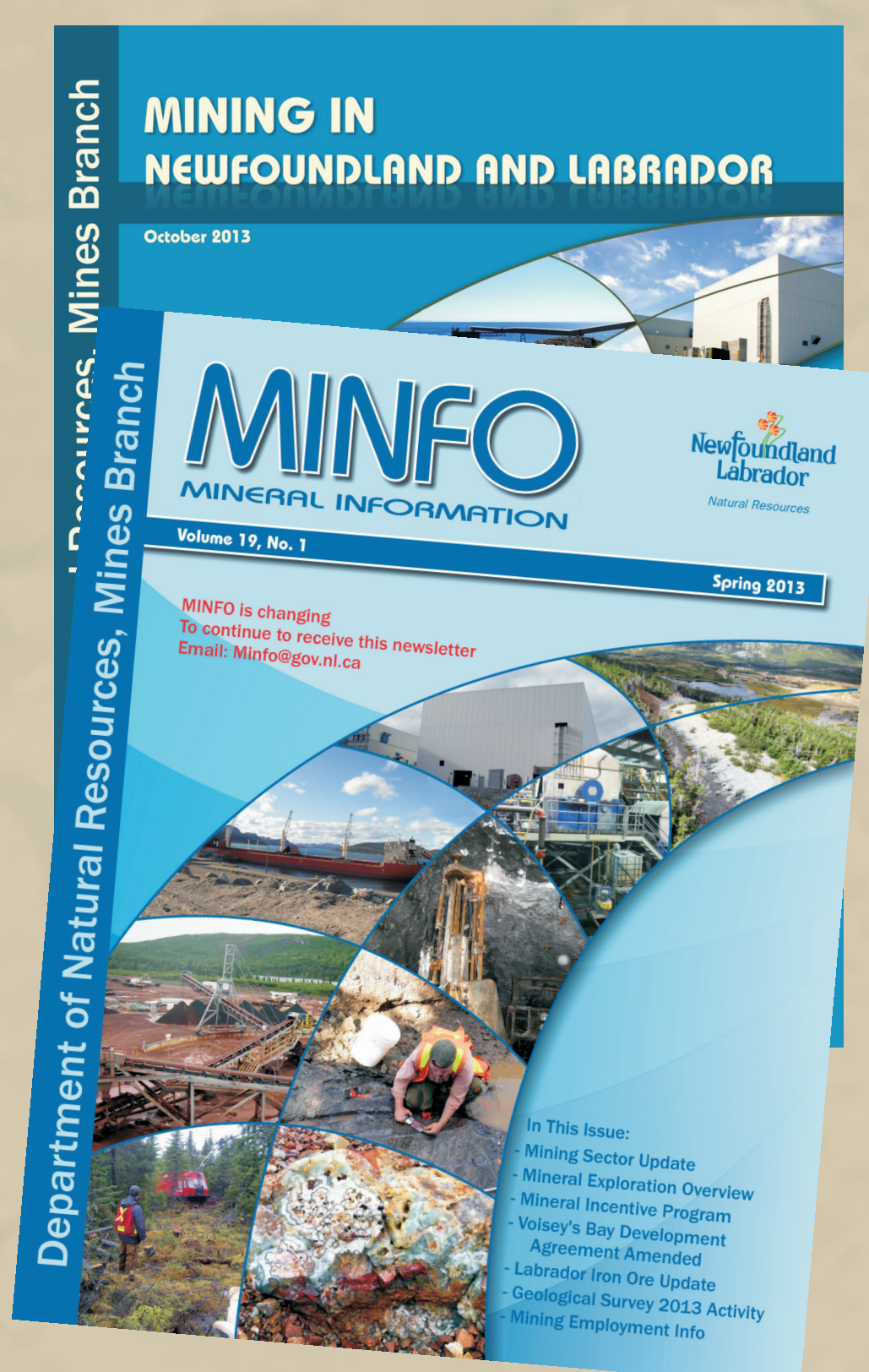


Sources: Department of Natural Resources and Natural Resources Canada;  
p: preliminary; e: estimate; f: forecast.

Value of Mineral Shipments in 2000 Dollars  
Looking Back 20 Years

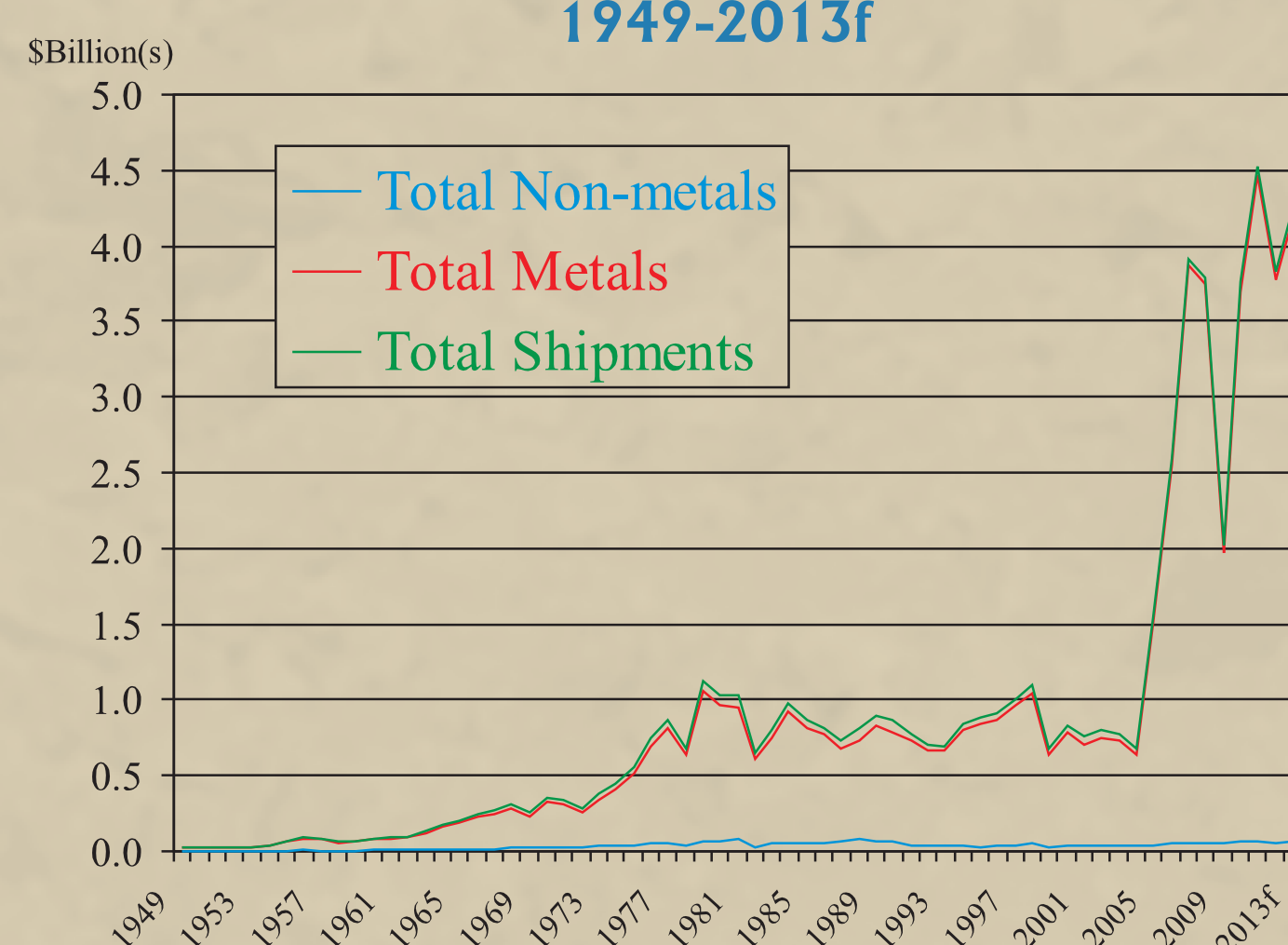


Sources: Department of Natural Resources and Natural Resources Canada;  
p: preliminary; e: estimate; f: forecast.



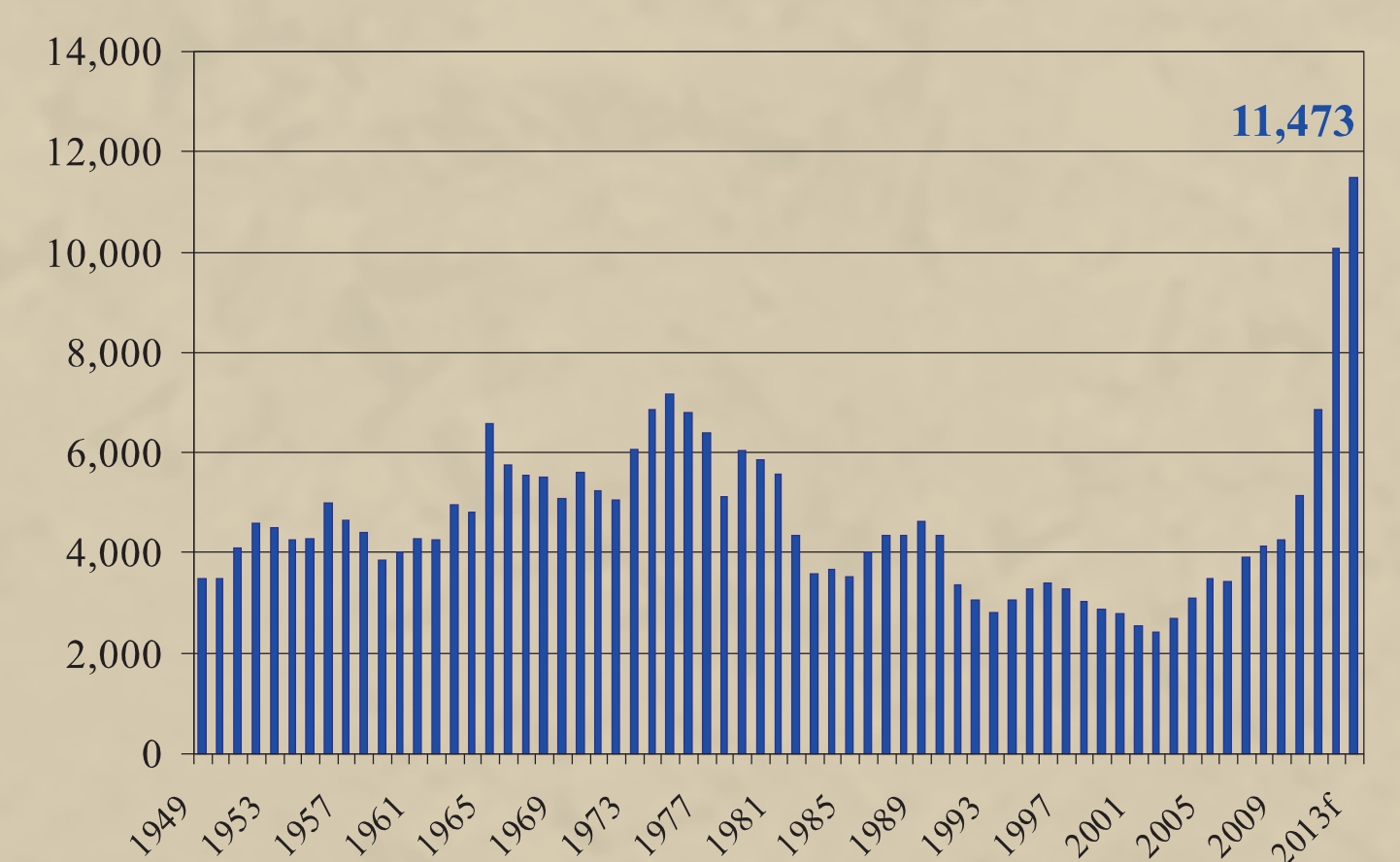
<http://www.nr.gov.nl.ca/nr/mines/MINL-October2013.pdf>  
<http://www.nr.gov.nl.ca/nr/mines/production/mrip/MINFO-Volume19.pdf>

Historical Value of Mineral Shipments  
1949-2013f



Sources: Department of Natural Resources and Natural Resources Canada; f: forecast.

Historical Employment in the Mineral Industry  
1949-2013f



Sources: Department of Natural Resources and Natural Resources Canada; f: forecast.