



City of Greater Sudbury Mining

Canada's mighty
mining metropolis



The Sudbury Basin still dominates.

“The Sudbury Basin remains an attractive region, hosting excellent ore bodies with decades of mining left.”

John Pollesel,
COO, North Atlantic
Operations, Vale

Since those first nickel and copper discoveries, Sudbury has evolved from a simple mining community into an internationally renowned, Canadian mining showcase and one of the most productive, technologically advanced, and environmentally aware mining centres on the planet.

Local mining operations together with a wonderfully robust supply and services sector are a powerful engine for economic growth in Greater Sudbury. With Sudbury holding the title as Ontario’s mining powerhouse, the province produced approximately \$7.7 billion worth of minerals in 2010 and employed more than 25,000 people in production and exploration combined. Ontario also leads Canada in nickel and copper production (34% and 30% respectively).

For a region that has been mined for well over a century, the continued high level of exploration activity is a testament to the confidence mining companies have in the future of the Sudbury Basin. John Pollesel, Chief Operating Officer for Vale’s North Atlantic Operations revealed recently that when he joined Vale, he was surprised how many deposits there were within the Basin with potential for future development. “The Sudbury Basin remains an attractive region hosting excellent ore bodies with decades of mining left,” says Pollesel, “which contributes to Vale’s position of having the best contained nickel reserve in the world, ahead of our closest competitor, Norilsk Nickel (Russia).”

Comparing the three years prior to Vale’s purchase of Inco and the three years after the purchase, Pollesel says the company increased its exploration spending by 159%. This led to the development of Vale’s Totten Mine complex. Increased exploration spending has also resulted in the discoveries of Xstrata’s Nickel Rim Mine and the Quadra FNX Morrison Deposit and a resumption of production at First Nickel’s Lockerby Mine. These projects are creating increased employment opportunities and economic prosperity for Greater Sudbury.



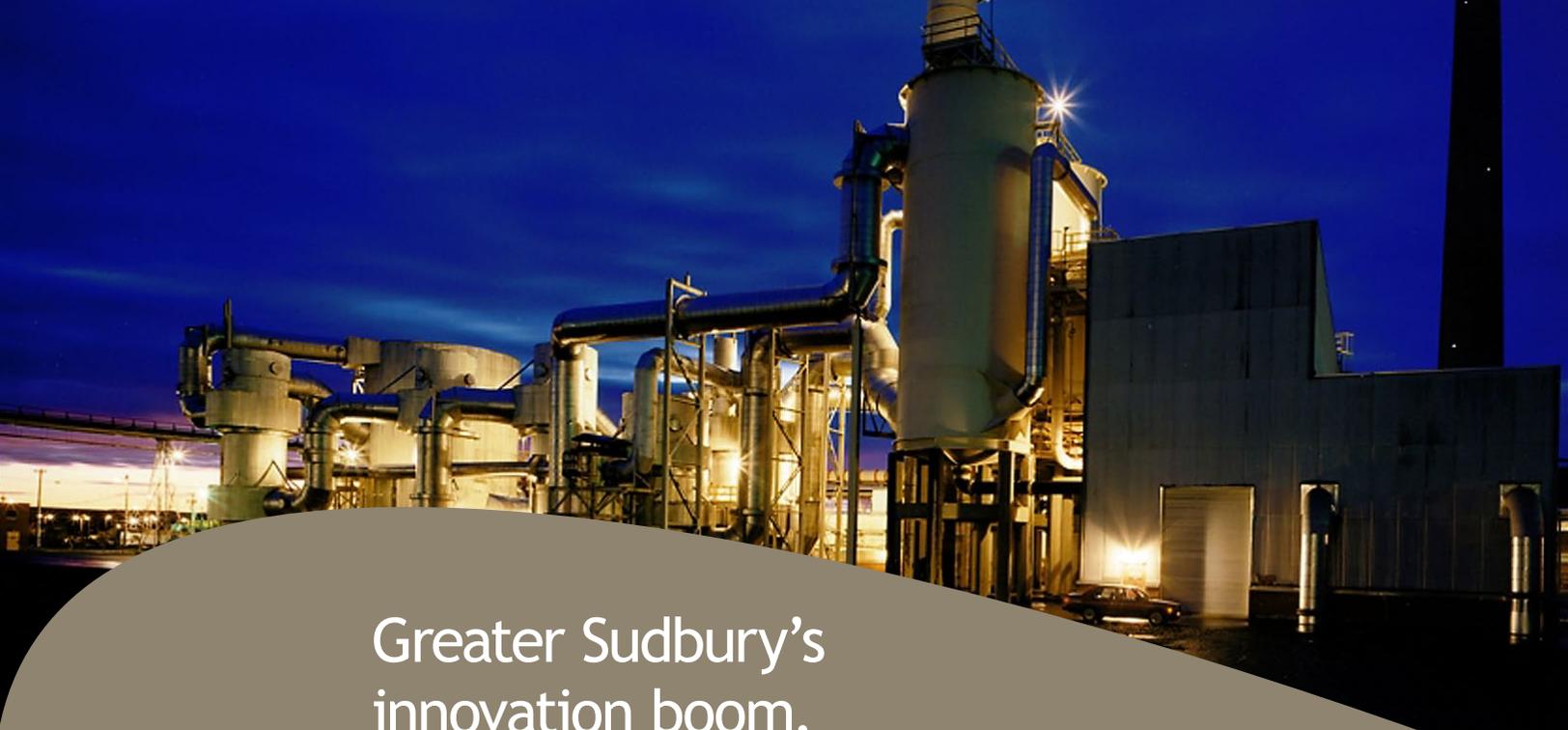
Building our mining muscle.

Sudbury's leadership position in the Canadian and global mining industry has not gone unnoticed. Increasingly, international firms view Sudbury as an ideal base of operations, allowing further expansion of this influential sector. Companies that want to be close to the action have established Canadian offices in Sudbury. These include mining equipment manufacturers, engineering firms and mining contractors.

Beyond mining the raw materials, there are also value-added operations. Crossworks Manufacturing's diamond cutting and polishing facility in Sudbury, the first of its kind in Ontario, cuts and polishes approximately \$35 million worth of rough stones each year. The stones come from the DeBeers Victor Mine, located near the James Bay Coastal community of Attawapiskat First Nation. Sudbury is also being considered as the location for Cliffs Natural Resources' chromite processing facility to process chromite into high-grade ferrochrome.

A surprising success story.

Sudbury's mining supply and services sector got its start by providing tools, parts and professional services to local mining companies. As new technology and innovation led to new products and processes, these homegrown companies found eager national and international mining markets looking to improve their productivity. Today, the sector represents more than 300 companies employing almost 14,000 skilled workers and professionals and generating approximately \$4 billion in revenue each year. While 80% of the mining supply and services market is domestic, companies are testing international waters in increasing numbers and are making inroads into the U.S., Latin America, Sub-Saharan Africa, Europe and Russia. Assisting with the sector's global expansion are the Greater Sudbury Development Corporation, Ontario Ministry of Northern Development and Mines, and the Sudbury Area Mining Supply and Service Association (SAMSSA).



Greater Sudbury's innovation boom.

Mining research and innovation in Sudbury has evolved into a world-class industry all its own. Many of the brightest minds in mining related sciences are being drawn here to be part of one of the world's most advanced clusters of international mining research.

Much of the ongoing research relates to the creation of the next generation of mines and the challenge of bringing more raw material up from deeper mines while maintaining the highest levels of safety and efficiency.

Greater Sudbury's innovation cluster is made possible through partnerships involving post-secondary institutions, all levels of government and some of the world's largest mining corporations including Vale, Xstrata and Rio Tinto. It is the long-term sustainability of these mining companies that is so dependent on the innovative research coming out of facilities like the Centre for Excellence in Mining Innovation (CEMI) and the Mining Innovation, Rehabilitation and Applied Research Corporation (MIRARCO), both located at Sudbury's Laurentian University.

At CEMI, R&D efforts strive to establish excellence in strategic areas of research such as deep mining, mineral exploration, integrated mine engineering and environmental sustainability.

MIRARCO is the largest not-for-profit, applied research firm in North America. Its goal is to transfer as much benefit as possible to industry,

to create unique and exciting employment, and to engage in projects that make a real difference.

The Northern Centre for Advanced Technology Inc (NORCAT) is Sudbury's third major innovation partner. A not-for-profit company, it's 60,000 square foot Innovation and Commercialization Centre is the central location for innovation development, contractor training, an Occupational Health and Safety Resource Centre and eLearning technology.

Other R&D facilities in Greater Sudbury include:

- Vale Living with Lakes Centre (Laurentian University)
- Centre for Integrated Monitoring Technology (CIMTEC)
- Deep Mine Research Consortium
- Xstrata Process Support
- CANMET

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City of Greater Sudbury Mining Sector