

Manitoba Mining, Exploration and Geoscience 2023–2024



Mining and Petroleum Sector Overview

- \$1.9 billion in estimated total value of production
- Accounts for approximately 2.4 per cent of the province's real GDP (basic prices) and 3.3 per cent of domestic merchandise exports
- Direct employment of approximately 3200 people
- \$826 million in estimated capital expenditures on development
- 2022 estimated spending intentions at \$169.9 million
- 218 new wells drilled in 2022

Major producers:

- Vale (nickel, copper)
- Hudbay Minerals Inc. (copper, zinc, gold)
- Sinomine Resources (Tantalum Mining Corporation of Canada Ltd.; lithium, cesium)



Manitoba's exploration and mining industries play a key role in our province's economic prosperity.

Exploration and investment are the driving forces behind a sustainable minerals sector. Manitoba is home to a wealth of natural resources, world-class deposits and underexplored remote regions of high mineral potential including various critical minerals. Our quality geoscience data coupled with our rich natural resources forms a solid foundation for developing global economic growth opportunities in green energy and critical minerals.

Commitment

Manitoba remains committed to fostering a collaborative relationship between government and the private sector. This includes a focus on our northern communities, many of which were established as a result of new ore discoveries and continuous exploration activity. In fact, the *Look North Initiative* identifies the province's mineral potential as the single most likely source of sustainable, long-term economic prosperity in the North. Working together, we can ensure our province remains a place where the mining sector can continue to grow and prosper for decades to come.

Making it Happen

The Manitoba government is working hard to connect goals, strategies, relationships and partnerships:

Jump-starting Exploration

Manitoba continues to identify new ways to streamline permitting and provide stronger supports for the exploration industry. In an effort to eliminate red tape, the Province has introduced a multi-year permitting process for mineral exploration projects—work permits for mineral exploration outside of parks are now valid for up to three years with the option for an additional two-year extension. In addition, Manitoba has contributed over \$20 million towards the Mineral Development Fund which continues to facilitate economic growth and job creation in northern Manitoba. Communities, businesses, Indigenous groups, municipalities and the not-for-profit sector are eligible to apply for funding. Financial assistance from the fund could include one-time grants to advance new mining opportunities and outreach to First Nations for collaborative resource development.

Manitoba is also in the process of developing a minerals strategy for the province, with a particular focus on critical minerals. Manitoba is well endowed with critical mineral commodities including nickel, copper, zinc, lithium, cobalt, graphite and others, and is well positioned to provide a competitive supply. These commodities remain in high global demand for the production of solar panels, electric vehicles, and batteries.

Engaging First Nations

The *Manitoba – First Nations Mineral Development Protocol* sets important parameters for how Crown–Indigenous consultations occur during all phases of the mining cycle, from exploration to development, operation to closure. This engagement will help to create certainty in order to advance projects in a timely manner and ensure First Nations can be actively involved in all phases of development projects within their traditional territories. The Protocol process is open to all Indigenous communities with immediate or potential mineral development opportunities.

Working Together

Manitoba's mineral sector turns commitments into actions. Industry, associations, Indigenous and northern communities, idea-brokers, investors and explorers are moving ahead in ways that respect our land, natural resources and people, while sharing a common goal...

...to make Manitoba a worldwide leader in mineral exploration and investment attractiveness.

Mineral Development Fund
Look North Initiative

mmdf.ca
cedf.mb.ca/look-north-story/

Manitoba has many advantages that make it an ideal location for business.



With close proximity to supply inputs and markets, an excellent transportation infrastructure, a skilled workforce and one of the greenest electricity grids in North America, Manitoba is an excellent place to explore and invest.

Manitoba has one of Canada's most diverse and dynamic economies. This diversity makes the province's economy one of the strongest and most stable in Canada.

Strategically located in the heart of North America, with abundant transportation connections via air, rail and road, Manitoba offers ready access to markets in the U.S. and beyond.

Extremely competitive business costs

- International studies have consistently shown the competitiveness of business costs in Manitoba.
- Manitoba offers many business support programs and incentives to encourage and facilitate entrepreneurial, expansion and employment opportunities within the province.

Low-cost, high-quality utilities

- Manitoba has abundant, environmentally sustainable hydroelectric capacity, high system reliability and superior power quality.
- Our industrial electricity rates are among the lowest in North America, as is the carbon intensity of our electric power production.

Economical access to North American markets

- Manitoba's position at the heart of North America makes it a key part of the Mid-continent Trade Corridor, connecting Canada to a central North American market of 100 million people.
- Manitoba's central location provides excellent connections by air, road and rail which saves on travel and delivery time.
- Manitoba has three rail links to the United States, allowing ready access to the world's largest market and beyond.

A well-educated, professional workforce

- Manitoba's workforce is known for its strong work ethic, quality and dedication. Low employee turnover levels result in reduced recruitment and training costs for employers.
- Over 26% of Manitoba's population are immigrants, resulting in more than 100 languages spoken in the province. This diversity is a distinct advantage for businesses looking to make connections around the world.
- Flin Flon is home to the Northern Manitoba Mining Academy, which offers training in the mining- and construction-related trades to develop a knowledgeable, skilled, and sustainable workforce for the industry.

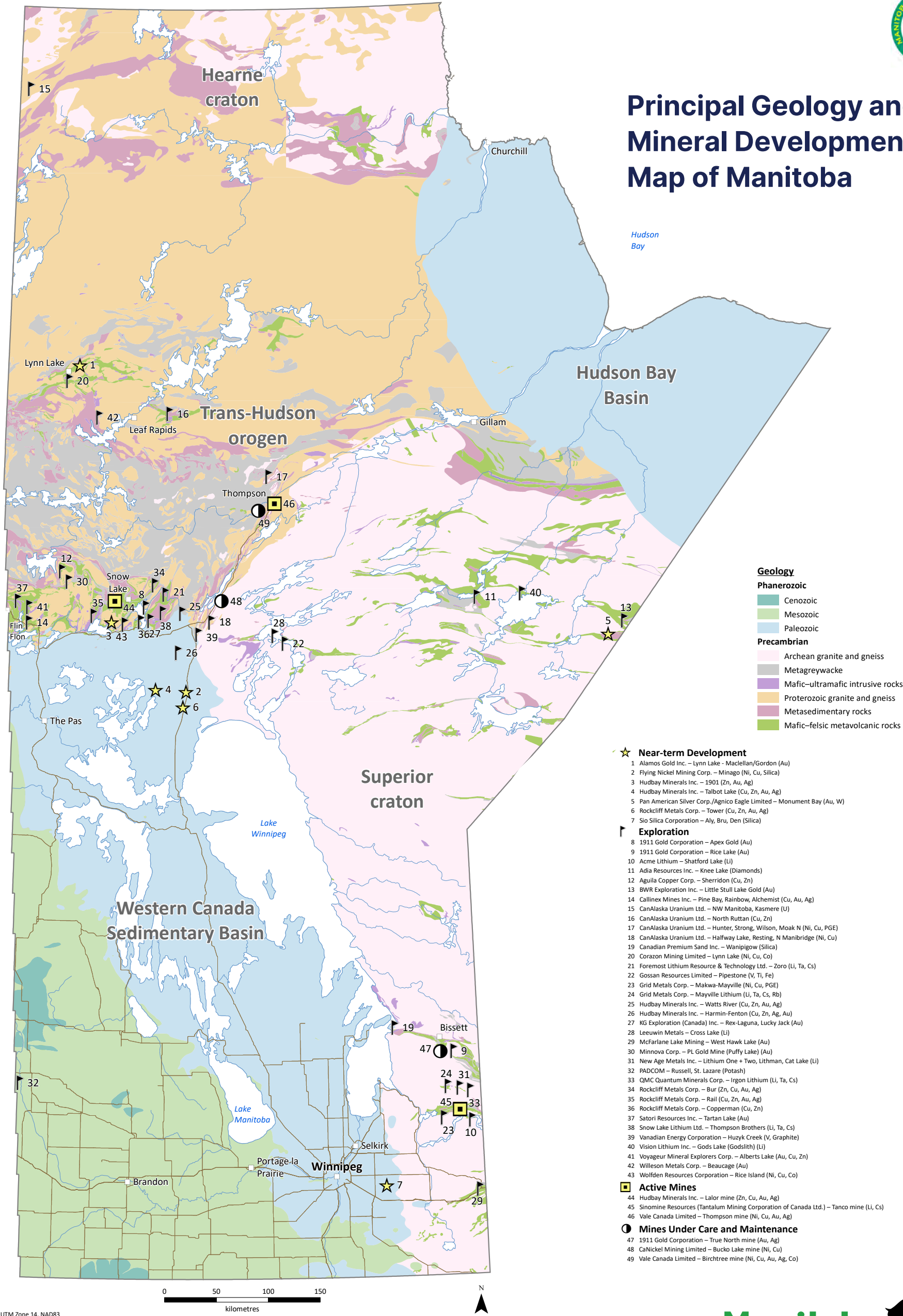


Mineral Commodities in Manitoba

Manitoba’s outstanding world-class deposits are central to building a prosperous and robust economy, to fostering sustainable and strong communities, and to strengthening employment growth for all Manitobans. These deposits include gold, copper-zinc, nickel, lithium, rare metals and potash. Along with the discovery of diamonds, Manitoba also has the potential to host different types of uranium deposits. Further details on these commodities can be found on our website at manitoba.ca/iem/geo/commodity/

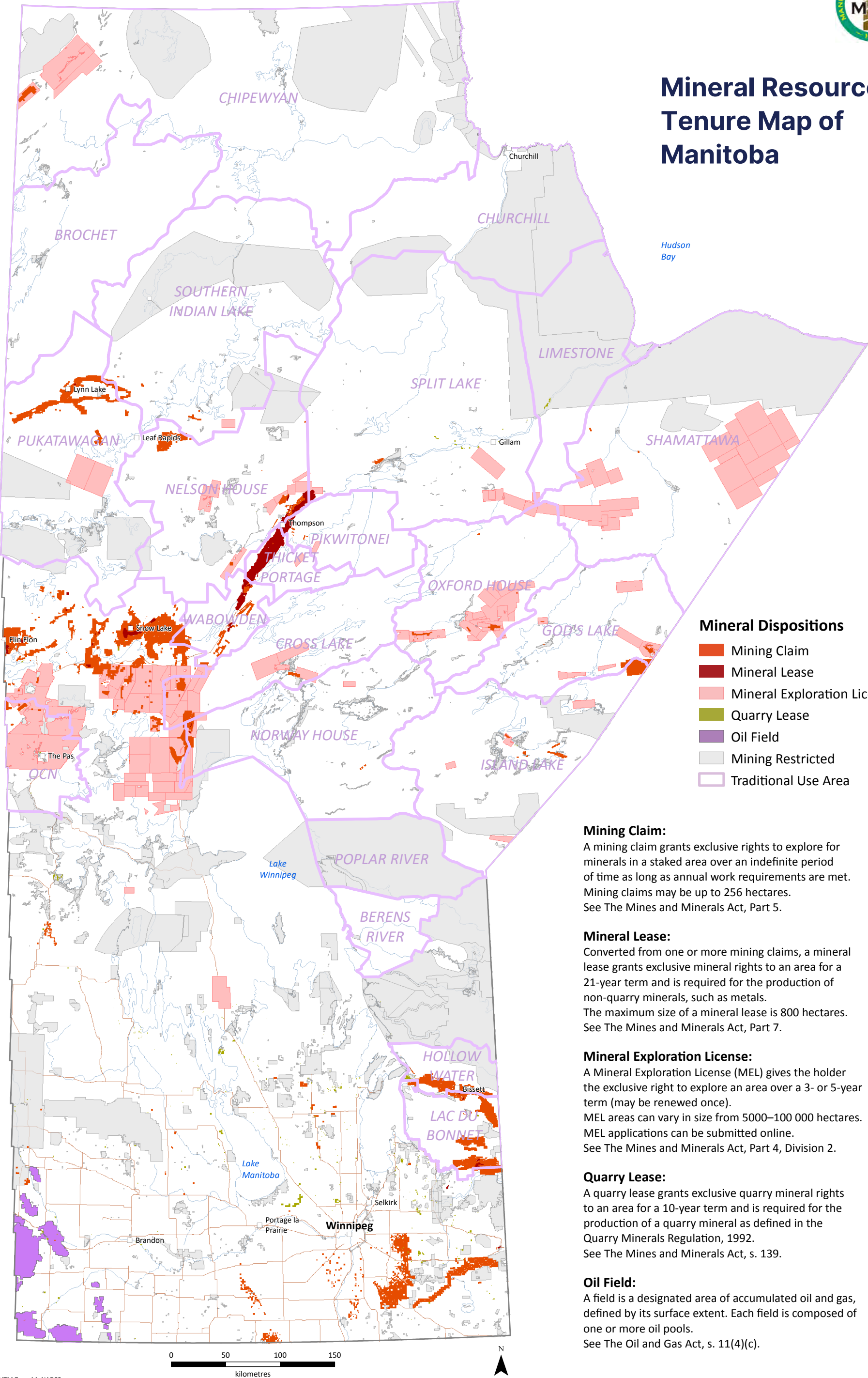


Principal Geology and Mineral Development Map of Manitoba





Mineral Resource Tenure Map of Manitoba



Mineral Dispositions

- Mining Claim
- Mineral Lease
- Mineral Exploration License
- Quarry Lease
- Oil Field
- Mining Restricted
- Traditional Use Area

Mining Claim:

A mining claim grants exclusive rights to explore for minerals in a staked area over an indefinite period of time as long as annual work requirements are met. Mining claims may be up to 256 hectares. See The Mines and Minerals Act, Part 5.

Mineral Lease:

Converted from one or more mining claims, a mineral lease grants exclusive mineral rights to an area for a 21-year term and is required for the production of non-quarry minerals, such as metals. The maximum size of a mineral lease is 800 hectares. See The Mines and Minerals Act, Part 7.

Mineral Exploration License:

A Mineral Exploration License (MEL) gives the holder the exclusive right to explore an area over a 3- or 5-year term (may be renewed once). MEL areas can vary in size from 5000–100 000 hectares. MEL applications can be submitted online. See The Mines and Minerals Act, Part 4, Division 2.

Quarry Lease:

A quarry lease grants exclusive quarry mineral rights to an area for a 10-year term and is required for the production of a quarry mineral as defined in the Quarry Minerals Regulation, 1992. See The Mines and Minerals Act, s. 139.

Oil Field:

A field is a designated area of accumulated oil and gas, defined by its surface extent. Each field is composed of one or more oil pools. See The Oil and Gas Act, s. 11(4)(c).

Contact us

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