



## Our Mining Industry

Saskatchewan mineral sales totalled \$7.9 billion in 2019. Natural Resources Canada (NRCan) estimates that Saskatchewan accounted for 14% of national sales value, third highest in Canada.

The province is the largest potash producer in the world, accounting for approximately one-third of total production, and hosting over half of the globe's potash reserves. Saskatchewan is home to the world's largest high-grade uranium deposits. Saskatchewan was the second-largest producer of uranium in the world in 2022, accounting for about 15 per cent of global production and is the sole producer of uranium in Canada.

Saskatchewan has large, underexplored areas with high gold potential. The Seabee Operation produced 1.9 million oz of gold since 1991. The operation remains active today and has recently experienced several consecutive years of record annual production, including over 136,000 oz of gold in 2022.

Saskatchewan also produces coal, sodium sulphate, helium, clays, limestone and has undeveloped deposits of base metals, diamonds and a host of other critical minerals including Rare Earth Elements (REE), Platinum Group Metals and lithium.



## Major Mining Companies Operating in Saskatchewan

- Nutrien
- Mosaic Company
- BHP Billiton Canada Inc.
- K+S Potash Canada
- ORANO Canada
- Cameco
- Vale Limited
- Rio Tinto
- Acron
- Yancoal

## Fast Facts

- Total operating mines (2019): 20, including potash, uranium, gold, coal, sodium sulphate, salt and clay
- GDP (2018): Minerals and petroleum contribute 25.7% of total provincial GDP
- Total mineral sales value (2019): \$7.4 billion
- Value of potash sales (2019): \$6.3 billion
- Exploration expenditures (2019): \$263.3 million

# Saskatchewan Mining Supply Chain

## Current Industry Activities

From 2008 to 2018, the mining sector invested \$168 billion into capital projects in Saskatchewan. More recently, focus has shifted towards ongoing operations. This, in part, reflects the current down cycle in commodity prices. While there continues to be long-term opportunities in supplying the mining industry in Saskatchewan, newcomers will need to understand current market conditions and provide additional value or solutions to compete with existing suppliers.

High demand for specific goods and services during the recent build appears to have eased.

In addition to the significant ongoing mining operations in the province, there are several mining projects currently under different stages of evaluation.

## Supply Chain Opportunities

Opportunities for suppliers exist in both ongoing mining operations as well as new mine development. Examples of the types of equipment, goods and services required for standard operations and development are listed below:

### Operating Mines:

- Chemicals and reagents
- Fuels and lubes
- De-dusting oil for potash
- Mobile equipment - trucks, dozers, front-end loaders
- Underground conveyor belting
- Bearings, seals and power transmission parts
- Electrical consumables such as breakers, fuses, switches and fixtures
- Pipes, valves and related fittings, i.e. PVC, steel and copper
- Boilers, piping, forged components
- Electronics and instrumentation
- Logistics, handling and storage
- Reagents and environment
- Bulk cement, explosives
- Diesel fuel, propane
- Maintenance parts – mobile equipment
- Computers and telecommunication
- General service

### Site Services:

- Water
- Waste disposal
- Catering
- Camp accommodation
- Transportation
- Internet and phone
- Storage shelters
- Janitorial services
- Pest control
- Onsite security
- Onsite medical

### Key manufactured goods for new mine development:

- Pumps and piping
- Valves and fittings
- Concrete
- Electrical
- Steel and fabrication
- Equipment

### Surface Construction:

- Mill/product storage/flotation buildings
- Cyclones
- Grinding equipment
- Scrubbers
- Pumps and piping
- Dryers
- Thickeners
- Process control equipment
- Process chemicals
- HVAC equipment
- Agitators
- Belt scales
- Transformers
- Switch gears
- Tanks and storage bins
- Conveyors
- Bucket elevators
- Boilers
- Centrifuges
- Overhead cranes
- Compressors
- Fire protection systems

# Saskatchewan Mining Supply Chain

## Underground Construction:

- Walking/drill rigs and drill bits
- Ultrasound measurement equipment
- Hoist rope/wire rope
- Winches
- Pumps
- Electrical equipment
- Hydraulic motors
- Instrumentation
- Load and hauling machinery
- Raise bore systems
- Specialized mine vehicles
- Rock tools
- Explosives and suppliers
- Rock drills
- Conveyors and components
- Fans
- Scoop trams
- Limit switches
- Cranes
- Crushers
- Screens
- Rock drill lifts

## Events and Resources

### *Saskatchewan Mining Supply Chain Forum*

This annual event provides a venue for mining project, procurement and operations personnel to meet with manufacturing, equipment and service companies to discuss opportunities in the mining supply chain.

The forum attracts over 900 participants who represent mining, engineering and supply chain companies.

Forum attendees hear presentations delivered by organizations such as Nutrien, BHP Billiton, Orano, Cameco, Mosaic, SNC Lavalin, AMEC and Hatch. The forum tradeshow also provides attendees with the opportunity to network and connect with mining and engineering companies from across the province. <https://mscf.ca/>

### *How to Successfully Access the Mining Supply Chain*

This guide provides key information to Saskatchewan manufacturers interested in understanding the potash and uranium industries. The guide describes opportunities and the process of becoming a successful preferred supplier.

The guide also offers insights into the qualities that mining companies seek in their suppliers. <https://publications.saskatchewan.ca/#/products/81697>

### *Potash Mining Supply Chain Requirement Guide*

This report provides information on the types of goods and services required to support the development and operation of both a conventional and a solution mine. It follows through lifecycle stages such as exploration and resource evaluation, through to closure, reclamation and monitoring. <https://publications.saskatchewan.ca/#/products/81699>

### *Uranium Mining Supply Chain Requirement Guide*

This guide outlines the quantity, value and scheduling of supplies and services purchased by Saskatchewan's uranium mining project owners and/or operators to assist with the development, operation, maintenance, decommission and close out of projects.

### *Saskatchewan Manufacturers Guide*

This online database lists a variety of manufacturers in Saskatchewan, searchable by industry, product or location. <https://manufacturers.saskatchewan.ca/>

### *Services We Provide*

- Information regarding general supply chain opportunities in the mining industry
- Business-to-business support connecting suppliers to buyers
- Targeted industry events linking companies to current supply chain opportunities
- Resources and support for companies interested in investing in Saskatchewan

For more information, contact:

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