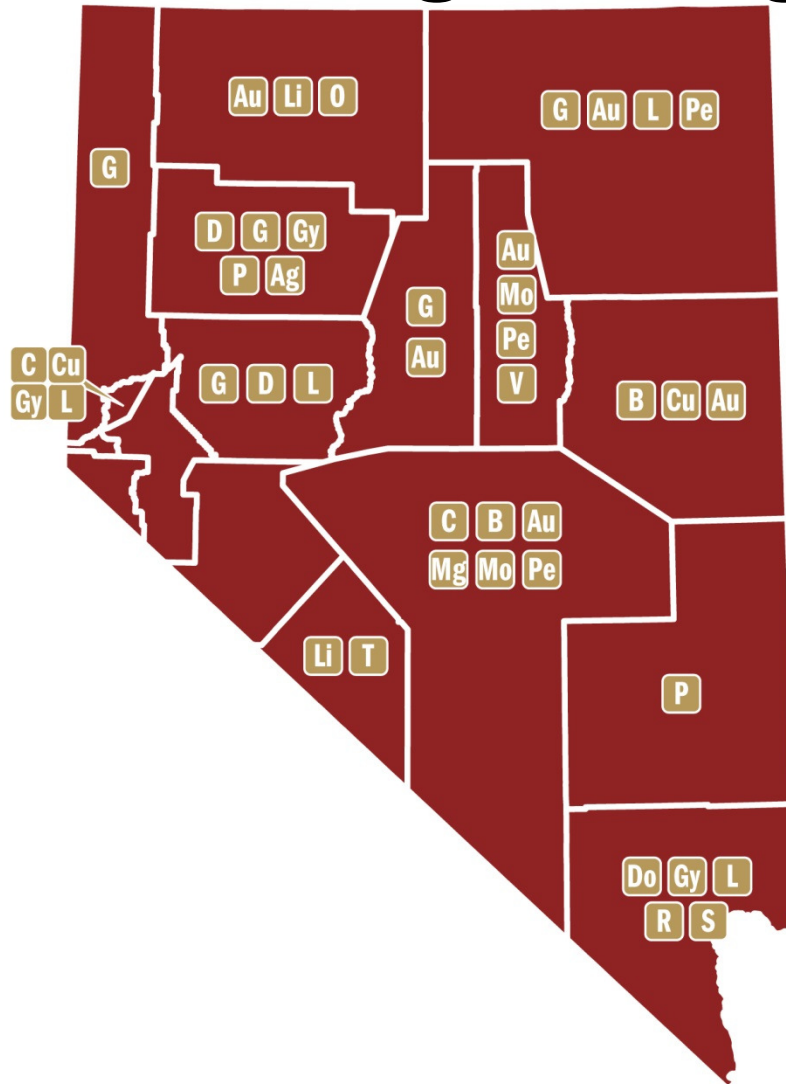




- ✓ Producing Essential Minerals
- ✓ Providing Quality Jobs
- ✓ Generating Significant Contributions

Producing Essential Minerals

Mining throughout the state



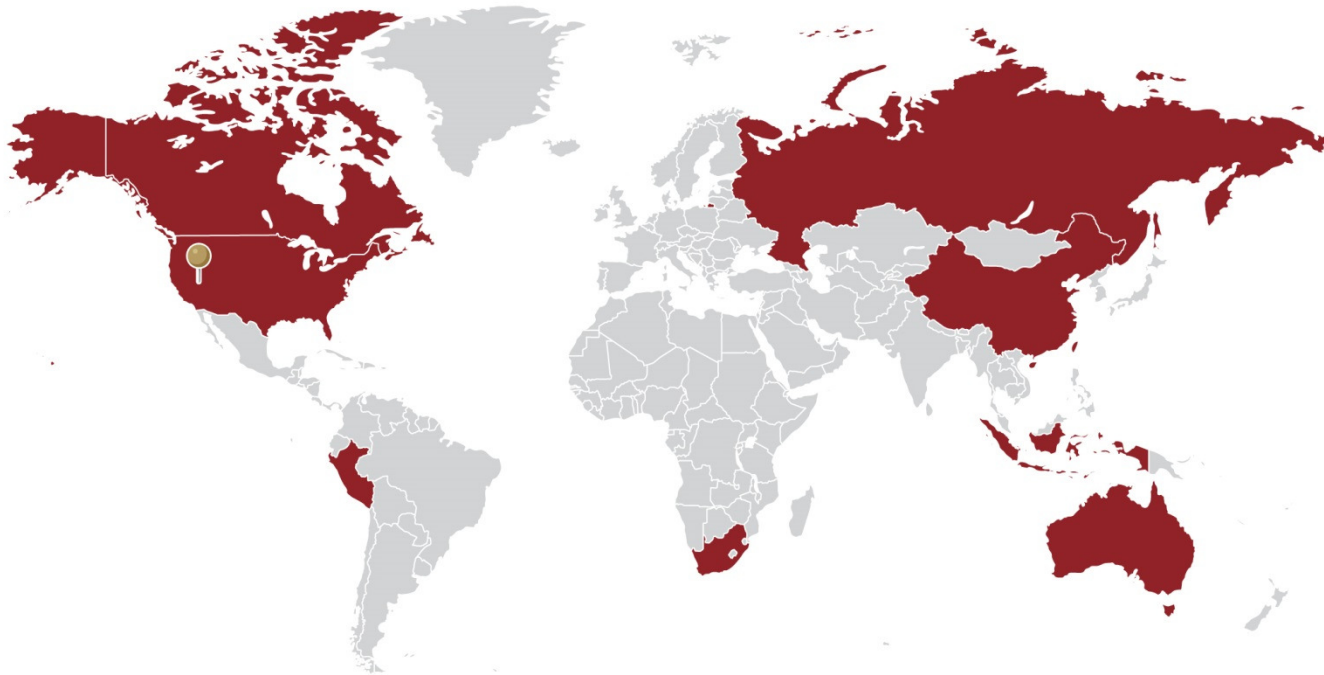
- | | |
|----------------------------|----------------------|
| B Barium | Mg Magnesium |
| C Clays | Mo Molybdenum |
| Cu Copper | O Opals |
| D Diatomite | P Perlite |
| Do Dolomite | Pe Petroleum |
| G Geothermal Energy | R Rare Earths |
| Au Gold | S Silica |
| Gy Gypsum | Ag Silver |
| L Lime | T Turquoise |
| Li Lithium | V Vanadium |

126 Mining Operators

Source: NVMA and Nevada Department of Taxation



GLOBAL GOLD PRODUCTION



	Country	Percent of Total
1	China	13.6%
2	Australia	9.7%
3	United States	8.8%
4	Russia	7.5%
5	S. Africa	6.8%
6	Peru	6.2%
7	Nevada	5.9%
8	Canada	3.6%
9	Indonesia	3.6%
10	Other	24.1%



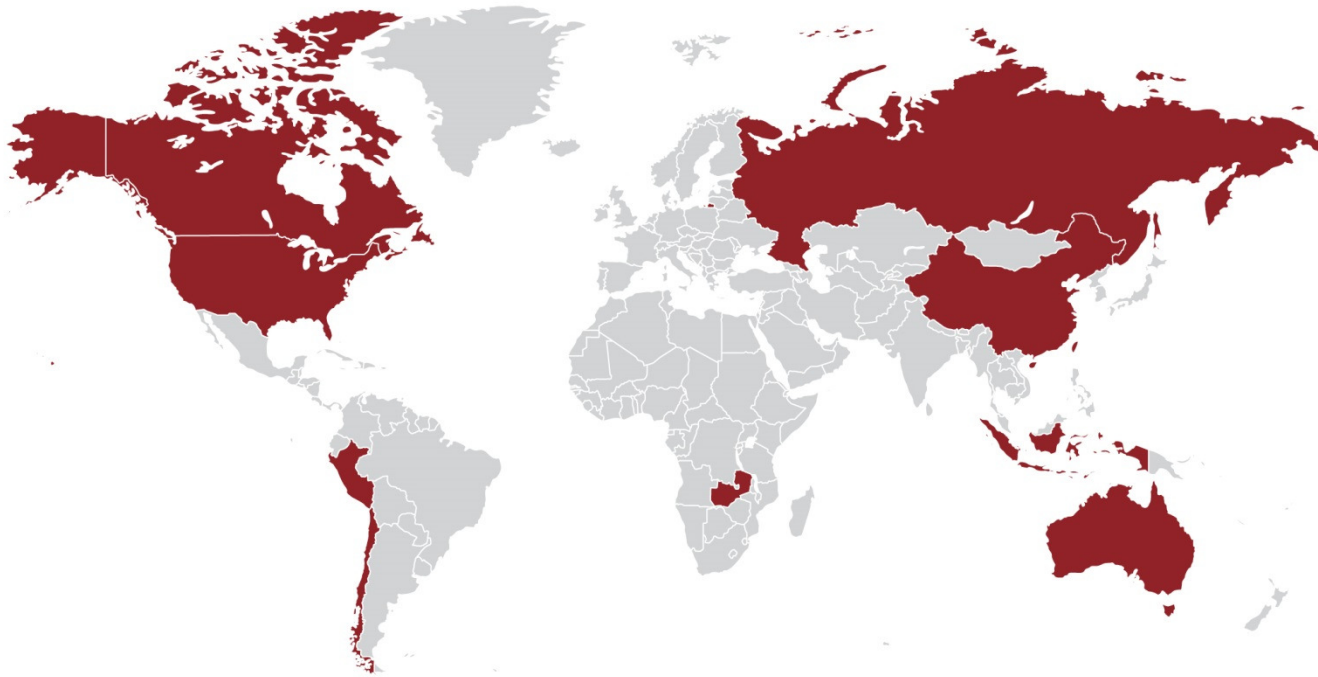
GLOBAL SILVER PRODUCTION



	Country	Percent of Total
1	Mexico	17.8%
2	China	15.9%
3	Peru	14.6%
4	Australia	7.4%
5	Russia	5.8%
6	Chile	5.5%
7	Bolivia	5.2%
8	Poland	5.0%
9	United States	4.8%
10	Nevada	0.9%
11	Other	15.5%



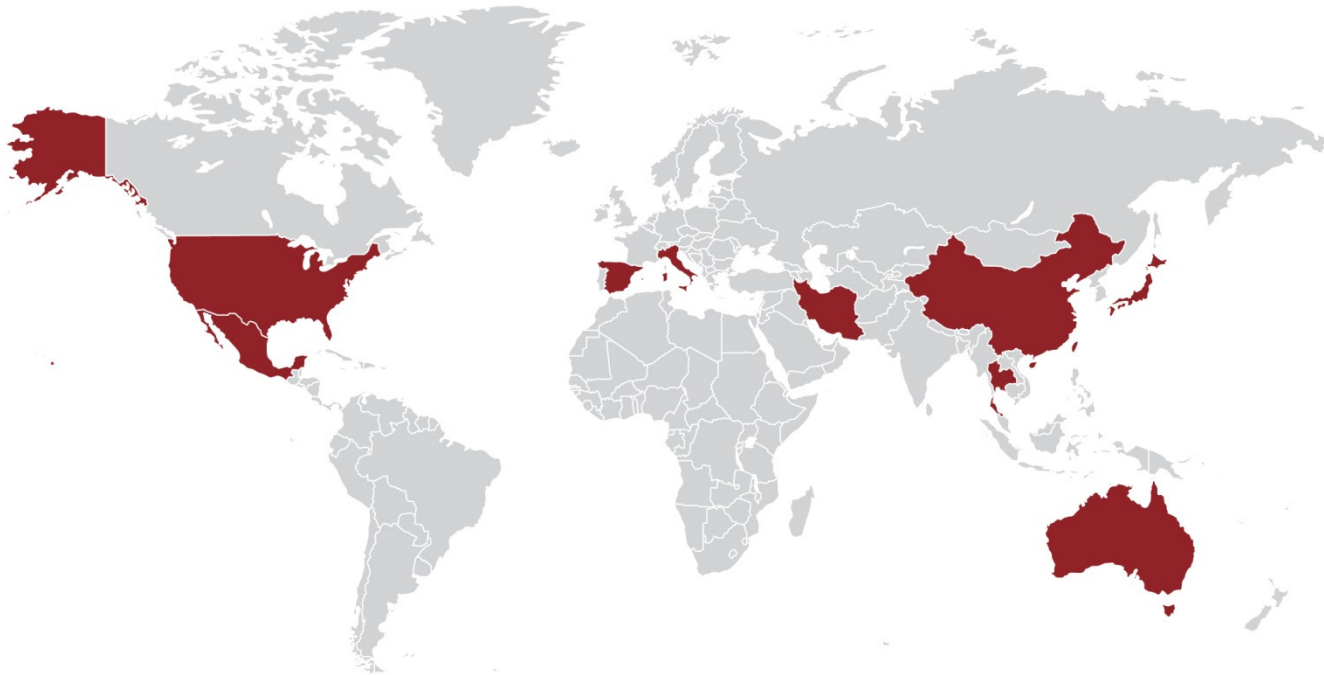
GLOBAL COPPER PRODUCTION



	Country	Percent of Total
1	Chile	32.7%
2	Other	12.2%
3	China	8.1%
4	Peru	7.7%
5	United States	6.9%
6	Australia	6.0%
7	Russia	4.4%
8	Zambia	4.1%
9	Canada	3.5%
10	Indonesia	3.4%
15	Nevada	0.3%



GLOBAL GYPSUM PRODUCTION



	Country	Percent of Total
1	China	32.2%
2	Other	9.7%
3	Iran	8.7%
4	Spain	7.7%
5	Thailand	6.6%
6	United States	6.0%
7	Japan	3.8%
8	Italy	2.8%
9	Mexico	2.6%
10	Australia	2.3%
23	Nevada	0.6%

D

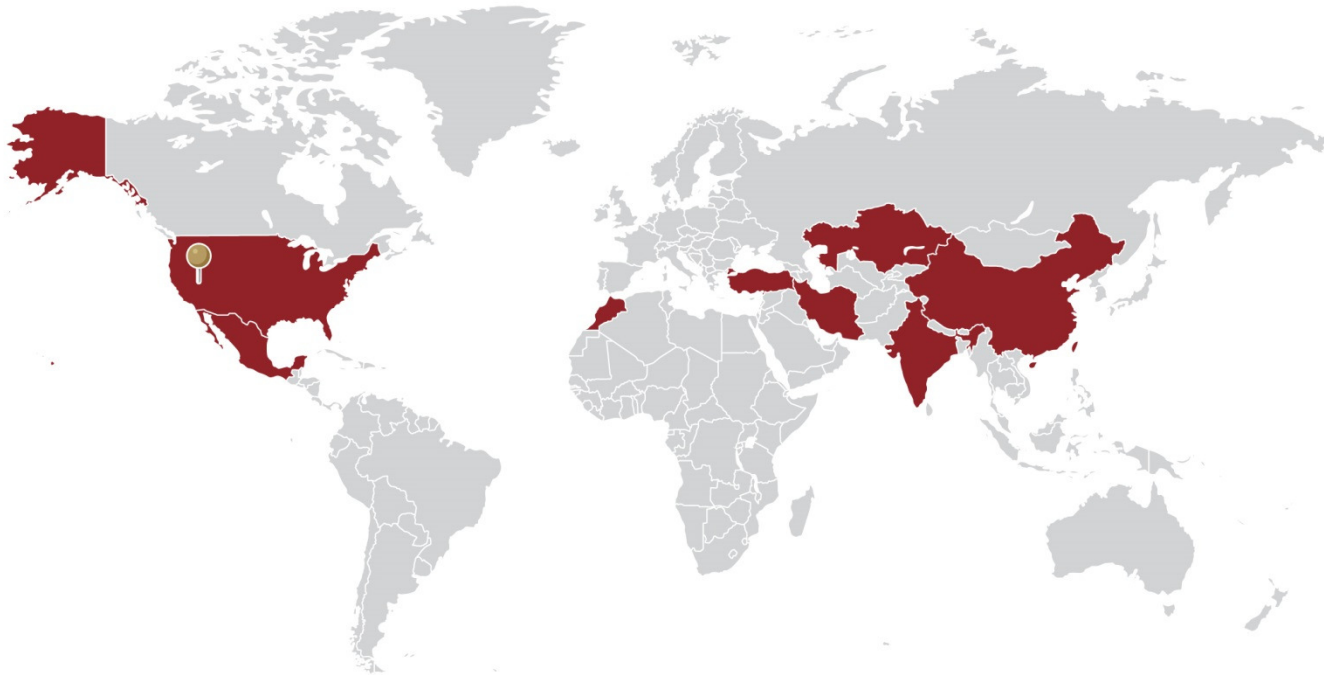
GLOBAL DIATOMITE PRODUCTION



	Country	Percent of Total
1	United States	38.7%
2	Nevada	21.6%
3	China	21.0%
4	Denmark	10.7%
5	Other	7.6%
6	Japan	4.8%
7	Mexico	4.3%
8	France	3.6%
9	Argentina	3.0%
10	Spain	2.4%

B

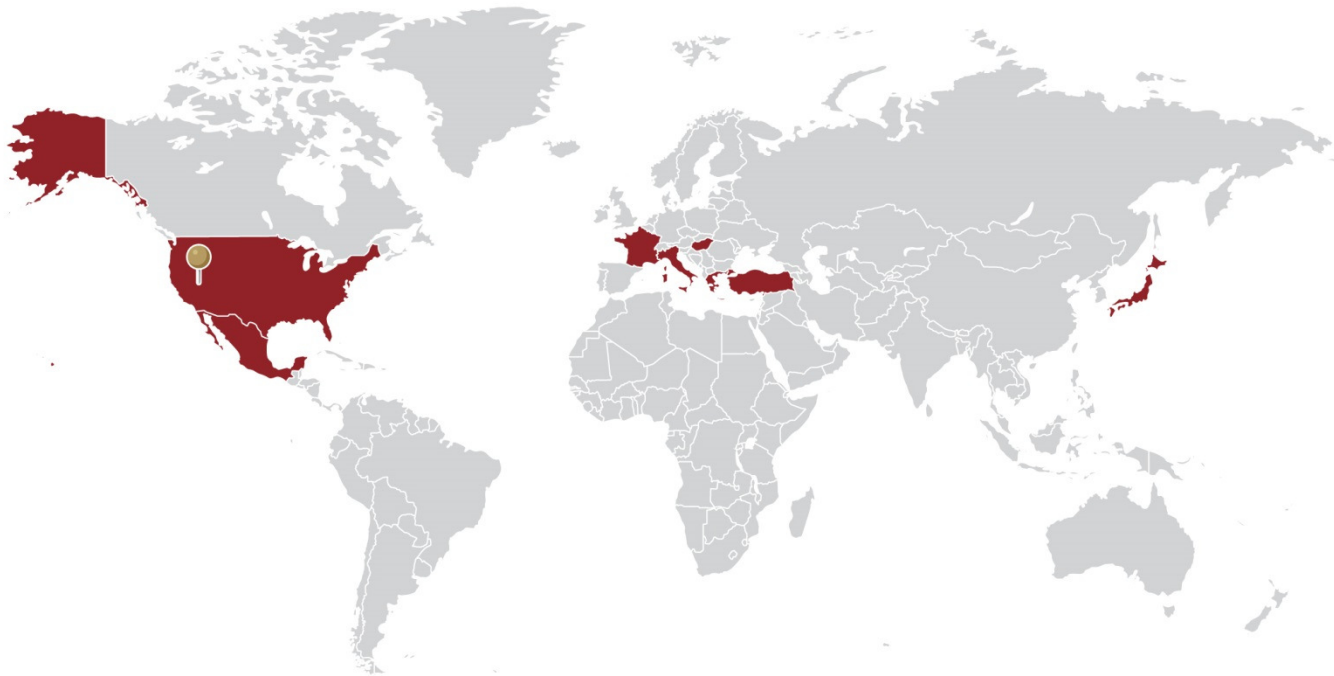
GLOBAL BARITE PRODUCTION



	Country	Percent of Total
1	China	49.0%
2	India	16.1%
3	United States	8.5%
4	Nevada	7.9%
5	Morocco	7.2%
6	Iran	4.2%
7	Turkey	2.7%
8	Other	2.6%
9	Kazakhstan	2.4%
10	Mexico	1.9%



GLOBAL PERLITE PRODUCTION



	Country	Percent of Total
1	Greece	28.2%
2	United States	23.7%
3	Japan	16.9%
4	Turkey	14.1%
5	Other	8.5%
6	Hungary	3.7%
7	Italy	3.4%
8	Mexico	1.7%
9	Nevada	0.5%

Providing Quality Jobs

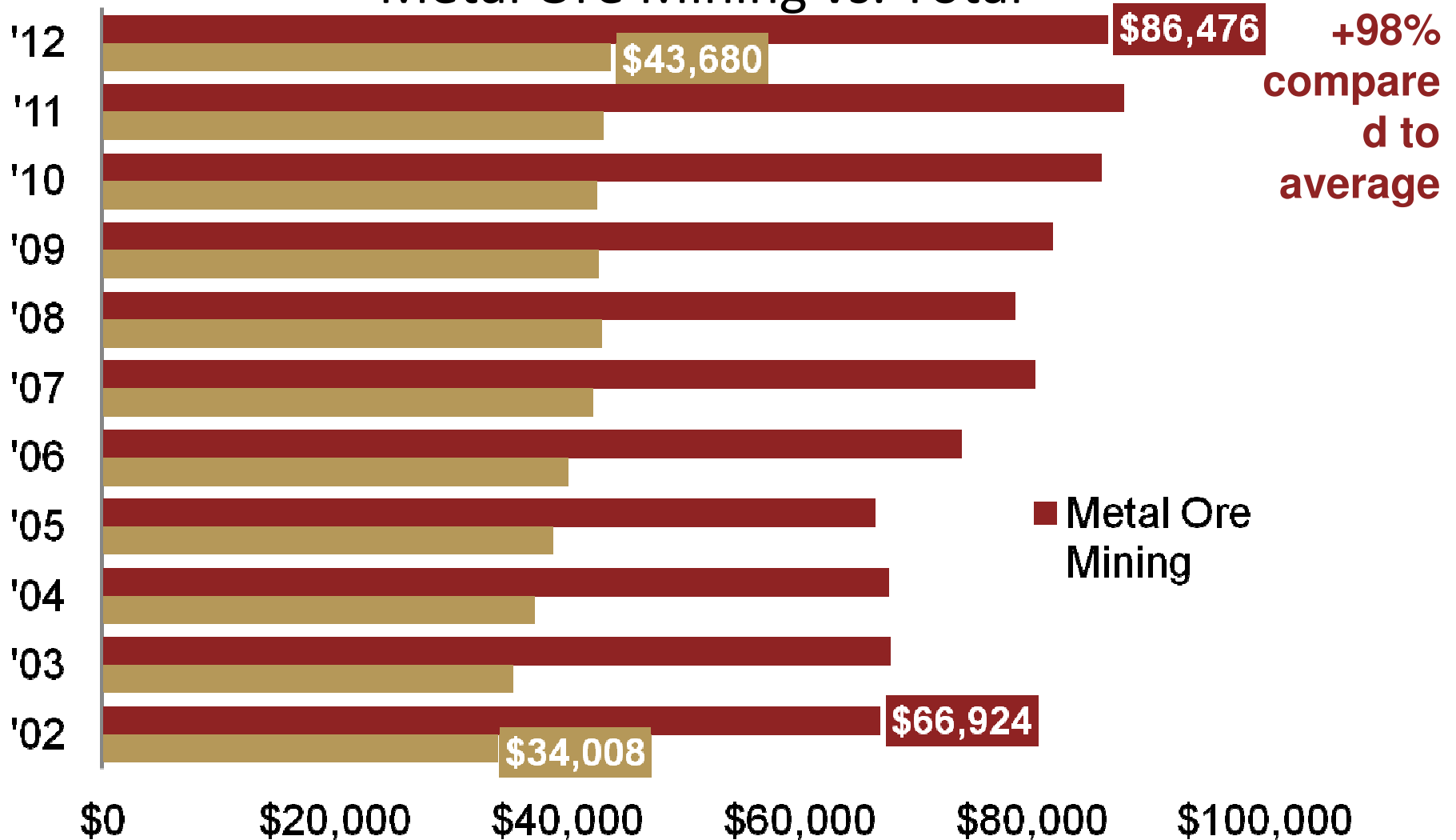
Mining Jobs

- Planners
- Equipment Operator
- Engineers
- Biologists
- Geologists
- Surveyors
- Draftsmen
- Drillers
- Chemists
- Electricians
- Human Resource Specialists
- Accountants
- Lawyers
- Safety professionals



Nevada Average Annual Wages

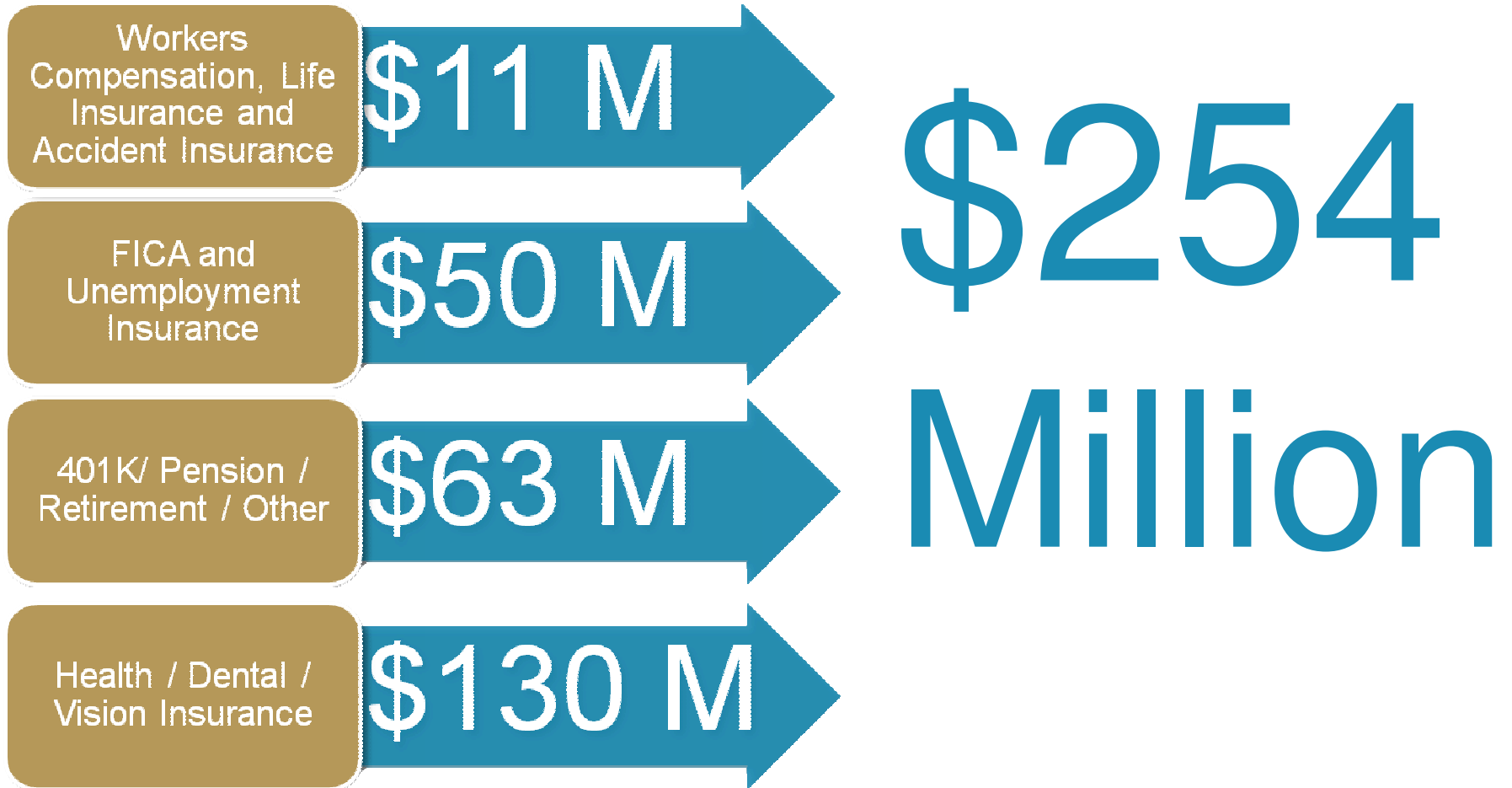
Metal Ore Mining vs. Total



Source: Nevada Department of Employment, Training and Rehabilitation



Benefits Paid by Nevada Mining



Source: NVMA Member Survey



Health Care Coverage

- Percent of Nevada private sector establishments that offer health insurance to employees:

55%

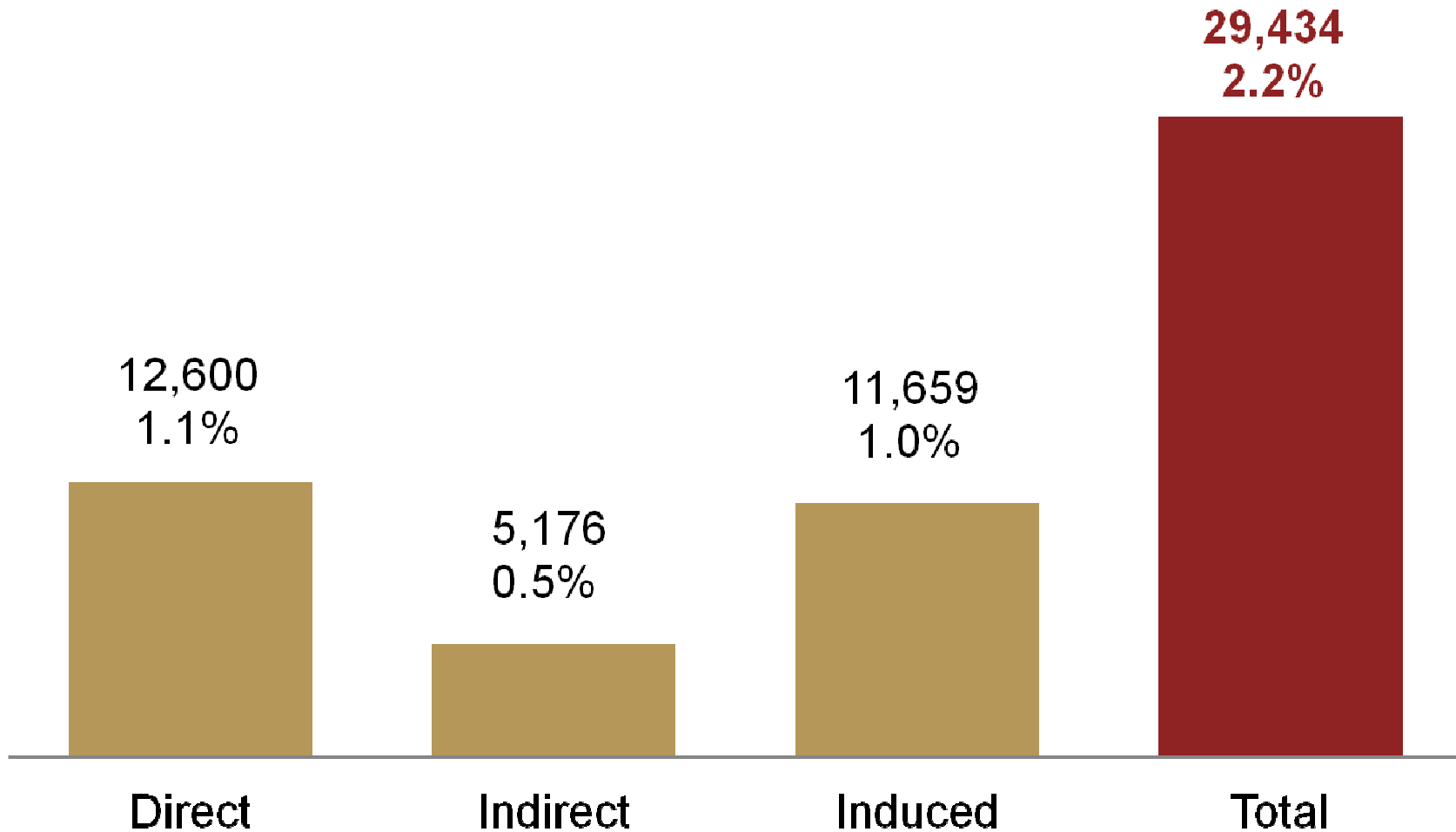
- Nevada mining industry-wide health care coverage rate:

93%

Source: NVMA Member Survey and Kaiser Family Foundation

Employment Impacts

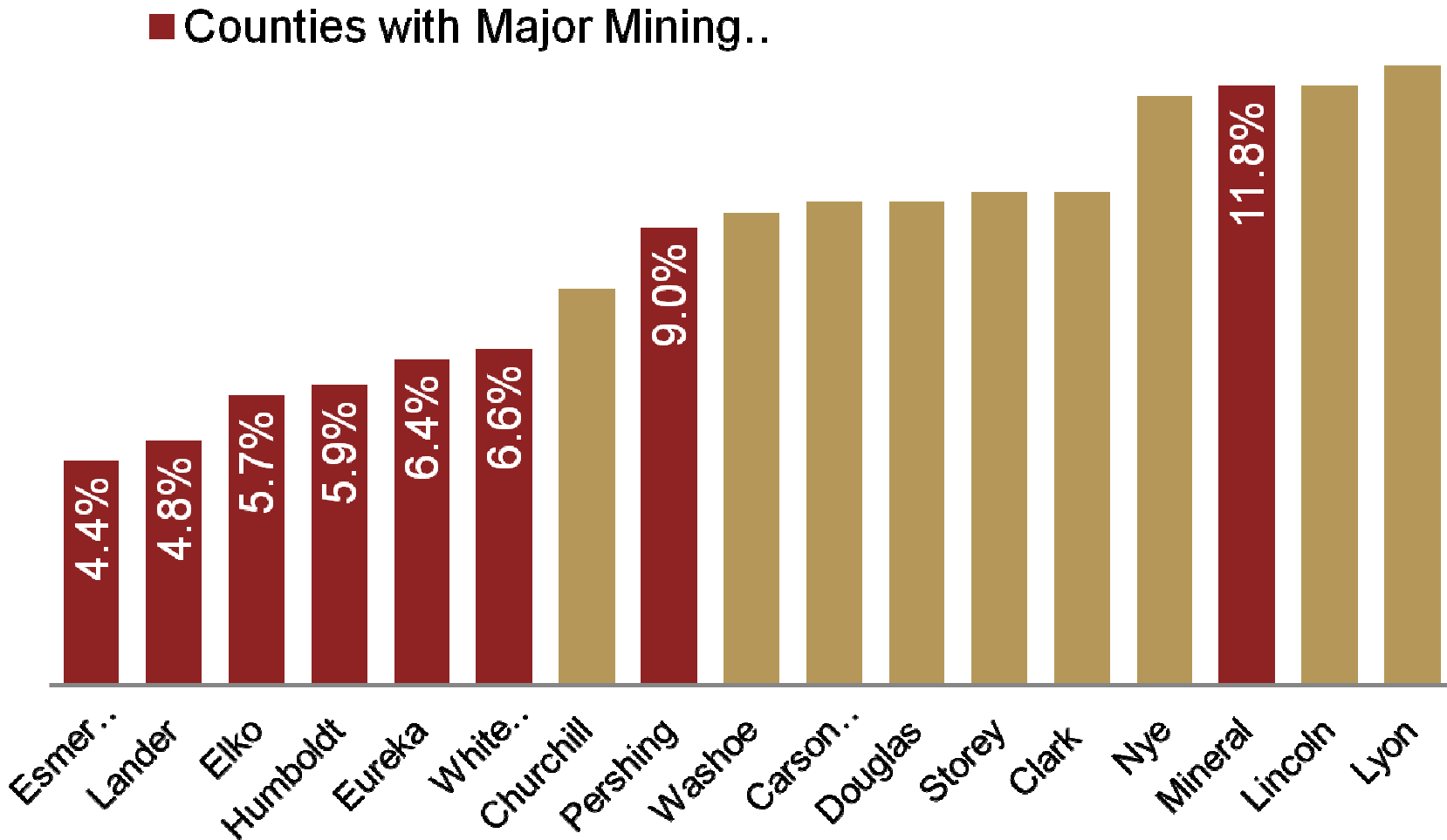
Nevada Mining Industry Operations (2012)



Source: Nevada Department of Employment, Training and Rehabilitation; Nevada Department of Taxation; IMPLAN; Applied Analysis

Unemployment Rate Comparison

Nevada Counties – July 2013

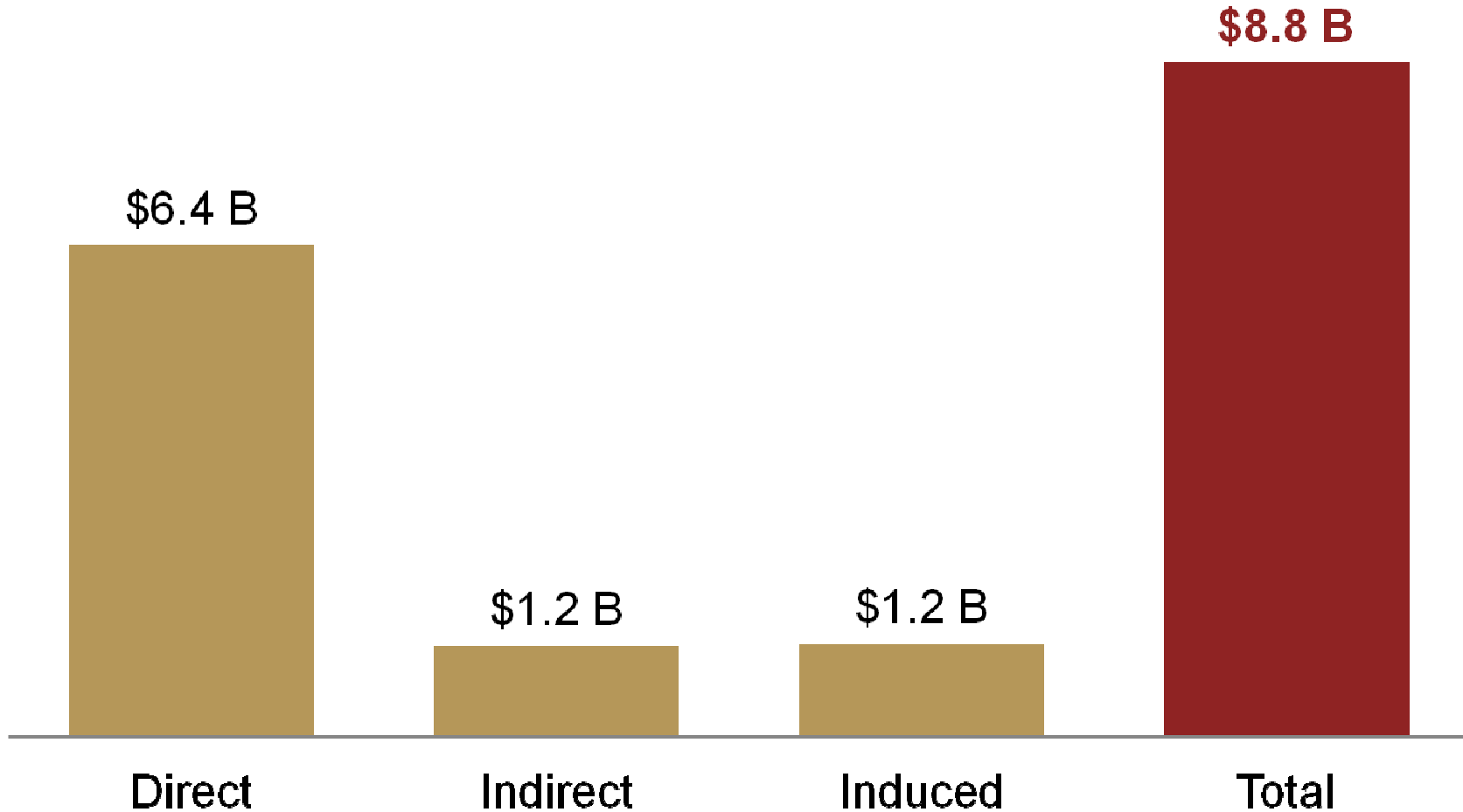


Source: U.S. Bureau of Labor Statistics and Applied Analysis

Generating Significant Contributions

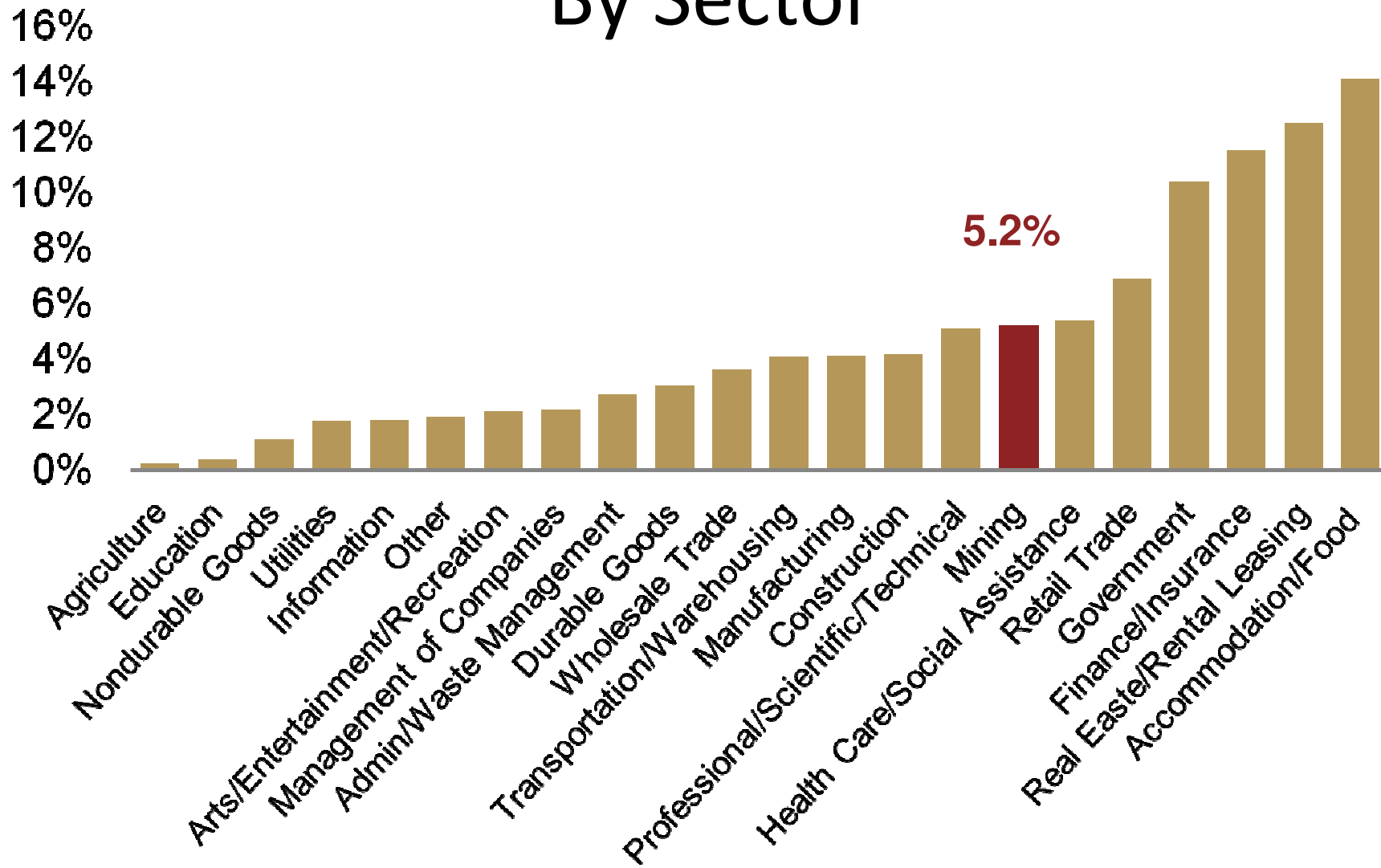
Economic Output

Nevada Mining Industry Operations (2012)



Source: U.S. Bureau of Economic Analysis; Nevada Department of Taxation; IMPLAN; Applied Analysis

Industry GDP as Share of Total By Sector



Source: U.S. Bureau of Economic Analysis

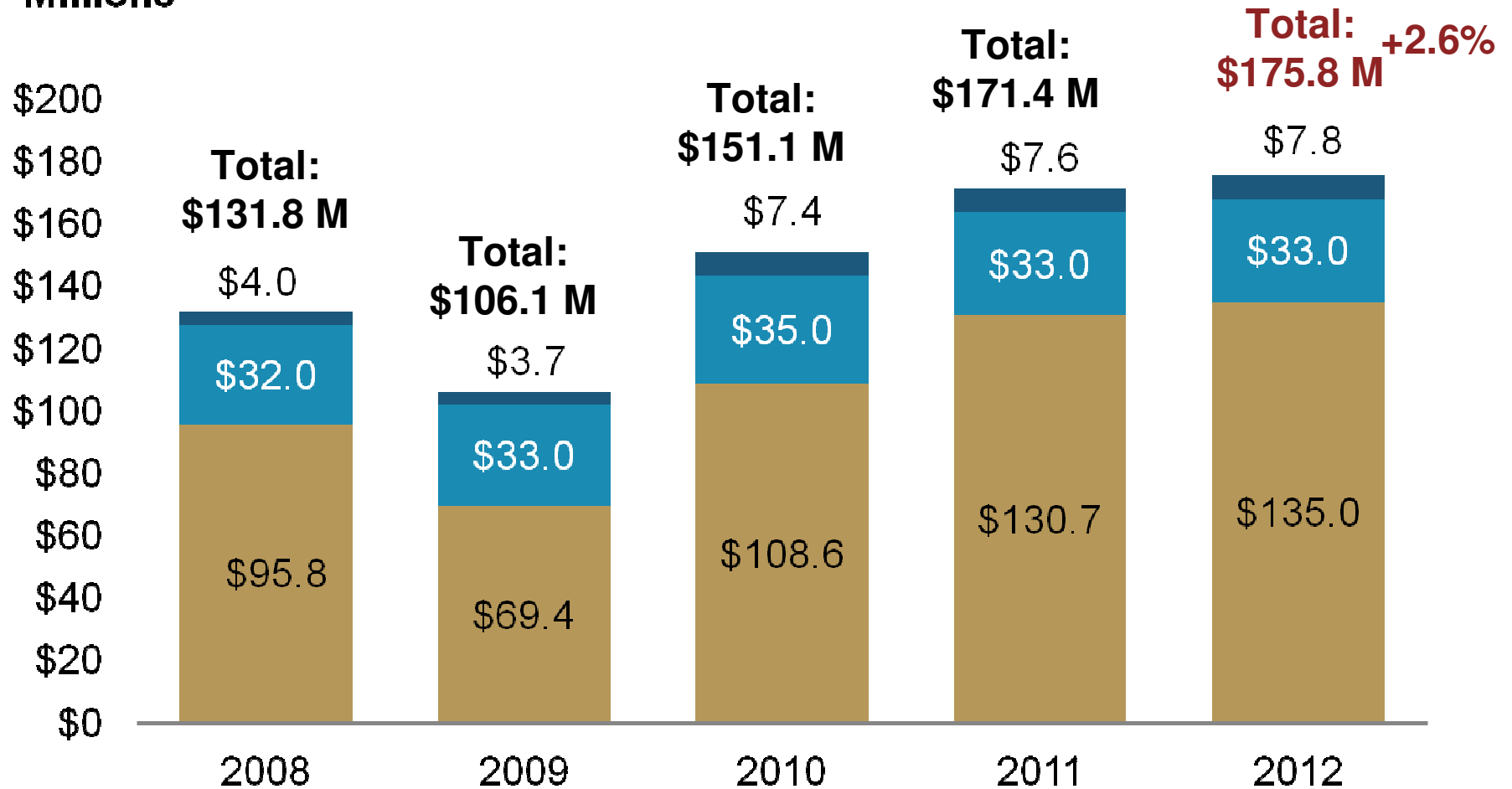
Indirect and Induced Output 2,200 Businesses



- Equipment Vendors
- Lab Techs
- Engineering Firms
- Construction Co's
- Grocery stores
- Restaurants
- Hotels
- Hospitals
- Banks

Estimated Total Non-Mining Specific Tax Paid by Nevada Mining

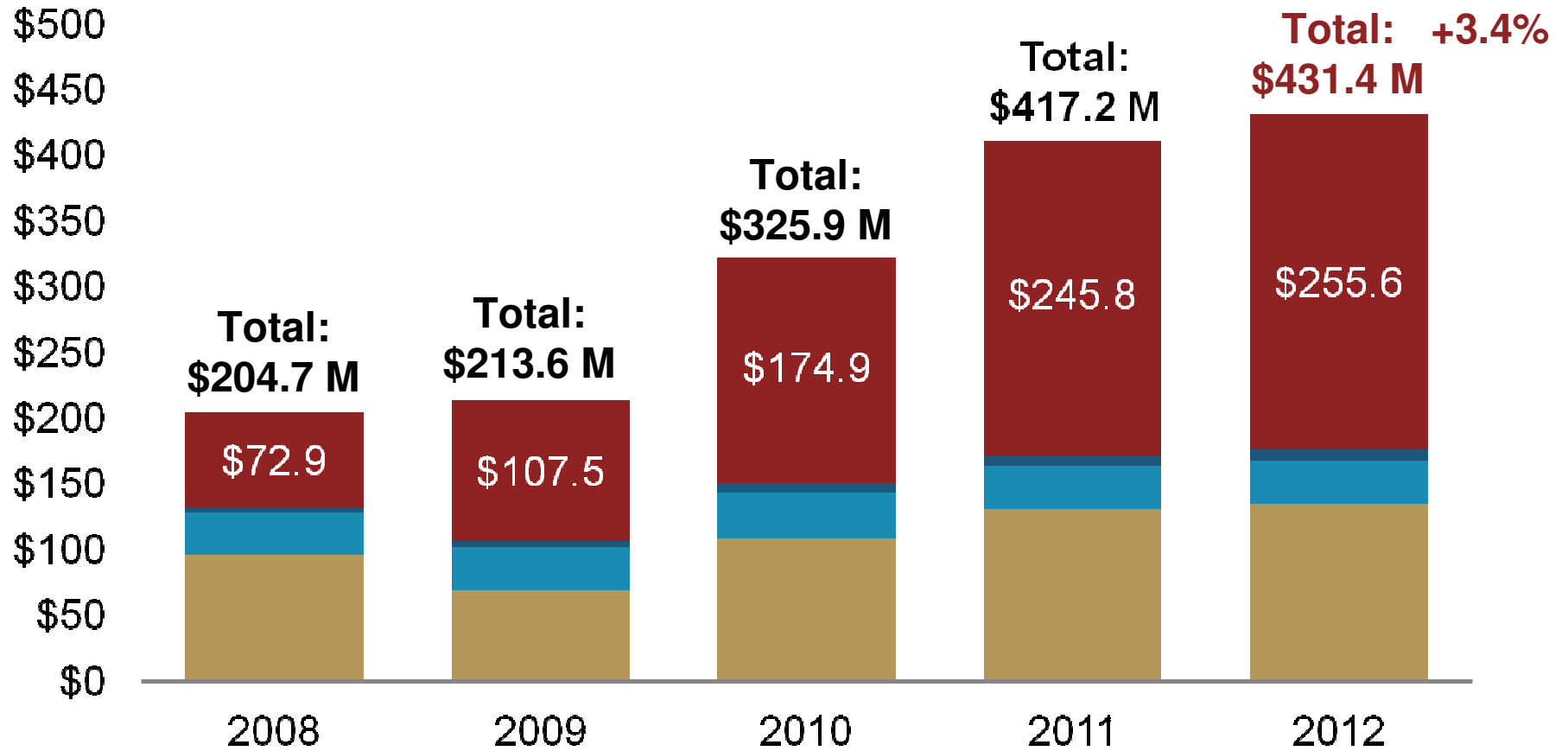
Millions



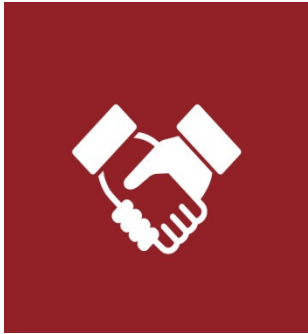
Source: NVMA Member Survey (2011, 2012); Natural Resource Industry Institute (2008 – 2010), NV Dept of Taxation and industry surveys

Estimated Total Mining and Non-Mining Specific Major Taxes Paid by Nevada Mining

Millions



Source: NVMA Member Survey (2011, 2012); Natural Resource Industry Institute (2008 – 2010), NV Dept of Taxation and industry surveys



Charitable Giving by Nevada Mining

- *What is the approximate amount of charitable gifts donated by your company in calendar year 2012?*



Monetary donations to non-profit/
charitable organizations:

\$8.5 Million



Educational scholarships:

\$3.0 Million



Higher education:

0.5 Million



Capital improvements in local
communities:

0.1 Million

Source: NVMA Member Survey



Charitable Giving by Nevada Mining

- *What is the approximate amount of volunteer hours tracked by your company in calendar year 2012?*



volunteer
time:

7,800 hours

Source: NVMA Member Survey



- ✓ Producing Essential Minerals
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