



POLICY FORUM ON MINING



Policy Forum on Mining
National Academy of Science and Technology
Hotel Jen Manila, Roxas Boulevard, Pasay City
26 May 2017





MINERALS INDUSTRY STATUS

STATUS - MINING RIGHTS

❖ 686 Approved Mining Tenements

| | | |
|--|--------------|-----------------------|
| Exploration Permits | - 26 | - 48,835 has. |
| Mineral Production Sharing Agreements | - 317 | - 602,879 has. |
| Financial or Technical Assistance Agreements | - 5 | - 100,136 has. |
| Special Mines Permit | - 5 | - 522 has. |
| Industrial Sand and Gravel Permits | - 72 | - 871 has. |
| Mining Patents | - 223 | - 1,946 has. |
| Mineral Processing Permits | - 38 | - - |
| TOTALS | - 686 | - 755,192 has. |

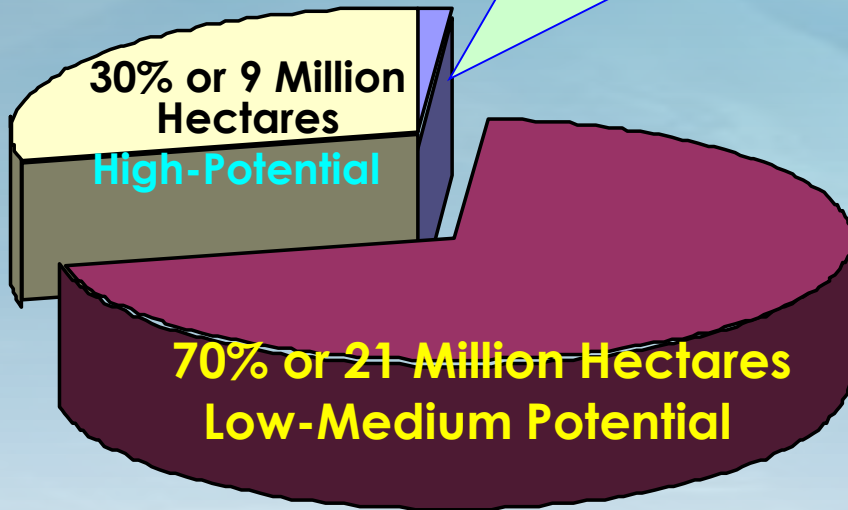




MINERALS INDUSTRY STATUS

MINING TENEMENT STATISTICS

Approximately 2.52% of Philippine land area is covered by mining contracts/permits



Mineral Land Distribution
Total Philippine Land Area is
30 Million Hectares

| | Area (hectares) | % of Area |
|---|-----------------|-----------|
| Area Covered by Mining Permits/Contracts | 755,192 | 2.52% |
| Area Under Production Stage | 96,797 | 0.32% |
| Area Under Exploration (subject to area relinquishment) | 658,395 | 2.20% |





MINERALS INDUSTRY STATUS

49 Operating Metallic Mines

27 Producing Mines

9 Under Suspension by MGB-DENR

1 Under Suspension due to ECC Cancellation

12 Under Voluntary Suspension

62 Operating Nonmetallic Mines

4 Metallic Mineral Processing Plants

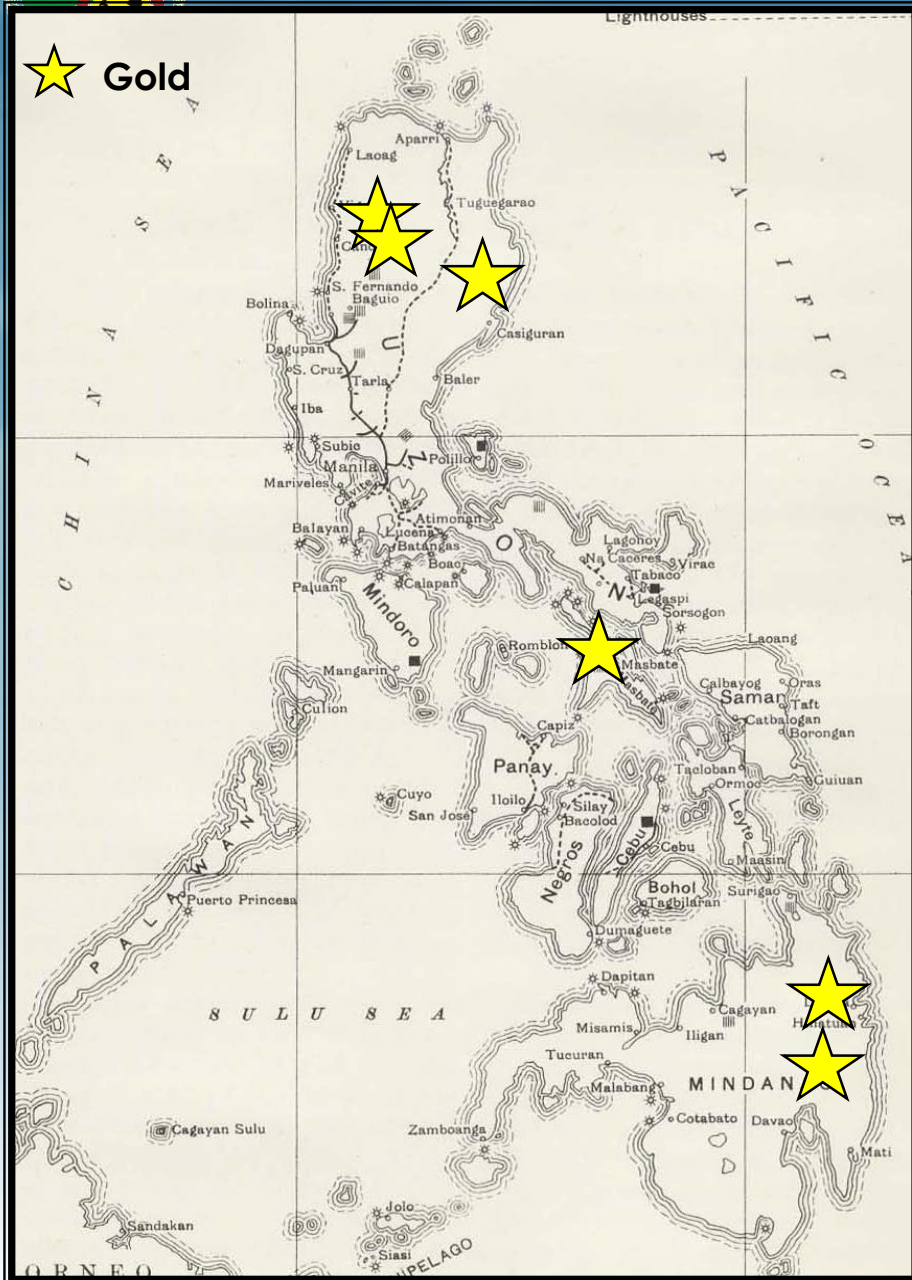
2 Gold Processing Plants

2 Nickel Processing Plants



PRODUCING MINES

★ Gold



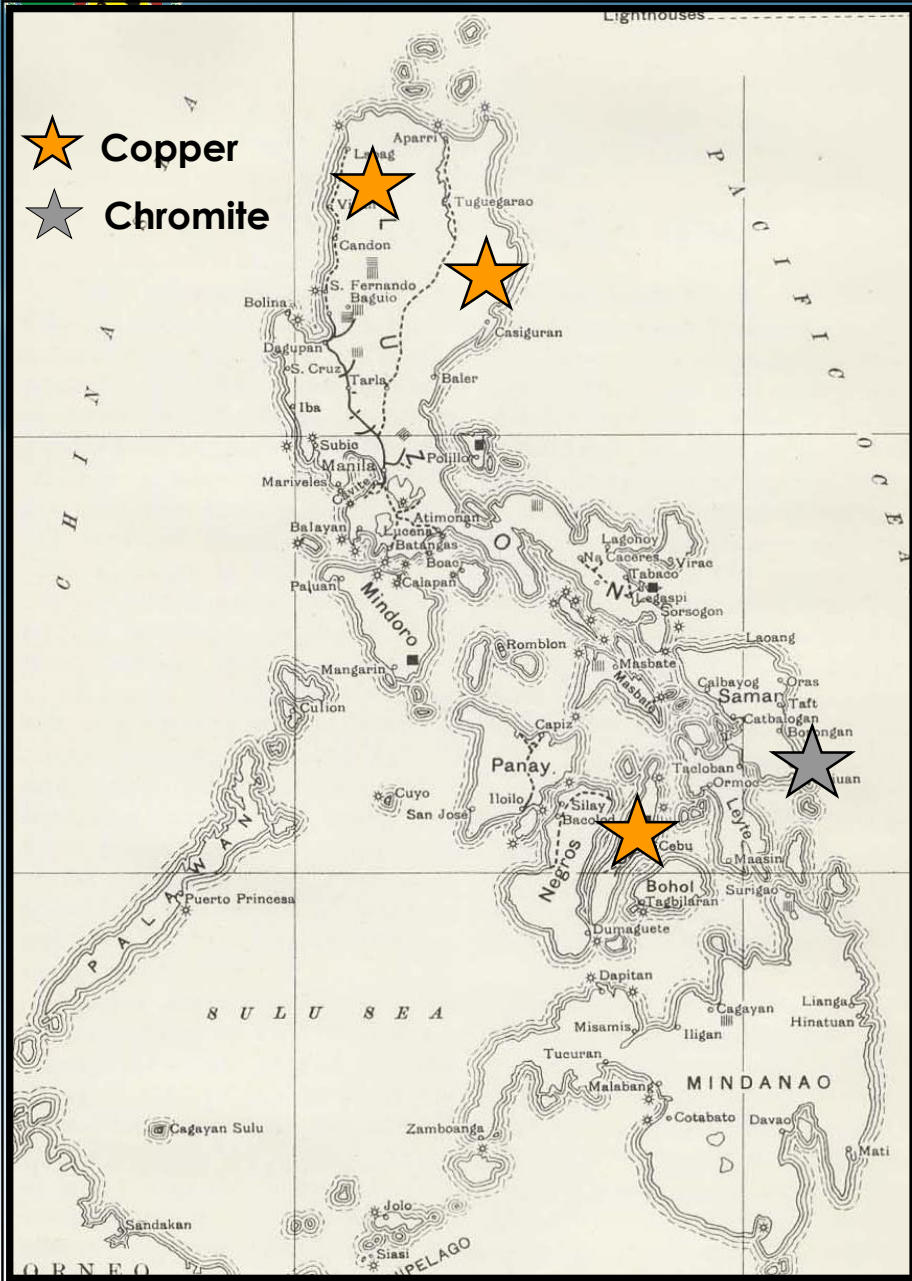
27 Metallic Mines

6 Gold Mines

- Victoria Gold Project (Lepanto) – Mankayan, Benguet
- Acupan Contract Mining Project (Benguet Corp) – Itogon, Benguet
- Runruno Gold Project (FCF Minerals) – Quezon, Nueva Vizcaya
- Masbate Gold Project (Filminera) – Aroroy, Masbate
- Banahaw Co-O Gold Project (Philsaga Mining) – Rosario, Agusan del Norte
- Maco Gold Mine (Apex Mining) – Maco, Compostela Valley



PRODUCING MINES



27 Metallic Mines

3 Copper Mines

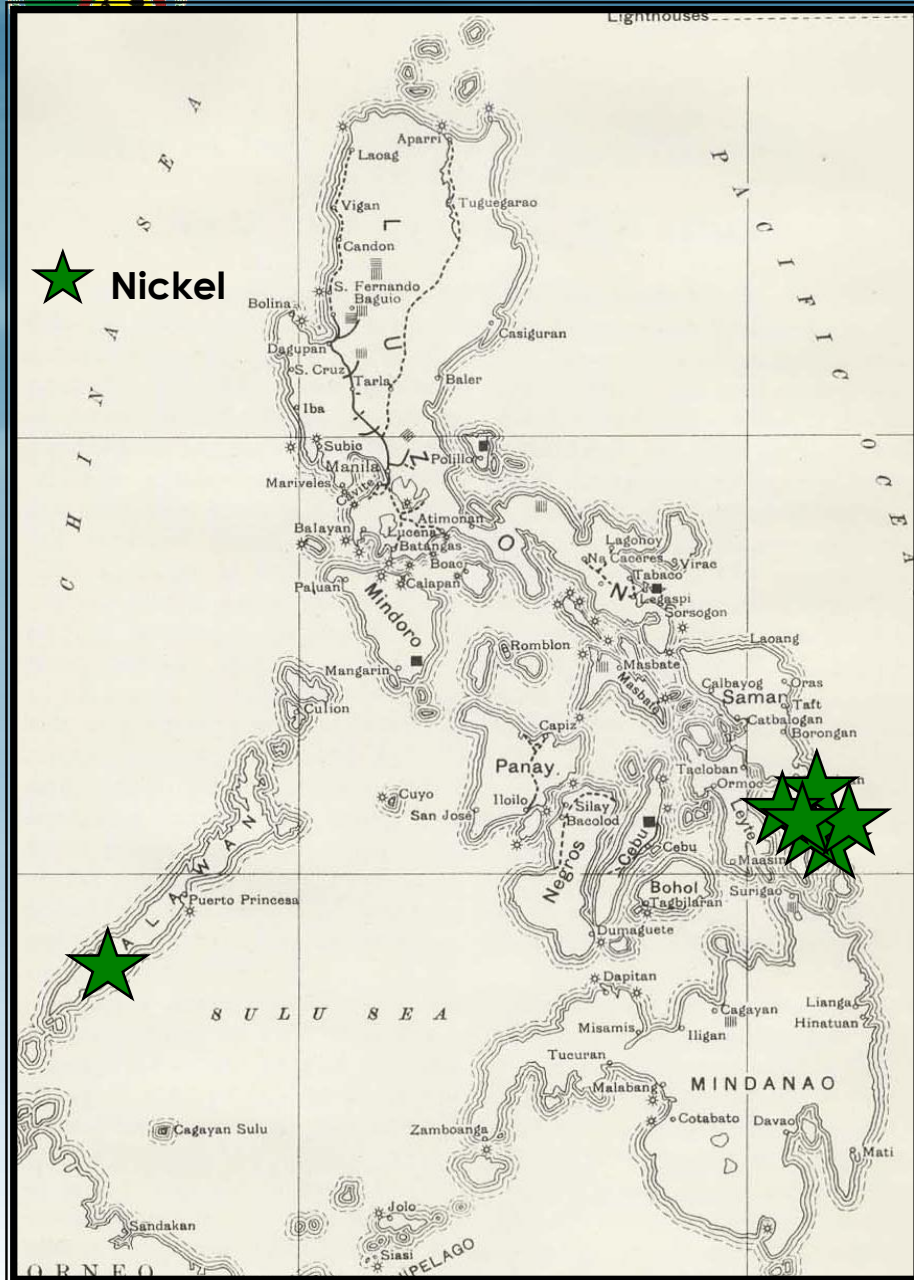
- Padcal Copper Project (Philex) – Tuba, Benguet
- Didipio Copper-Gold Project (Oceanagold) – Kasibu, Nueva Vizcaya
- Toledo Copper Project (Atlas/ CCC) – Toledo City, Cebu

1 Chromite Mine

- Homonhon Chromite Project (Chromiteking, Inc.) - Homonhon, Guian, Samar



PRODUCING MINES



27 Metallic Mines

17 Nickel Mines

1 – Palawan

- Rio Tuba Nickel Project (Rio Tuba Nickel Mining Corporation) - Bataraza, Palawan

6 – Dinagat Islands

- Dinagat Chromite-Nickel Project (PMDC/AAM-PHIL) - Basilisa and San Jose, Dinagat Island
- Cagdianao Nickel Project (East Coast/Cagdianao Mining) - Valencia, Cagdianao, Dinagat Island
- Libjo Nickel Laterite Mining Project (East Coast Mineral/Libjo Mining Corporation) - Tubajon and Libjo, Dinagat Island
- Palhi Nickel Project (Norweah Metals/Oriental Vision) - Tubajon, Dinagat Island
- Casiguran Nickel Project (Century Peak) - Loreto, Dinagat Island
- Esperanza Nickel Project (Century Peak) - Loreto, Dinagat Island





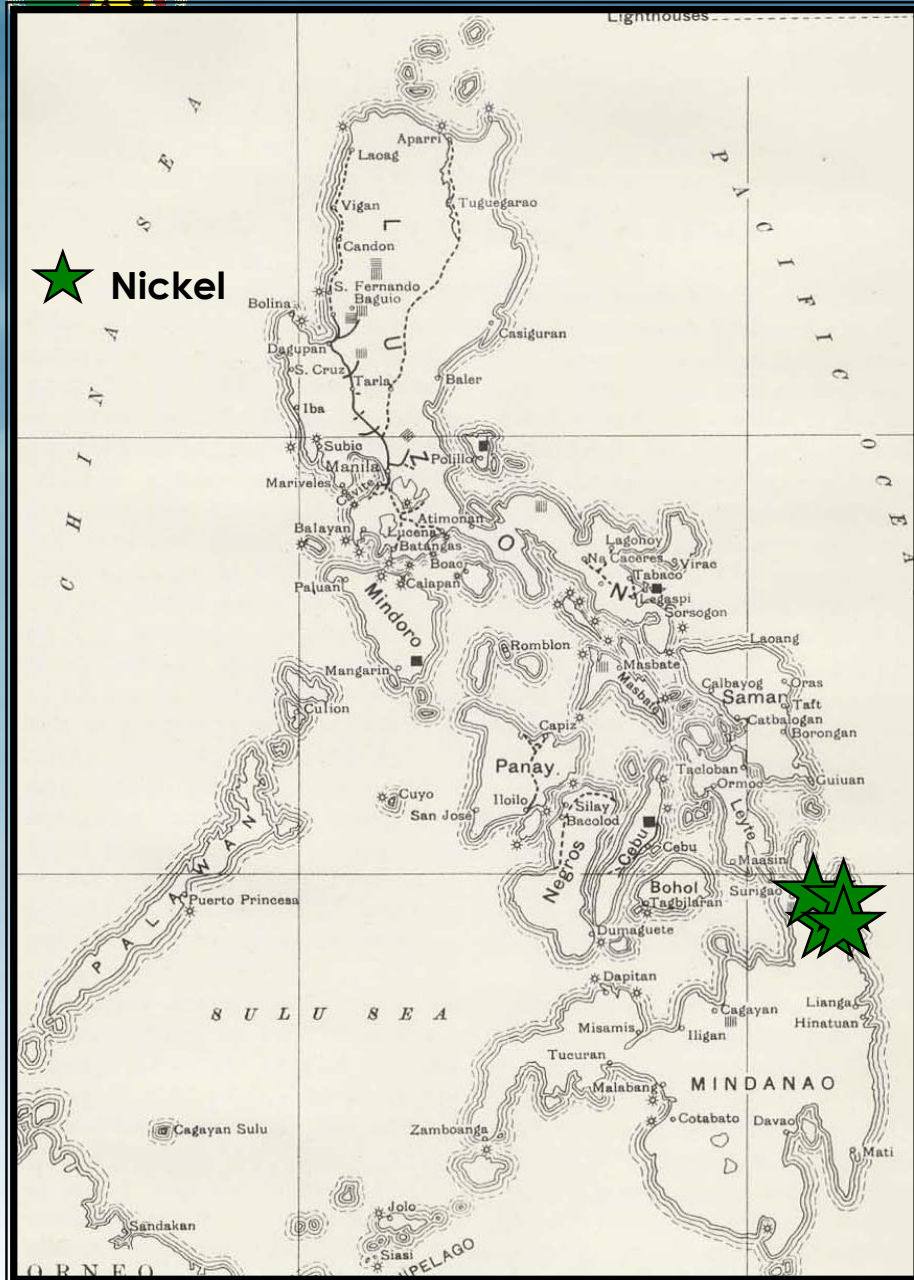
PRODUCING MINES

27 Metallic Mines

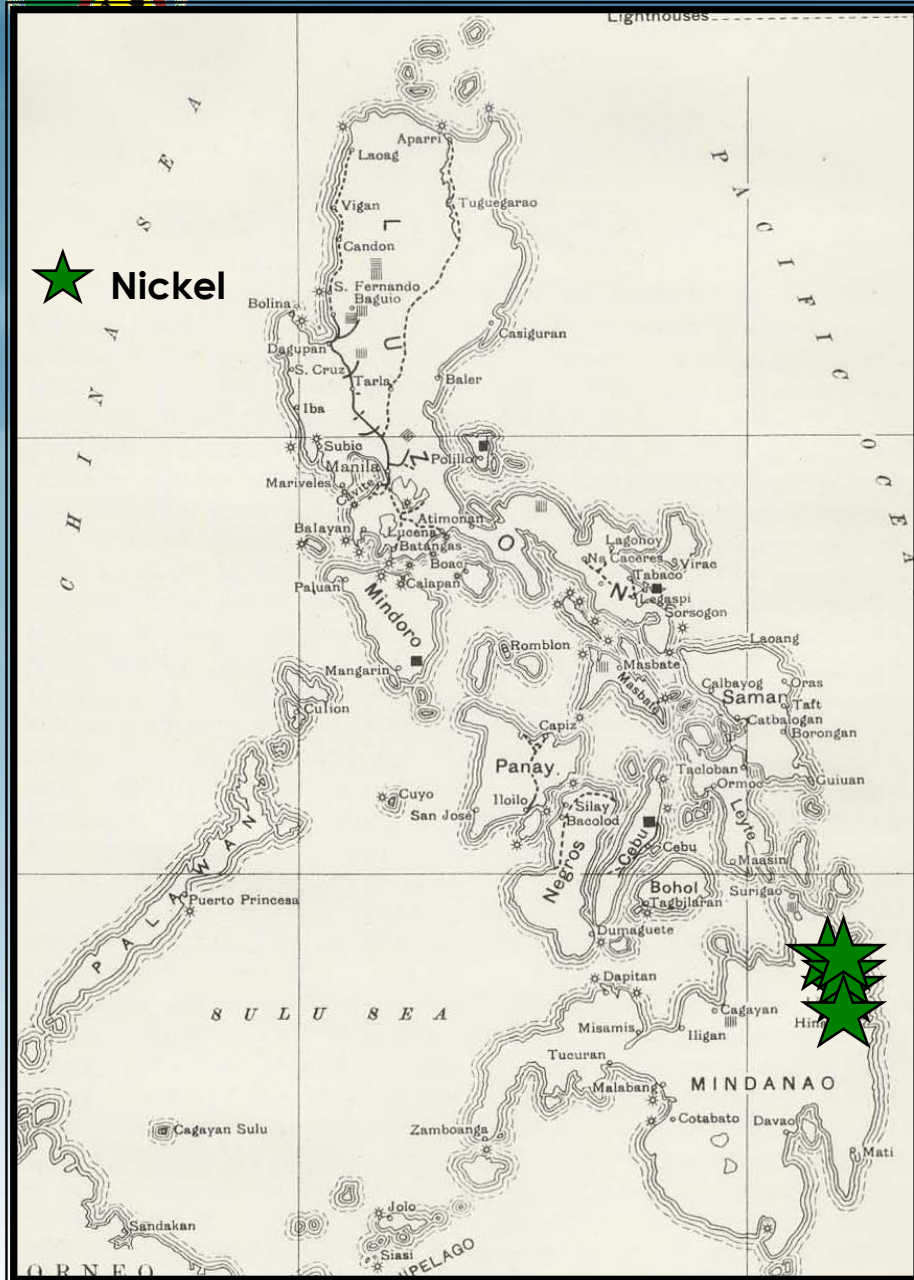
17 Nickel Mines

4 – Surigao del Norte

- Cagdianao Nickel Project (Surigao Integrated Resource/Platinum Group Metals) - Cagdianao, Claver, Surigao del Norte
- Tagana-an Nickel Project (Hinatuan Mining) - Tagana-an, Surigao del Norte
- Urbiztondo Nickel Project (Adnama Mining) - Urbiztondo, Claver, Surigao del Norte
- Taganito Nickel Project (Taganito Mining) - Claver, Surigao del Norte



PRODUCING MINES



27 Metallic Mines

17 Nickel Mines

4 – Surigao del Sur

- Cantilan Nickel Project (Marcventures Mining) - Cantilan, Surigao del Sur
- Adlay Nickel Project (CTP Mining) - Adlay, Carrascal, Surigao del Sur
- Dahican Nickel Project (CTP Mining) - Dahican, Carrascal, Surigao del Sur
- Carrascal Nickel Project (CTP Mining/Carrascal Nickel) - Carrascal, Surigao del Sur

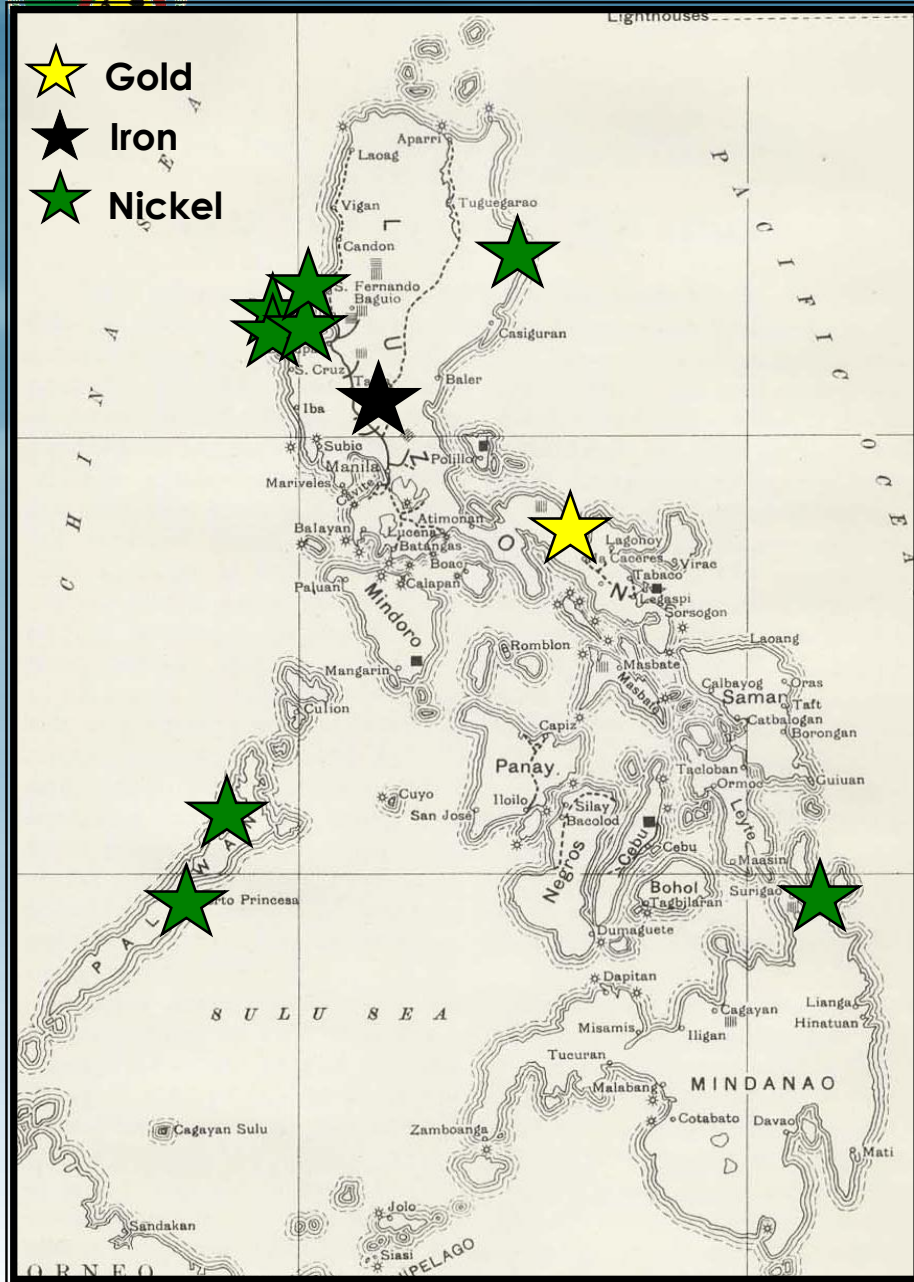
2 – Agusan del Norte

- Tubay Nickel-Cobalt Mining Project (SR Metals) - Tubay, Agusan del Norte
- Agata Nickel Laterite Project (Agatha Mining Ventures, Inc.) - Tubay, Santiago and Jabonga, Agusan del Norte



UNDER SUSPENSION BY MGB-DENR

- ★ Gold
- ★ Iron
- ★ Nickel



9 Metallic Mines

1 Gold Mine

- Paracale Gold Project (Johnson Gold Mining) – Jose Panganiban, Camarines Norte

1 Iron Mine

- Camachin Iron Ore Mining Project (Ore Asia Mining) - Dona Remedios Trinidad, Bulacan

7 Nickel Mines

- Sta. Cruz Candelaria Project (Zambales Diversified) - Sta. Cruz, Zambales
- Sta. Cruz Nickel Project (Benguet Nickel Mines) - Sta. Cruz, Zambales
- Sta. Cruz Nickel Project (Eramen Minerals) - Sta. Cruz and Candelaria, Zambales
- Guinabon Nickel Project (Filipinas Mining /LNL Archipelago) - Guinabon, Sta. Cruz, Zambales
- Toronto and Pulot Nickel Projects (Citinickel Mines) - Narra and Sofronio Espanola, Palawan
- Berong Nickel Project (Berong Nickel) - Quezon, Palawan
- Tandawa Nickel Project (Claver Mineral Development Corporation) – Claver, Surigao del Norte



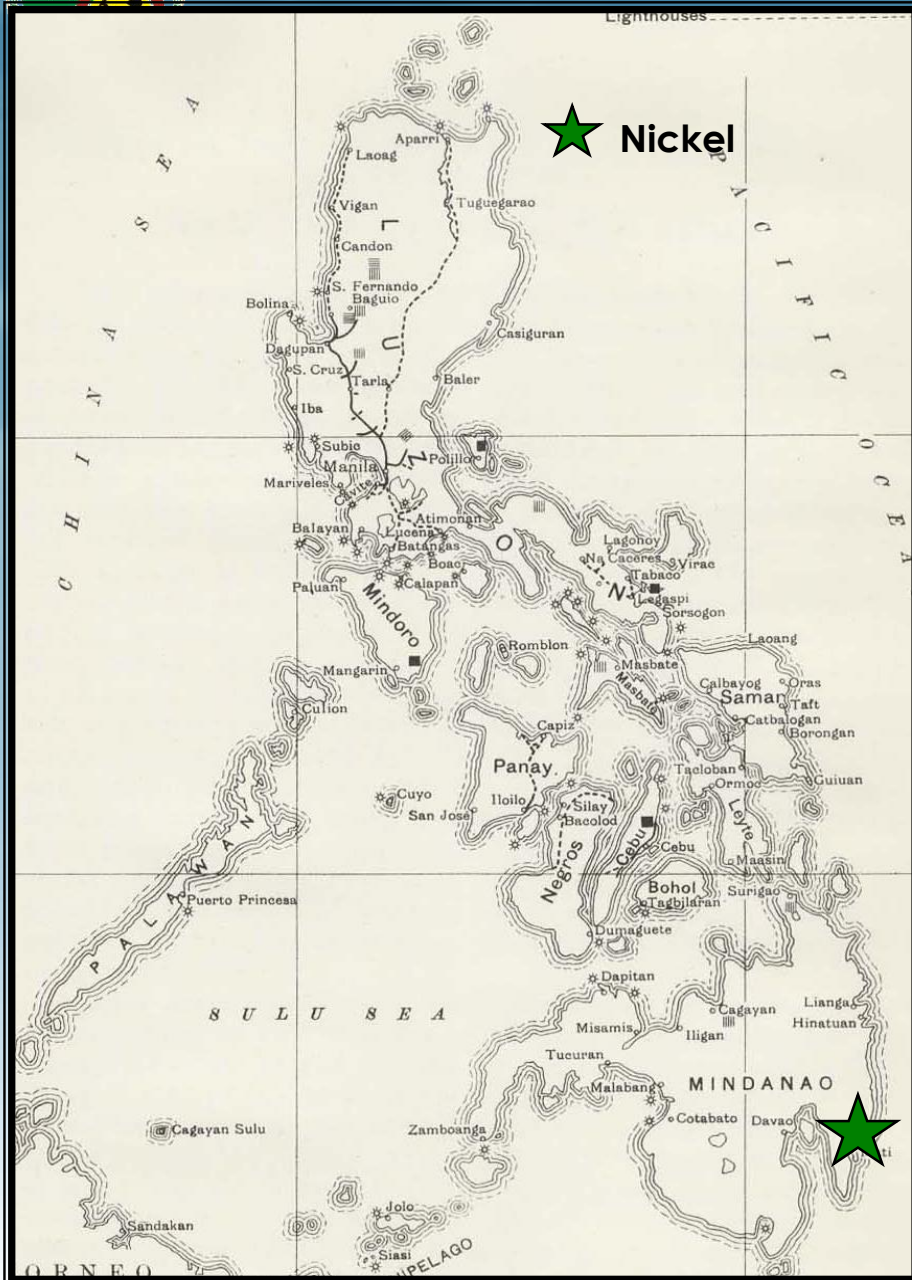


UNDER SUSPENSION DUE TO ECC CANCELLATION

1 Metallic Mine

1 Nickel Mine

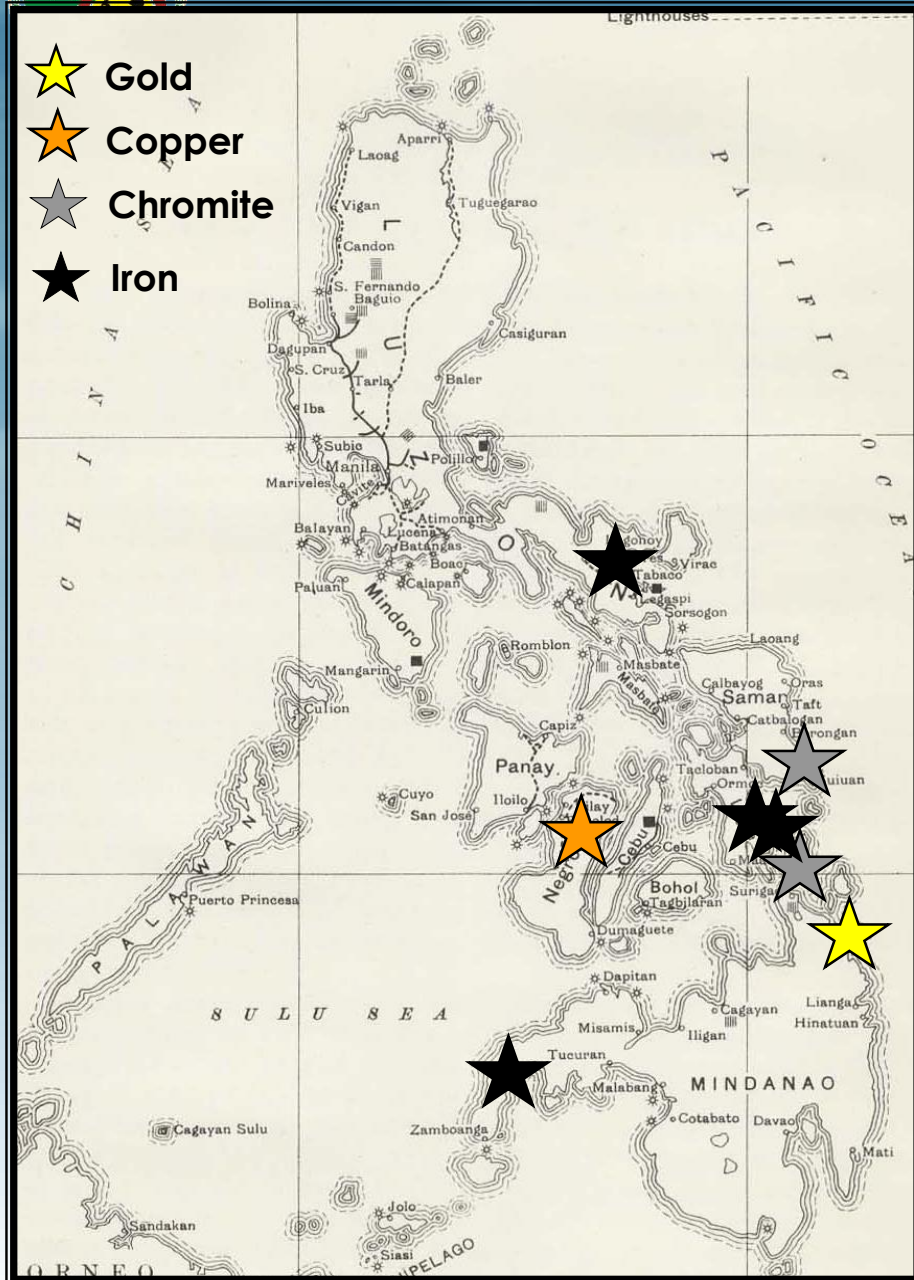
- Mati Nickel Project (Austral-Asia Link) – Mati and Generoso, Davao Oriental



UNDER VOLUNTARY SUSPENSION

12 Metallic Mines

- ★ Gold
- ★ Copper
- ★ Chromite
- ★ Iron



1 Gold Mine

- Siana Gold Mine (Greenstone Resources) - Tubod, Surigao del Norte

1 Copper Mine

- Sipalay Mines (Maricalum Mining) - Sipalay, Negros Occidental

2 Chromite Mines

- Samar Chromite Project (Mt. Sinai) - Homonhon, Guian, Samar
- Dinagat Chromite Project (Krominco) - Loreto, Dinagat Island

4 Iron Mines

- Panganiban Iron Project (Investwell Mining) - Jose Panganiban, Camarines Norte
- Leyte Ironsand Project (Strongbuilt Mining) - Macarthur, Leyte
- Leyte Iron Project (VTTiong/Nicua Mining) - Macarthur, Leyte
- Atro-Vitali Iron Project (Atro-Vitali Mining) - Vitali, Zamboanga Sibugay

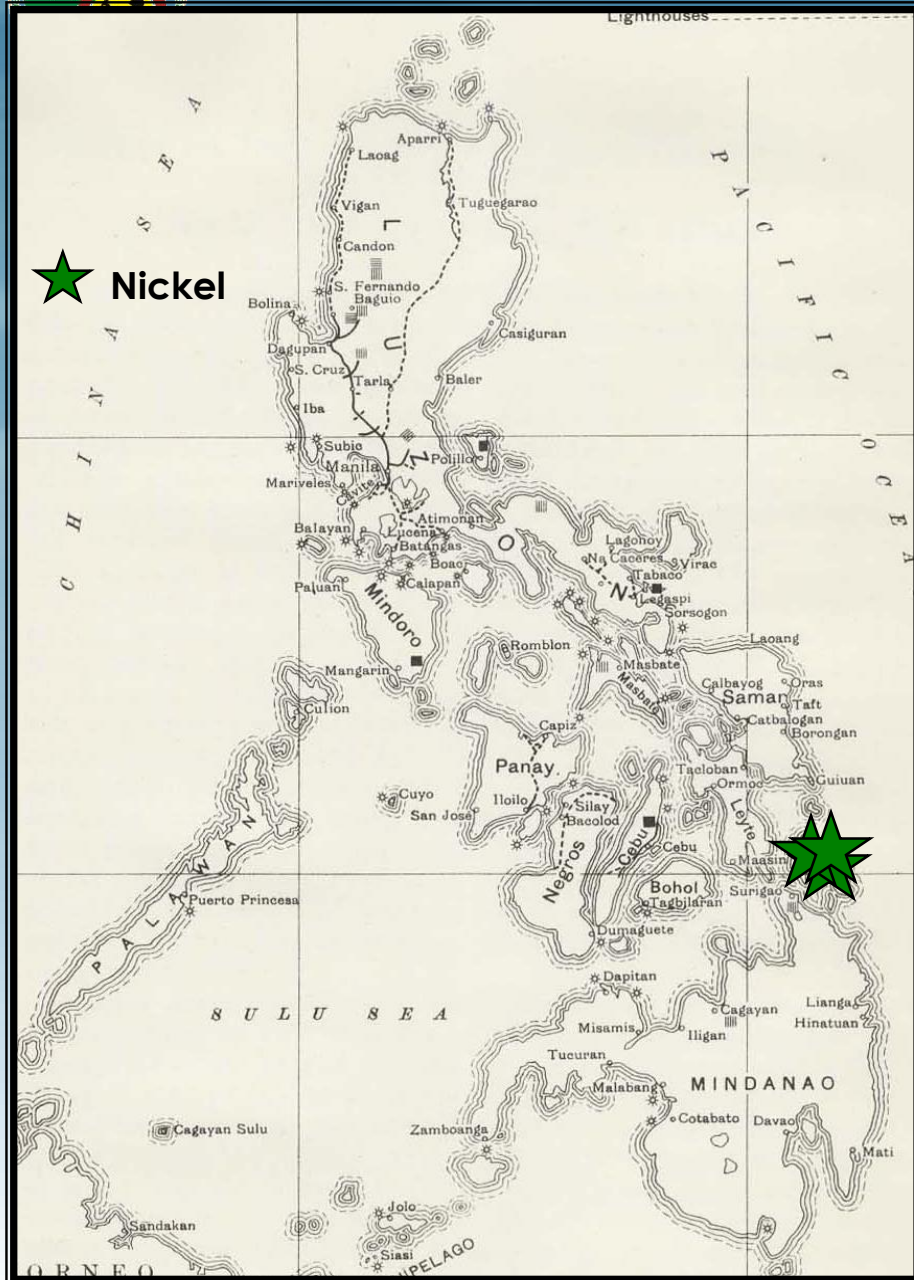


UNDER VOLUNTARY SUSPENSION

11 Metallic Mines

4 Nickel Mines

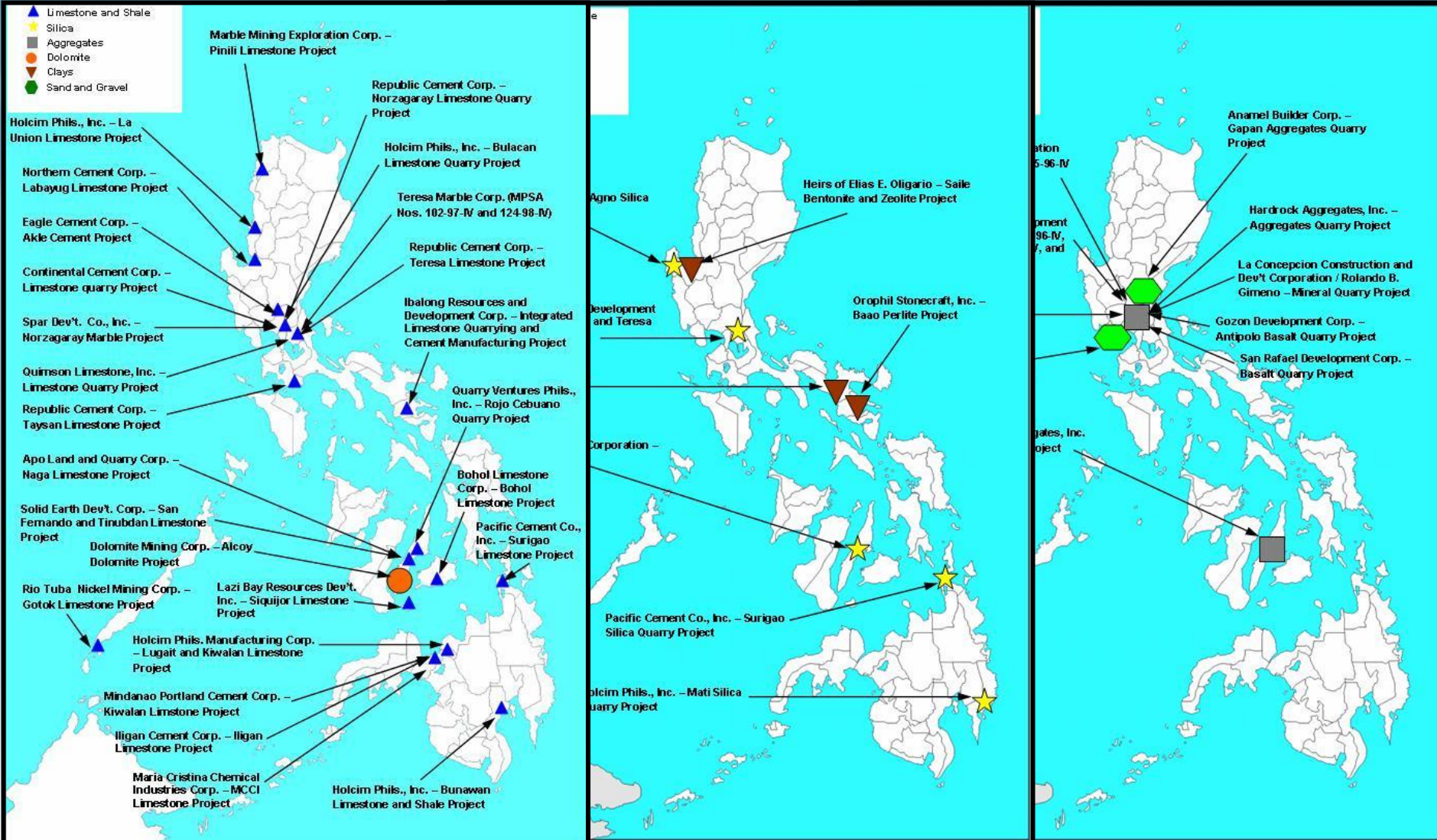
- H. Y. Nickel-Chromite Project (Sinosteel H. Y. Mining) - Loreto, Dinagat Island
- Bel-at Nickel Project (Minahang Bayan ng Mamamayan ng Dinagat Island Cooperative/Oriental Synergy) - Bel-at, Esperanza, Loreto, Dinagat Island
- Wellex Parcel 1 Nickel Mining Project (Vista Buena/Wellex Mining) - Libjo, Dinagat Island
- Nonoc Nickel Project (Pacific Nickel Philippines, Inc.) – Nonoc Island, Surigao del Norte





MINERALS INDUSTRY STATUS

Operating Mines – 62 Nonmetallic Mines





MINERALS INDUSTRY STATUS

Economic Contributions

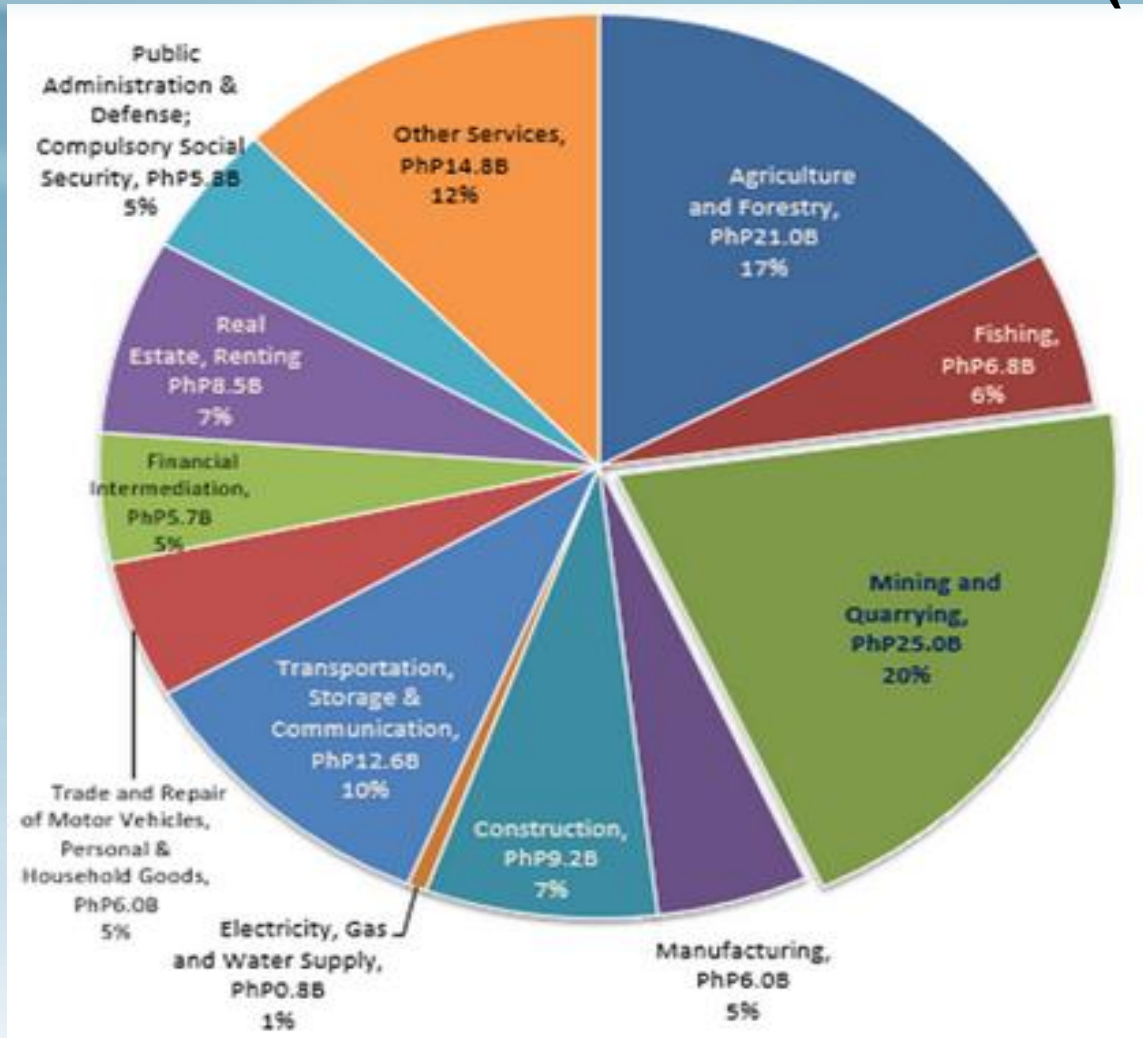
| Indicator | 2012 | 2013 | 2014 | 2015 | 2016 ^P |
|-------------------------------------|-------------|-------------|-------------|-------------|-------------------|
| Gross Production Value | PhP 144.8 B | PhP 157.1 B | PhP 208.2 B | PhP 179.7 B | PhP 101.9 B |
| GDP Contribution | PhP 79.5 B | PhP 77.7 B | PhP 90.7 B | PhP 80.9 B | PhP 84.9 B |
| | 0.7 % | 0.7 % | 0.7 % | 0.6 % | 0.6 % |
| Export Share | \$ 2.337 B | \$ 3.412 B | \$ 4.038 B | \$ 2.853 B | \$ 2.317 B |
| | 4.5 % | 6.3 % | 6.5 % | 4.8 % | 4.1 % |
| Employment | 250,000 | 250,000 | 235,000 | 236,000 | 218,000 |
| | 0.7 % | 0.7 % | 0.6 % | 0.6 % | 0.5 % |
| Taxes, Fees & Royalties from Mining | PhP 20.67 B | PhP 24.39 B | PhP 32.75 B | PhP 29.58 B | PhP 21.67 B |

^P Preliminary data



MINERALS INDUSTRY STATUS

MIMAROPA GROSS REGIONAL DOMESTIC PRODUCT BY INDUSTRIAL ORIGIN AT CONSTANT 2000 PRICES (CY 2015)

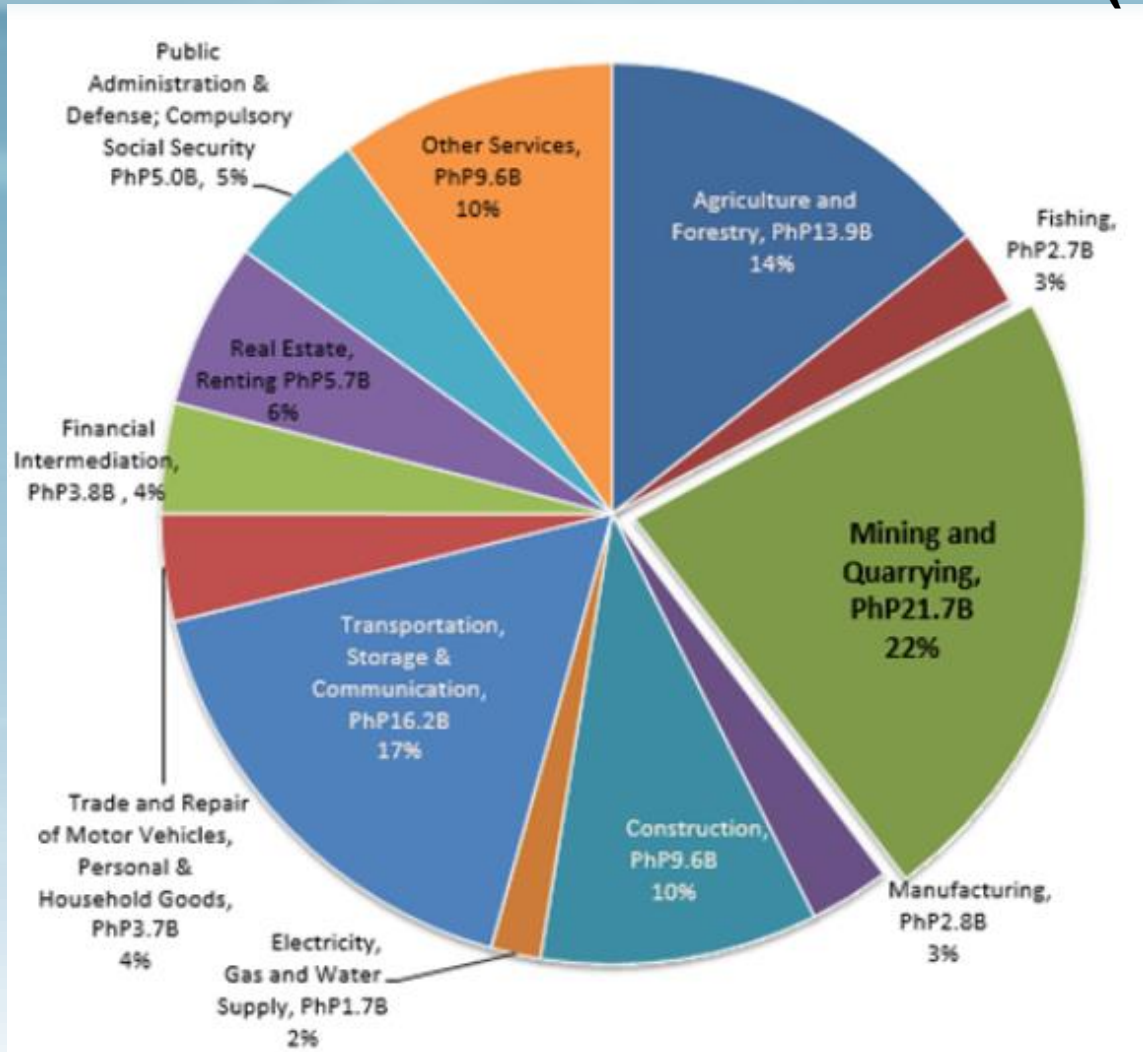


Source: Extracted from PSA 2015 GRDP Highlights Table 1.8B



MINERALS INDUSTRY STATUS

CARAGA GROSS REGIONAL DOMESTIC PRODUCT BY INDUSTRIAL ORIGIN AT CONSTANT 2000 PRICES (CY 2015)



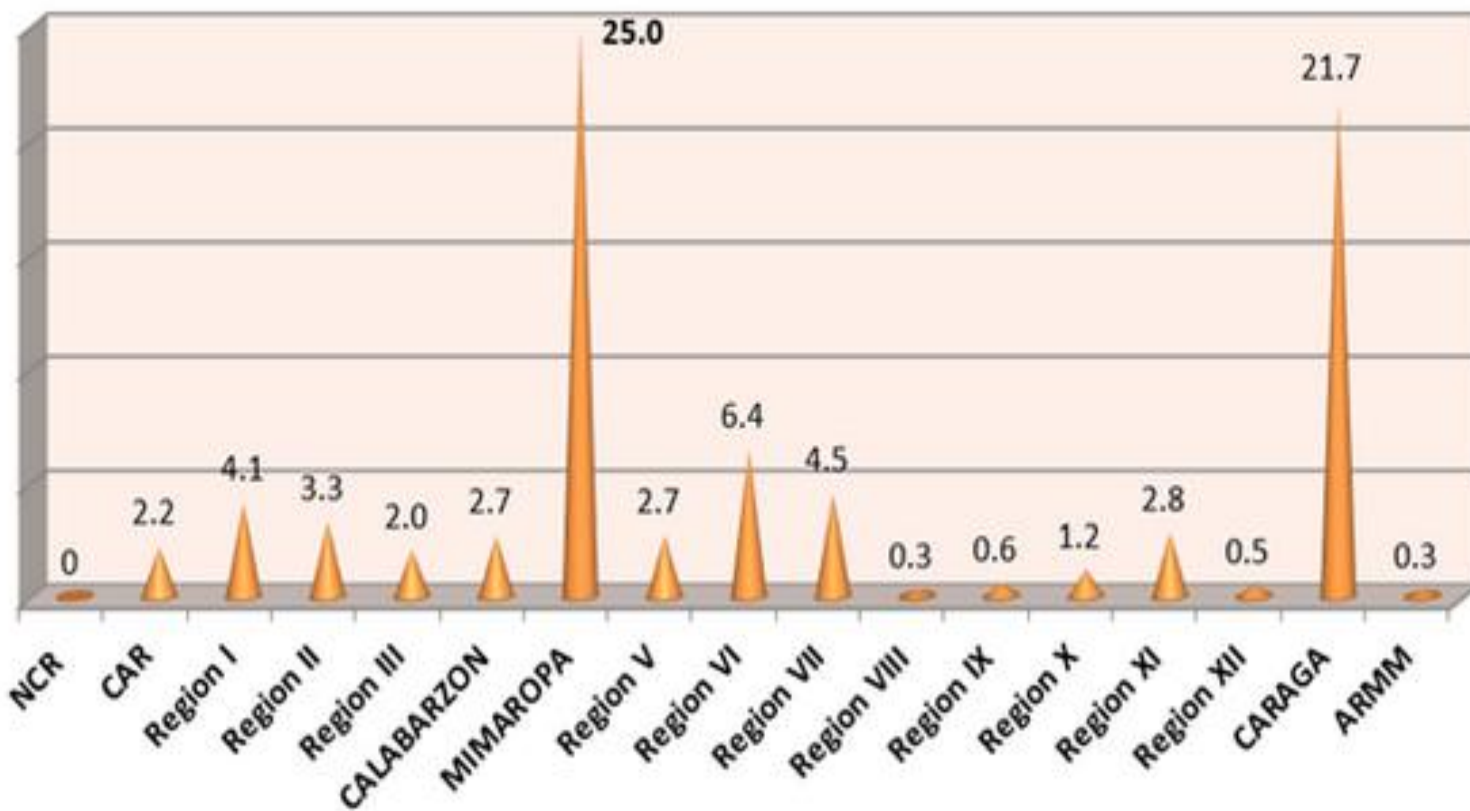
Source: Extracted from PSA 2015 GRDP Highlights Table 1.8B





MINERALS INDUSTRY STATUS

2015 GROSS VALUE ADDED IN MINING AND QUARRYING BY REGION (IN BILLION PESOS)



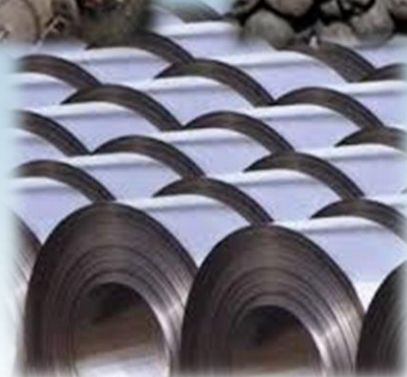
Source: Extracted from PSA 2015 GRDP Highlights Table 3.1.1B





POLICY DIRECTIONS

- **Minerals and metal-led industrialization initiatives**
 - Ensure continued availability and security of supply of materials and commodities;
 - Revisit regulatory and compliance policies;
 - Conduct inventory and exploration studies of various resources;





POLICY DIRECTIONS

- **Streamlining of Application Procedures**
 - Simplify and rationalize applications procedures;
 - Strengthen the foundation of good governance;
 - Clear policy issuances - “well understood”





POLICY DIRECTIONS

- **MGB-led Inter-agency Coordination of Regulatory Agencies in Mining Projects**
 - **BMB – Biodiversity Concerns, protected areas**
 - **NCIP – Prior Informed Consent from IPS**
 - **EMB – Environmental Requirements**
 - **FMB – Timber Rights/Tree Cutting Permit**
 - **NWRB – Water Rights**
 - **LGUs/Sanggunian – Project Consultation/Endorsement**





POLICY DIRECTIONS

- **Strong Community Relations Programs**
 - Squarely address legitimate concerns;
 - Provide proper information;
 - Encourage cooperation;
 - Government to ensure that host communities are engaged and adhere to the principle of subsidiarity;
 - Industry to work with communities and engage them from day one of a project.





POLICY DIRECTIONS

- **Final Land Use Options of Mineral Lands**
 - Mining is a temporary land use;
 - Thorough discussion and consultation on final land use options;
 - Collaboration between LGUs, community, local civil society and the industry





“Mining projects should be environmentally compliant, socially acceptable, culturally sensitive, technically feasible, and financially viable.

Any of these imperatives absent, it is not time to mine.”





MINES AND GEOSCIENCES BUREAU

END OF PRESENTATION

