
NSW Mining Industry Expenditure Impact Survey 2021/22

November 2022

Executive Summary

Overview

The New South Wales Minerals Council (NSWMC) analysed the expenditure patterns of 27 NSW exploration and mining companies to determine the economic contribution of the industry throughout NSW in 2021/22. The spending data, which included employee salaries and wages, business purchases, community contributions and local and state government payments, was collected by postcode where it was spent to allow local, regional and state-wide economic benefits to be assessed. This report is an extension of previous annual surveys completed since 2011/12.

Direct Spending

The 27 companies surveyed **directly spent an estimated \$16.7 billion in the NSW economy** in 2021/22, comprised of:

- **Total workforce of 30,981 full-time equivalent workers** (including direct resident employees and contract workers), which represented an annual increase of 2.9%;
- **\$2.9 billion in wages and salaries** to approximately **19,996 direct fulltime resident employees** (not including contractors), representing an **average salary** level across the sector of **\$144,550** per annum;
- **\$10.5 billion in purchases of goods and services from over 6,800 local businesses** (including contract payments), community contributions and payments to local government (including rates, developer contributions and other payments); and
- **\$3.4 billion** in state government payments (including royalties, stamp duty, payroll tax and land tax).

*NSW mining companies surveyed contributed a record **\$16.7 billion** in direct spending to the State economy in 2021/22.*

Disclaimer

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The Hunter region recorded the highest direct expenditure in 2021/22, with \$6.3 billion (or 37.4% of the total direct spend across NSW), followed by Sydney (\$3.7 billion, or 22.0%) and Central West (\$1.3 billion, or 7.7%).

Table E1: Direct Impact of NSW Mining Companies Surveyed by Region, 2021/22

Region	Residing employees (FTEs)	Associated salaries (\$M)	Total workforce ^(b)	Business purchases, community and govt payments (\$M)	No. of local suppliers	Total direct spending (\$M)	% of total direct spend, NSW
Central West	3,023	406.0	5,601	886.9	1,006	1,292.9	7.7%
Far West	430	51.4	1,656	139.5	115	190.9	1.1%
Hunter	10,024	1,569.1	13,589	4,694.5	3,028	6,263.6	37.4%
Illawarra	1,441	170.3	1,856	631.7	424	802.0	4.8%
Mid-North Coast	56	7.4	56	43.3	39	50.7	0.3%
Murray	38	4.4	38	18.6	57	23.0	0.1%
Murrumbidgee	104	12.7	104	54.8	79	67.5	0.4%
North Western	2,640	347.0	2,934	244.3	715	591.3	3.5%
Northern	1,298	176.2	3,573	164.3	356	340.5	2.0%
Richmond-Tweed	17	2.4	17	10.4	20	12.8	0.1%
South Eastern	95	10.3	95	31.5	87	41.8	0.2%
Sydney	818	131.7	1,417	3,546.3	2,564	3,678.1	22.0%
Unallocated ^(a)	12	1.4	46	3,374.1		3,375.5	20.2%
Total New South Wales	19,996	2,890.4	30,981	13,843.1	6,833	16,730.7	100.0%
Rest of Australia	568	76.5	572	6,354.4	3,203	6,430.9	
Total Australia	20,564	2,966.9	31,553	20,197.5	10,036	23,161.5	
Overseas	0	0.0	0	886.9	241	177.9	
Other	48	1.9	48	139.5	198	419.8	
Total	20,612	2,968.8	31,601	4,694.5	10,475	23,759.2	

Note: Regions are based on 12 former Statistical Divisions in NSW. (a) Includes state government payments. (b) Includes full-time resident direct employees and contract workers by place of operation.

Comparison with results from previous surveys is difficult due to differences in the composition of participating companies. Based on whole-of-survey totals, the direct expenditure in NSW of the companies surveyed in 2021/22 increased significantly by \$2.1 billion, or 14.6%, compared to the previous year, whilst the total workforce increased annually by 886 FTEs, or 2.9%.

Compared to 2020/21, the direct spending of NSW mining companies surveyed increased significantly by \$2.1 billion, or 14.6%.

Since 2011/12, NSW mining companies surveyed by NSWMC have generated \$139.1 billion in direct spending, with average annual expenditure of \$12.6 billion.

Since 2011/12, NSW mining companies surveyed have contributed \$139.1 billion in direct spending to the State economy.

Direct Expenditure of NSW Mining Companies Surveyed

New South Wales (\$ billion, real)

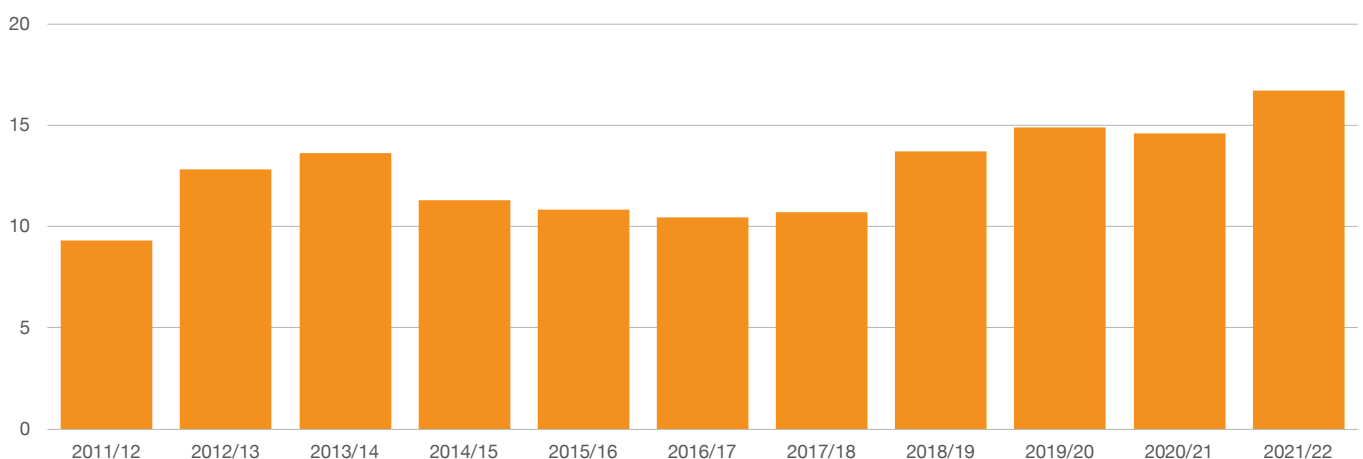


Table E2: Annual Change in Survey Results

Region	Level 2021/22	Level 2020/21	Level 2019/20	Annual % change, 2020/21- 2021/22
No. of companies surveyed	27	29	28	-3.6%
DIRECT EMPLOYEES				
No. of direct employees (FTEs)	19,996	20,003	20,117	0.0%
No. of apprenticeships and traineeships (FTEs)	382	315	298	21.3%
Total wages/salaries paid (\$M)	2,890.4	2,828.8	2,737.9	2.2%
BUSINESS PURCHASES				
No. of suppliers	6,833	7,311	7,862	-6.5%
Total opex spend (\$M)	8,976.6	8,608.4	8,504.6	4.3%
Total capex spend (\$M)	1,399.1	1,362.0	1,683.9	2.7%
Total business purchases (\$M)	10,375.7	9,970.4	10,188.5	4.1%
COMMUNITY CONTRIBUTIONS				
No. of community organisations supported	1,103	1,069	1,143	3.2%
Total community contributions (\$M)	12.7	13.2	8.2	-3.5%
LOCAL COUNCIL PAYMENTS				
Total local government payments (\$M)	84.4	80.1	69.5	5.4%
STATE GOVERNMENT PAYMENTS				
Total state government payments (\$M)	3,370.2	1,704.1	1,900.4	97.8%
TOTAL SPEND (\$M)	16,733.5	14,596.6	14,904.4	14.6%
TOTAL WORKFORCE (FTEs)	30,981	30,095	28,780	2.9%

Indirect and Total Economic Impacts

Economic modelling of the flow-on effects of the surveyed companies' direct expenditure allowed the indirect and total economic impact to be estimated. Across NSW, the total economic impact of the surveyed companies in 2021/22, based on Type II multipliers (i.e. including both indirect industry and consumption-induced effects), amounted to:

- **\$40.4 billion in output/turnover** (a measure of direct and supply chain purchases from businesses);
- **\$36.1 billion in gross value added (GVA)**, amounting to 5.6% of Gross State Product (GSP) for NSW (which was \$643.1 billion in 2020/21) through \$16.7 billion in direct effects and \$19.4 billion in supply chain and consumption effects;
- **\$13.6 billion in income** (wages and salaries) paid to workers; and
- **181,945 full time equivalent jobs** supported, or 4.4% of total employment in NSW during 2021/22.

*The total economic impact of the NSW mining companies surveyed to the State economy was estimated at **\$36.1 billion in gross value added and 181,945 jobs supported in 2021/22.***

In terms of total economic benefit, the 27 companies surveyed had the **highest overall impact in the Hunter region**, with total value added of \$13.1 billion, followed by Sydney (\$7.6 billion) and Central West (\$2.9 billion). With regard to economic contribution, the total gross value added from the NSW companies surveyed comprised the largest share of gross regional product in the Far West region (35.7%), followed by Hunter (29.5%), Central West (22.2%) and North Western (11.7%).

With regard to employment, the NSW mining companies surveyed again had the greatest impact on jobs in the Hunter region, supporting 75,181 jobs (FTEs), followed by the Sydney (24,722 FTEs) and Central West (22,430 FTEs) regions.

Table E3: Economic Impact of NSW Mining Companies Surveyed, 2021/22

	New South Wales	Rest of Australia	Total Australia
Gross Value Added (\$M)			
Direct	16,731	6,431	23,162
% of Gross State Product (GSP)	2.6%	0.5%	1.2%
Indirect	12,384	4,210	16,595
Total GVA (Type I)	29,115	10,641	39,756
% of GSP	4.5%	0.8%	2.0%
Consumption-induced	7,026	2,521	9,547
Total GVA (Type II)	36,141	13,162	49,303
% of GSP	5.6%	1.0%	2.5%
Employment (FTEs)			
Direct	19,996	568	20,564
% of total state employment	0.5%	0.0%	0.2%
Indirect	99,645	25,354	124,998
Total employment (Type I)	119,640	25,921	145,561
% of total state employment	2.9%	0.3%	1.1%
Consumption-induced	62,305	15,989	78,294
Total employment (Type II)	181,945	41,910	223,855
% of total state employment	4.4%	0.5%	1.8%
Business spend (incl. community contributions and govt payments) (\$M)			
Direct	13,843	6,354	20,197
Indirect	9,920	4,509	14,429
Total business spend (Type I)	23,763	10,863	34,626
Consumption-induced	13,710	4,740	18,450
Total business spend (Type II)	37,474	15,603	53,076
Wages & salaries (\$M)			
Direct	2,890	76	2,967
Indirect	6,721	2,193	8,914
Total wages & salaries (Type I)	9,612	2,269	11,881
Consumption-induced	4,030	1,160	5,190
Total wages & salaries (Type II)	13,642	3,429	17,071

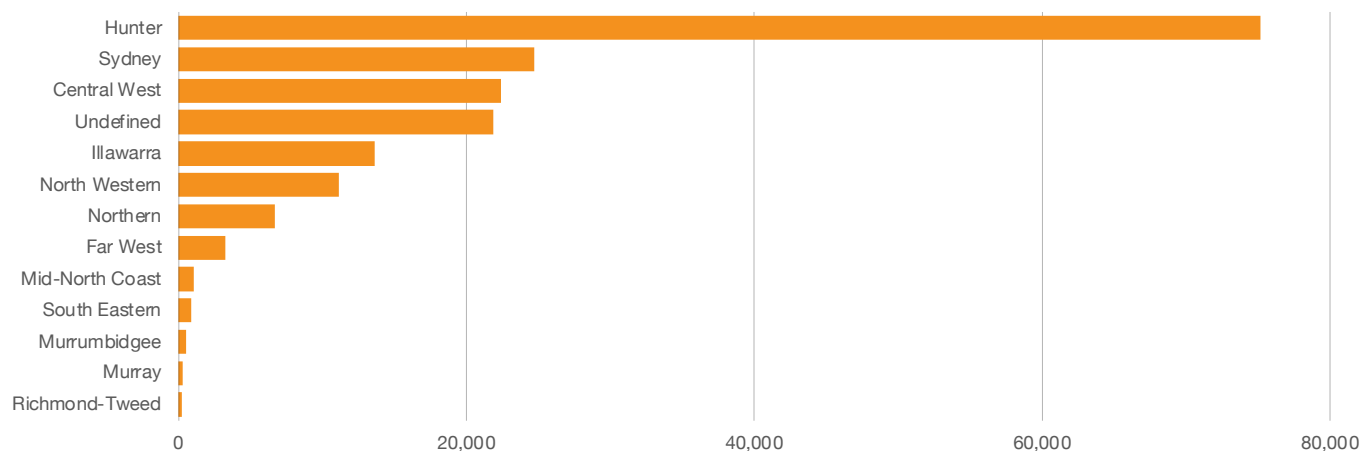
Note: Consumption-induced impacts seek to measure the change in consumption for all goods and services that arise from an increase in final output from the industry in question. Direct employment and wages relate specifically to full-time equivalent residing direct employees (not including contractors).

Table E4: Total Economic Impact of NSW Mining Companies Surveyed by Region, 2021/22

Region	Total GVA (\$M)	Total value added as % of GRP	Total jobs supported (FTEs)	% of regional employment
Central West	2,856.0	22.2%	22,430	22.1%
Far West	415.6	35.7%	3,233	38.6%
Hunter	13,087.0	29.5%	75,181	21.1%
Illawarra	1,897.0	8.3%	13,626	6.0%
Mid-North Coast	131.6	1.1%	1,067	0.9%
Murray	41.4	0.6%	271	0.5%
Murrumbidgee	105.5	0.7%	531	0.6%
North Western	1,278.0	11.7%	11,171	19.4%
Northern	776.2	5.9%	6,726	7.8%
Richmond-Tweed	30.6	0.2%	215	0.2%
South Eastern	106.5	1.0%	903	0.9%
Sydney	7,587.3	1.6%	24,722	0.9%
Undefined	7,827.9		21,869	
Total New South Wales	36,140.5	5.6%	181,945	4.4%
Rest of Australia	13,162.5	1.0%	41,910	0.5%
Total Australia	49,303.0	2.5%	223,855	1.8%

Total Employment Supported by NSW Mining Companies Surveyed by Region

New South Wales (FTEs)



Local Suppliers

Approximately 6,833 unique businesses in New South Wales received payments for goods and services supplied during 2021/22 to those survey respondents that provided supplier details. The highest number of businesses was recorded in the Hunter region (3,028), followed by Sydney (2,564), Central West (1,006), North Western (715) and Illawarra (424).

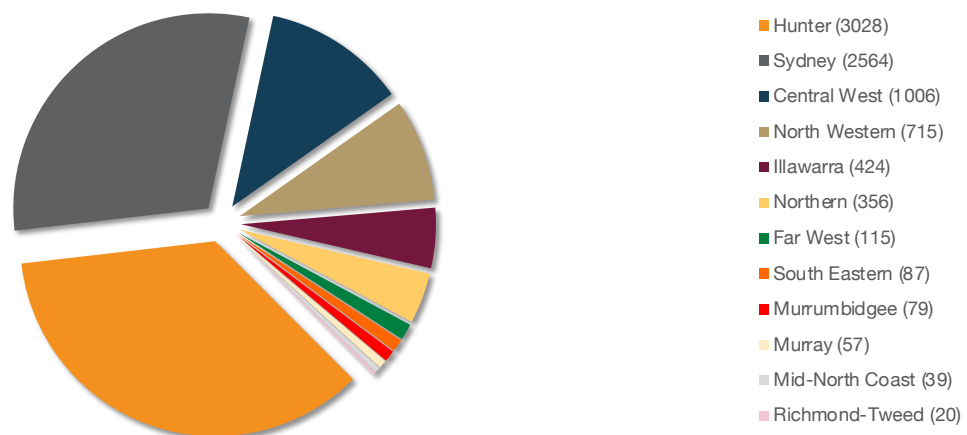
Table E5: Number of Businesses Supported by Region, 2021/22

Region	Number of local suppliers
Central West	1,006
Far West	115
Hunter	3,028
Illawarra	424
Mid-North Coast	39
Murray	57
Murrumbidgee	79
North Western	715
Northern	356
Richmond-Tweed	20
South Eastern	87
Sydney	2,564
Total New South Wales	6,833

Note: Only for those companies that provided supplier details. Duplicates were removed to the best extent practicable to ensure an accurate estimation of the number of businesses supported at both state and regional level.

Local Businesses Supported by NSW Mining Companies Surveyed by Region

New South Wales, 2021/22



Community Support

During 2021/22, survey respondents directly contributed over \$12.7 million to 1,103 separate community groups across New South Wales in a wide range of areas including health, education, environment and the arts. The Hunter region recorded the highest number of community organisations supported (398), followed by Central West (275).

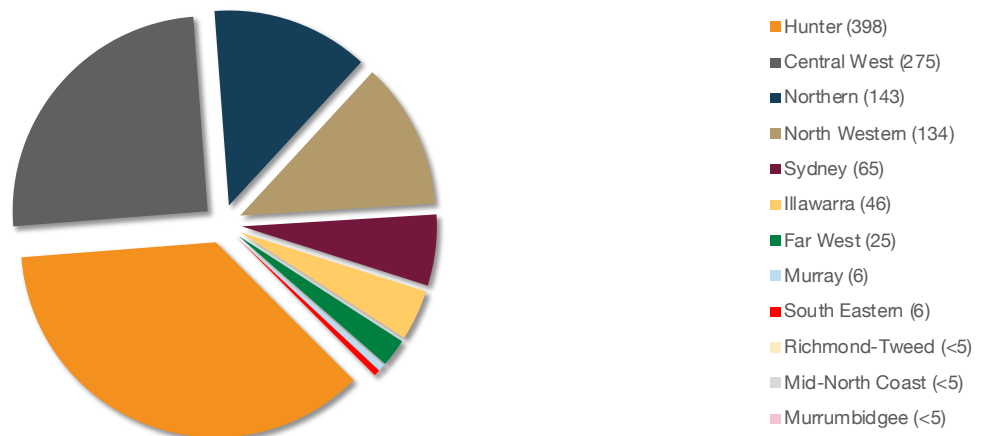
Table E6: Number of Community Organisations Supported by Region, 2021/22

Region	No. of community groups	% of total	Total contribution (\$)
Central West	275	24.9%	4,191,523
Far West	25	2.3%	104,219
Hunter	398	36.1%	4,772,122
Illawarra	46	4.2%	1,201,223
Mid-North Coast	<5	n.p.	6,000
Murray	6	0.5%	16,620
Murrumbidgee	<5	n.p.	2,785
North Western	134	12.1%	715,758
Northern	143	13.0%	592,856
Richmond-Tweed	<5	n.p.	6,955
South Eastern	6	0.5%	20,524
Sydney	65	5.9%	1,114,555
Total New South Wales	1,103	100.0%	12,743,125

Note: Only for those companies that provided details. n.p. not publishable data. Duplicates were removed to the best extent practicable to ensure an accurate estimation of the number of individual community organisations supported at both state and regional level.

Community Organisations Supported by Companies Surveyed by Region

New South Wales, 2021/22



Local Council Contributions

Mining companies contribute to local councils through the payment of rates, developer contributions agreed as a condition of planning approval, and through other payments such as water rates and payments for specific infrastructure upgrades.

During 2021/22, survey respondents reported direct contributions to local councils totalling \$84.4 million, which represented a significant annual increase of \$4.3 million, or 5.4% from the level for 2020/21. Rates (\$65.5 million) comprised the largest proportion of local council payments, followed by Other contributions (\$11.1 million) and Voluntary Planning Agreements (VPA)/developer contributions (\$7.8 million).

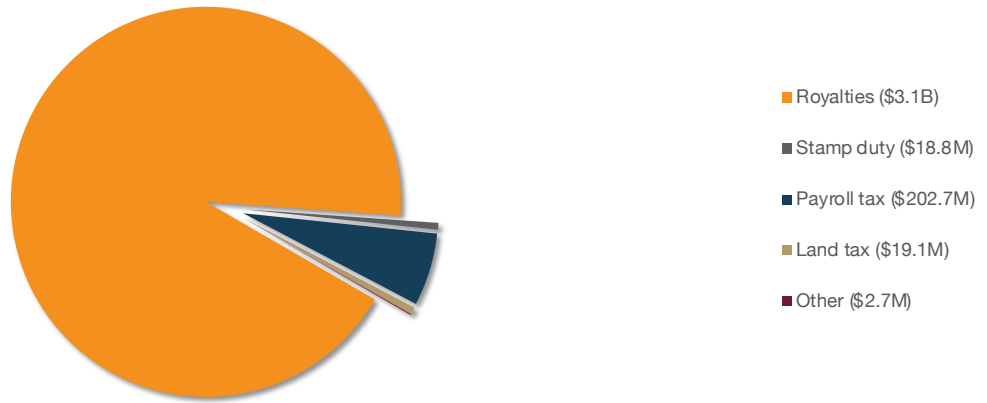
Table E7: Local Council Contributions by Region, 2021/22

Region	Rates (\$)	VPA/Developer (\$)	Other (\$)	Total contributions (\$)
Central West	14,162,776	1,459,556	5,880,813	21,503,145
Far West	2,237,980	0	0	2,237,980
Hunter	25,389,470	4,134,887	2,925,860	32,450,218
Illawarra	713,785	0	863	714,648
Mid-North Coast	8,403	0	0	8,403
Murray	1,059,416	0	755,077	1,814,493
Murrumbidgee	0	0	0	0
North Western	12,655,222	1,684,004	1,395,647	15,734,873
Northern	5,512,582	559,491	951	6,073,024
Richmond-Tweed	0	0	0	0
South Eastern	29,352	0	100,589	129,941
Sydney	3,711,382	0	0	3,711,383
Total New South Wales	65,541,164	7,837,436	11,059,199	84,437,800
Annual % change	5.2%	-32.1%	76.2%	5.4%

State Government Payments

During 2021/22, the direct contribution made by companies surveyed in state government payments was approximately \$3.4 billion, comprised of royalties (\$3.1 billion), payroll tax (\$202.7 million), land tax (\$19.1 million) and stamp duty (\$18.8 million).

State Government Contributions by Companies Surveyed by Category
New South Wales, 2021/22



Contents

Introduction	1
Company Survey	2
Economic Benefits	4
Direct Impact	4
Direct Spending	4
Local Suppliers	7
Community Support	8
Indirect Impact	9
Total Impact	9
Regional Impact	12
Central West	17
Far West	18
Hunter	19
Illawarra	20
Mid-North Coast	21
Murray	22
Murrumbidgee	23
North Western	24
Northern	25
Richmond-Tweed	26
South Eastern	27
Sydney	28
Local Impact	29
Direct Spending	29
Indirect Impact	31
Conclusion	33
Appendix A: Modelling Approach	35
Input-Output Modelling	35
Construction of Regional I-O Models	38
Appendix B: Direct Impact by Local Government Area	40
Appendix C: Total Impact by Local Government Area	45
Appendix D: Direct Impact by State Electorate	50
Appendix E: Direct Impact by Commonwealth Electorate	54

Introduction

The NSW Minerals Council (NSWMC) commissioned Lawrence Consulting to determine the total direct, indirect and consumption-induced economic benefit to the state economy based on expenditure data provided by 27 exploration and mining companies operating in NSW. This report provides a detailed summary of the level of expenditure into the New South Wales economy by these companies in 2021/22 and the multiplier and consumption-induced effects that are generated by that initial stimulus. The analysis is an update of previous studies completed since 2011/12, available to download at www.nswmining.com.au.

While the mining sector makes a significant contribution to the New South Wales and Australian economies, information about the impacts of the sector on regional and metropolitan economies within New South Wales is limited. Impacts on regional and metropolitan areas of New South Wales occur through direct, indirect and consumption-induced effects. There are two key types of direct impacts:

- Wages for direct employment of workforce; and
- Expenditure on business goods and services in local and regional economies.

Business expenditure generates both upstream and downstream ripple effects through the supply chain as local businesses purchase goods and services from other businesses, often through several links in the supply chain. The net effect of subsequent rounds of economic activity in the business supply chain can be categorised as indirect effects. The increased employment generated through the direct effects (resources sector employment) and the indirect effects (business supply chain) generates a number of final consumption-induced effects to support the increased population base.

The focus of this report is to identify the geographical spread of impacts (direct, indirect and consumption-induced) from the mining industry across New South Wales at five geographic scales:

- State (the whole area of New South Wales);
- Regional (represented by 12 former Statistical Divisions in NSW);
- Local (represented by 128 Local Government Areas in NSW);
- State electoral divisions (represented by 93 SEDs in NSW); and
- Commonwealth electoral divisions (represented by 47 CEDs in NSW).

This report concentrates more on the state and regional profiles, whilst data tables for LGA, SED and CED areas are contained in the Appendices.

Company Survey

The process was initiated in July 2022 when NSWMC distributed an expenditure survey form to New South Wales exploration and mining companies, which were asked to disclose total operational spending in 2021/22 in the following categories:

- Employee salaries and wages (by place of residence) for full-time direct employees, along with the number of apprenticeships and traineeships;
- Goods and services expenditure, including payments made to contractors (including identification of the number of contract FTEs employed on-site) as well as other goods and services providers;
- Voluntary community contributions;
- Local government payments, including council rates and infrastructure charges; and
- State government payments, including royalties, stamp duty, payroll tax and land tax.

Of the companies surveyed, 27 returned the survey, representing the majority of the New South Wales mining sector based on current value of production. The data includes both operational expenditure (OPEX) data for current projects and capital expenditure (CAPEX) data from proposed investments currently under development.

The data was supplied by Australian postcodes where the salary was paid (residence of the direct employee) and where the community contributions and business expenditures were made. The companies that provided expenditure data as part of the study are shown in Table 1.

The postcode spend data were then aggregated using geographical concordance files from the Australian Bureau of Statistics and the economic impacts (direct, indirect and consumption impacts) of the minerals and energy sector were analysed at five geographic levels:

- State (the whole area of New South Wales);
- Regional (represented by 12 former Statistical Divisions in NSW);
- Local (represented by 128 Local Government Areas in NSW);
- State electoral divisions (represented by 93 SEDs in NSW); and
- Commonwealth electoral divisions (represented by 47 CEDs in NSW).

The current analysis of the economic contribution of the NSW mining companies surveyed in 2021/22 was based on identification and allocation of purchases by region to relevant industry categories based on commodity groupings as used in the input-output modelling (refer methodology outlined in Appendix A), which was done to alleviate any possible supply constraint issues. Similarly, household (or consumption) spending was allocated based on different industry expenditure coefficients for each region.

Table 1: NSW Mining Companies Supplying Expenditure Data

Aeris Resources	Mach Energy Australia Pty Ltd
Alkane Resources Limited	Malabar Coal Limited
Aurelia Metals	Newcrest Mining Limited Cadia Valley Operations
Bengalla Mining Company Pty Ltd	Peabody Energy Australia
BHP Billiton NSW Energy Coal	Perilya Limited
Bloomfield Collieries Pty Ltd	Regis Resources Limited
Centennial Coal Company Limited	South 32 Illawarra Coal
CMOC Northparkes	Sunrise Energy
CSA Copper	Thiess Pty Limited
Delta Electricity	Tronox Holdings
Evolution Cowal Gold	Whitehaven Coal Limited
Glencore Coal (NSW) Pty Ltd	Wyang Areas Coal Joint Venture
Idemitsu Australia Resources Pty Ltd	Yancoal Australia
Iluka Resources	

Economic Benefits

Direct Impact

Direct Spending

Expenditure data provided by the 27 NSW mining companies surveyed indicated that these companies **contributed an estimated \$16.7 billion in the NSW economy** in 2021/22, comprised of:

- **Total workforce of 30,981 full-time equivalent workers** (including direct resident employees and contract workers), which represented an annual increase of 2.9%;
- **\$2.9 billion in wages and salaries** to approximately **19,996 direct fulltime resident employees** (not including contractors), representing an **average salary** level across the sector of **\$144,550** per annum;
- **\$10.5 billion in purchases of goods and services from over 6,800 local businesses** (including contract payments), community contributions and payments to local government (including rates, developer contributions and other payments); and
- **\$3.4 billion** in state government payments (including royalties, stamp duty, payroll tax and land tax).

*NSW mining companies surveyed contributed a record **\$16.7 billion** in direct spending to the State economy in 2021/22.*

The direct economic stimulus provided by the NSW mining companies surveyed in 2021/22 also extended to other states, with an additional \$6.4 billion in direct spending, which combined with the impact in New South Wales for a **total direct impact of \$23.2 billion for the whole of Australia**, comprised of:

- \$3.0 billion in wages and salaries to approximately 20,564 full-time residing employees; and
- \$20.2 billion in purchases of goods and services from local businesses, government and community contributions.

When overseas and other unallocated spending of \$597.7 million was also included, the total direct expenditure relating to the NSW mining companies surveyed was approximately \$23.8 billion in 2021/22.

Comparison with results from previous surveys is difficult due to differences in the composition of participating companies. Based on whole-of-survey totals, the direct expenditure in NSW of the companies surveyed in 2021/22 increased significantly by \$2.1 billion, or 14.6%, compared to the previous year, whilst the total workforce increased annually by 886 FTEs, or 2.9%.

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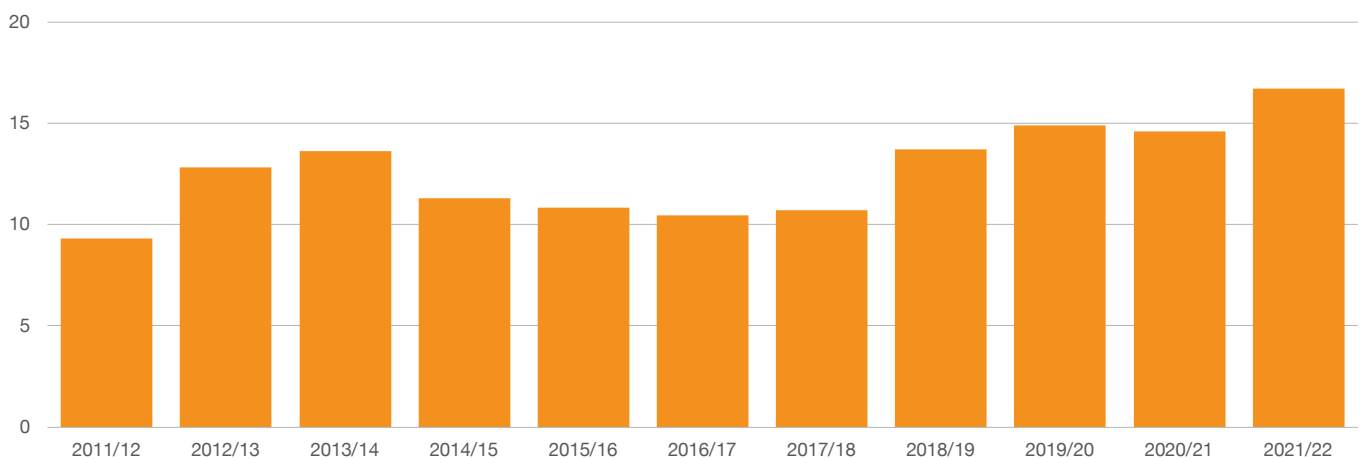


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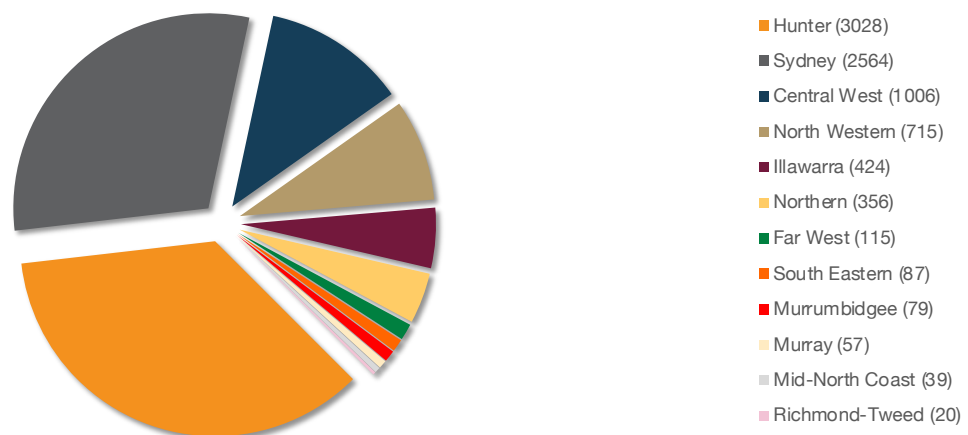
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Community Support

During 2021/22, survey respondents directly contributed over \$12.7 million to 1,103 separate community groups across New South Wales in a wide range of areas including health, education, environment and the arts. The Hunter region recorded the highest number of community organisations supported (398), followed by Central West (275).

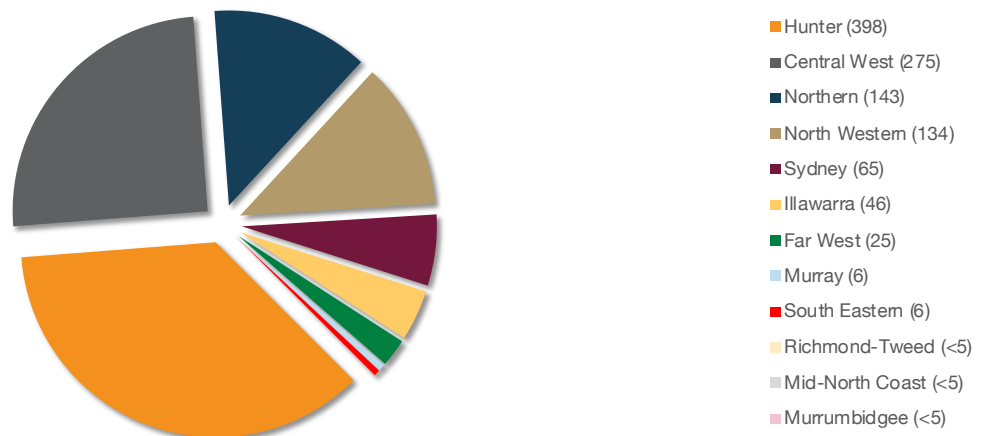
Table 4: Number of Community Organisations Supported by Region, 2021/22

Region	No. of community groups	% of total	Total contribution (\$)
Central West	275	24.9%	4,191,523
Far West	25	2.3%	104,219
Hunter	398	36.1%	4,772,122
Illawarra	46	4.2%	1,201,223
Mid-North Coast	<5	n.p.	6,000
Murray	6	0.5%	16,620
Murrumbidgee	<5	n.p.	2,785
North Western	134	12.1%	715,758
Northern	143	13.0%	592,856
Richmond-Tweed	<5	n.p.	6,955
South Eastern	6	0.5%	20,524
Sydney	65	5.9%	1,114,555
Total New South Wales	1,103	100.0%	12,743,125

Note: Only for those companies that provided details. n.p. not publishable data. Duplicates were removed to the best extent practicable to ensure an accurate estimation of the number of individual community organisations supported at both state and regional level.

Community Organisations Supported by Companies Surveyed by Region

New South Wales, 2021/22



Indirect Impact

The I-O modelling conducted for this project has estimated the indirect (Type I) and consumption-induced (Type II) effects flowing from the business expenditure, community and government contributions of \$13.8 billion and the employment expenditure of \$2.9 billion. These impacts have been modelled separately and then aggregated to identify the level of impacts on output, incomes, employment and industry value added in New South Wales. In 2021/22, the \$16.7 billion in direct spending by the 27 NSW mining companies surveyed supported additional supply chain and consumption-induced effects of 161,950 fulltime jobs and \$34.4 billion in aggregate spending (\$10.8 billion in wages and salaries and \$23.6 billion in purchases of goods and services).

In 2021/22, the NSW mining companies surveyed supported an additional 161,950 fulltime jobs and \$34.4 billion in aggregate spending (\$10.8 billion in wages and \$23.6 billion in purchases of goods and services).

Total Impact

The results of the I-O modelling allow forecasts to be made about the total size of impacts from the 27 NSW mining companies surveyed on the economy. For each key measure, the total impact on the economy is the sum of the direct effects from industry, the indirect effects through the business chain, and the final consumption-induced effects. The total economic impact (i.e. direct, indirect and induced, or Type II impact) from the minerals and energy sector to the New South Wales economy in 2021/22 amounted to:

- **\$40.4 billion in output/turnover** (or purchases from supplying businesses);
- **\$36.1 billion in gross value added** (contribution to gross state product);
- **\$13.6 billion in income** (wages and salaries); and
- **181,945 full-time equivalent jobs.**

Estimates of the contribution to Gross State Product (GSP) require an estimate of the initial contribution of the industry in terms of direct value added – defined as compensation of employees plus gross operating surplus plus other taxes less subsidies on production – plus the value added effects generated through the business chain and consumption effects. A precise measure of direct value added for the minerals and energy sector is not available from the data; an estimated value added of \$16.7 billion – equivalent to the sum of input and labour costs, or total direct spending – has instead been adopted.

When business supply and employment effects are considered, the minerals and energy sector generated approximately **\$36.1 billion in gross value added** (\$16.7 billion in direct effects, and \$19.4 billion in supply chain and consumption effects) in 2021/22 and was responsible for supporting approximately **181,945 jobs** (19,996 in direct employment and 161,950 in additional employment). This means that the 27 NSW mining companies surveyed contributed an estimated **5.6% of Gross State Product** (based on the figure of \$643.1 billion in 2020/21) and **4.4% of total employment** (4,103,863 persons) in New South Wales in 2021/22.

*The total economic impact of the NSW mining companies surveyed was estimated at **\$36.1 billion in gross value added and 181,945 jobs supported in 2021/22.***

Under the more conservative Type I scenario (i.e. excluding consumption-induced effects), direct spending by the companies surveyed and flow-on impacts contributed 4.5% to GSP and 2.9% of total state employment.

Since 2011/12, companies surveyed by the NSWMC have generated approximately \$298.4 billion in value added – including \$139.1 billion in direct spending – and has supported an average workforce of approximately 150,560 jobs per annum.

*Since 2011/12, companies surveyed by the NSWMC have generated approximately **\$298.4 billion in value added and supported an average workforce of approximately 150,560 jobs per annum.***

Table 5: Economic Impact of NSW Mining Companies Surveyed, 2021/22

	New South Wales	Rest of Australia	Total Australia
Gross Value Added (\$M)			
Direct	16,731	6,431	23,162
% of Gross State Product (GSP)	2.6%	0.5%	1.2%
Indirect	12,384	4,210	16,595
Total GVA (Type I)	29,115	10,641	39,756
% of GSP	4.5%	0.8%	2.0%
Consumption-induced	7,026	2,521	9,547
Total GVA (Type II)	36,141	13,162	49,303
% of GSP	5.6%	1.0%	2.5%
Employment (FTEs)			
Direct	19,996	568	20,564
% of total state employment	0.5%	0.0%	0.2%
Indirect	99,645	25,354	124,998
Total employment (Type I)	119,640	25,921	145,561
% of total state employment	2.9%	0.3%	1.1%
Consumption-induced	62,305	15,989	78,294
Total employment (Type II)	181,945	41,910	223,855
% of total state employment	4.4%	0.5%	1.8%
Business spend (incl. community contributions and govt payments) (\$M)			
Direct	13,843	6,354	20,197
Indirect	9,920	4,509	14,429
Total business spend (Type I)	23,763	10,863	34,626
Consumption-induced	13,710	4,740	18,450
Total business spend (Type II)	37,474	15,603	53,076
Wages & salaries (\$M)			
Direct	2,890	76	2,967
Indirect	6,721	2,193	8,914
Total wages & salaries (Type I)	9,612	2,269	11,881
Consumption-induced	4,030	1,160	5,190
Total wages & salaries (Type II)	13,642	3,429	17,071

Note: Consumption-induced impacts seek to measure the change in consumption for all goods and services that arise from an increase in final output from the industry in question. Direct employment and wages relate specifically to full-time equivalent residing direct employees (not including contractors).

Regional Impact

The postcode expenditure data provided by companies was aggregated using geographical concordances at the regional (or SD) and local (LGA) levels. The expenditures of the 27 NSW mining companies surveyed varied considerably across regional areas.

The level of employment, and direct expenditure on employees and business purchases in 2021/22 is summarised for the 12 major regions in New South Wales in Table 6.

The largest proportion of direct expenditure from the 27 companies surveyed in New South Wales in 2021/22 was in the Hunter region (\$6.3 billion), followed by the Sydney (\$3.7 billion), Central West (\$1.3 billion) and Illawarra (\$802.0 million) regions.

Hunter recorded the largest share of direct expenditure by region in 2021/22 (\$6.3 billion), followed by Sydney (\$3.7 billion) and Central West (\$1.3 billion).

With regard to employment, the largest workforce share (i.e. number of direct full-time resident employees and contract workers by place of operation) across New South Wales was also recorded in the Hunter region (13,589 FTEs, or 43.9%), followed by the Central West (5,601 FTEs, or 18.1%), Northern (3,573 FTEs, or 11.5%), North Western (2,934 FTEs, or 9.5%) and Illawarra (1,856 FTEs, or 6.0%).

The average salary for workers directly employed by the 27 NSW mining companies surveyed was approximately \$144,550 in 2021/22.

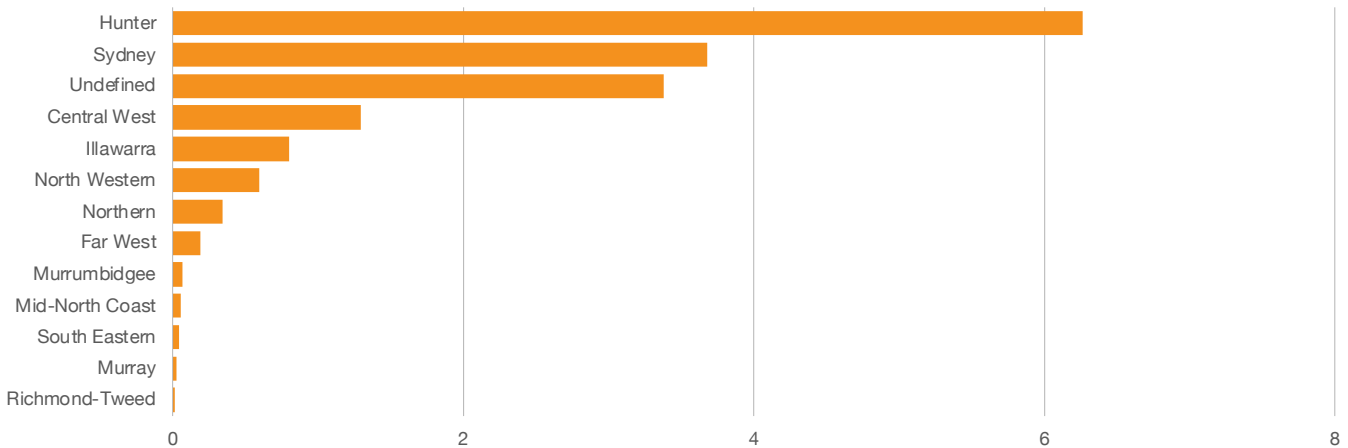
Table 6: Direct Impact of NSW Mining Companies Surveyed by Region, 2021/22

Region	Residing employees (FTEs)	Associated salaries (\$M)	Total workforce ^(b)	Business purchases, community and govt payments (\$M)	No. of local suppliers	Total direct spending (\$M)	% of total direct spend, NSW
Central West	3,023	406.0	5,601	886.9	1,006	1,292.9	7.7%
Far West	430	51.4	1,656	139.5	115	190.9	1.1%
Hunter	10,024	1,569.1	13,589	4,694.5	3,028	6,263.6	37.4%
Illawarra	1,441	170.3	1,856	631.7	424	802.0	4.8%
Mid-North Coast	56	7.4	56	43.3	39	50.7	0.3%
Murray	38	4.4	38	18.6	57	23.0	0.1%
Murrumbidgee	104	12.7	104	54.8	79	67.5	0.4%
North Western	2,640	347.0	2,934	244.3	715	591.3	3.5%
Northern	1,298	176.2	3,573	164.3	356	340.5	2.0%
Richmond-Tweed	17	2.4	17	10.4	20	12.8	0.1%
South Eastern	95	10.3	95	31.5	87	41.8	0.2%
Sydney	818	131.7	1,417	3,546.3	2,564	3,678.1	22.0%
Unallocated ^(a)	12	1.4	46	3,374.1		3,375.5	20.2%
Total NSW	19,996	2,890.4	30,981	13,843.1	6,833	16,730.7	100.0%

Note: Regions are based on 12 former Statistical Divisions in NSW. (a) Includes state government payments. (b) Includes full-time resident direct employees and contract workers by place of operation.

NSW Mining Companies Surveyed Direct Spend by Region

New South Wales (\$ billion)



The economic modelling conducted for this project has estimated the indirect and consumption-induced effects flowing from the two key direct impacts on the economy, i.e. those generated by business supply chain expenditure in each region and those generated by consumption-induced spending in each region. These impacts have been modelled separately and then aggregated to identify the level of impacts on output, incomes, employment and industry value added for each region.

Table 7: Flow-on Impacts of NSW Mining Companies Surveyed by Region, 2021/22 (Type II)

Region	Indirect full-time employees (FTEs)	Associated salaries (\$M)	Supply of goods and services (\$M)	Total indirect value added (\$M)
Central West	19,406	714.5	1,600.6	1,563.1
Far West	2,803	121.4	253.2	224.7
Hunter	65,157	3,889.9	8,155.3	6,823.3
Illawarra	12,185	628.2	1,240.8	1,095.0
Mid-North Coast	1,012	36.4	82.1	80.9
Murray	233	10.1	21.0	18.4
Murrumbidgee	427	17.9	40.0	38.0
North Western	8,531	319.9	707.0	686.7
Northern	5,428	201.3	446.9	435.7
Richmond-Tweed	198	10.2	20.1	17.8
South Eastern	809	29.3	65.8	64.7
Sydney	23,904	1,937.5	5,321.7	3,909.2
Undefined	21,857	2,835.1	5,676.0	4,452.4
Total New South Wales	161,950	10,751.6	23,630.4	19,409.9

Table 8 shows that the direct expenditure of the 27 companies surveyed has the highest overall impact in the Hunter region, with estimated total value added of \$13.1 billion, meaning these companies contributed 29.5% to gross regional product (\$44.4 billion) in 2021/22. The impact in the Hunter region was significantly higher than other regional economies, the next highest of which was Sydney (\$7.6 billion in value added) and Central West (\$2.9 billion).

The Far West region recorded the highest proportion of GRP contributed by the companies surveyed (35.7%), followed by the Hunter (29.5%), Central West (22.2%), North Western (11.7%) and Illawarra (8.3%) regions.

The Far West region had the highest proportion of GRP contributed by the resource sector (35.7%), followed by Hunter (29.5%) and Central West (22.2%).

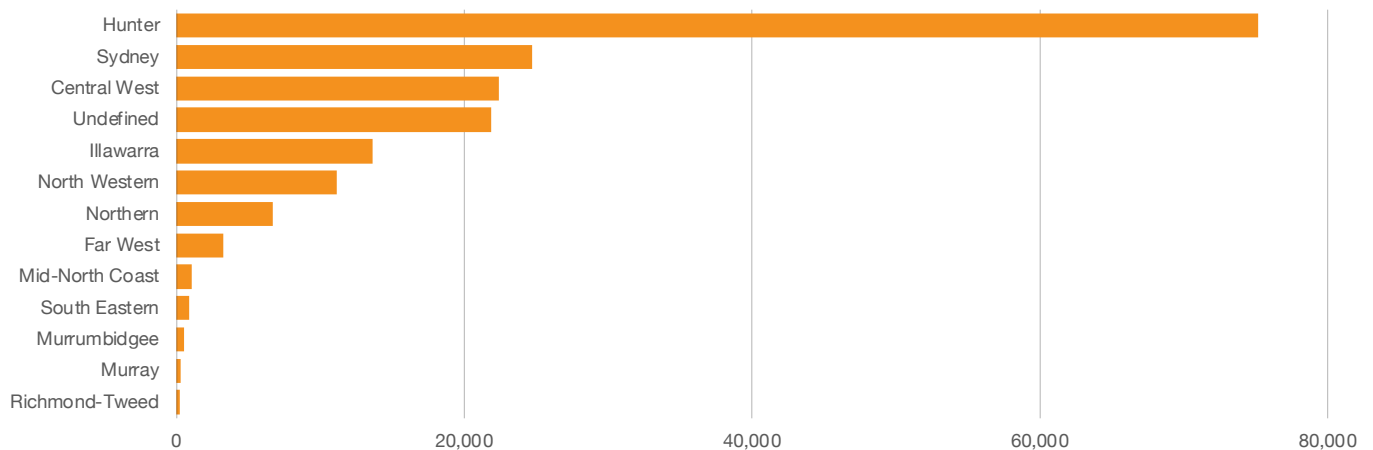
With regard to employment, the companies surveyed again had the highest impact on jobs in the Hunter region, supporting 75,181 FTEs, comprising 21.1% of the total regional workforce. The Sydney (24,722 FTEs), Central West (22,430 FTEs) and Illawarra (13,626 FTEs) regions recorded the next highest number of employees. The Far West region recorded the greatest proportion of total jobs (38.6%) from the impact of the 27 companies surveyed.

Table 8: Total Economic Impact of Minerals and Energy Sector by Region, 2021/22

Region	Total GVA (\$M)	Total value added as % of GRP	Total jobs supported (FTEs)	% of regional employment
Central West	2,856.0	22.2%	22,430	22.1%
Far West	415.6	35.7%	3,233	38.6%
Hunter	13,087.0	29.5%	75,181	21.1%
Illawarra	1,897.0	8.3%	13,626	6.0%
Mid-North Coast	131.6	1.1%	1,067	0.9%
Murray	41.4	0.6%	271	0.5%
Murrumbidgee	105.5	0.7%	531	0.6%
North Western	1,278.0	11.7%	11,171	19.4%
Northern	776.2	5.9%	6,726	7.8%
Richmond-Tweed	30.6	0.2%	215	0.2%
South Eastern	106.5	1.0%	903	0.9%
Sydney	7,587.3	1.6%	24,722	0.9%
Undefined	7,827.9	n.a.	21,869	n.a.
Total New South Wales	36,140.5	5.6%	181,945	4.4%

Total Employment Supported by NSW Mining Companies Surveyed by Region

New South Wales (FTEs)



Central West

Direct Contribution

In 2021/22, NSW mining companies surveyed contributed \$1.3 billion in direct spending in the Central West region (representing 19.0% annual growth), through:

- Total workforce of 5,601 FTEs, including 2,577 contract workers whose place of work was in the region;
- \$406.0 million in wages and salaries to 3,023 direct full-time employees (not including contractors);
- \$861.2 million in purchases of goods and services from 1,006 local businesses (includes contractors);
- \$4.2 million in contributions to 275 community organisations; and
- \$21.5 million in local government payments.

Indirect Contribution

This **\$1.3 billion in direct spending** supported:

- \$1.6 billion in additional supply chain purchases and household consumption; and
- \$714.5 million in wages and salaries associated with a further 19,406 jobs supported in this region.

Total Contribution

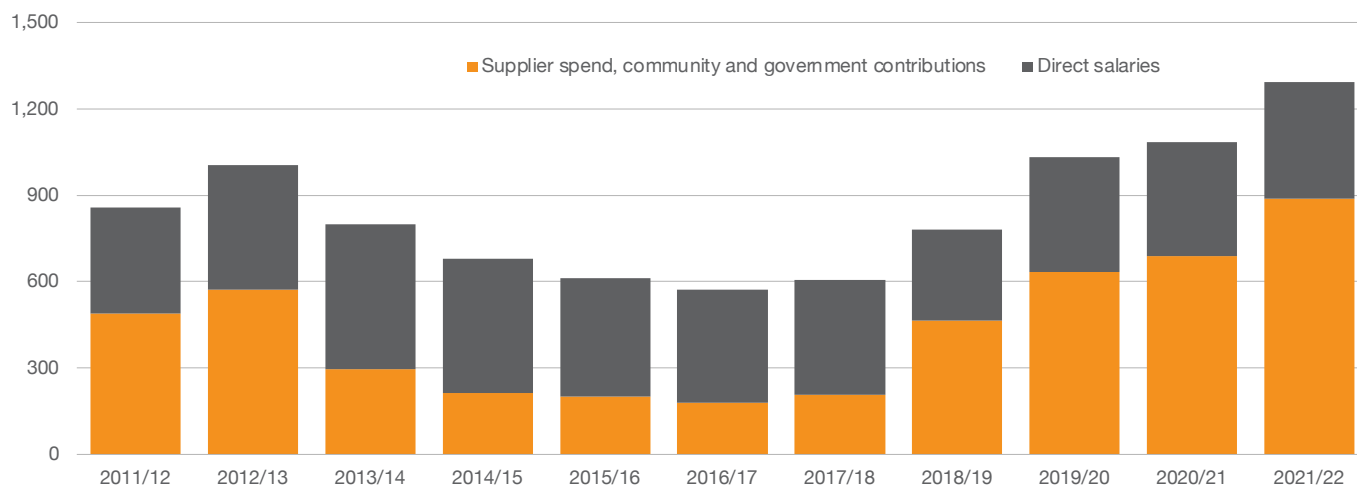
The total economic contribution (direct, indirect and consumption-induced) from the minerals sector in 2021/22 amounted to:

- \$2.5 billion in supplying business purchases;
- \$1.1 billion in total wages and salaries paid to workers;
- **\$2.9 billion in gross value added**, or 22.2% of total GRP in this region (\$12.9 billion); and
- **22,430 full-time equivalent jobs**, or 22.1% of the regional workforce.

Since 2011/12, NSW mining companies surveyed have generated **\$9.3 billion in direct spending in the Central West region**, comprised of \$4.5 billion in total wages and salaries and \$4.8 billion in business purchases, community contributions and local government payments.

Direct Expenditure of NSW Mining Companies Surveyed

Central West (\$ million)



Far West

Direct Contribution

In 2021/22, NSW mining companies surveyed contributed \$190.1 million in direct spending in the Far West region through:

- Total workforce of 1,656 FTEs, including 1,226 contract workers whose place of work was in the region;
- \$51.4 million in wages and salaries to 430 direct full-time employees (not including contractors);
- \$137.2 million in purchases of goods and services from 115 local businesses (includes contractors);
- \$0.1 million in contributions to 25 community organisations; and
- \$2.2 million in local government payments.

Indirect Contribution

This **\$190.1 million in direct spending** supported:

- \$253.2 million in additional supply chain purchases and household consumption; and
- \$121.4 million in wages and salaries associated with a further 2,803 jobs supported in this region.

Total Contribution

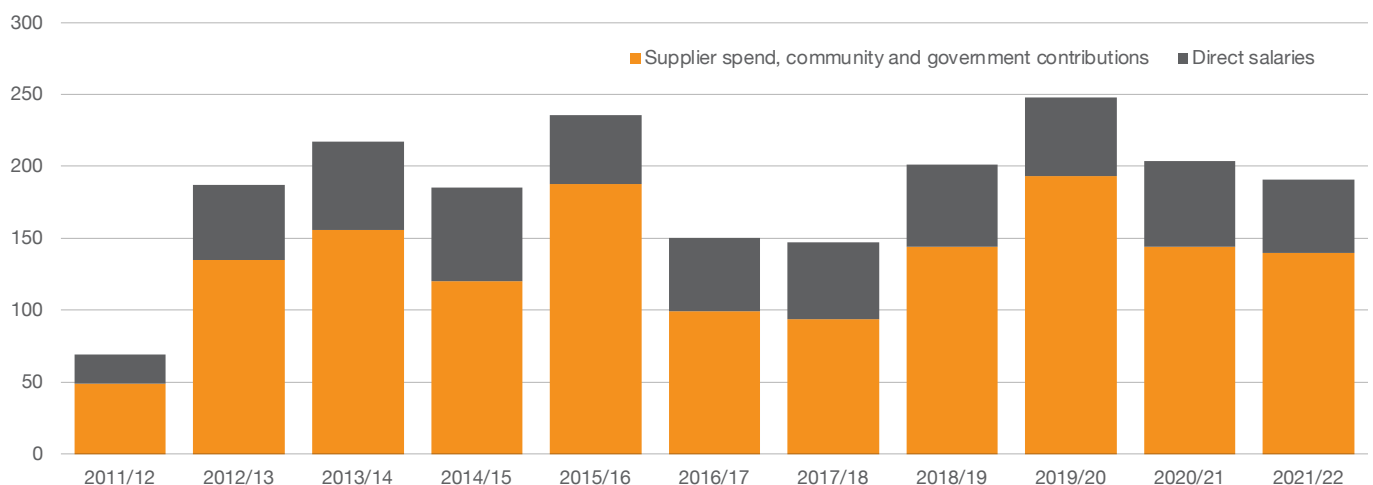
The total economic contribution (direct, indirect and consumption-induced) from the minerals sector in 2021/22 amounted to:

- \$390.4 million in supplying business purchases;
- \$172.8 million in total wages and salaries paid to workers;
- **\$415.6 million in gross value added**, or 35.7% of total GRP in this region (\$1.2 billion); and
- **3,233 full-time equivalent jobs**, or 38.6% of the regional workforce.

*Since 2011/12, NSW mining companies surveyed have generated **\$2.0 billion in direct spending in the Far West region**, comprised of \$573.2 million in total wages and salaries and \$1.5 million in business purchases, community contributions and local government payments.*

Direct Expenditure of NSW Mining Companies Surveyed

Far West (\$ million)



Hunter

Direct Contribution

In 2021/22, NSW mining companies surveyed contributed \$6.3 billion in direct spending in the Hunter region through:

- Total workforce of 13,589 FTEs, including 3,565 contract workers whose place of work was in the region;
- \$1.6 billion in wages and salaries to 10,024 direct full-time employees (not including contractors);
- \$4.7 billion in purchases of goods and services from 3,028 local businesses (includes contractors);
- \$4.8 million in contributions to 398 community organisations; and
- \$32.5 million in local government payments.

Indirect Contribution

This **\$6.3 billion in direct spending** supported:

- \$8.2 billion in additional supply chain purchases and household consumption; and
- \$3.9 billion in wages and salaries associated with a further 65,157 jobs supported in this region.

Total Contribution

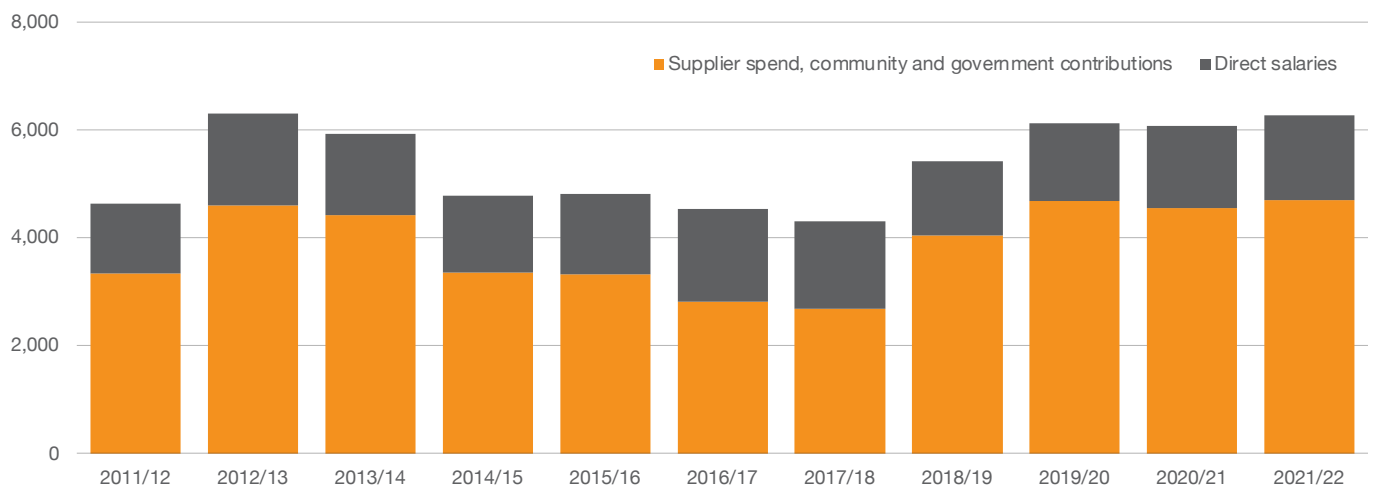
The total economic contribution (direct, indirect and consumption-induced) from the minerals sector in 2021/22 amounted to:

- \$12.8 billion in supplying business purchases;
- \$5.5 billion in total wages and salaries paid to workers;
- **\$13.1 billion in gross value added**, or 29.5% of total GRP in this region (\$44.4 billion); and
- **75,181 full-time equivalent jobs**, or 21.1% of the regional workforce.

Since 2011/12, NSW mining companies surveyed have generated **\$59.2 billion in direct spending in the Hunter region**, comprised of \$16.7 billion in total wages and salaries and \$42.5 billion in business purchases, community contributions and local government payments.

Direct Expenditure of NSW Mining Companies Surveyed

Hunter (\$ million)



Illawarra

Direct Contribution

In 2021/22, NSW mining companies surveyed contributed \$802.0 million in direct spending in the Illawarra region (representing 14.3% annual growth), through:

- Total workforce of 1,856 FTEs, including 415 contract workers whose place of work was in the region;
- \$170.3 million in wages and salaries to 1,441 direct full-time employees (not including contractors);
- \$629.8 million in purchases of goods and services from 424 local businesses (includes contractors);
- \$1.2 million in contributions to 46 community organisations; and
- \$0.7 million in local government payments.

Indirect Contribution

This **\$802.0 million in direct spending** supported:

- \$1.2 billion in additional supply chain purchases and household consumption; and
- \$628.2 million in wages and salaries associated with a further 12,185 jobs supported in this region.

Total Contribution

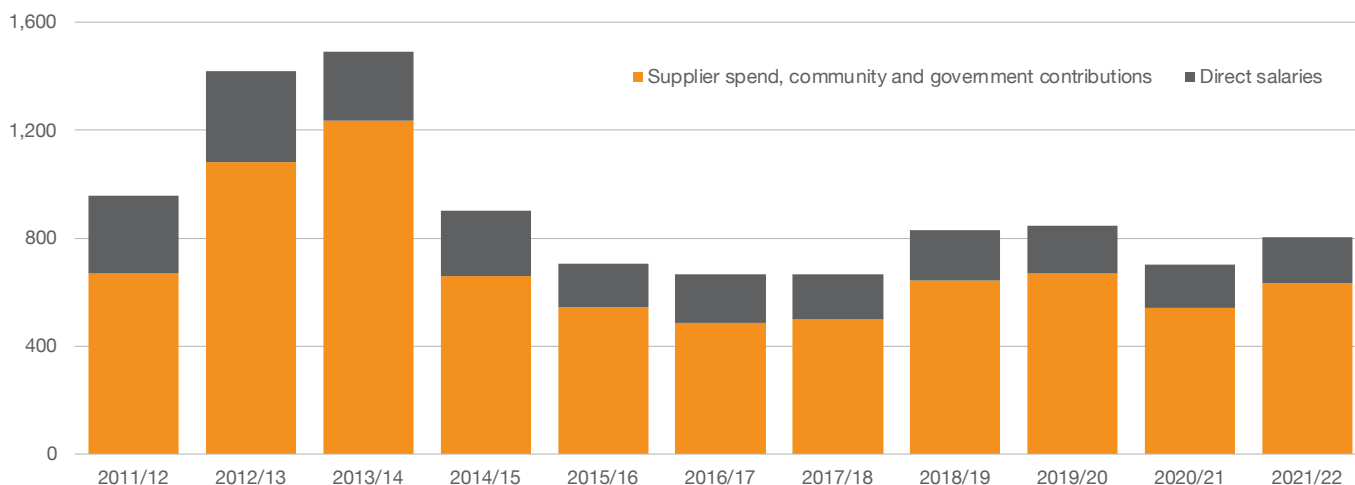
The total economic contribution (direct, indirect and consumption-induced) from the minerals sector in 2021/22 amounted to:

- \$1.9 billion in supplying business purchases;
- \$798.4 million in total wages and salaries paid to workers;
- **\$1.9 billion in gross value added**, or 8.3% of total GRP in this region (\$22.9 billion); and
- **13,626 full-time equivalent jobs**, or 6.0% of the regional workforce.

Since 2011/12, NSW mining companies surveyed have generated **\$10.0 billion in direct spending in the Illawarra region**, comprised of \$2.3 billion in total wages and salaries and \$7.7 billion in business purchases, community contributions and local government payments.

Direct Expenditure of NSW Mining Companies Surveyed

Illawarra (\$ million)



Mid-North Coast

Direct Contribution

In 2021/22, NSW mining companies surveyed contributed \$50.7 million in direct spending in the Mid-North Coast region (representing 57.3% annual growth), through:

- \$7.4 million in wages and salaries to 56 direct full-time employees (not including contractors); and
- \$43.3 million in purchases of goods and services from 39 local businesses (includes contractors).

Indirect Contribution

This **\$50.7 million in direct spending** supported:

- \$82.1 million in additional supply chain purchases and household consumption; and
- \$36.4 million in wages and salaries associated with a further 1,012 jobs supported in this region.

Total Contribution

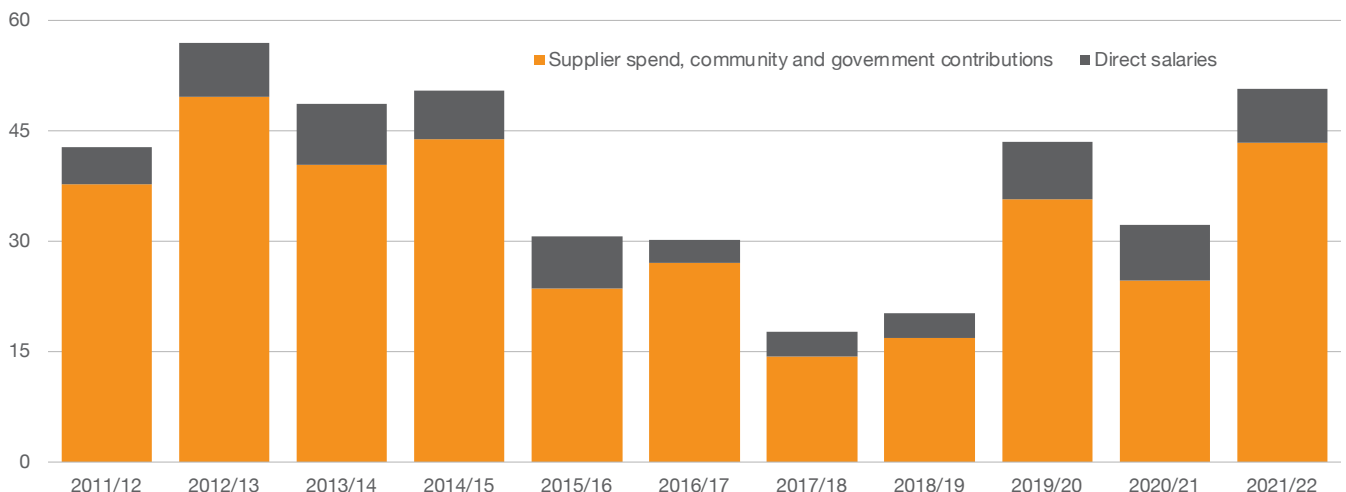
The total economic contribution (direct, indirect and consumption-induced) from the minerals sector in 2021/22 amounted to:

- \$125.4 million in supplying business purchases;
- \$43.8 million in total wages and salaries paid to workers;
- **\$131.6 million in gross value added**, or 1.1% of total GRP in this region (\$11.9 billion); and
- **1,067 full-time equivalent jobs**, or 0.9% of the regional workforce.

Since 2011/12, NSW mining companies surveyed have generated **\$424.0 million in direct spending in the Mid-North Coast region**, comprised of \$67.1 million in total wages and salaries and \$356.9 million in business purchases, community contributions and local government payments.

Direct Expenditure of NSW Mining Companies Surveyed

Mid-North Coast (\$ million)



Murray

Direct Contribution

In 2021/22, NSW mining companies surveyed contributed \$23.0 million in direct spending in the Murray region through:

- \$4.4 million in wages and salaries to 38 direct full-time employees (not including contractors);
- \$16.8 million in purchases of goods and services from 57 local businesses (includes contractors); and
- \$1.8 million in local government payments.

Indirect Contribution

This **\$23.0 million in direct spending** supported:

- \$21.0 million in additional supply chain purchases and household consumption; and
- \$10.1 million in wages and salaries associated with a further 233 jobs supported in this region.

Total Contribution

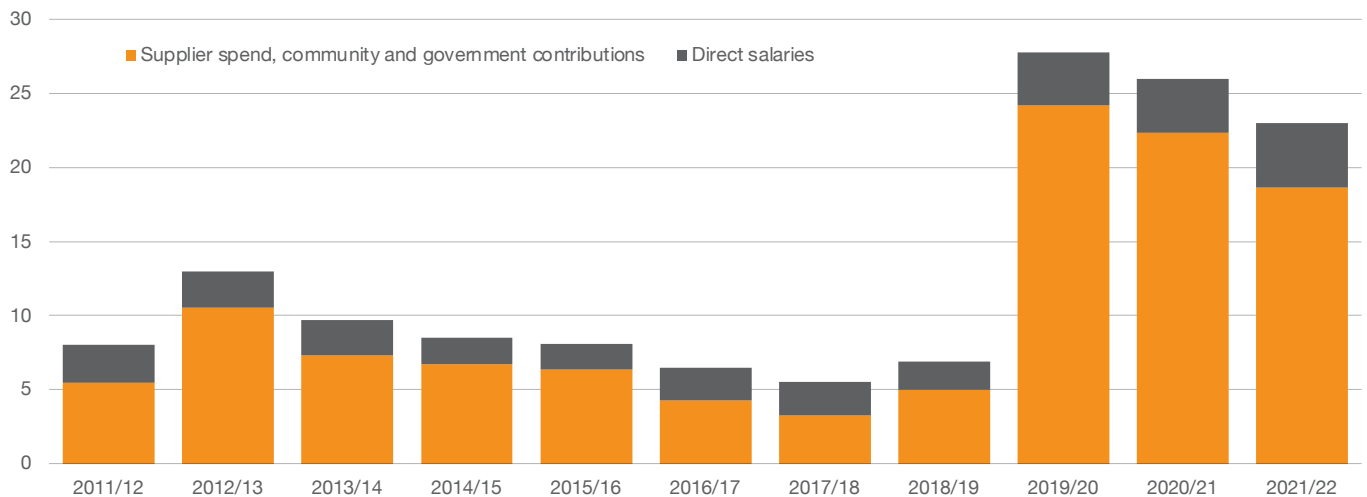
The total economic contribution (direct, indirect and consumption-induced) from the minerals sector in 2021/22 amounted to:

- \$37.8 million in supplying business purchases;
- \$14.5 million in total wages and salaries paid to workers;
- **\$41.4 million in gross value added**, or 0.6% of total GRP in this region (\$7.2 billion); and
- **271 full-time equivalent jobs**, or 0.5% of the regional workforce.

Since 2011/12, NSW mining companies surveyed have generated **\$142.9 million in direct spending in the Murray region**, comprised of \$28.9 million in total wages and salaries and \$114.0 million in business purchases, community contributions and local government payments.

Direct Expenditure of NSW Mining Companies Surveyed

Murray (\$ million)



Murrumbidgee

Direct Contribution

In 2021/22, NSW mining companies surveyed contributed \$67.5 million in direct spending in the Murrumbidgee region through:

- \$12.7 million in wages and salaries to 104 direct full-time employees (not including contractors); and
- \$54.8 million in purchases of goods and services from 79 local businesses (includes contractors).

Indirect Contribution

This **\$67.5 million in direct spending** supported:

- \$40.0 million in additional supply chain purchases and household consumption; and
- \$17.9 million in wages and salaries associated with a further 427 jobs supported in this region.

Total Contribution

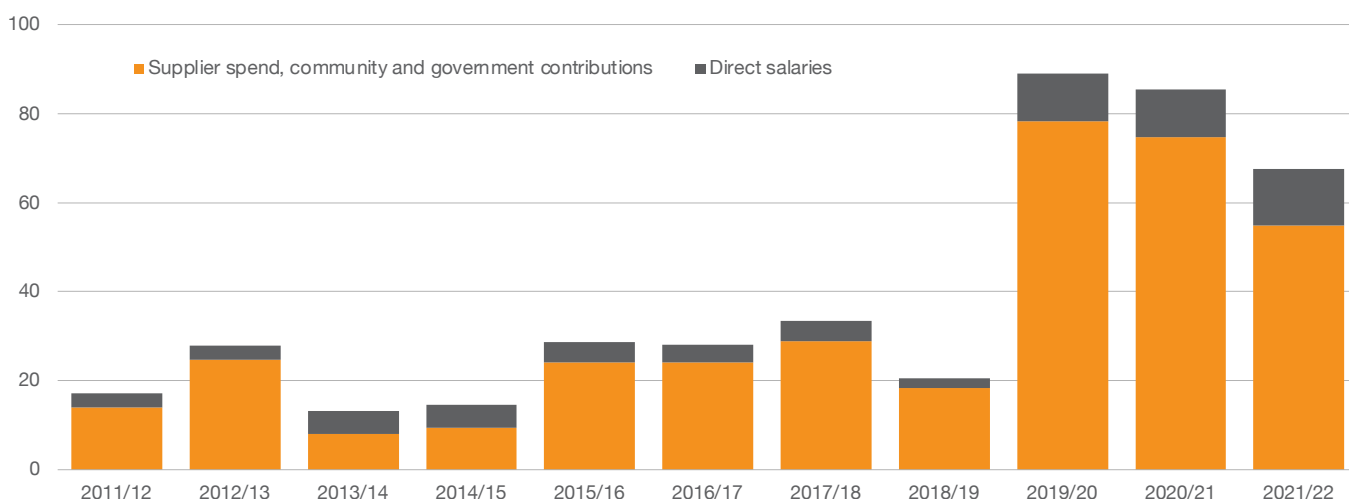
The total economic contribution (direct, indirect and consumption-induced) from the minerals sector in 2021/22 amounted to:

- \$94.8 million in supplying business purchases;
- \$30.6 million in total wages and salaries paid to workers;
- **\$105.5 million in gross value added**, or 0.7% of total GRP in this region (\$14.2 billion); and
- **531 full-time equivalent jobs**, or 0.6% of the regional workforce.

Since 2011/12, NSW mining companies surveyed have generated **\$424.9 million in direct spending in the Murrumbidgee region**, comprised of \$66.1 million in total wages and salaries and \$358.8 million in business purchases, community contributions and local government payments.

Direct Expenditure of NSW Mining Companies Surveyed

Murrumbidgee (\$ million)



North Western

Direct Contribution

In 2021/22, NSW mining companies surveyed contributed \$591.3 million in direct spending in the North Western region through:

- Total workforce of 2,934 FTEs, including 294 contract workers whose place of work was in the region;
- \$347.0 million in wages and salaries to 2,640 direct full-time employees (not including contractors);
- \$227.9 million in purchases of goods and services from 715 local businesses (includes contractors);
- \$0.7 million in contributions to 134 community organisations; and
- \$15.7 million in local government payments.

Indirect Contribution

This **\$591.3 million in direct spending** supported:

- \$707.0 million in additional supply chain purchases and household consumption; and
- \$319.9 million in wages and salaries associated with a further 8,531 jobs supported in this region.

Total Contribution

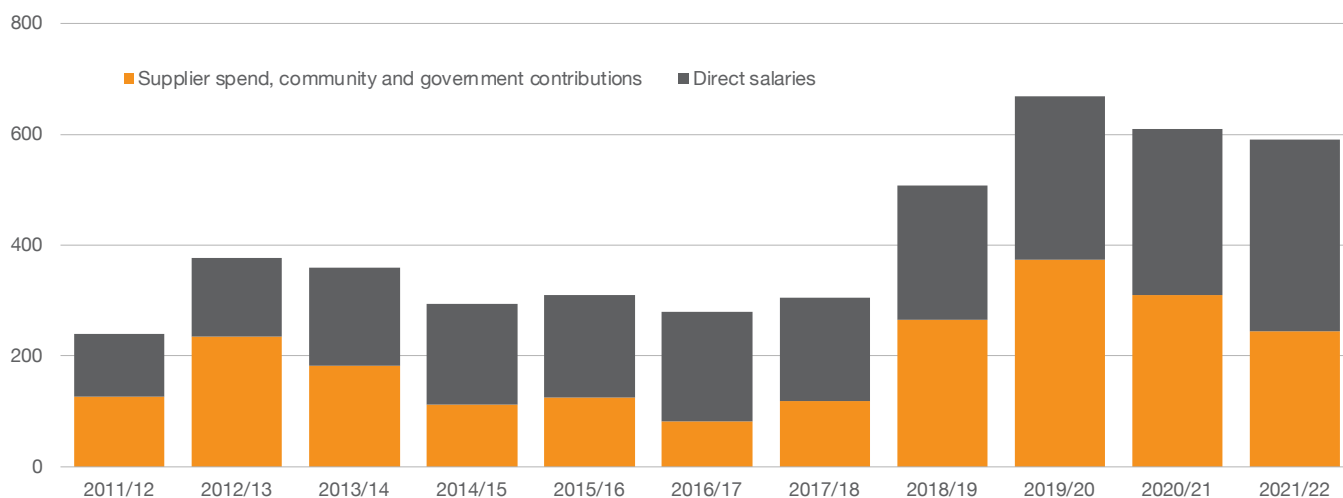
The total economic contribution (direct, indirect and consumption-induced) from the minerals sector in 2021/22 amounted to:

- \$934.9 million in supplying business purchases;
- \$667.0 million in total wages and salaries paid to workers;
- **\$1.3 billion in gross value added**, or 11.7% of total GRP in this region (\$11.0 billion); and
- **11,171 full-time equivalent jobs**, or 19.4% of the regional workforce.

Since 2011/12, NSW mining companies surveyed have generated **\$4.5 billion in direct spending in the North Western region**, comprised of \$2.4 billion in total wages and salaries and \$2.2 billion in business purchases, community contributions and local government payments.

Direct Expenditure of NSW Mining Companies Surveyed

North Western (\$ million)



Northern

Direct Contribution

In 2021/22, NSW mining companies surveyed contributed \$340.5 million in direct spending in the Northern region through:

- Total workforce of 3,573 FTEs, including 2,275 contract workers whose place of work was in the region;
- \$176.2 million in wages and salaries to 1,298 direct full-time employees (not including contractors);
- \$157.7 million in purchases of goods and services from 356 local businesses (includes contractors);
- \$0.6 million in contributions to 143 community organisations; and
- \$6.1 million in local government payments.

Indirect Contribution

This **\$340.5 million in direct spending** supported:

- \$446.9 million in additional supply chain purchases and household consumption; and
- \$201.3 million in wages and salaries associated with a further 5,428 jobs supported in this region.

Total Contribution

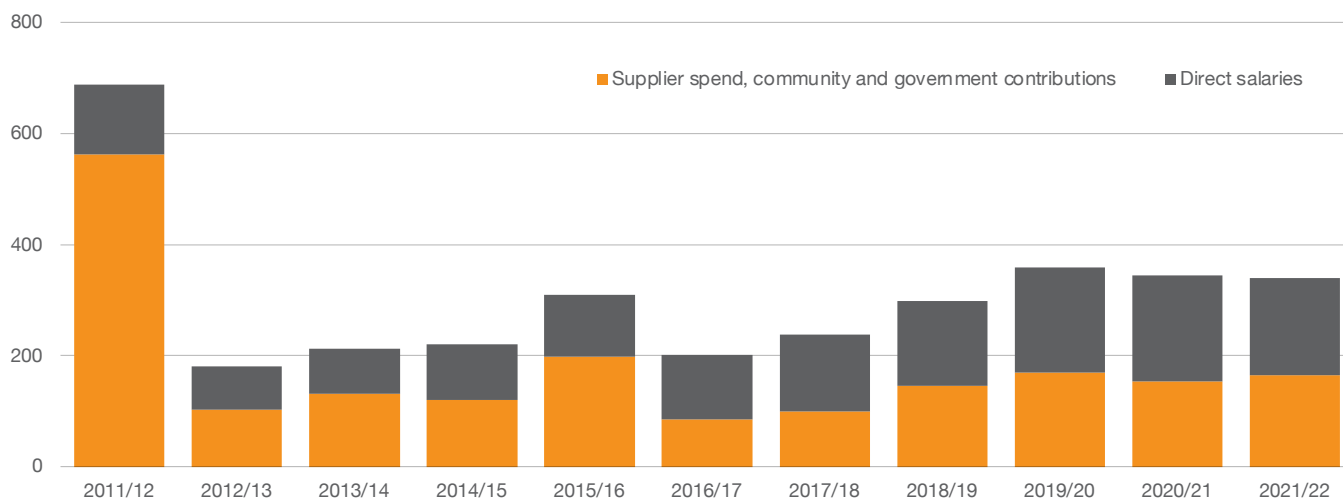
The total economic contribution (direct, indirect and consumption-induced) from the minerals sector in 2021/22 amounted to:

- \$604.5 million in supplying business purchases;
- \$377.4 million in total wages and salaries paid to workers;
- **\$776.1 million in gross value added**, or 5.9% of total GRP in this region (\$13.1 billion); and
- **6,726 full-time equivalent jobs**, or 7.8% of the regional workforce.

Since 2011/12, NSW mining companies surveyed have generated **\$3.4 billion in direct spending in the Northern region**, comprised of \$1.5 billion in total wages and salaries and \$1.9 billion in business purchases, community contributions and local government payments.

Direct Expenditure of NSW Mining Companies Surveyed

Northern (\$ million)



Richmond-Tweed

Direct Contribution

In 2021/22, NSW mining companies surveyed contributed \$12.8 million in direct spending in the Richmond-Tweed region (representing 22.0% annual growth), through:

- \$2.4 million in wages and salaries to 17 direct full-time employees (not including contractors); and
- \$10.4 million in purchases of goods and services from 20 local businesses (includes contractors).

Indirect Contribution

This **\$12.8 million in direct spending** supported:

- \$20.1 million in additional supply chain purchases and household consumption; and
- \$10.2 million in wages and salaries associated with a further 198 jobs supported in this region.

Total Contribution

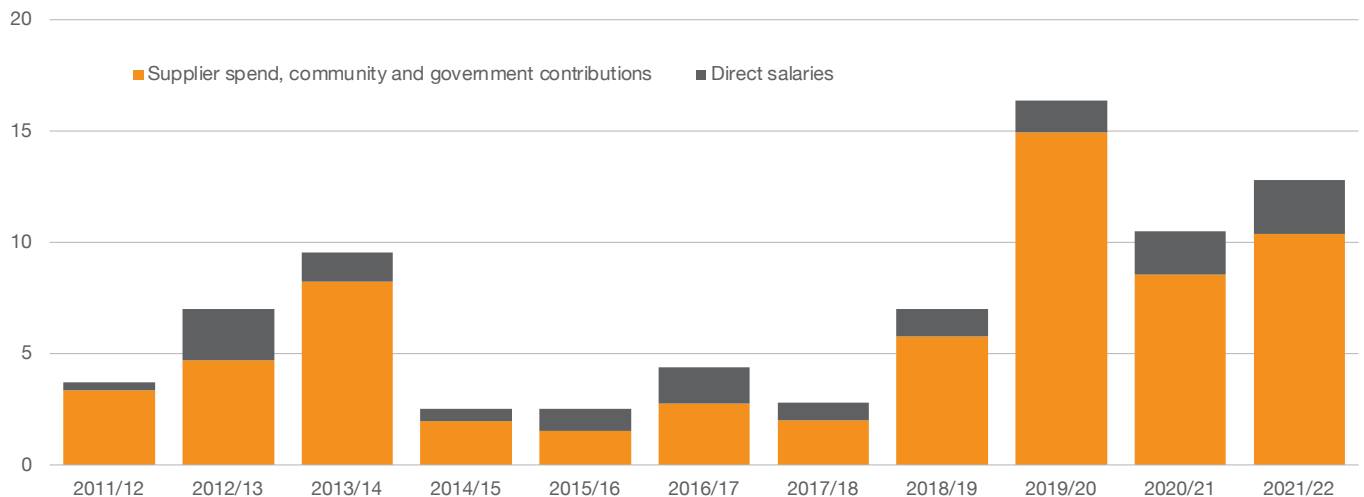
The total economic contribution (direct, indirect and consumption-induced) from the minerals sector in 2021/22 amounted to:

- \$30.5 million in supplying business purchases;
- \$12.6 million in total wages and salaries paid to workers;
- **\$30.6 million in gross value added**, or 0.2% of total GRP in this region (\$12.7 billion); and
- **215 full-time equivalent jobs**, or 0.2% of the regional workforce.

Since 2011/12, NSW mining companies surveyed have generated **\$79.1 million in direct spending in the Richmond-Tweed region**, comprised of \$14.9 million in total wages and salaries and \$64.2 million in business purchases, community contributions and local government payments.

Direct Expenditure of NSW Mining Companies Surveyed

Richmond-Tweed (\$ million)



South Eastern

Direct Contribution

In 2021/22, NSW mining companies surveyed contributed \$41.8 million in direct spending in the South Eastern region (representing 16.7% annual growth), through:

- \$10.3 million in wages and salaries to 95 direct full-time employees (not including contractors);
- \$31.3 million in purchases of goods and services from 87 local businesses (includes contractors); and
- \$0.1 million in local government payments.

Indirect Contribution

This **\$41.8 million in direct spending** supported:

- \$65.8 million in additional supply chain purchases and household consumption; and
- \$29.3 million in wages and salaries associated with a further 809 jobs supported in this region.

Total Contribution

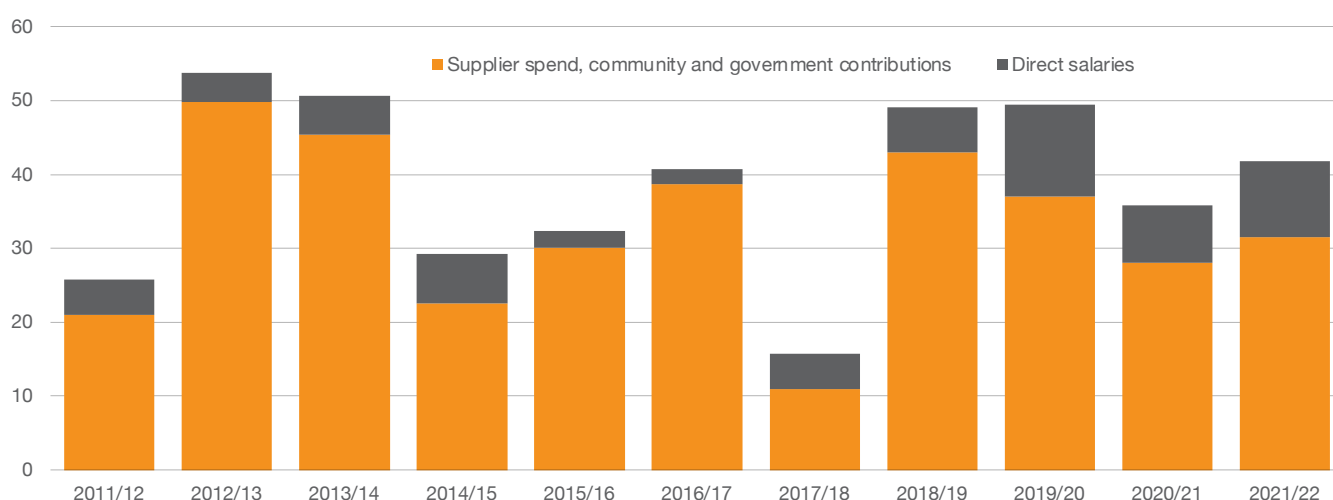
The total economic contribution (direct, indirect and consumption-induced) from the minerals sector in 2021/22 amounted to:

- \$97.1 million in supplying business purchases;
- \$39.6 million in total wages and salaries paid to workers;
- **\$106.5 million in gross value added**, or 1.0% of total GRP in this region (\$11.1 billion); and
- **903 full-time equivalent jobs**, or 0.9% of the regional workforce.

Since 2011/12, NSW mining companies surveyed have generated **\$424.5 million in direct spending in the South Eastern region**, comprised of \$66.6 million in total wages and salaries and \$357.9 million in business purchases, community contributions and local government payments.

Direct Expenditure of NSW Mining Companies Surveyed

South Eastern (\$ million)



Sydney

Direct Contribution

In 2021/22, NSW mining companies surveyed contributed \$3.7 billion in direct spending in the Sydney region through:

- Total workforce of 1,417 FTEs, including 599 contract workers whose place of work was in the region;
- \$131.7 million in wages and salaries to 818 direct full-time employees (not including contractors);
- \$3.5 billion in purchases of goods and services from 2,564 local businesses (includes contractors);
- \$1.1 million in contributions to 65 community organisations; and
- \$3.7 million in local government payments.

Indirect Contribution

This **\$3.7 billion in direct spending** supported:

- \$5.3 billion in additional supply chain purchases and household consumption; and
- \$1.9 billion in wages and salaries associated with a further 23,904 jobs supported in this region.

Total Contribution

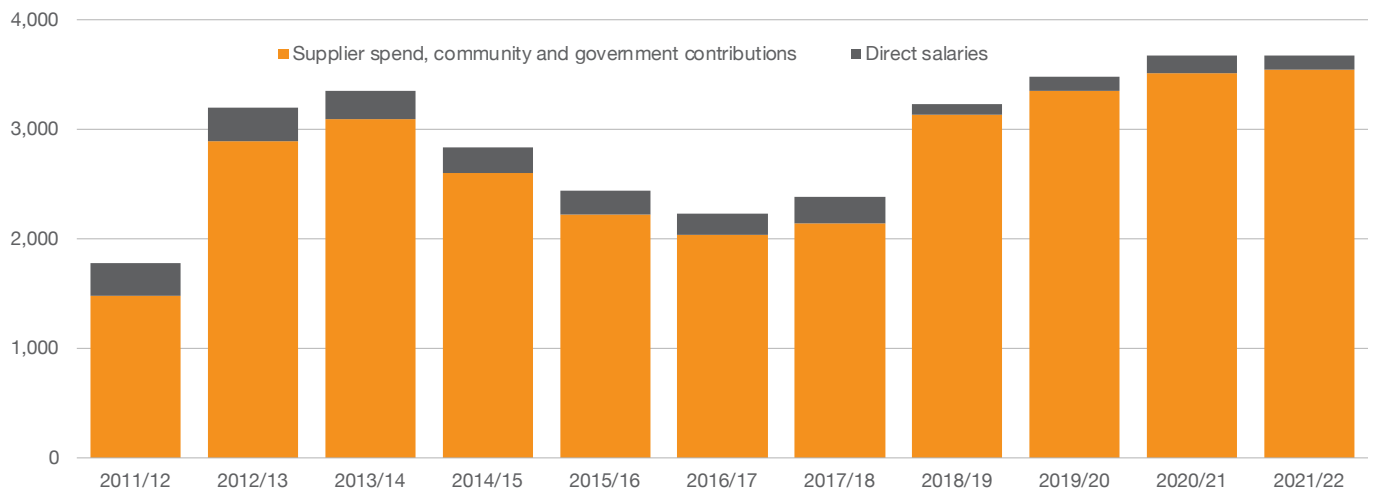
The total economic contribution (direct, indirect and consumption-induced) from the minerals sector in 2021/22 amounted to:

- \$8.9 billion in supplying business purchases;
- \$2.1 billion in total wages and salaries paid to workers;
- **\$7.6 billion in gross value added**, or 1.6% of total GRP in this region (\$480.6 billion); and
- **24,722 full-time equivalent jobs**, or 0.9% of the regional workforce.

Since 2011/12, NSW mining companies surveyed have generated **\$32.3 billion in direct spending in the Sydney region**, comprised of \$2.3 billion in total wages and salaries and \$30.0 billion in business purchases, community contributions and local government payments.

Direct Expenditure of NSW Mining Companies Surveyed

Sydney (\$ million)



Local Impact

Direct Spending

The spending and employment data provided by companies was aggregated using geographical concordances at the local government area (LGA) level. As expected, the surveyed companies' expenditures, split across salary and supplier and voluntary community contribution expenditure, varied considerably across LGAs. The level of employment and direct expenditure on employees and business supply chain purchases is summarised for the 128 LGAs in New South Wales in Appendix B (where significant activity occurs in an LGA).

Table 9 shows the distribution of total direct spending (i.e. salaries, business purchases and community contributions) from the 27 mining companies surveyed across New South Wales to the top 20 LGAs by expenditure. Sydney LGA recorded the largest share of direct expenditure in 2021/22 (\$1.7 billion), followed by Newcastle (\$1.6 billion), Singleton (\$1.4 billion), Maitland (\$1.2 billion) and Orange (\$663.0 million).

Sydney recorded the largest share of direct expenditure by local government area in 2021/22 (\$1.7 billion), followed by Newcastle (\$1.6 billion).

Direct resident employment was greatest in the Singleton LGA (2,044 FTEs), followed by the Maitland (1,602 FTEs), Mid-Western Regional (1,544 FTEs), Cessnock (1,528 FTEs) LGAs and Lake Macquarie (1,480 FTEs).

NSW Mining Companies Surveyed Direct Employment by LGA

New South Wales (FTEs), 2021/22

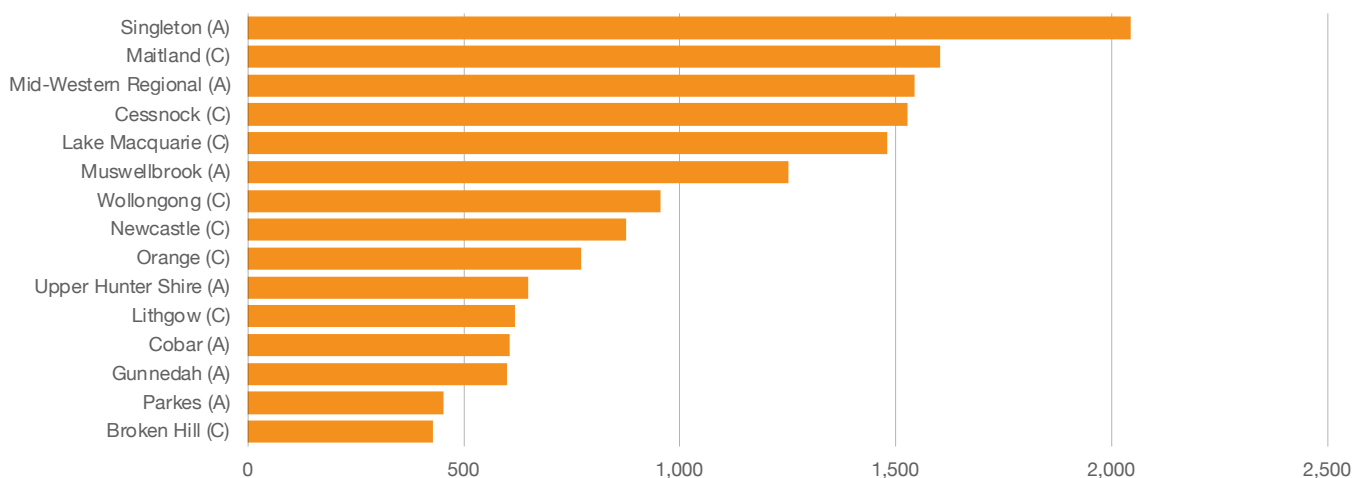


Table 9: Direct Impact of NSW Mining Companies Surveyed, Highest LGAs by Expenditure, 2021/22

Region	Residing employees (FTEs)	Associated salaries (\$M)	Total workforce ^(a) (FTEs)	Business purchases, community and govt payments (\$M)	Total direct spending (\$M)	Local suppliers (no.)
Sydney (C)	35	9.2	48	1,651.4	1,660.5	629
Newcastle (C)	875	137.8	875	1,417.1	1,554.9	791
Singleton (A)	2,044	330.8	4,035	1,020.6	1,351.4	486
Maitland (C)	1,602	258.3	1,609	957.9	1,216.2	542
Orange (C)	772	103.4	1,254	559.7	663.0	265
Muswellbrook (A)	1,251	189.3	2,748	472.3	661.6	260
Cessnock (C)	1,528	232.3	1,528	360.5	592.8	192
Parramatta (C)	11	1.3	11	542.0	543.3	189
Lake Macquarie (C)	1,480	231.3	1,531	289.6	520.9	507
Wollongong (C)	956	115.1	1,371	383.0	498.1	333
Mid-Western Regional (A)	1,544	230.8	1,802	135.8	366.6	308
Broken Hill (C)	429	51.4	1,655	139.5	190.8	114
Gunnedah (A)	600	84.1	1,045	73.5	157.7	127
Wingecarribee (A)	41	5.2	41	151.0	156.2	25
Lithgow (C)	619	94.4	699	56.2	150.6	116
Central Coast (C) (NSW)	234	35.6	256	113.6	149.2	140
Fairfield (C)	4	0.4	4	147.6	148.0	109
Port Stephens (A)	290	44.8	290	94.1	139.0	89
Upper Hunter Shire (A)	649	99.5	670	24.6	124.1	86
Canterbury-Bankstown (A)	8	1.4	8	122.2	123.6	85

Note: (a) Includes full-time resident direct employees and contract workers by place of operation.

Indirect Impact

The I-O modelling estimated the indirect and consumption effects flowing from business supply chain expenditure and consumption spending in each LGA. These impacts have been modelled separately and then aggregated to identify the level of impacts on output, incomes, employment and industry value added for each region. The I-O model allowed for spending leakages to imports in both the first and subsequent rounds of economic activity.

Modelling consumption impacts is problematic for smaller shires with limited economic structures because only a subset of goods and services are available. Smaller and specialised mining LGAs tend to have larger expenditure leakages, typically to the nearest large regional centre. To incorporate this into the modelling, a further correction factor has been applied for LGAs, as shown in Table 10. The rates were further reduced for a number of mining focused LGAs to account for the tendency of residents of those communities to travel to major centres for consumption spending and to alleviate any constrained consumption capacity.

The total economic impact (i.e. Type II model scenario) of the 27 companies' direct spending for each LGA across New South Wales in 2021/22 are contained in Appendix C (where significant activity occurs in an LGA), with a summary of the top 20 LGAs by value added provided in Table 11. The largest contributions made by the 27 NSW mining companies surveyed to gross regional product (i.e. total estimated value added) occurred in the Sydney LGA, with total estimated value added of \$3.4 billion, followed by Newcastle (\$3.3 billion), Singleton (\$2.8 billion), Maitland (\$2.5 billion) and Orange (\$1.5 billion)

With regard to employment, the surveyed companies again had the greatest impact on jobs in the Newcastle LGA, with 16,454 FTEs, followed by the Maitland (13,744 FTEs) and Singleton (11,297 FTEs) LGAs, whilst the regions where the impact of the 27 companies' direct spending accounted for the largest share of employment were Singleton (90.4%), Muswellbrook (87.1%) and Cobar (83.1%).

Table 10: Rates of Adjustment for Local Consumption Expenditure by LGA Population Size

Population of LGA	Rate of consumption expenditure in LGA
0 – 2,000	40%
2,000 – 5,000	46.7%
5,000 – 10,000	53.3%
10,000 – 30,000	73.3%
30,000 – 50,000	80%
50,000 – 100,000	86.7%
Over 100,000	100%

Table 11: Total Economic Impact of NSW Mining Companies Surveyed, Highest LGAs by Gross Value Added, 2021/22 (Type II)

Region	Total GVA (\$M)	Total value added as % of GRP	Total jobs supported (FTEs)	% of regional employment
Sydney (C)	3,412.8	2.2%	10,671	6.5%
Newcastle (C)	3,262.5	22.0%	16,454	18.6%
Singleton (A)	2,755.3	70.8%	11,297	90.4%
Maitland (C)	2,485.5	58.1%	13,744	31.9%
Orange (C)	1,502.5	46.4%	11,207	47.1%
Muswellbrook (A)	1,344.4	57.7%	6,456	87.1%
Cessnock (C)	1,224.5	56.8%	7,712	28.8%
Wollongong (C)	1,183.8	9.8%	8,604	8.0%
Parramatta (C)	1,115.1	3.5%	3,487	2.5%
Lake Macquarie (C)	1,089.4	13.8%	7,151	7.1%
Mid-Western Regional (A)	739.5	46.8%	6,176	46.6%
Broken Hill (C)	415.4	40.6%	3,230	42.4%
Wingecarribee (A)	345.1	13.0%	2,082	8.0%
Gunnedah (A)	337.1	41.2%	2,835	47.0%
Central Coast (C) (NSW)	312.6	2.2%	1,260	0.8%
Lithgow (C)	311.8	23.5%	2,627	26.1%
Fairfield (C)	300.4	42.1%	950	1.2%
Port Stephens (A)	286.3	6.7%	1,717	5.4%
Canterbury-Bankstown	254.2	1.5%	801	0.5%
North Sydney (A)	248.4	1.6%	790	1.8%

Conclusion

This report contains the outcomes of two key pieces of analysis. The first is the collection of primary data by the NSW Minerals Council (NSWMC) that identifies the direct impact of 27 exploration and mining companies by local and regional areas in New South Wales. The second is the conduct of I-O modelling that identifies the flow-on effects through the economy at a State, Regional, Local Government Authority and State and Federal electoral boundary levels.

The results of the analysis demonstrate that incomes and expenditures from the 27 companies surveyed are widely distributed across the state generating significant flow-on effects, and that traditional economic techniques understate the true contribution of the mining sector as they do not attribute the output from related sectors such as construction, rail transport, utilities, professional services, manufacturing and contract workers.

The analysis identifies that the 27 companies surveyed contributed an estimated \$16.7 billion in direct spending to the state economy in 2021/22, comprised of:

- Total workforce of 30,981 full-time equivalent workers (including direct resident employees and contract workers), which represented an annual increase of 2.9%;
- \$2.9 billion in wages and salaries to approximately 19,996 direct fulltime resident employees (not including contractors), representing an average salary level across the sector of \$144,550 per annum;
- \$10.5 billion in purchases of goods and services from over 6,800 local businesses (including contract payments), community contributions and payments to local government (including rates, developer contributions and other payments); and
- \$3.4 billion in state government payments (including royalties, stamp duty, payroll tax and land tax).

*The NSW mining companies surveyed contributed **\$16.7 billion** in direct spending to the New South Wales economy in 2021/22.*

Of the total workforce employed by the 27 companies surveyed, 19,996 were direct full-time employees, or 64.5% of the total workforce – of which 2,564 direct workers, or 12.9% were female – with another 10,985 contract workers.

The economic stimulus provided by the 27 mining companies in 2021/22 also extended to other states, with an additional \$6.4 billion in direct spending, which combined with the impact in New South Wales for a total impact of \$23.2 billion for the whole of Australia, comprised of:

- \$3.0 billion in wages and salaries to approximately 20,564 full-time direct residing employees; and
- \$20.2 billion in purchases of goods and services from local businesses, government (state and local) and community contributions.

The total impact of the \$16.7 billion in direct spending by the minerals sector, measured through supply chain and consumption-induced spending effects, amounted to an estimated 5.6% of Gross State Product and 4.4% of employment in New South Wales. Using a conservative approach of excluding consumption-induced effects, direct spending by the companies surveyed and flow-on impacts still contributed 4.5% to GSP and 2.9% of total state employment.

*The total economic impact of the NSW mining companies surveyed was estimated at **\$36.1 billion** in gross value added and **181,945 jobs** supported in 2021/22.*

Since 2011/12, NSW mining companies surveyed have generated approximately \$298.4 billion in value added, including \$139.1 billion in direct spending and has supported average total employment of 150,564 jobs per annum.

Appendix A: Modelling Approach

Input-Output Modelling

For this study, input-output (I-O) modelling has been used to estimate the sum of direct, indirect and consumption-induced effects of the companies surveyed on different regions of New South Wales. I-O techniques provide a solid approach for taking account of the inter-relationships between the various sectors of the economy in the short-term and hence are an appropriate tool for determining the direct, indirect and induced economic impact of economic stimuli.

I-O models can be used to capture only the indirect impacts that occur through other industry sectors (Type I models), or the indirect plus the consumption-induced effects (Type II models), which have been adopted for the current study. Further, the I-O models used in this study were based on the ABS model of the Australian economy generated from general equilibrium models. Note: Type II models involve assumptions about fixed relationships between income and consumption patterns. These factors mean that the results of I-O models should generally be treated as the upper bound of estimates, and that care has to be taken in interpreting the results of very large changes in demand or production.

A concept underlying I-O modelling is that an initial economic shock or stimulus can have multiplier effects through a series of successive spending rounds. The size of the economic multiplier in a local or regional area can be summarised in the following way:

- The extent to which project operators purchase inputs from the local or regional economy. Examples of inputs include wages for labour supplied from the local or regional area, and purchases of goods and services. The more that a project operator sources from the local or regional economy, the more money that is directly injected into the economy; and
- The extent to which money spent in a local or regional economy is retained within that economy. If there is not much opportunity for people receiving income to spend it on goods and services in their local or regional area, then not as much money will be kept in the local or regional area. Larger and more diverse regional economies tend to be better at keeping expenditures in their economy and not 'losing' it to other regions.

Key advantages of using input-output models are the fineness of detail available at a disaggregated industry level, the relative ease of application, particularly for sub-regional levels, and the ability to model effects in a timely manner.

To generate predictions, the economic contribution of an industry is applied to the relevant industry sectors of the input-output model of a regional economy. The stimulus from economic activity can be traced through the economy in several different ways:

- The first-round effect, or direct effect, are those from the activities expenditure in purchasing goods from other industries;
- The second-round effects are those from the supplying industries increasing their purchases to meet the additional demand. The second and subsequent rounds of purchasing are termed the indirect effects; and
- The consumption-induced effects, which recognise that the level of local production is important in determining regional levels of household consumption, that this in turn will be spent locally to a large extent and therefore influence the level of regional consumption and the level of output of each sector.

These effects can be represented in terms of multipliers and changes in four key variables:

Output

The output impact measures the increase in gross sales throughout the whole economy by summing all the individual transactions resulting, directly and indirectly, from the economic stimulus.

Income

The income impact measures the additional amount of wages and salaries paid to employees of the industry under consideration and to other industries benefiting from the stimulus to the economy.

Employment

The employment impact measures the combined number of existing jobs sustained and new jobs generated by the stimulus, both directly and indirectly, although allocation between these forms of employment is not separately identified.

Value Added

The value added or Gross Regional Product (GRP) impact measures only the net activity at each stage of production. GRP is defined as the addition of consumption, investment and government expenditure, plus exports of goods and services, minus imports of goods and services for a region. The GRP impacts are the preferred measure for the assessment and contribution of a stimulus to the economy.

Key advantages of using input-output models are the fineness of detail available at a disaggregated industry level, the relative ease of application, particularly for sub-regional levels, and the ability to model effects in a timely manner. However, care has to be taken in its application and interpretation of results. Key assumptions that underpin the application of I-O models are:

- The inputs purchased by each industry are a function of the level of output of that industry. The input function is generally assumed linear and homogenous of degree one (which implies constant returns to scale and no substitution between inputs);
- Each commodity (or group of commodities) is supplied by a single industry or sector of production. This implies that there is only one method used to produce each commodity and that each sector has only a single primary output;
- The total effect of carrying on several types of production is the sum of the separate effects. This rules out external economies and diseconomies and is known simply as the additivity assumption;
- The system is in equilibrium at given prices. This would not be the case in an economic system subject to external influences;
- In the static input-output model, there are no capacity constraints so that the supply of each good is perfectly elastic. Each industry can supply whatever quantity is demanded of it and there are no capital restrictions. This assumption would come into play depending upon the magnitude of the changes in quantities demanded, brought about through changes in taxation levels; and
- The input-output model is an optimisation model that allocates resources between sectors to their most efficient use.

Type II models involve additional assumptions about fixed relationships between income and consumption patterns. These factors mean that the results of I-O models should generally be treated as the upper bound of estimates, and that care has to be taken in interpreting the results of very large changes in demand or production.

Construction of Regional I-O Models

For the derivation of the regional I-O tables, a variable interference non-survey technique was applied, involving a formalised non-survey method compilation. This allowed data on direct effects of the companies surveyed to be inserted at any stage of the compilation procedure. This approach is based primarily on the Generation of Regional Input-Output Tables (GRIT) technique, a widely used method of constructing local and regional input-output tables in Australia, America and Europe. The procedure utilises cross-industry location quotients as well as superior data (including expenditure patterns of within the primary company data) for the regionalisation of the national direct requirements matrix (DRM) or at the elements of other final payments and demand, which are at the core of any I-O table.

In summary, the construction of the local and regional I-O models employed the following steps:

- Adjustment to the latest available national I-O table;
- Computation of the regional direct requirement matrix;
- Aggregation of regional sectors (if necessary); and
- Computation of the complete regional I-O table.

All the necessary data for the regionalisation procedure were collected from the Australian Bureau of Statistics as well as other reliable sources for secondary data such as regional household expenditure patterns, income and productivity measures. The latest available national I-O tables were 2019-20, which consisted of 114 sectors of economic activity, at the 4-digit level, compiled following the industry-technology assumption, product-by-product, with total flows and valued at basic values in current prices.

For estimating the regional I-O tables, and especially in the interpretation of results, relevant limitations of the I-O approach (static, linear production function, no substitution or scale economy effects, infinite elasticity of supply) were taken into consideration. Once the I-O models were generated, predictions of impact were estimated for each regional area using the available data on salary and business expenditure.

The predictions of the I-O models for regional area were estimated in two separate groups. The first group involved the economic impacts of expenditure on business goods and services (business suppliers), while the second involved economic expenditure of the labour force. Each stimulus group was modelled using expenditure coefficients and household consumption patterns applicable for each region, also taking into account the type of commodity (e.g. coal, gas, metals, etc.) and the nature of the expenditure (i.e. operating or capital expenditure).

The outputs of the models can be classified into First Round and Indirect Effects, representing industry impacts through the business chain, and Final Consumption-Induced effects, which represent the economic activity needed to support the increased workforce from Direct, First Round and Indirect Effects.

The data collection and the methodology applied in this study are notable in three key aspects:

- First, the data collected on actual spending by the minerals and energy sector allowed an assessment of impacts by spending in the economy in comparison to the more traditional approach of predicting economic impacts from total revenue changes;
- Second, the collection of primary data by local area allowed a much more accurate assessment of the direct impacts by geographic area than had previously been available; and
- Third, the application of the I-O modelling framework down to the LGA, SED and CED levels, when combined with the accuracy of the primary data, meant that relatively accurate models of local impacts from the New South Wales minerals and energy sector could be generated.

The outcomes of the data collection and modelling approach meant that the assessment of direct, indirect and consumption effects could be expected to be more detailed and accurate at the LGA, SED and CED levels than could be achieved with standard applications of general equilibrium models.

Appendix B: Direct Impact by Local Government Area

Table B1: Direct Impacts of NSW Mining Companies Surveyed Sector by LGA, 2021/22

Local government area	Residing employees (FTEs)	Associated salaries (\$M)	Total workforce ^(a) FTEs	Business purchases, community and local govt payments (\$M)	Total direct spending (\$M)	Local suppliers (no.)
Albury (C)	11	1.1	11.0	1.9	3.0	12
Armidale Regional (A)	8	1.0	8.2	1.2	2.2	14
Ballina (A)	5	0.7	5.0	1.2	2.0	n.a.
Balranald (A)	n.a.	n.a.	n.a.	11.6	12.1	21
Bathurst Regional (A)	248	35.4	249.9	33.7	69.1	88
Bayside (A)	16	2.3	16.1	62.2	64.5	70
Bega Valley (A)	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Bellingen (A)	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Berrigan (A)	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Blacktown (C)	11	1.2	10.8	94.6	95.9	151
Bland (A)	256	36.2	531.1	30.6	66.8	114
Blayney (A)	191	25.3	191.5	10.5	35.8	97
Blue Mountains (C)	71	10.0	71.3	2.2	12.2	20
Bogan (A)	180	19.7	185.4	2.7	22.4	67
Bourke (A)	6	0.5	6.7	n.a.	n.a.	n.a.
Brewarrina (A)	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Broken Hill (C)	429	51.4	1,655.0	139.5	190.8	114
Burwood (A)	n.a.	n.a.	n.a.	n.a.	n.a.	6
Byron (A)	n.a.	n.a.	n.a.	7.5	7.6	n.a.
Cabonne (A)	143	18.2	202.9	71.8	90.0	49
Camden (A)	43	4.8	42.6	87.6	92.4	32
Campbelltown (C) (NSW)	32	2.9	31.8	51.0	53.9	70
Canada Bay (A)	14	2.6	14.0	1.0	3.6	20
Canterbury-Bankstown (A)	8	1.4	7.6	122.2	123.6	85
Carrathool (A)	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Central Coast (C) (NSW)	234	35.6	255.8	113.6	149.2	140

Table B1: Direct Impacts of NSW Mining Companies Surveyed Sector by LGA, 2021/22

Local government area	Residing employees (FTEs)	Associated salaries (\$M)	Total workforce ^(a) FTEs	Business purchases, community and local govt payments (\$M)	Total direct spending (\$M)	Local suppliers (no.)
Central Darling (A)	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Cessnock (C)	1,528	232.3	1,528.0	360.5	592.8	192
Clarence Valley (A)	7	0.6	6.5	n.a.	1.0	6
Cobar (A)	606	64.0	608.4	36.2	100.2	116
Coffs Harbour (C)	10	1.1	9.8	4.3	5.4	9
Coolamon (A)	6	0.8	6.5	n.a.	n.a.	n.a.
Coonamble (A)	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Cootamundra-Gundagai (A)	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Cowra (A)	32	3.7	32.3	n.a.	4.1	9
Cumberland (A)	11	1.7	10.6	55.5	57.3	68
Dubbo Regional (A)	263	31.5	283.7	71.2	102.7	209
Dungog (A)	138	20.1	138.0	6.5	26.7	16
Edward River (A)	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Eurobodalla (A)	6	0.9	6.1	n.a.	1.4	8
Fairfield (C)	n.a.	n.a.	n.a.	147.6	148.0	109
Federation (A)	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Forbes (A)	132	15.8	147.4	4.4	20.3	43
Georges River (A)	5	0.5	5.1	18.2	18.7	20
Gilgandra (A)	14	1.6	13.9	n.a.	1.7	n.a.
Glen Innes Severn (A)	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Goulburn Mulwaree (A)	16	1.8	16.3	n.a.	2.3	10
Greater Hume Shire (A)	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Griffith (C)	8	0.8	8.0	1.4	2.2	10
Gunnedah (A)	600	84.1	1,045.2	73.5	157.7	127
Gwydir (A)	11	1.0	15.0	1.5	2.5	n.a.
Hawkesbury (C)	11	1.2	10.6	6.3	7.5	24
Hay (A)	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Hilltops (A)	16	2.0	16.4	2.4	4.4	n.a.

Table B1: Direct Impacts of NSW Mining Companies Surveyed Sector by LGA, 2021/22

Local government area	Residing employees (FTEs)	Associated salaries (\$M)	Total workforce ^(a) FTEs	Business purchases, community and local govt payments (\$M)	Total direct spending (\$M)	Local suppliers (no.)
Hornsby (A)	13	1.7	13.2	9.1	10.8	57
Hunters Hill (A)	n.a.	n.a.	n.a.	n.a.	2.0	n.a.
Inner West (A)	27	5.5	27.1	25.4	30.8	46
Inverell (A)	11	1.5	11.1	4.8	6.4	n.a.
Junee (A)	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Kempsey (A)	8	1.2	7.7	5.1	6.2	n.a.
Kiama (A)	77	9.7	77.3	4.0	13.7	17
Ku-ring-gai (A)	18	4.7	18.3	9.7	14.5	33
Kyogle (A)	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Lachlan (A)	53	7.0	58.8	6.1	13.1	61
Lake Macquarie (C)	1,480	231.3	1,530.6	289.6	520.9	507
Lane Cove (A)	n.a.	n.a.	n.a.	13.7	15.6	29
Leeton (A)	11	1.3	11.0	27.7	29.0	17
Lismore (C)	n.a.	n.a.	n.a.	1.5	2.1	n.a.
Lithgow (C)	619	94.4	698.9	56.2	150.6	116
Liverpool (C)	11	1.4	11.3	42.7	44.1	39
Liverpool Plains (A)	77	10.4	259.1	7.0	17.3	22
Lockhart (A)	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Maitland (C)	1,602	258.3	1,608.9	957.9	1,216.2	542
Mid-Coast (A)	166	25.0	165.8	51.1	76.1	60
Mid-Western Regional (A)	1,544	230.8	1,802.4	135.8	366.6	308
Moree Plains (A)	5	0.9	9.0	n.a.	1.1	n.a.
Mosman (A)	n.a.	n.a.	n.a.	n.a.	n.a.	6
Murray River (A)	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Murrumbidgee (A)	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Muswellbrook (A)	1,251	189.3	2,747.8	472.3	661.6	260
Nambucca (A)	7	1.1	7.1	n.a.	1.1	n.a.
Narrabri (A)	365	48.2	2,003.9	37.0	85.2	86

Table B1: Direct Impacts of NSW Mining Companies Surveyed Sector by LGA, 2021/22

Local government area	Residing employees (FTEs)	Associated salaries (\$M)	Total workforce ^(a) FTEs	Business purchases, community and local govt payments (\$M)	Total direct spending (\$M)	Local suppliers (no.)
Narrandera (A)	5	0.6	5.4	n.a.	n.a.	n.a.
Narromine (A)	56	5.6	56.3	2.0	7.6	15
Newcastle (C)	875	137.8	874.8	1,417.1	1,554.9	791
North Sydney (A)	12	2.8	12.0	118.2	121.0	119
Northern Beaches (A)	16	3.3	16.1	20.6	23.9	101
Oberon (A)	12	1.5	11.8	50.6	52.1	5
Orange (C)	772	103.4	1,253.7	559.7	663.0	265
Parkes (A)	453	48.4	2,104.5	56.5	104.9	131
Parramatta (C)	11	1.3	10.9	542.0	543.3	189
Penrith (C)	15	1.6	15.4	13.6	15.3	42
Port Macquarie-Hastings (A)	20	2.8	20.1	33.5	36.3	18
Port Stephens (A)	290	44.8	290.3	94.1	139.0	89
Queanbeyan-Palerang Regional (A)	39	3.5	38.8	25.5	28.9	54
Randwick (C)	16	2.3	15.7	76.3	78.6	19
Richmond Valley (A)	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Ryde (C)	12	2.9	11.5	103.9	106.8	115
Shellharbour (C)	326	35.9	326.0	60.3	96.2	26
Shoalhaven (C)	41	4.5	40.9	33.4	37.9	22
Singleton (A)	2,044	330.8	4,035.0	1,020.6	1,351.4	486
Snowy Monaro Regional (A)	5	0.6	5.4	n.a.	1.3	n.a.
Snowy Valleys (A)	6	0.8	6.2	n.a.	1.4	7
Strathfield (A)	n.a.	n.a.	n.a.	8.3	8.5	19
Sutherland Shire (A)	42	5.0	42.1	57.7	62.7	82
Sydney (C)	35	9.2	47.7	1,651.4	1,660.5	629
Tamworth Regional (A)	210	27.4	212.2	37.6	64.9	92
Temora (A)	14	1.9	14.0	n.a.	2.8	n.a.

Table B1: Direct Impacts of NSW Mining Companies Surveyed Sector by LGA, 2021/22

Local government area	Residing employees (FTEs)	Associated salaries (\$M)	Total workforce ^(a) FTEs	Business purchases, community and local govt payments (\$M)	Total direct spending (\$M)	Local suppliers (no.)
Tenterfield (A)	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
The Hills Shire (A)	15	5.3	14.8	30.0	35.2	87
Tweed (A)	6	0.9	6.0	n.a.	n.a.	7
Upper Hunter Shire (A)	649	99.5	669.6	24.6	124.1	86
Upper Lachlan Shire (A)	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Uralla (A)	n.a.	n.a.	n.a.	1.1	1.4	n.a.
Wagga Wagga (C)	38	4.6	37.8	23.5	28.1	33
Walcha (A)	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Walgett (A)	10	1.2	13.3	n.a.	1.3	n.a.
Warren (A)	10	1.1	11.5	n.a.	1.4	n.a.
Warrumbungle Shire (A)	46	5.9	49.9	2.0	7.8	11
Waverley (A)	5	2.3	5.3	1.5	3.8	15
Weddin (A)	12	1.5	12.4	n.a.	1.5	n.a.
Wentworth (A)	20	2.2	20.0	3.1	5.4	15
Willoughby (C)	10	2.0	9.6	47.3	49.4	84
Wingecarribee (A)	41	5.2	41.4	151.0	156.2	25
Wollondilly (A)	83	9.1	647.2	10.2	19.3	23
Wollongong (C)	956	115.1	1,370.6	383.0	498.1	333
Woollahra (A)	8	2.5	7.7	1.6	4.1	8
Yass Valley (A)	n.a.	n.a.	n.a.	1.8	2.1	n.a.

Note: Data not published for LGAs with total direct spend of less than \$1 million and/or less than 5 residing employees. (a) Includes full-time resident direct employees and contract workers by place of operation.

Appendix C: Total Impact by Local Government Area

Table C1: Estimated Total Economic Impact of NSW Mining Companies Surveyed by LGA, 2021/22 (Type II)

Local government area	Total GVA (\$M)	Total value added as % of GRP	Total jobs supported (FTEs)	% of regional employment
Albury (C)	7.5	0.2%	67	0.3%
Armidale Regional (A)	5.0	0.3%	43	0.3%
Ballina (A)	4.8	0.2%	37	0.2%
Balranald (A)	14.7	11.0%	35	2.9%
Bathurst Regional (A)	139.0	4.5%	1,114	4.6%
Bayside (A)	133.2	0.6%	434	0.4%
Bega Valley (A)	1.2	0.1%	12	0.1%
Bellingen (A)	1.1	0.2%	11	0.2%
Berrigan (A)	n.a.	n.a.	n.a.	n.a.
Blacktown (C)	194.8	0.9%	627	0.3%
Bland (A)	137.1	34.5%	1,132	36.9%
Blayney (A)	61.7	11.7%	509	12.2%
Blue Mountains (C)	27.7	1.1%	169	0.4%
Bogan (A)	35.6	13.1%	344	28.3%
Bourke (A)	n.a.	n.a.	11	1.1%
Brewarrina (A)	n.a.	n.a.	n.a.	n.a.
Broken Hill (C)	415.4	40.6%	3,230	42.4%
Burwood (A)	1.2	0.0%	n.a.	n.a.
Byron (A)	17.3	0.8%	106	0.5%
Cabonne (A)	193.3	26.0%	1,424	18.3%
Camden (A)	191.1	4.0%	645	1.0%
Campbelltown (C)	109.5	1.5%	383	0.5%
Canada Bay (A)	8.0	0.1%	42	0.1%
Canterbury-Bankstown (A)	254.2	1.5%	801	0.5%
Carrathool (A)	n.a.	n.a.	7	0.5%
Central Coast (C)	312.6	2.2%	1,260	0.8%
Central Darling (A)	n.a.	n.a.	n.a.	n.a.

Table C1: Estimated Total Economic Impact of NSW Mining Companies Surveyed by LGA, 2021/22 (Type II)

Local government area	Total GVA (\$M)	Total value added as % of GRP	Total jobs supported (FTEs)	% of regional employment
Cessnock (C)	1,224.5	56.8%	7,712	28.8%
Clarence Valley (A)	2.2	0.1%	21	0.1%
Cobar (A)	192.1	36.8%	1,752	83.1%
Coffs Harbour (C)	13.4	0.3%	110	0.3%
Coolamon (A)	1.3	0.5%	12	0.4%
Coonamble (A)	1.1	0.5%	10	0.6%
Cootamundra-Gundagai (A)	n.a.	n.a.	7	0.1%
Cowra (A)	7.6	1.1%	75	1.2%
Cumberland (A)	117.1	0.7%	381	0.3%
Dubbo Regional (A)	223.5	7.2%	1,763	6.5%
Dungog (A)	46.5	12.4%	344	7.9%
Edward River (A)	n.a.	n.a.	n.a.	n.a.
Eurobodalla (A)	2.9	0.2%	25	0.2%
Fairfield (C)	300.4	42.1%	950	1.2%
Federation (A)	n.a.	n.a.	7	0.1%
Forbes (A)	36.5	5.4%	334	6.8%
Georges River (A)	38.6	0.5%	126	0.2%
Gilgandra (A)	2.5	1.2%	25	1.2%
Glen Innes Severn (A)	n.a.	n.a.	7	0.2%
Goulburn Mulwaree (A)	4.5	0.3%	44	0.3%
Greater Hume Shire (A)	1.9	0.4%	13	0.2%
Griffith (C)	3.6	0.2%	23	0.2%
Gunnedah (A)	337.1	41.2%	2,835	47.0%
Gwydir (A)	5.7	1.7%	51	2.2%
Hawkesbury (C)	15.4	0.4%	61	0.2%
Hay (A)	n.a.	n.a.	n.a.	n.a.
Hilltops (A)	10.2	1.0%	88	1.1%
Hornsby (A)	22.4	0.4%	86	0.1%

Table C1: Estimated Total Economic Impact of NSW Mining Companies Surveyed by LGA, 2021/22 (Type II)

Local government area	Total GVA (\$M)	Total value added as % of GRP	Total jobs supported (FTEs)	% of regional employment
Hunters Hill (A)	4.2	0.5%	15	0.2%
Inner West (A)	63.4	0.6%	238	0.2%
Inverell (A)	16.0	1.5%	131	1.8%
Junee (A)	1.5	0.4%	11	0.4%
Kempsey (A)	16.1	1.3%	131	1.2%
Kiama (A)	32.2	3.6%	294	2.5%
Ku-ring-gai (A)	31.4	0.6%	123	0.2%
Kyogle (A)	n.a.	n.a.	n.a.	n.a.
Lachlan (A)	27.0	6.7%	226	7.1%
Lake Macquarie (C)	1,089.4	13.8%	7,151	7.1%
Lane Cove (A)	31.9	1.0%	106	0.5%
Leeton (A)	43.7	1.3%	174	3.2%
Lismore (C)	5.2	0.2%	39	0.2%
Lithgow (C)	311.8	23.5%	2,627	26.1%
Liverpool (C)	91.1	0.8%	297	0.3%
Liverpool Plains (A)	34.7	6.7%	293	8.7%
Lockhart (A)	n.a.	n.a.	n.a.	n.a.
Maitland (C)	2,485.5	58.1%	13,744	31.9%
Mid-Coast (A)	156.8	4.4%	951	2.7%
Mid-Western Regional (A)	739.5	46.8%	6,176	46.6%
Moree Plains (A)	2.2	0.2%	18	0.3%
Mosman (A)	1.2	0.1%	n.a.	n.a.
Murray River (A)	n.a.	n.a.	n.a.	n.a.
Murrumbidgee (A)	n.a.	n.a.	n.a.	n.a.
Muswellbrook (A)	1,344.4	57.7%	6,456	87.1%
Nambucca (A)	1.9	0.3%	17	0.2%
Narrabri (A)	180.3	8.5%	1,549	24.3%
Narrandera (A)	1.5	0.4%	12	0.4%

Table C1: Estimated Total Economic Impact of NSW Mining Companies Surveyed by LGA, 2021/22 (Type II)

Local government area	Total GVA (\$M)	Total value added as % of GRP	Total jobs supported (FTEs)	% of regional employment
Narromine (A)	13.7	2.0%	132	4.5%
Newcastle (C)	3,262.5	22.0%	16,454	18.6%
North Sydney (A)	248.4	1.6%	790	1.8%
Northern Beaches (A)	50.0	0.4%	177	0.1%
Oberon (A)	71.5	16.9%	233	7.9%
Orange (C)	1,502.5	46.4%	11,207	47.1%
Parkes (A)	231.5	25.5%	2,028	27.3%
Parramatta (C)	1,115.1	3.5%	3,487	2.5%
Penrith (C)	31.8	0.3%	117	0.1%
Port Macquarie-Hastings (A)	96.0	2.8%	767	2.2%
Port Stephens (A)	286.3	6.7%	1,717	5.4%
Queanbeyan-Palerang Regional (A)	76.5	2.8%	634	1.9%
Randwick (C)	162.4	2.0%	524	0.6%
Richmond Valley (A)	n.a.	n.a.	n.a.	n.a.
Ryde (C)	219.4	0.8%	701	0.9%
Shellharbour (C)	238.4	9.4%	1,939	5.0%
Shoalhaven (C)	88.6	1.9%	599	1.3%
Singleton (A)	2,755.3	70.8%	11,297	90.4%
Snowy Monaro Regional (A)	2.8	0.2%	25	0.2%
Snowy Valleys (A)	2.3	0.2%	17	0.2%
Strathfield (A)	17.5	0.3%	57	0.2%
Sutherland Shire (A)	130.6	1.4%	456	0.3%
Sydney (C)	3,412.8	2.2%	10,671	6.5%
Tamworth Regional (A)	153.6	3.8%	1,318	4.4%
Temora (A)	4.4	1.1%	32	1.2%
Tenterfield (A)	n.a.	n.a.	n.a.	n.a.
The Hills Shire (A)	73.0	0.7%	253	0.3%
Tweed (A)	2.5	0.1%	25	0.1%

Table C1: Estimated Total Economic Impact of NSW Mining Companies Surveyed by LGA, 2021/22 (Type II)

Local government area	Total GVA (\$M)	Total value added as % of GRP	Total jobs supported (FTEs)	% of regional employment
Upper Hunter Shire (A)	236.9	27.9%	1,854	26.5%
Upper Lachlan Shire (A)	1.3	0.3%	11	0.3%
Uralla (A)	3.5	1.1%	28	1.0%
Wagga Wagga (C)	41.8	0.9%	191	0.5%
Walcha (A)	1.9	0.8%	15	1.0%
Walgett (A)	2.2	0.8%	22	1.0%
Warren (A)	2.5	1.5%	23	1.9%
Warrumbungle Shire (A)	14.4	0.4%	129	3.2%
Waverley (A)	8.3	0.2%	34	0.1%
Weddin (A)	2.2	1.2%	21	1.2%
Wentworth (A)	10.6	1.9%	86	2.6%
Willoughby (C)	100.9	0.8%	329	0.8%
Wingecarribee (A)	345.1	13.0%	2,082	8.0%
Wollondilly (A)	40.9	0.7%	218	0.8%
Wollongong (C)	1,183.8	9.8%	8,604	8.0%
Woollahra (A)	9.1	0.2%	39	0.1%
Yass Valley (A)	5.5	0.9%	45	0.5%

Note: Data not published for LGAs with total value added of less than \$1 million and/or less than 5 total employees.

Appendix D: Direct Impact by State Electorate

Table D1: Direct Impacts of NSW Mining Companies Surveyed Sector by SED, 2021/22

State electoral division	Residing employees (FTEs)	Associated salaries (\$M)	Total workforce ^(a) FTEs	Business purchases, community and local govt payments (\$M)	Total direct spending (\$M)	Local suppliers (no.)
Albury	16	1.7	16	2.8	4.5	17
Auburn	n.a.	n.a.	n.a.	35.0	35.4	93
Ballina	6	0.9	6	8.7	9.6	7
Balmain	13	3.1	13	3.1	6.2	27
Bankstown	n.a.	n.a.	n.a.	49.1	49.2	29
Barwon	1,738	202.5	4,662	228.2	430.6	473
Bathurst	1,157	169.9	1,244	156.6	326.5	330
Baulkham Hills	5	1.1	5	20.1	21.2	47
Bega	11	1.4	11	n.a.	2.0	10
Blacktown	n.a.	n.a.	n.a.	53.2	53.2	56
Blue Mountains	70	9.9	70	1.8	11.7	16
Cabramatta	n.a.	n.a.	n.a.	4.3	4.4	n.a.
Camden	44	5.0	44	87.8	92.8	33
Campbelltown	26	2.5	26	1.8	4.3	15
Canterbury	n.a.	n.a.	n.a.	1.3	2.0	7
Castle Hill	9	3.4	9	11.1	14.5	39
Cessnock	1,833	279.3	1,951	467.2	746.5	301
Charlestown	426	68.2	426	134.4	202.6	194
Clarence	7	0.6	7	n.a.	1.1	7
Coffs Harbour	10	1.1	10	4.3	5.4	9
Coogee	8	1.6	8	2.2	3.8	19
Cootamundra	348	47.5	624	34.9	82.4	137
Cronulla	13	1.7	13	5.8	7.5	40
Davidson	7	2.5	7	9.5	12.0	31

Table D1: Direct Impacts of NSW Mining Companies Surveyed Sector by SED, 2021/22

State electoral division	Residing employees (FTEs)	Associated salaries (\$M)	Total workforce ^(a) FTEs	Business purchases, community and local govt payments (\$M)	Total direct spending (\$M)	Local suppliers (no.)
Drummoyne	14	2.6	14	n.a.	3.5	19
Dubbo	1,691	241.8	1,951	195.8	437.7	492
East Hills	n.a.	n.a.	n.a.	13.0	13.6	39
Epping	n.a.	n.a.	n.a.	5.3	5.7	22
Fairfield	n.a.	n.a.	n.a.	120.7	120.7	46
Gosford	16	2.3	16	37.9	40.2	33
Goulburn	40	4.7	40	147.3	152.0	30
Granville	n.a.	n.a.	n.a.	53.4	54.4	23
Hawkesbury	11	1.9	11	6.7	8.6	29
Heathcote	63	6.3	63	52.2	58.5	43
Heffron	19	2.4	19	30.8	33.2	75
Holsworthy	6	0.6	6	27.7	28.3	23
Hornsby	10	1.3	10	4.2	5.5	35
Keira	472	57.5	472	80.6	138.1	82
Kiama	188	21.9	188	78.5	100.3	37
Kogarah	n.a.	n.a.	n.a.	15.5	15.9	13
Ku-ring-gai	15	3.4	15	4.0	7.4	24
Lake Macquarie	611	94.8	661	90.5	185.3	190
Lakemba	n.a.	n.a.	n.a.	62.2	62.3	10
Lane Cove	11	4.9	11	52.8	57.8	75
Lismore	7	0.9	7	1.6	2.5	n.a.
Liverpool	n.a.	n.a.	n.a.	12.4	12.8	12
Londonderry	7	0.6	7	7.7	8.3	22
Macquarie Fields	8	0.9	8	51.5	52.4	58
Maitland	1,602	258.3	1,609	957.9	1,216.2	542
Manly	11	1.9	11	n.a.	2.9	16
Maroubra	8	1.2	8	118.6	119.9	37
Miranda	10	1.4	10	4.8	6.2	20
Monaro	44	4.1	44	26.1	30.2	58

Table D1: Direct Impacts of NSW Mining Companies Surveyed Sector by SED, 2021/22

State electoral division	Residing employees (FTEs)	Associated salaries (\$M)	Total workforce ^(a) FTEs	Business purchases, community and local govt payments (\$M)	Total direct spending (\$M)	Local suppliers (no.)
Mount Druitt	n.a.	n.a.	n.a.	11.2	11.6	28
Mulgoa	n.a.	n.a.	n.a.	9.4	9.8	13
Murray	49	5.7	49	45.1	50.7	70
Myall Lakes	68	10.3	68	26.7	37.0	21
Newcastle	430	71.6	430	1,147.0	1,218.6	604
Newtown	8	2.2	8	26.9	29.1	36
North Shore	10	2.3	10	113.9	116.2	117
Northern Tablelands	41	5.2	48	8.9	14.1	27
Oatley	n.a.	n.a.	n.a.	2.8	3.1	11
Orange	1,500	185.8	3,709	692.4	878.2	488
Oxley	24	3.5	24	19.2	22.7	10
Parramatta	n.a.	n.a.	n.a.	463.4	463.6	90
Penrith	8	1.0	8	2.1	3.1	23
Pittwater	n.a.	n.a.	n.a.	11.9	12.1	35
Port Macquarie	20	3.0	20	19.5	22.5	14
Port Stephens	283	43.2	283	114.1	157.4	98
Prospect	n.a.	n.a.	n.a.	59.2	59.9	85
Riverstone	5	0.7	5	4.0	4.7	n.a.
Rockdale	9	1.4	9	n.a.	1.7	6
Ryde	9	2.0	9	77.2	79.2	82
Seven Hills	n.a.	n.a.	n.a.	27.1	27.8	69
Shellharbour	354	39.1	378	21.9	61.0	36
South Coast	24	2.5	24	9.9	12.4	9
Strathfield	n.a.	n.a.	n.a.	5.2	5.7	26
Summer Hill	10	1.5	10	2.4	4.0	14
Swansea	331	53.2	337	11.0	64.2	54
Sydney	20	6.9	33	1,632.0	1,638.9	558
Tamworth	832	114.5	1,462	111.5	226.0	222
Terrigal	31	4.8	31	13.8	18.6	24

Table D1: Direct Impacts of NSW Mining Companies Surveyed Sector by SED, 2021/22

State electoral division	Residing employees (FTEs)	Associated salaries (\$M)	Total workforce ^(a) FTEs	Business purchases, community and local govt payments (\$M)	Total direct spending (\$M)	Local suppliers (no.)
The Entrance	40	5.9	40	41.6	47.5	36
Tweed	6	0.9	6	n.a.	n.a.	7
Upper Hunter	4,181	652.4	7,587	1,482.7	2,135.1	882
Vaucluse	9	3.5	9	1.8	5.3	10
Wagga Wagga	43	5.3	43	24.0	29.3	38
Wakehurst	n.a.	n.a.	n.a.	5.0	5.2	34
Wallsend	438	64.2	438	282.2	346.5	192
Willoughby	11	2.3	11	40.2	42.6	84
Wollondilly	109	12.5	673	16.4	28.8	36
Wollongong	318	39.7	709	284.5	324.2	211
Wyong	104	16.1	119	15.5	31.6	34

Note: Data not published for SEDs with total direct spend of less than \$1 million and/or less than 5 residing employees. (a) Includes full-time resident direct employees and contract workers by place of operation.

Appendix E: Direct Impact by Commonwealth Electorate

Table E1: Direct Impacts of NSW Mining Companies Surveyed Sector by CED, 2021/22

Commonwealth electoral division	Residing employees (FTEs)	Associated salaries (\$M)	Total workforce ^(a) FTEs	Business purchases, community and local govt payments (\$M)	Total direct spending (\$M)	Local suppliers (no.)
Banks	7	0.8	7	16.6	17.4	41
Barton	12	1.8	12	13.9	15.6	25
Bennelong	16	3.3	16	106.3	109.6	129
Berowra	12	5.1	12	7.7	12.8	58
Blaxland	n.a.	n.a.	n.a.	59.1	59.4	65
Bradfield	22	5.2	22	14.5	19.6	62
Calare	3,548	511.2	4,434	920.4	1,431.5	941
Chifley	6	0.6	6	45.7	46.3	61
Cook	18	2.4	18	6.4	8.8	48
Cowper	37	5.0	37	24.4	29.4	22
Cunningham	800	97.6	1,182	364.4	462.0	308
Dobell	147	22.4	162	54.8	77.1	70
Eden-Monaro	58	5.8	58	28.9	34.7	71
Farrer	69	7.8	69	48.1	55.8	86
Fowler	n.a.	n.a.	n.a.	39.3	39.8	21
Gilmore	123	14.9	123	37.5	52.4	45
Grayndler	24	5.1	24	23.8	28.9	37
Greenway	6	0.8	6	54.5	55.3	93
Hughes	29	3.2	29	57.6	60.7	40
Hume	145	16.5	709	74.3	90.8	61
Hunter	5,184	809.2	8,722	1,699.3	2,508.5	1,091
Kingsford Smith	20	2.9	20	138.0	140.9	79
Lindsay	14	1.6	14	5.2	6.7	37
Lyne	623	97.3	623	190.1	287.4	168
Macarthur	48	4.7	48	84.7	89.5	74
Mackellar	n.a.	n.a.	n.a.	17.8	19.1	69
Macquarie	82	11.2	82	8.5	19.7	44

Table E1: Direct Impacts of NSW Mining Companies Surveyed Sector by CED, 2021/22

Commonwealth electoral division	Residing employees (FTEs)	Associated salaries (\$M)	Total workforce ^(a) FTEs	Business purchases, community and local govt payments (\$M)	Total direct spending (\$M)	Local suppliers (no.)
McMahon	6	0.9	6	161.1	162.0	131
Mitchell	13	2.0	13	35.8	37.8	93
Newcastle	972	141.8	1,180	78.2	220.0	226
New England	843	133.2	843	1,261.6	1,394.8	741
North Sydney	25	7.6	25	176.4	184.1	214
Page	16	1.8	16	2.8	4.6	13
Parkes	2,647	322.9	6,037	373.0	695.9	814
Parramatta	6	1.1	6	522.2	523.3	109
Paterson	1,978	310.9	1,985	1,365.0	1,675.9	678
Reid	20	3.2	20	33.7	36.9	108
Richmond	10	1.4	10	8.8	10.2	14
Riverina	966	115.9	2,909	119.1	235.0	344
Robertson	45	6.7	45	54.0	60.7	57
Shortland	799	127.0	805	176.5	303.5	286
Sydney	33	8.8	46	1,651.6	1,660.4	624
Warringah	15	2.8	15	3.2	6.1	41
Watson	n.a.	n.a.	n.a.	62.9	63.7	18
Wentworth	16	5.4	16	3.5	8.9	31
Werriwa	7	0.9	7	21.1	22.0	29
Whitlam	511	56.9	543	217.8	274.7	71

Note: Data not published for CEDs with total direct spend of less than \$1 million and/or less than 5 residing employees. (a) Includes full-time resident direct employees and contract workers by place of operation.

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