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# NSW Mining Industry Expenditure Impact Survey 2022/23

November 2023

# Executive Summary

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## Overview

The New South Wales Minerals Council (NSWMC) analysed the expenditure patterns of 28 NSW exploration and mining companies to determine the economic contribution of the industry throughout NSW in 2022/23. 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

NSW mining companies **directly spent an estimated \$23.6 billion in the NSW economy** in 2022/23, comprised of:

- **Total workforce of 31,586 full-time equivalent workers** (including direct resident employees and contract workers), which represented an annual increase of 2.0%;
- **\$3.4 billion in wages and salaries** to approximately **22,905 direct fulltime resident employees** (not including contractors), representing an **average salary** level across the sector of **\$147,755** per annum;
- **\$14.4 billion in purchases of goods and services from 6,980 local businesses** (including contract payments), community contributions and payments to local government (including rates, developer contributions and other payments); and
- **\$5.8 billion** in state government payments (including royalties, stamp duty, payroll tax and land tax).

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*NSW mining companies contributed a record **\$23.6 billion** in direct spending to the State economy in 2022/23.*

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The Hunter region recorded the highest direct expenditure in 2022/23, with \$8.2 billion (or 34.7% of the total direct spend across NSW), followed by Sydney (\$5.9 billion, or 24.8%) and Central West (\$1.2 billion, or 5.2%).

**Table E1: Direct Impact of NSW Resource Sector by Region, 2022/23**

Region	Residing employees (FTEs)	Associated salaries (\$M)	Total workforce <sup>(b)</sup>	Business purchases, community and govt payments (\$M)	No. of local suppliers	Total direct spending (\$M)	% of total direct spend, NSW
Central West	3,093	458.9	5,520	758.4	1,004	1,217.3	5.2%
Far West	481	70.1	994	127.6	127	197.6	0.8%
Hunter	12,140	1,870.5	15,299	6,310.7	2,726	8,181.2	34.7%
Illawarra	1,447	190.0	2,061	773.8	419	963.9	4.1%
Mid-North Coast	85	10.0	85	44.3	43	54.3	0.2%
Murray	45	5.6	49	23.1	65	28.7	0.1%
Murrumbidgee	101	13.2	101	66.4	80	79.6	0.3%
North Western	2,848	380.8	3,425	328.9	772	709.7	3.0%
Northern	1,676	216.0	2,479	207.7	448	423.7	1.8%
Richmond-Tweed	19	2.7	19	12.6	27	15.3	0.1%
South Eastern	109	11.8	109	36.7	96	48.5	0.2%
Sydney	846	152.5	1,416	5,711.0	2,517	5,863.4	24.8%
Unallocated <sup>(a)</sup>	14	2.2	28	7.2		5,818.5	24.7%
<b>Total NSW</b>	<b>22,905</b>	<b>3,384.3</b>	<b>31,586</b>	<b>14,408.3</b>	<b>6,980</b>	<b>23,601.7</b>	<b>100.0%</b>
Rest of Australia	688	98.6	689	7,987.1	3,071	8,085.7	
<b>Total Australia</b>	<b>23,593</b>	<b>3,482.9</b>	<b>32,275</b>	<b>22,395.3</b>	<b>10,051</b>	<b>31,687.4</b>	
Overseas	0	0.0	0	284.3	269	284.3	
Other	26	2.6	26	368.5	210	371.1	
<b>Total</b>	<b>23,619</b>	<b>3,485.5</b>	<b>32,301</b>	<b>23,048.1</b>	<b>10,530</b>	<b>32,342.7</b>	

Note: Regions are based on 12 former Statistical Divisions in NSW. (a) Includes spending in New South Wales that is not region-specific or unknown, including state government payments. (b) Includes full-time resident direct employees and contract workers by place of operation.

Based on whole-of-survey totals, the direct expenditure in NSW by mining companies in 2022/23 increased significantly by \$6.9 billion, or 41.1%, compared to the previous year, whilst the total workforce increased annually by 605 FTEs, or 2.0%.

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*Compared to 2021/22, the direct spending of NSW mining companies increased substantially by \$6.9 billion, or 41.1%.*

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Since 2011/12, NSW mining companies surveyed by NSWMC have generated \$162.7 billion in direct spending, with average annual expenditure of \$13.6 billion.

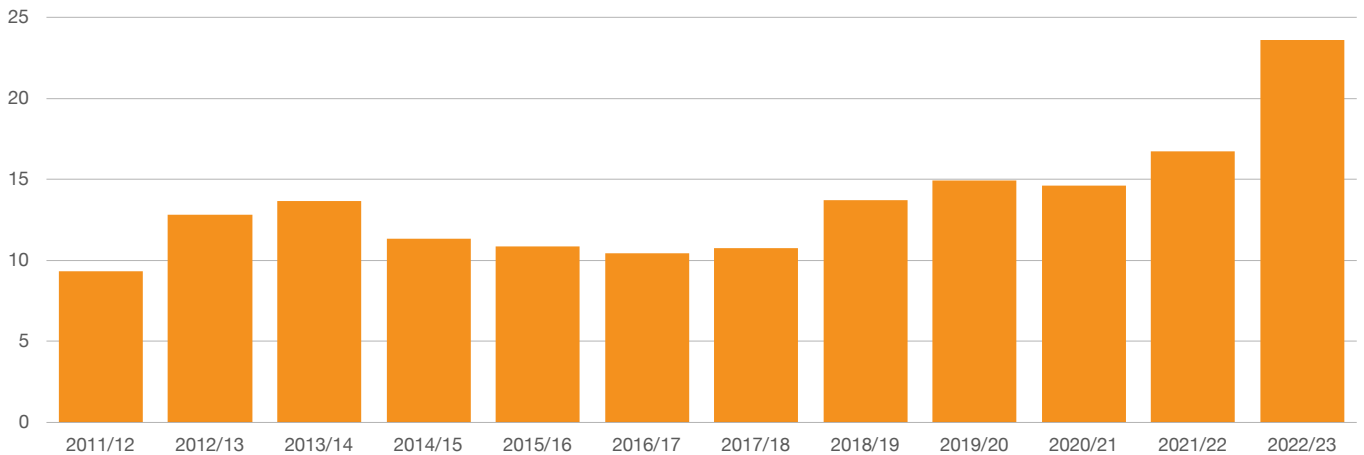
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*Since 2011/12, NSW mining companies have contributed \$162.7 billion in direct spending to the State economy.*

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### Direct Expenditure of NSW Mining Companies

New South Wales (\$ billion, real)



**Table E2: Annual Change in Survey Results**

	Level 2022/23	Level 2021/22	Level 2020/21	Annual % change, 2021/22- 2022/23
No. of companies surveyed	28	27	29	3.7%
<b>DIRECT EMPLOYEES</b>				
No. of direct employees (FTEs)	22,905	19,996	20,003	14.5%
No. of apprenticeships and traineeships (FTEs)	397	382	315	3.9%
Total wages/salaries paid (\$M)	3,384.3	2,890.4	2,828.8	17.1%
<b>BUSINESS PURCHASES</b>				
No. of suppliers	6,980	6,833	7,311	2.2%
Total opex spend (\$M)	12,389.9	8,976.6	8,608.4	38.0%
Total capex spend (\$M)	1,911.0	1,399.1	1,362.0	36.6%
Total business purchases (\$M)	14,300.9	10,375.7	9,970.4	37.8%
<b>COMMUNITY CONTRIBUTIONS</b>				
No. of community organisations supported	1,319	1,103	1,069	19.6%
Total community contributions (\$M)	17.0	12.7	13.2	33.7%
<b>LOCAL COUNCIL PAYMENTS</b>				
Total local government payments (\$M)	90.3	84.4	80.1	6.9%
<b>STATE GOVERNMENT PAYMENTS</b>				
Total state government payments (\$M)	5,809.2	3,370.2	1,704.1	72.4%
<b>TOTAL SPEND (\$M)</b>	<b>23,601.7</b>	<b>16,733.5</b>	<b>14,596.6</b>	<b>41.0%</b>
<b>TOTAL WORKFORCE (FTEs)</b>	<b>31,586</b>	<b>30,981</b>	<b>30,095</b>	<b>2.0%</b>

## 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 2022/23, based on Type II multipliers (i.e. including both indirect industry and consumption-induced effects), amounted to:

- **\$57.5 billion in output/turnover** (a measure of direct and supply chain purchases from businesses);
- **\$51.1 billion in gross value added (GVA)**, amounting to 7.3% of Gross State Product (GSP) for NSW (which was \$697.4 billion in 2021/22) through \$23.6 billion in direct effects and \$27.5 billion in supply chain and consumption effects;
- **\$18.7 billion in income** (wages and salaries) paid to workers; and
- **239,744 full time equivalent jobs** supported, or 5.6% of total employment in NSW during 2022/23.

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*The total economic impact of the NSW mining companies surveyed to the State economy was estimated at **\$51.1 billion in gross value added and 239,744 jobs supported in 2022/23.***

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In terms of total economic benefit, the 28 companies surveyed had the **highest overall impact in the Hunter region**, with total value added of \$17.1 billion, followed by Sydney (\$12.1 billion) and Central West (\$2.7 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 Hunter region (25.9%), followed by Far West (21.8%), Central West (19.2%) and North Western (14.4%).

With regard to employment, the NSW mining companies surveyed again had the greatest impact on jobs in the Hunter region, supporting 96,708 jobs (FTEs), followed by the Sydney (38,791 FTEs) and Central West (20,896 FTEs) regions.

**Table E3: Economic Impact of NSW Mining Companies, 2022/23**

	New South Wales	Rest of Australia	Total Australia
<b>Gross Value Added (\$M)</b>			
Direct	23,602	8,086	31,687
% of Gross State Product (GSP)	3.4%	0.5%	1.4%
Indirect	17,340	5,286	22,626
Total GVA (Type I)	40,942	13,371	54,313
% of GSP	5.9%	0.8%	2.4%
Consumption-induced	10,128	3,168	13,297
<b>Total GVA (Type II)</b>	<b>51,070</b>	<b>16,539</b>	<b>67,610</b>
% of GSP	7.3%	1.0%	2.9%
<b>Employment (FTEs)</b>			
Direct	22,905	688	23,593
% of total state employment	0.5%	0.0%	0.2%
Indirect	131,568	31,899	163,468
Total employment (Type I)	154,473	32,587	187,060
% of total state employment	3.6%	0.3%	1.4%
Consumption-induced	85,271	20,089	105,361
<b>Total employment (Type II)</b>	<b>239,744</b>	<b>52,677</b>	<b>292,421</b>
% of total state employment	5.6%	0.6%	2.1%
<b>Business spend (incl. community contributions and govt payments) (\$M)</b>			
Direct	20,217	7,987	28,204
Indirect	14,138	5,668	19,806
Total business spend (Type I)	34,355	13,655	48,010
Consumption-induced	19,748	5,955	25,703
Total business spend (Type II)	54,103	19,611	73,713
<b>Wages &amp; salaries (\$M)</b>			
Direct	3,384	99	3,483
Indirect	9,528	2,755	12,283
Total wages & salaries (Type I)	12,912	2,853	15,766
Consumption-induced	5,838	1,458	7,295
Total wages & salaries (Type II)	18,750	4,311	23,061

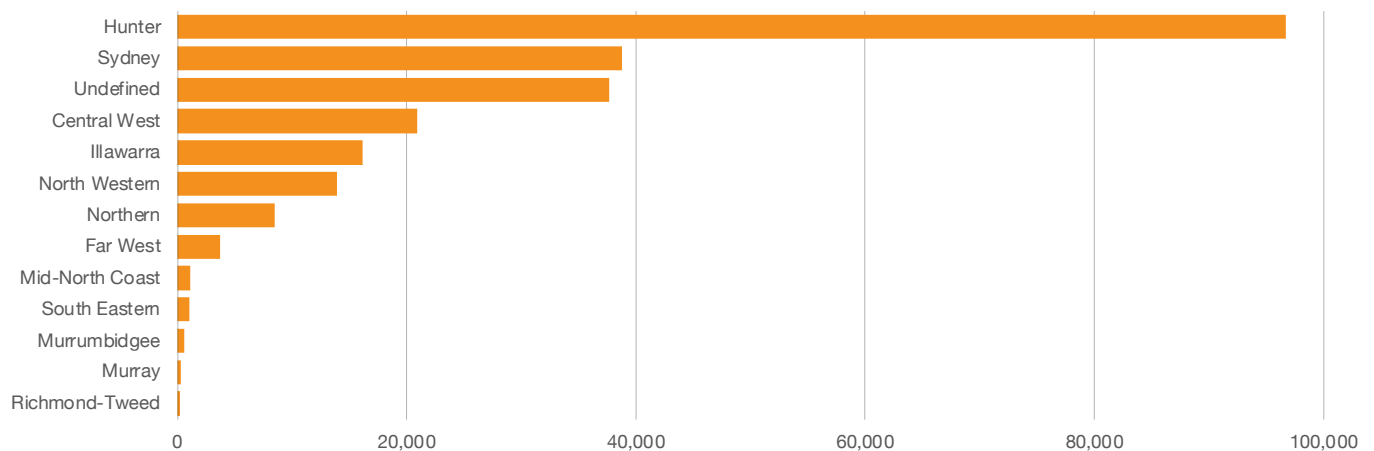
Note: Consumption-induced impacts seek to measure the change in consumption for all goods and services that arise from an increase in final output from the industry in question. Direct employment and wages relate specifically to full-time equivalent residing direct employees (not including contractors).

**Table E4: Total Economic Impact of NSW Mining Companies by Region, 2022/23**

Region	Total GVA (\$M)	Total value added as % of GRP	Total jobs supported (FTEs)	% of regional employment
Central West	2,651.7	19.2%	20,896	20.9%
Far West	454.2	21.8%	3,711	40.0%
Hunter	17,078.9	25.9%	96,708	24.7%
Illawarra	2,290.4	8.6%	16,186	6.7%
Mid-North Coast	138.2	0.9%	1,133	1.0%
Murray	50.8	0.6%	326	0.5%
Murrumbidgee	121.5	0.9%	572	0.6%
North Western	1,601.1	14.4%	13,947	22.4%
Northern	972.8	5.3%	8,519	9.5%
Richmond-Tweed	35.8	0.2%	246	0.2%
South Eastern	121.3	0.9%	1,019	0.9%
Sydney	12,060.7	2.4%	38,791	1.4%
Undefined	13,493.0	n.a.	37,689	n.a.
<b>Total New South Wales</b>	<b>51,070.4</b>	<b>7.3%</b>	<b>239,744</b>	<b>5.6%</b>
<b>Rest of Australia</b>	<b>16,539.3</b>	<b>1.0%</b>	<b>52,677</b>	<b>0.6%</b>
<b>Total Australia</b>	<b>67,609.6</b>	<b>2.9%</b>	<b>292,421</b>	<b>2.1%</b>

**Total Employment Supported by NSW Mining Companies by Region**

New South Wales (FTEs)





## Local Suppliers

Approximately 6,980 unique businesses in New South Wales received payments for goods and services supplied during 2022/23 from the mining sector. The highest number of businesses was recorded in the Hunter region (2,726), followed by Sydney (2,517), Central West (1,004), North Western (772) and Northern (448).

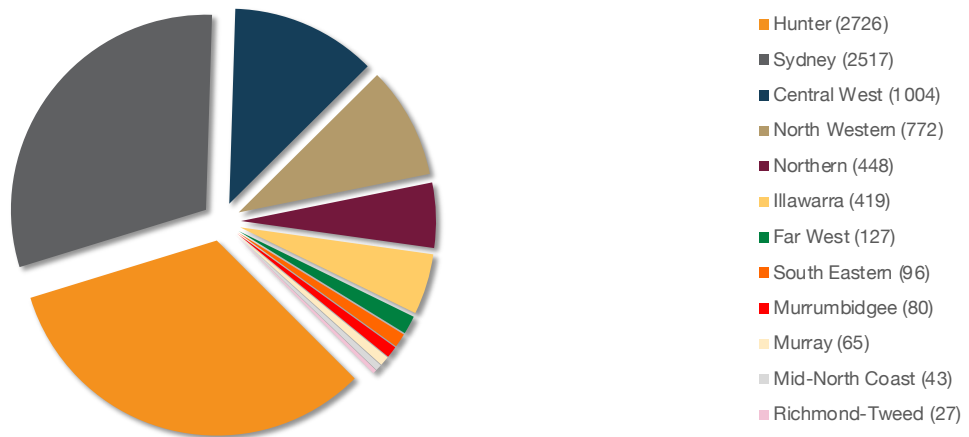
**Table E5: Number of Businesses Supported by Region, 2022/23**

Region	Number of local suppliers
Central West	1,004
Far West	127
Hunter	2,726
Illawarra	419
Mid-North Coast	43
Murray	65
Murrumbidgee	80
North Western	772
Northern	448
Richmond-Tweed	27
South Eastern	96
Sydney	2,517
<b>Total New South Wales</b>	<b>6,980</b>

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 by Region

New South Wales, 2022/23



## Community Support

During 2022/23, NSW mining companies directly contributed over \$17.0 million to 1,319 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 (528), followed by Central West (360).

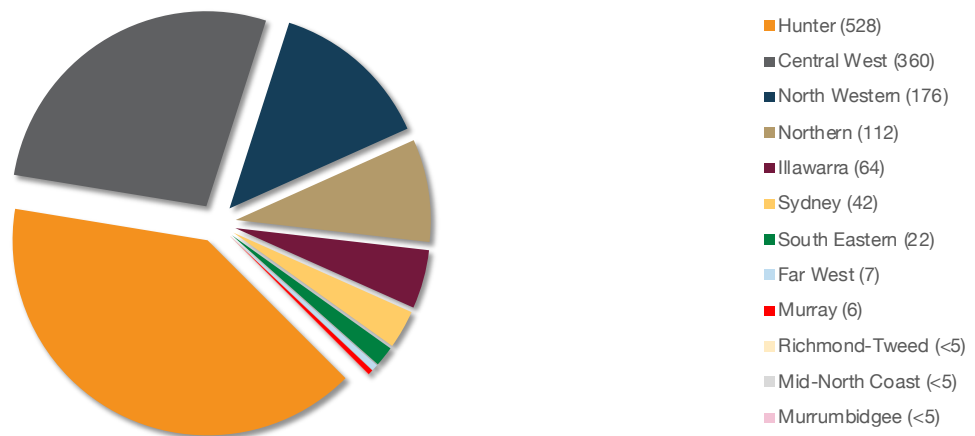
**Table E6: Number of Community Organisations Supported by Region, 2022/23**

Region	No. of community groups	% of total	Total contribution (\$)
Central West	360	27.3%	6,367,812
Far West	7	0.5%	49,161
Hunter	528	40.0%	5,672,999
Illawarra	64	4.9%	1,607,374
Mid-North Coast	0	0.0%	0
Murray	6	0.5%	14,659
Murrumbidgee	0	0.0%	0
North Western	176	13.3%	967,020
Northern	112	8.5%	704,075
Richmond-Tweed	2	0.2%	7,540
South Eastern	22	1.7%	171,877
Sydney	42	3.2%	1,469,707
<b>Total New South Wales</b>	<b>1,319</b>	<b>100.0%</b>	<b>17,033,666</b>

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 NSW Mining Companies by Region

New South Wales, 2022/23



## 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 2022/23, NSW mining companies reported direct contributions to local councils totalling \$90.3 million, which represented a significant annual increase of \$5.8 million, or 6.9% from the level for 2021/22. Rates (\$69.5 million) comprised the largest proportion of local council payments, followed by Other contributions (\$12.6 million) and Voluntary Planning Agreements (VPA)/developer contributions (\$8.2 million).

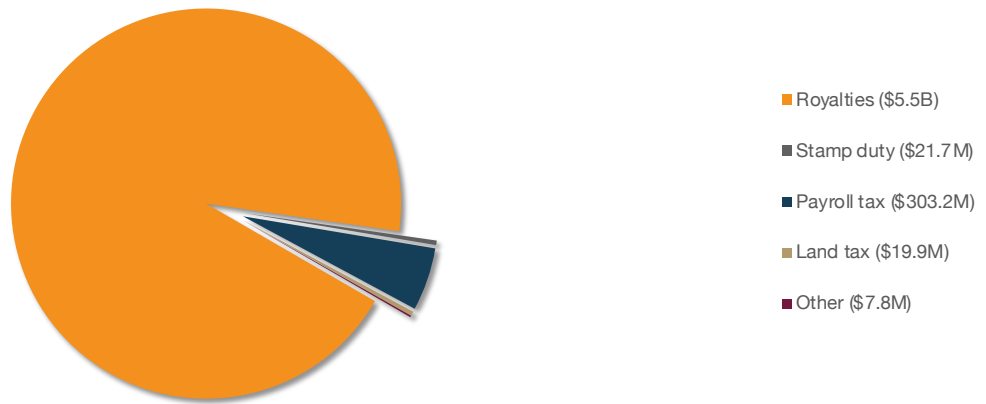
**Table E7: Local Council Contributions by Region, 2022/23**

Region	Rates (\$)	VPA/Developer (\$)	Other (\$)	Total contributions (\$)
Central West	13,344,539	1,398,642	4,985,109	19,728,290
Far West	3,074,123	0	12,819	3,086,942
Hunter	27,807,552	4,996,588	2,257,974	35,062,115
Illawarra	1,385,820	0	0	1,385,820
Mid-North Coast	16,685	0	0	16,685
Murray	2,335,436	0	79,696	2,415,132
Murrumbidgee	0	0	0	0
North Western	14,483,477	1,296,118	588,838	16,368,433
Northern	4,625,240	485,208	4,535,109	9,645,556
Richmond-Tweed	0	0	0	0
South Eastern	29,049	0	99,548	128,597
Sydney	2,361,705	0	0	2,361,706
<b>Total New South Wales</b>	<b>69,548,505</b>	<b>8,176,241</b>	<b>12,559,596</b>	<b>90,284,343</b>
Annual % change	6.1%	4.3%	13.6%	6.9%

## State Government Payments

During 2022/23, the direct contribution made by NSW mining companies in state government payments was approximately \$5.8 billion, which represented a substantial annual increase of \$2.4 billion, or 72.4% from the level for 2021/22 (\$3.4 billion). Total state government payments were comprised of royalties (\$5.5 billion), payroll tax (\$303.2 million), stamp duty (\$21.7 million) and land tax (\$19.9 million).

**State Government Contributions by NSW Mining Companies by Category**  
New South Wales, 2022/23



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# Introduction

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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 28 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 2022/23 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](http://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

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The process was initiated in July 2023 when NSWMC distributed an expenditure survey form to New South Wales exploration and mining companies, which were asked to disclose total operational spending in 2022/23 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.

Twenty eight member companies returned the survey, representing the significant 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 2022/23 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
Bowdens Silver	RZ Resources
Centennial Coal Company Limited	South 32 Illawarra Coal
CMOC Northparkes	Sunrise Energy
CSA Copper	Thiess Pty Limited
Evolution Cowal Gold	Tronox Holdings
Glencore Coal (NSW) Pty Ltd	Whitehaven Coal Limited
Idemitsu Australia Resources Pty Ltd	Wyong Areas Coal Joint Venture
Iluka Resources	Yancoal Australia

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#### **Disclaimer**

Lawrence Consulting does not warrant the accuracy of this information and accepts no liability for any loss or damage that you may suffer as a result of your reliance on this information, whether or not there has been any error, omission or negligence on the part of Lawrence Consulting or its employees.



# Economic Benefits

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## Direct Impact

### Direct Spending

Expenditure data provided by the 28 NSW mining companies surveyed indicated that these companies **contributed an estimated \$23.6 billion in the NSW economy** in 2022/23, comprised of:

- **Total workforce of 31,586 full-time equivalent workers** (including direct resident employees and contract workers), which represented an annual increase of 2.0%;
- **\$3.4 billion in wages and salaries** to approximately **22,905 direct fulltime resident employees** (not including contractors), representing an **average salary** level across the sector of **\$147,755** per annum;
- **\$14.4 billion in purchases of goods and services from 6,980 local businesses** (including contract payments), community contributions and payments to local government (including rates, developer contributions and other payments); and
- **\$5.8 billion** in state government payments (including royalties, stamp duty, payroll tax and land tax).

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*NSW mining companies contributed a record **\$23.6 billion** in direct spending to the State economy in 2022/23.*

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The direct economic stimulus provided by NSW mining companies in 2022/23 also extended to other states, with an additional \$8.1 billion in direct spending, which combined with the impact in New South Wales for a **total direct impact of \$31.7 billion for the whole of Australia**, comprised of:

- \$3.5 billion in wages and salaries to approximately 23,593 full-time residing employees; and
- \$28.2 billion in purchases of goods and services from local businesses, government and community contributions.

When overseas and other unallocated spending of \$655.4 million was also included, the total direct expenditure relating to the NSW mining sector was approximately \$32.3 billion in 2022/23.

Based on whole-of-survey totals, the direct expenditure by NSW mining companies in 2022/23 increased significantly by \$6.9 billion, or 41.1%, compared to the previous year, whilst the total workforce increased annually by 605 FTEs, or 2.0%.

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*Compared to 2021/22, the direct spending of NSW mining companies increased substantially by \$6.9 billion, or 41.1%.*

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Since 2011/12, NSW mining companies surveyed by NSWMC have generated \$162.7 billion in direct spending, with average annual expenditure of \$13.6 billion.

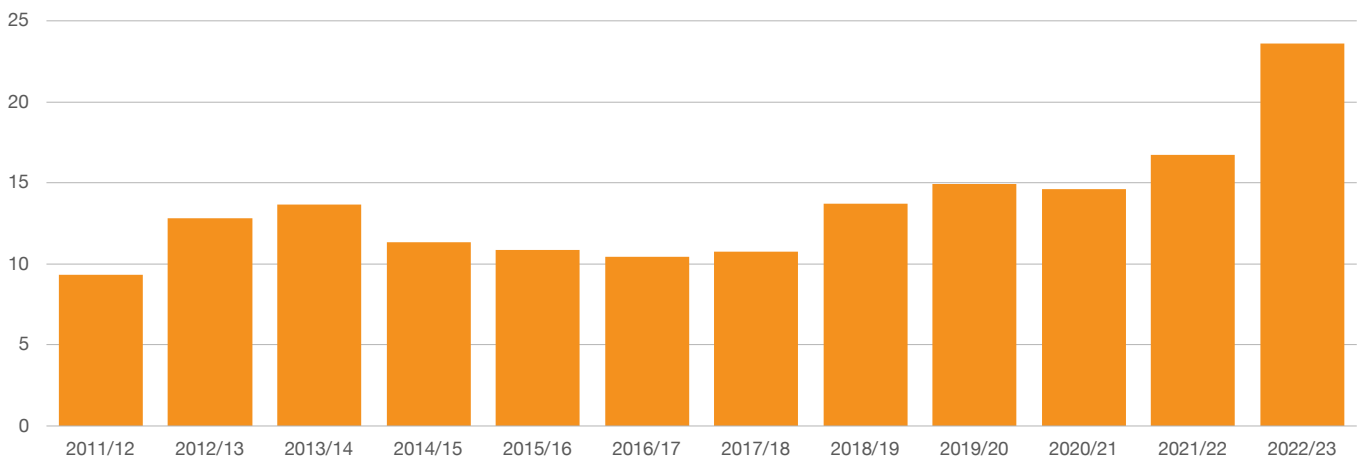
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*Since 2011/12, NSW mining companies surveyed have contributed \$162.7 billion in direct spending to the State economy.*

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### Direct Expenditure of NSW Mining Companies

New South Wales (\$ billion, real)



**Table 2: Annual Change in Survey Results**

	Level 2022/23	Level 2021/22	Level 2020/21	Annual % change, 2021/22- 2022/23
No. of companies surveyed	28	27	29	3.7%
<b>DIRECT EMPLOYEES</b>				
No. of direct employees (FTEs)	22,905	19,996	20,003	14.5%
No. of apprenticeships and traineeships (FTEs)	397	382	315	3.9%
Total wages/salaries paid (\$M)	3,384.3	2,890.4	2,828.8	17.1%
<b>BUSINESS PURCHASES</b>				
No. of suppliers	6,980	6,833	7,311	2.2%
Total opex spend (\$M)	12,389.9	8,976.6	8,608.4	38.0%
Total capex spend (\$M)	1,911.0	1,399.1	1,362.0	36.6%
Total business purchases (\$M)	14,300.9	10,375.7	9,970.4	37.8%
<b>COMMUNITY CONTRIBUTIONS</b>				
No. of community organisations supported	1,319	1,103	1,069	19.6%
Total community contributions (\$M)	17.0	12.7	13.2	33.7%
<b>LOCAL COUNCIL PAYMENTS</b>				
Total local government payments (\$M)	90.3	84.4	80.1	6.9%
<b>STATE GOVERNMENT PAYMENTS</b>				
Total state government payments (\$M)	5,809.2	3,370.2	1,704.1	72.4%
<b>TOTAL SPEND (\$M)</b>	<b>23,601.7</b>	<b>16,733.5</b>	<b>14,596.6</b>	<b>41.0%</b>
<b>TOTAL WORKFORCE (FTEs)</b>	<b>31,586</b>	<b>30,981</b>	<b>30,095</b>	<b>2.0%</b>

## Local Suppliers

Approximately 6,980 unique businesses in New South Wales received payments for goods and services supplied during 2022/23 from NSW mining companies. The highest number of businesses was recorded in the Hunter region (2,726), followed by Sydney (2,517), Central West (1,004), North Western (772) and Northern (448).

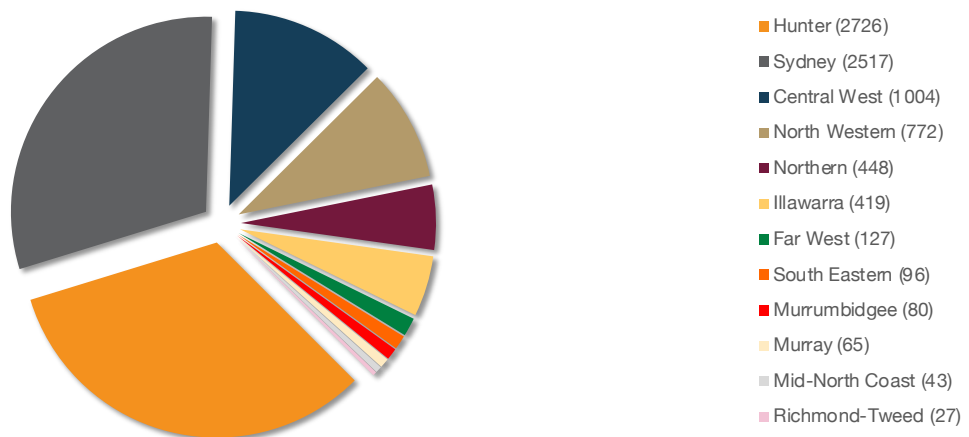
**Table 3: Number of Businesses Supported by Region, 2022/23**

Region	Number of local suppliers
Central West	1,004
Far West	127
Hunter	2,726
Illawarra	419
Mid-North Coast	43
Murray	65
Murrumbidgee	80
North Western	772
Northern	448
Richmond-Tweed	27
South Eastern	96
Sydney	2,517
<b>Total New South Wales</b>	<b>6,980</b>

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 by Region

New South Wales, 2022/23



## Community Support

During 2022/23, NSW mining companies directly contributed over \$17.0 million to 1,319 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 (528), followed by Central West (360).

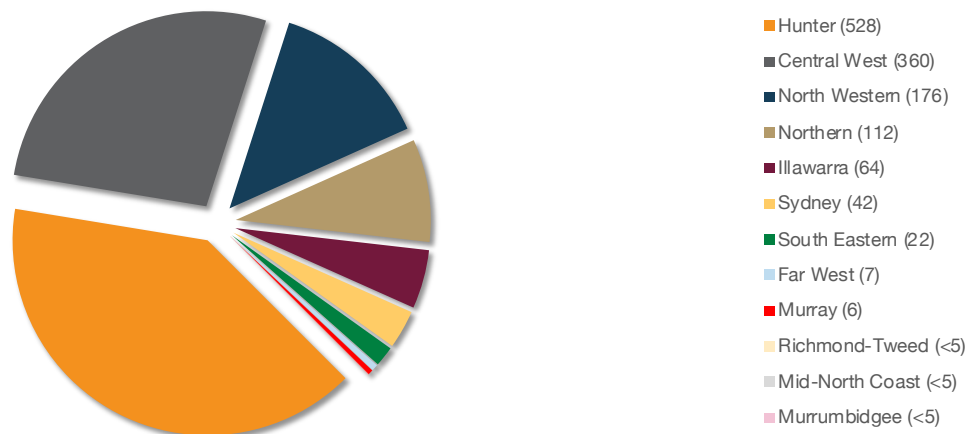
**Table 4: Number of Community Organisations Supported by Region, 2022/23**

Region	No. of community groups	% of total	Total contribution (\$)
Central West	360	27.3%	6,367,812
Far West	7	0.5%	49,161
Hunter	528	40.0%	5,672,999
Illawarra	64	4.9%	1,607,374
Mid-North Coast	0	0.0%	0
Murray	6	0.5%	14,659
Murrumbidgee	0	0.0%	0
North Western	176	13.3%	967,020
Northern	112	8.5%	704,075
Richmond-Tweed	2	0.2%	7,540
South Eastern	22	1.7%	171,877
Sydney	42	3.2%	1,469,707
		0.0%	
<b>Total New South Wales</b>	<b>1,319</b>	<b>100.0%</b>	<b>17,033,666</b>

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 NSW Mining Companies by Region

New South Wales, 2022/23



## 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 \$20.2 billion and the employment expenditure of \$3.4 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 2022/23, the \$23.6 billion in direct spending by NSW mining companies supported additional supply chain and consumption-induced effects of 216,840 fulltime jobs and \$49.3 billion in aggregate spending (\$15.4 billion in wages and salaries and \$33.9 billion in purchases of goods and services).

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*In 2022/23, NSW mining companies supported an **additional 216,840 fulltime jobs and \$49.3 billion in aggregate spending** (\$15.4 billion in wages and salaries and \$33.9 billion in purchases of goods and services).*

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## Total Impact

The results of the I-O modelling allow forecasts to be made about the total size of impacts from the 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 2022/23 amounted to:

- **\$57.5 billion in output/turnover** (or purchases from supplying businesses);
- **\$51.1 billion in gross value added** (contribution to gross state product);
- **\$18.7 billion in income** (wages and salaries); and
- **239,744 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 \$23.6 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 **\$51.1 billion in gross value added** (\$23.6 billion in direct effects, and \$27.5 billion in supply chain and consumption effects) in 2022/23 and was responsible for supporting approximately **239,744 jobs** (22,905 in direct employment and 216,840 in additional employment). This means that NSW mining companies contributed an estimated **7.3% of Gross State Product** (based on the figure of \$697.4 billion in 2021/22) and **5.6% of total employment** (4,244,967 persons) in New South Wales in 2022/23.

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*The total economic impact of NSW mining companies was estimated at **\$51.1 billion in gross value added and 239,744 jobs supported in 2022/23.***

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Under the more conservative Type I scenario (i.e. excluding consumption-induced effects), direct spending by the companies surveyed and flow-on impacts contributed 5.9% to GSP and 3.6% of total state employment.

Since 2011/12, companies surveyed by the NSWMC have generated approximately \$349.5 billion in value added, including \$162.7 billion in direct spending.

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*Since 2011/12, companies surveyed by the NSWMC have generated approximately **\$349.5 billion in value added.***

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**Table 5: Economic Impact of NSW Mining Companies, 2022/23**

	New South Wales	Rest of Australia	Total Australia
<b>Gross Value Added (\$M)</b>			
Direct	23,602	8,086	31,687
% of Gross State Product (GSP)	3.4%	0.5%	1.4%
Indirect	17,340	5,286	22,626
Total GVA (Type I)	40,942	13,371	54,313
% of GSP	5.9%	0.8%	2.4%
Consumption-induced	10,128	3,168	13,297
<b>Total GVA (Type II)</b>	<b>51,070</b>	<b>16,539</b>	<b>67,610</b>
% of GSP	7.3%	1.0%	2.9%
<b>Employment (FTEs)</b>			
Direct	22,905	688	23,593
% of total state employment	0.5%	0.0%	0.2%
Indirect	131,568	31,899	163,468
Total employment (Type I)	154,473	32,587	187,060
% of total state employment	3.6%	0.3%	1.4%
Consumption-induced	85,271	20,089	105,361
<b>Total employment (Type II)</b>	<b>239,744</b>	<b>52,677</b>	<b>292,421</b>
% of total state employment	5.6%	0.6%	2.1%
<b>Business spend (incl. community contributions and govt payments) (\$M)</b>			
Direct	20,217	7,987	28,204
Indirect	14,138	5,668	19,806
Total business spend (Type I)	34,355	13,655	48,010
Consumption-induced	19,748	5,955	25,703
Total business spend (Type II)	54,103	19,611	73,713
<b>Wages &amp; salaries (\$M)</b>			
Direct	3,384	99	3,483
Indirect	9,528	2,755	12,283
Total wages & salaries (Type I)	12,912	2,853	15,766
Consumption-induced	5,838	1,458	7,295
Total wages & salaries (Type II)	18,750	4,311	23,061

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 NSW mining companies varied considerably across regional areas.

The level of employment, and direct expenditure on employees and business purchases in 2022/23 is summarised for the 12 major regions in New South Wales in Table 6.

The largest proportion of direct expenditure from NSW mining companies in New South Wales in 2022/23 was in the Hunter region (\$8.2 billion), followed by the Sydney (\$5.9 billion), Central West (\$1.2 billion) and Illawarra (\$963.9 million) regions.

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**Hunter recorded the largest share of direct expenditure by region in 2022/23 (\$8.2 billion), followed by Sydney (\$5.9 billion) and Central West (\$1.2 billion).**

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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 (15,299 FTEs, or 48.4%), followed by the Central West (5,520 FTEs, or 17.5%), North Western (3,425 FTEs, or 10.8%), Northern (2,479 FTEs, or 7.8%) and Illawarra (2,061 FTEs, or 6.5%).

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**The average salary for workers directly employed by NSW mining companies was approximately \$147,755 in 2022/23.**

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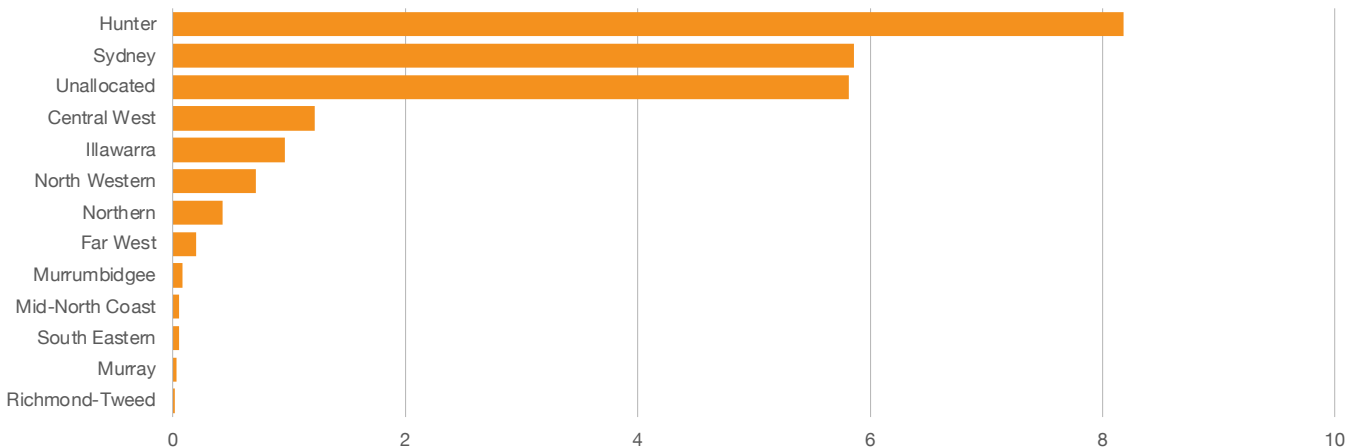
**Table 6: Direct Impact of NSW Mining Companies by Region, 2022/23**

Region	Residing employees (FTEs)	Associated salaries (\$M)	Total workforce <sup>(b)</sup>	Business purchases, community and govt payments (\$M)	No. of local suppliers	Total direct spending (\$M)	% of total direct spend, NSW
Central West	3,093	458.9	5,520	758.4	1,004	1,217.3	5.2%
Far West	481	70.1	994	127.6	127	197.6	0.8%
Hunter	12,140	1,870.5	15,299	6,310.7	2,726	8,181.2	34.7%
Illawarra	1,447	190.0	2,061	773.8	419	963.9	4.1%
Mid-North Coast	85	10.0	85	44.3	43	54.3	0.2%
Murray	45	5.6	49	23.1	65	28.7	0.1%
Murrumbidgee	101	13.2	101	66.4	80	79.6	0.3%
North Western	2,848	380.8	3,425	328.9	772	709.7	3.0%
Northern	1,676	216.0	2,479	207.7	448	423.7	1.8%
Richmond-Tweed	19	2.7	19	12.6	27	15.3	0.1%
South Eastern	109	11.8	109	36.7	96	48.5	0.2%
Sydney	846	152.5	1,416	5,711.0	2,517	5,863.4	24.8%
Unallocated <sup>(a)</sup>	14	2.2	28	7.2	0	5,818.5	24.7%
<b>Total NSW</b>	<b>22,905</b>	<b>3,384.3</b>	<b>31,586</b>	<b>14,408.3</b>	<b>6,980</b>	<b>23,601.7</b>	<b>100.0%</b>

Note: Regions are based on 12 former Statistical Divisions in NSW. (a) Includes spending in New South Wales that is not region-specific or unknown, including state government payments. (b) Includes full-time resident direct employees and contract workers by place of operation.

**NSW Mining Companies Direct Spend by Region**

New South Wales (\$ billion), 2022/23



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 by Region, 2022/23 (Type II)**

Region	Indirect full-time employees (FTEs)	Associated salaries (\$M)	Supply of goods and services (\$M)	Total indirect value added (\$M)
Central West	17,803	658.9	1,471.5	1,434.5
Far West	3,230	139.7	290.1	256.6
Hunter	84,569	5,064.2	10,643.8	8,897.6
Illawarra	14,740	758.4	1,501.1	1,326.5
Mid-North Coast	1,048	37.8	85.2	83.9
Murray	281	12.2	25.3	22.1
Murrumbidgee	471	19.7	44.0	41.9
North Western	11,098	412.5	914.8	891.4
Northern	6,843	253.4	562.9	549.2
Richmond-Tweed	227	11.7	23.3	20.5
South Eastern	910	33.0	74.1	72.8
Sydney	37,945	3,077.1	8,465.4	6,197.3
Undefined <sup>(a)</sup>	37,675	4,886.9	9,783.7	7,674.5
<b>Total New South Wales</b>	<b>216,840</b>	<b>15,365.5</b>	<b>33,885.3</b>	<b>27,468.7</b>

Note: (a) Includes impacts associated with unallocated, or non-region specific spending, including state government payments.

Table 8 shows that the direct expenditure of NSW mining companies has the highest overall impact in the Hunter region, with estimated total value added of \$17.1 billion, meaning these companies contributed 25.9% to gross regional product (\$65.9 billion) in 2022/23. The impact in the Hunter region was significantly higher than other regional economies, the next highest of which was Sydney (\$12.1 billion in value added) and Central West (\$2.7 billion).

The Hunter region recorded the highest proportion of GRP contributed by the mining sector (35.7%), followed by the Far West (21.8%), Central West (19.2%), North Western (14.4%) and Illawarra (8.6%) regions.

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*The Hunter region had the highest proportion of GRP contributed by the resource sector (25.9%), followed by Far West (21.8%) and Central West (19.2%).*

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With regard to employment, the NSW mining sector again had the highest impact on jobs in the Hunter region, supporting 96,708 FTEs, comprising 21.1% of the total regional workforce. The Sydney (38,791 FTEs), Central West (20,896 FTEs) and Illawarra (16,186 FTEs) regions recorded the next highest number of employees. The Far West region recorded the greatest proportion of total jobs (40.0%) from the impact of NSW mining companies.

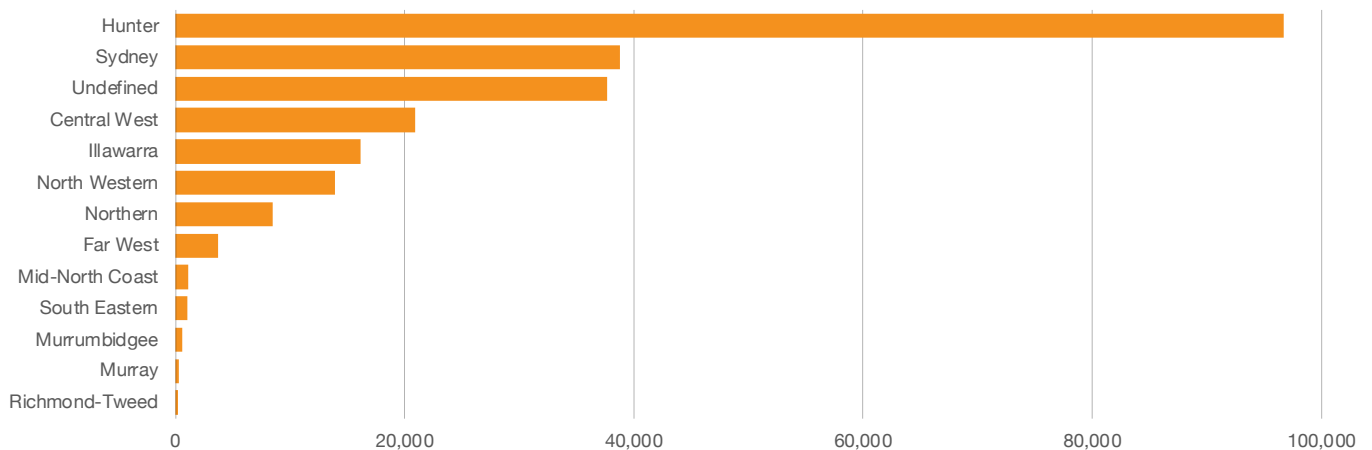
**Table 8: Total Economic Impact of Minerals and Energy Sector by Region, 2022/23**

Region	Total GVA (\$M)	Total value added as % of GRP	Total jobs supported (FTEs)	% of regional employment
Central West	2,651.7	19.2%	20,896	20.9%
Far West	454.2	21.8%	3,711	40.0%
Hunter	17,078.9	25.9%	96,708	24.7%
Illawarra	2,290.4	8.6%	16,186	6.7%
Mid-North Coast	138.2	0.9%	1,133	1.0%
Murray	50.8	0.6%	326	0.5%
Murrumbidgee	121.5	0.9%	572	0.6%
North Western	1,601.1	14.4%	13,947	22.4%
Northern	972.8	5.3%	8,519	9.5%
Richmond-Tweed	35.8	0.2%	246	0.2%
South Eastern	121.3	0.9%	1,019	0.9%
Sydney	12,060.7	2.4%	38,791	1.4%
Undefined <sup>(a)</sup>	13,493.0	n.a.	37,689	n.a.
<b>Total New South Wales</b>	<b>51,070.4</b>	<b>7.3%</b>	<b>239,744</b>	<b>5.6%</b>

Note: (a) Includes impacts associated with unallocated, or non-region specific spending, including state government payments.

**Total Employment Supported by NSW Mining Companies by Region**

New South Wales (FTEs)



## Central West

### Direct Contribution

In 2022/23, NSW mining companies contributed \$1.2 billion in direct spending in the Central West region, through:

- Total workforce of 5,520 FTEs, including 2,427 contract workers whose place of work was in the region;
- \$458.9 million in wages and salaries to 3,093 direct full-time employees (not including contractors);
- \$732.3 million in purchases of goods and services from 1,004 local businesses (includes contractors);
- \$6.4 million in contributions to 360 community organisations; and
- \$19.7 million in local government payments.

### Indirect Contribution

This **\$1.2 billion in direct spending** supported:

- \$1.5 billion in additional supply chain purchases and household consumption; and
- \$658.9 million in wages and salaries associated with a further 17,803 jobs supported in this region.

### Total Contribution

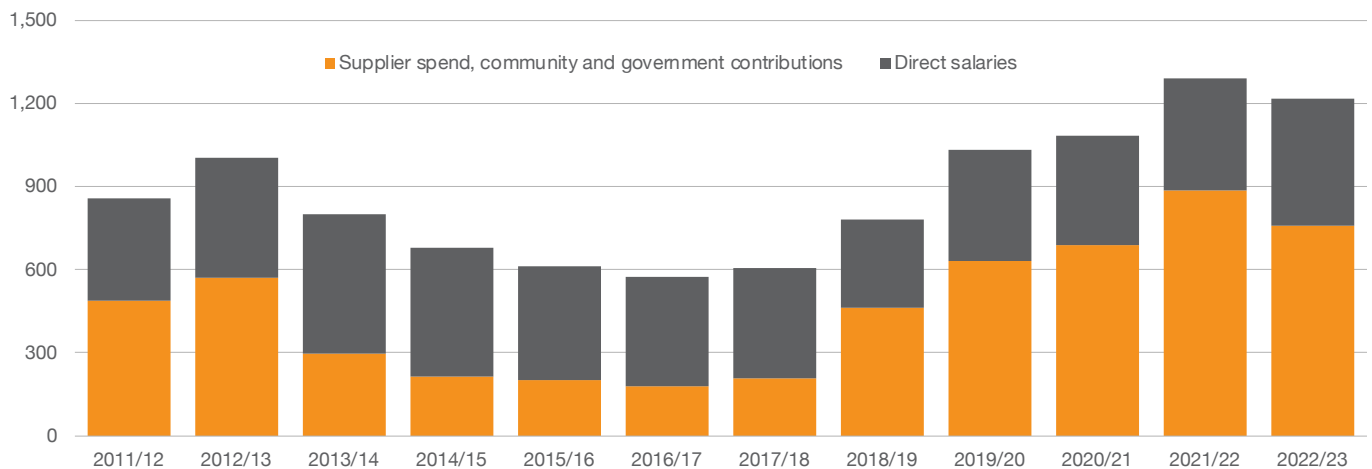
The total economic contribution (direct, indirect and consumption-induced) from the minerals sector in 2022/23 amounted to:

- \$2.3 billion in supplying business purchases;
- \$1.1 billion in total wages and salaries paid to workers;
- **\$2.7 billion in gross value added**, or 19.2% of total GRP in this region (\$13.8 billion); and
- **20,896 full-time equivalent jobs**, or 20.9% of the regional workforce.

Since 2011/12, NSW mining companies have generated **\$10.5 billion in direct spending in the Central West region**, comprised of \$5.0 billion in total wages and salaries and \$5.6 billion in business purchases, community contributions and local government payments.

### Direct Expenditure of NSW Mining Companies

Central West (\$ million)



## Far West

### Direct Contribution

In 2022/23, NSW mining companies contributed \$197.6 million in direct spending in the Far West region (representing 3.5% annual growth), through:

- Total workforce of 994 FTEs, including 514 contract workers whose place of work was in the region;
- \$70.1 million in wages and salaries to 481 direct full-time employees (not including contractors);
- \$124.4 million in purchases of goods and services from 127 local businesses (includes contractors);
- \$0.05 million in contributions to 7 community organisations; and
- \$3.1 million in local government payments.

### Indirect Contribution

This **\$197.6 million in direct spending** supported:

- \$290.1 million in additional supply chain purchases and household consumption; and
- \$139.7 million in wages and salaries associated with a further 3,230 jobs supported in this region.

### Total Contribution

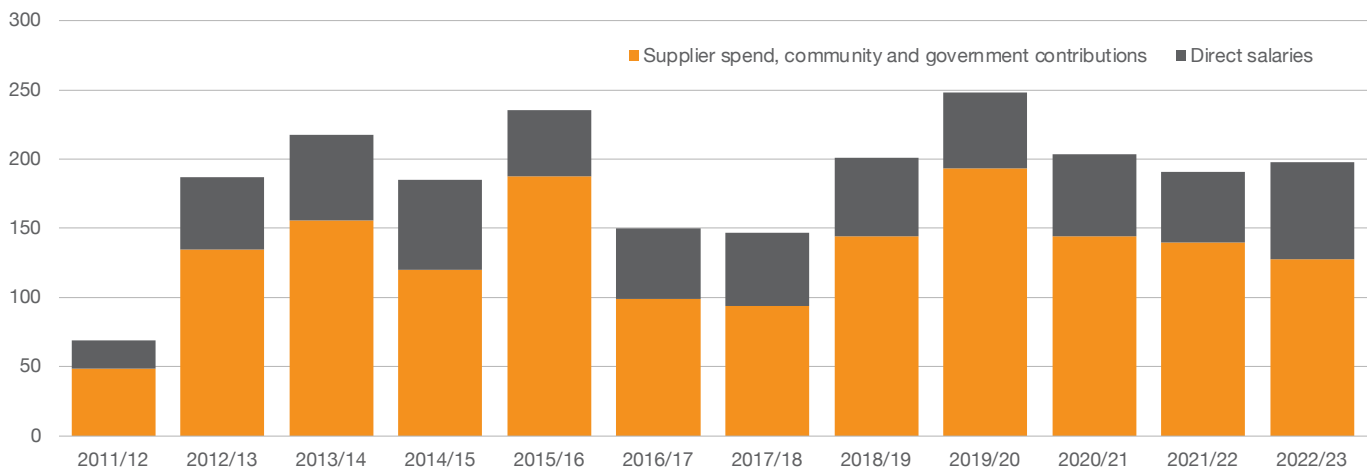
The total economic contribution (direct, indirect and consumption-induced) from the minerals sector in 2022/23 amounted to:

- \$427.3 million in supplying business purchases;
- \$209.8 million in total wages and salaries paid to workers;
- **\$454.2 million in gross value added**, or 21.8% of total GRP in this region (\$2.1 billion); and
- **3,711 full-time equivalent jobs**, or 40.0% of the regional workforce.

*Since 2011/12, NSW mining companies have generated **\$2.2 billion in direct spending in the Far West region**, comprised of \$643.3 million in total wages and salaries and \$1.6 billion in business purchases, community contributions and local government payments.*

### Direct Expenditure of NSW Mining Companies

Far West (\$ million)



## Hunter

### Direct Contribution

In 2022/23, NSW mining companies contributed \$8.2 billion in direct spending in the Hunter region (representing 30.6% annual growth), through:

- Total workforce of 15,299 FTEs, including 3,160 contract workers whose place of work was in the region;
- \$1.9 billion in wages and salaries to 12,140 direct full-time employees (not including contractors);
- \$6.3 billion in purchases of goods and services from 2,726 local businesses (includes contractors);
- \$5.7 million in contributions to 528 community organisations; and
- \$35.1 million in local government payments.

### Indirect Contribution

This **\$8.2 billion in direct spending** supported:

- \$10.6 billion in additional supply chain purchases and household consumption; and
- \$5.1 billion in wages and salaries associated with a further 84,569 jobs supported in this region.

### Total Contribution

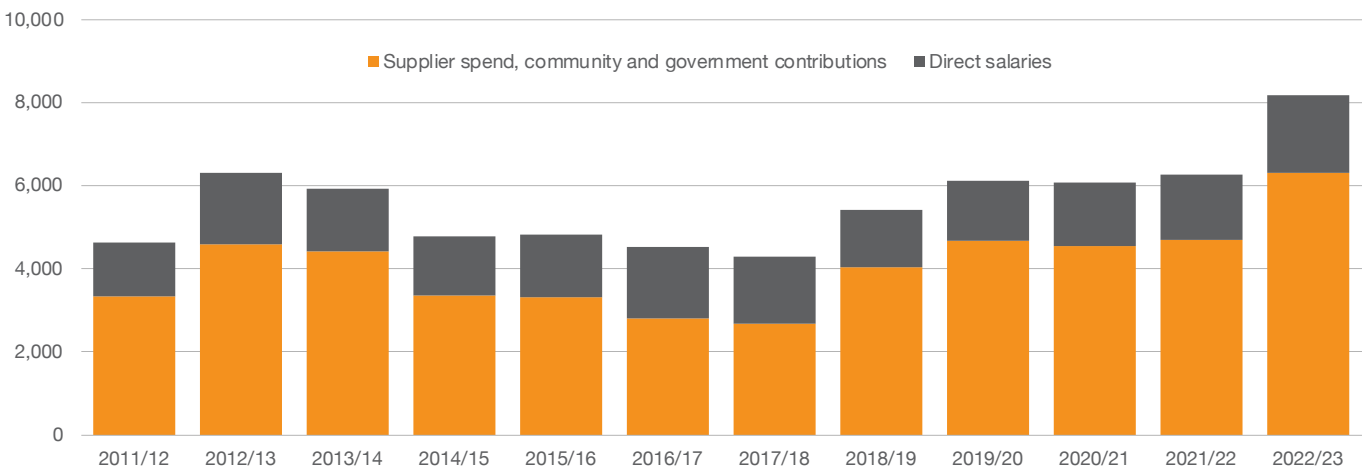
The total economic contribution (direct, indirect and consumption-induced) from the minerals sector in 2022/23 amounted to:

- \$16.9 billion in supplying business purchases;
- \$6.9 billion in total wages and salaries paid to workers;
- **\$17.1 billion in gross value added**, or 25.9% of total GRP in this region (\$65.9 billion); and
- **96,708 full-time equivalent jobs**, or 24.7% of the regional workforce.

Since 2011/12, NSW mining companies have generated **\$67.4 billion in direct spending in the Hunter region**, comprised of \$18.7 billion in total wages and salaries and \$48.8 billion in business purchases, community contributions and local government payments.

### Direct Expenditure of NSW Mining Companies

Hunter (\$ million)





## Illawarra

### Direct Contribution

In 2022/23, NSW mining companies contributed \$963.9 million in direct spending in the Illawarra region (representing 20.2% annual growth), through:

- Total workforce of 2,061 FTEs, including 615 contract workers whose place of work was in the region;
- \$190.0 million in wages and salaries to 1,447 direct full-time employees (not including contractors);
- \$770.8 million in purchases of goods and services from 419 local businesses (includes contractors);
- \$1.6 million in contributions to 64 community organisations; and
- \$1.4 million in local government payments.

### Indirect Contribution

This **\$963.9 million in direct spending** supported:

- \$1.5 billion in additional supply chain purchases and household consumption; and
- \$758.4 million in wages and salaries associated with a further 14,740 jobs supported in this region.

### Total Contribution

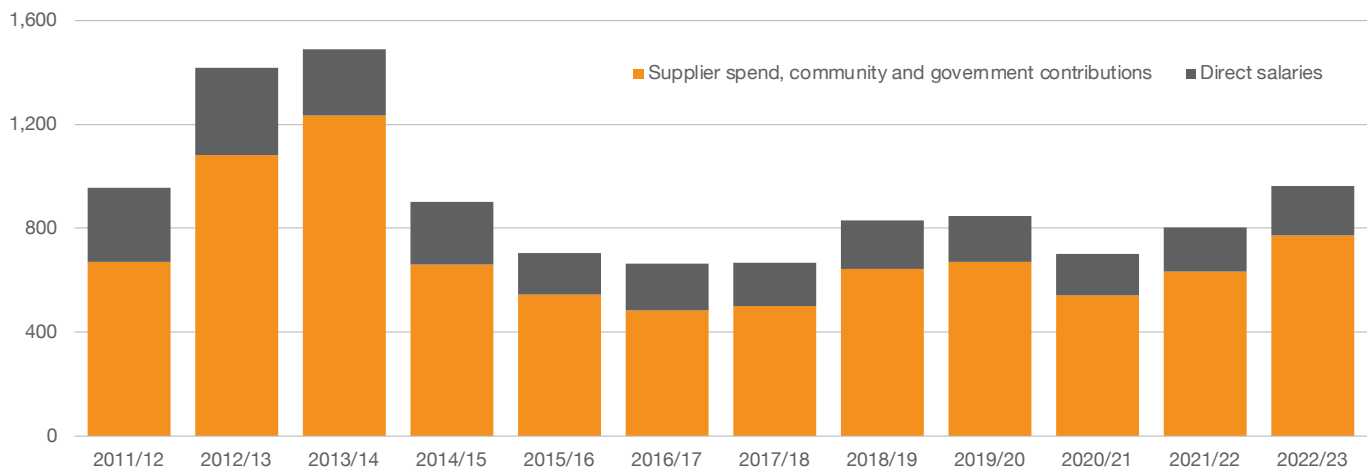
The total economic contribution (direct, indirect and consumption-induced) from the minerals sector in 2022/23 amounted to:

- \$2.3 billion in supplying business purchases;
- \$948.4 million in total wages and salaries paid to workers;
- **\$2.3 billion in gross value added**, or 8.6% of total GRP in this region (\$26.5 billion); and
- **16,186 full-time equivalent jobs**, or 6.7% of the regional workforce.

Since 2011/12, NSW mining companies have generated **\$10.9 billion in direct spending in the Illawarra region**, comprised of \$2.5 billion in total wages and salaries and \$8.4 billion in business purchases, community contributions and local government payments.

### Direct Expenditure of NSW Mining Companies

Illawarra (\$ million)



## Mid-North Coast

### Direct Contribution

In 2022/23, NSW mining companies contributed \$54.3 million in direct spending in the Mid-North Coast region (representing 7.1% annual growth), through:

- \$10.0 million in wages and salaries to 85 direct full-time employees (not including contractors); and
- \$44.3 million in purchases of goods and services from 43 local businesses (includes contractors).

### Indirect Contribution

This **\$54.3 million in direct spending** supported:

- \$85.2 million in additional supply chain purchases and household consumption; and
- \$37.8 million in wages and salaries associated with a further 1,048 jobs supported in this region.

### Total Contribution

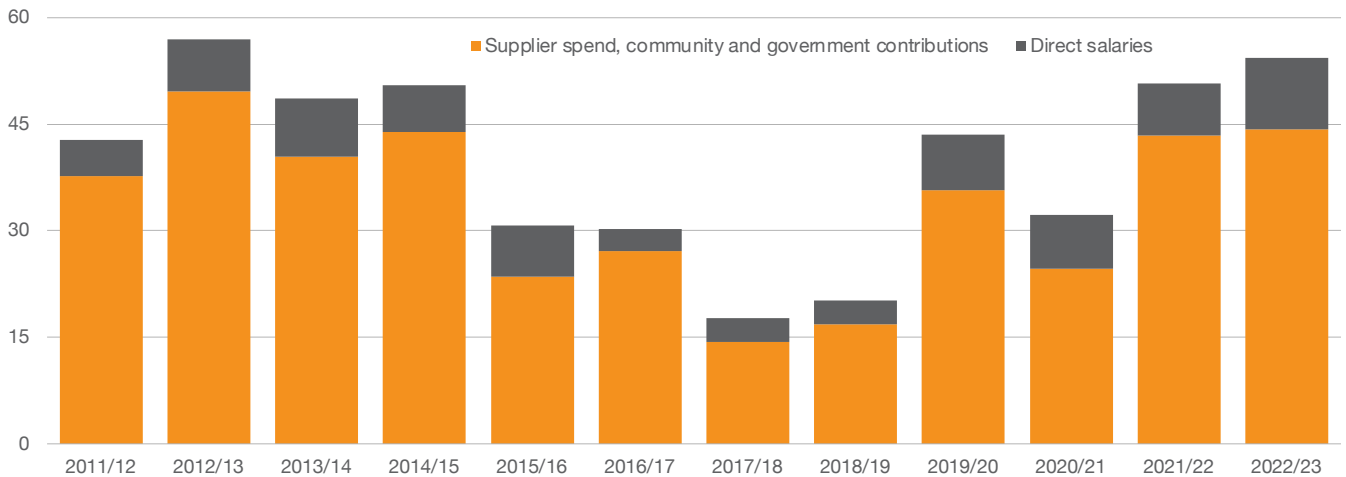
The total economic contribution (direct, indirect and consumption-induced) from the minerals sector in 2022/23 amounted to:

- \$129.5 million in supplying business purchases;
- \$47.9 million in total wages and salaries paid to workers;
- **\$138.2 million in gross value added**, or 0.9% of total GRP in this region (\$15.2 billion); and
- **1,133 full-time equivalent jobs**, or 1.0% of the regional workforce.

Since 2011/12, NSW mining companies have generated **\$478.3 million in direct spending in the Mid-North Coast region**, comprised of \$77.2 million in total wages and salaries and \$401.2 million in business purchases, community contributions and local government payments.

### Direct Expenditure of NSW Mining Companies

Mid-North Coast (\$ million)



## Murray

### Direct Contribution

In 2022/23, NSW mining companies contributed \$28.7 million in direct spending in the Murray region (representing 24.5% annual growth), through:

- \$5.6 million in wages and salaries to 45 direct full-time employees (not including contractors);
- \$20.6 million in purchases of goods and services from 65 local businesses (includes contractors); and
- \$2.4 million in local government payments.

### Indirect Contribution

This **\$28.7 million in direct spending** supported:

- \$25.3 million in additional supply chain purchases and household consumption; and
- \$12.2 million in wages and salaries associated with a further 281 jobs supported in this region.

### Total Contribution

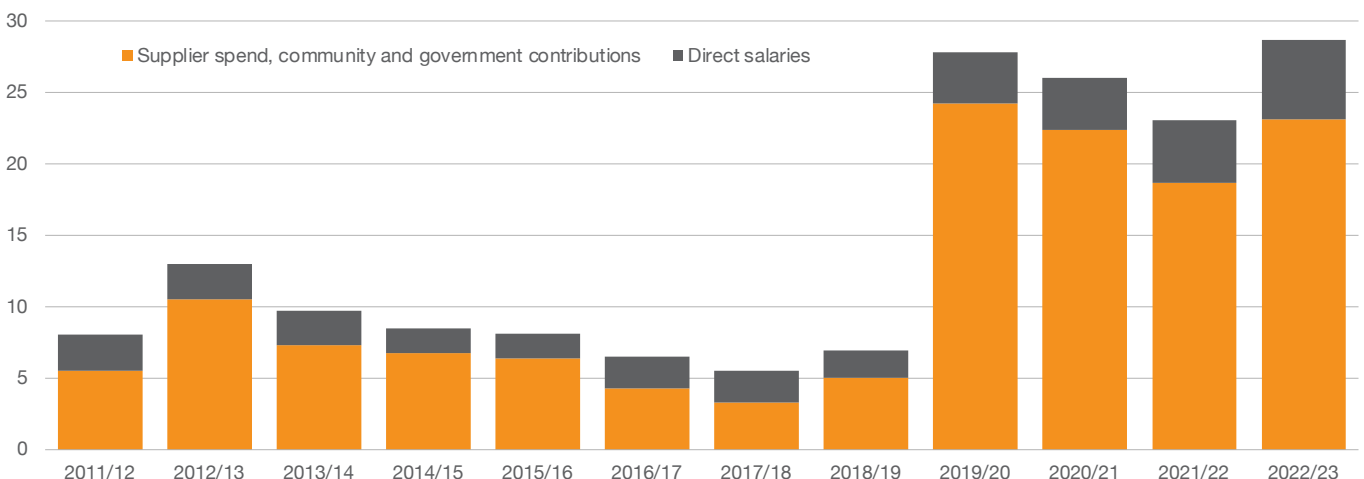
The total economic contribution (direct, indirect and consumption-induced) from the minerals sector in 2022/23 amounted to:

- \$45.9 million in supplying business purchases;
- \$17.8 million in total wages and salaries paid to workers;
- **\$50.8 million in gross value added**, or 0.6% of total GRP in this region (\$8.8 billion); and
- **326 full-time equivalent jobs**, or 0.5% of the regional workforce.

Since 2011/12, NSW mining companies have generated **\$171.6 million in direct spending in the Murray region**, comprised of \$34.5 million in total wages and salaries and \$137.1 million in business purchases, community contributions and local government payments.

### Direct Expenditure of NSW Mining Companies

Murray (\$ million)



## Murrumbidgee

### Direct Contribution

In 2022/23, NSW mining companies contributed \$79.6 million in direct spending in the Murrumbidgee region (representing 17.9% annual growth), through:

- \$13.2 million in wages and salaries to 101 direct full-time employees (not including contractors); and
- \$66.4 million in purchases of goods and services from 80 local businesses (includes contractors).

### Indirect Contribution

This **\$79.6 million in direct spending** supported:

- \$44.0 million in additional supply chain purchases and household consumption; and
- \$19.7 million in wages and salaries associated with a further 471 jobs supported in this region.

### Total Contribution

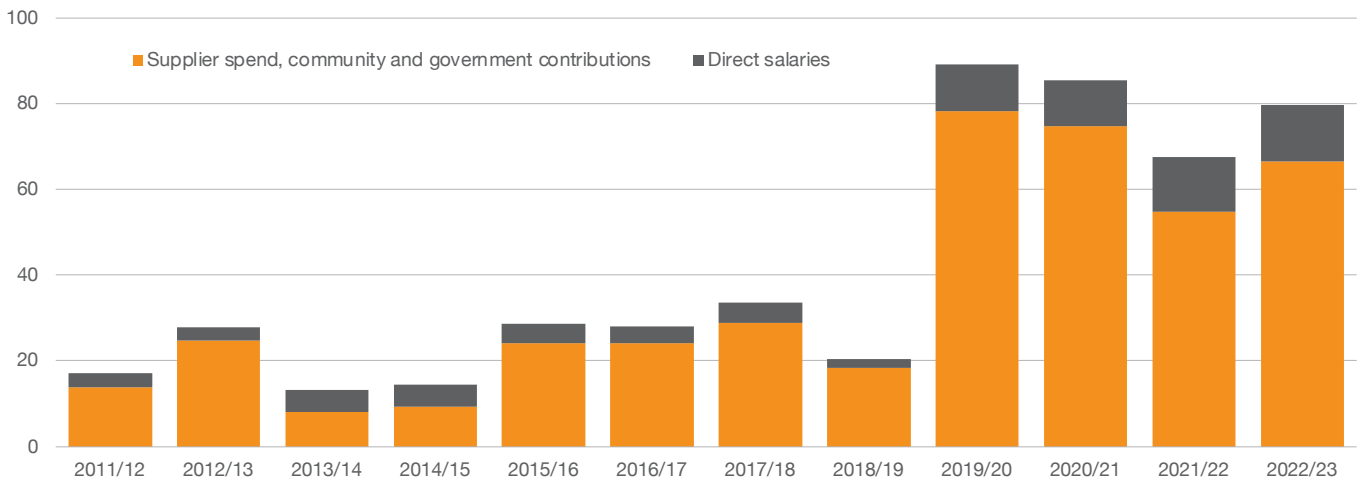
The total economic contribution (direct, indirect and consumption-induced) from the minerals sector in 2022/23 amounted to:

- \$110.4 million in supplying business purchases;
- \$32.9 million in total wages and salaries paid to workers;
- **\$121.5 million in gross value added**, or 0.9% of total GRP in this region (\$13.0 billion); and
- **572 full-time equivalent jobs**, or 0.6% of the regional workforce.

Since 2011/12, NSW mining companies have generated **\$504.5 million in direct spending in the Murrumbidgee region**, comprised of \$79.3 million in total wages and salaries and \$425.2 million in business purchases, community contributions and local government payments.

### Direct Expenditure of NSW Mining Companies

Murrumbidgee (\$ million)



## North Western

### Direct Contribution

In 2022/23, NSW mining companies contributed \$709.7 million in direct spending in the North Western region (representing 20.0% annual growth), through:

- Total workforce of 3,425 FTEs, including 576 contract workers whose place of work was in the region;
- \$380.8 million in wages and salaries to 2,848 direct full-time employees (not including contractors);
- \$311.5 million in purchases of goods and services from 772 local businesses (includes contractors);
- \$1.0 million in contributions to 176 community organisations; and
- \$16.4 million in local government payments.

### Indirect Contribution

This **\$709.7 million in direct spending** supported:

- \$914.8 million in additional supply chain purchases and household consumption; and
- \$412.5 million in wages and salaries associated with a further 11,098 jobs supported in this region.

### Total Contribution

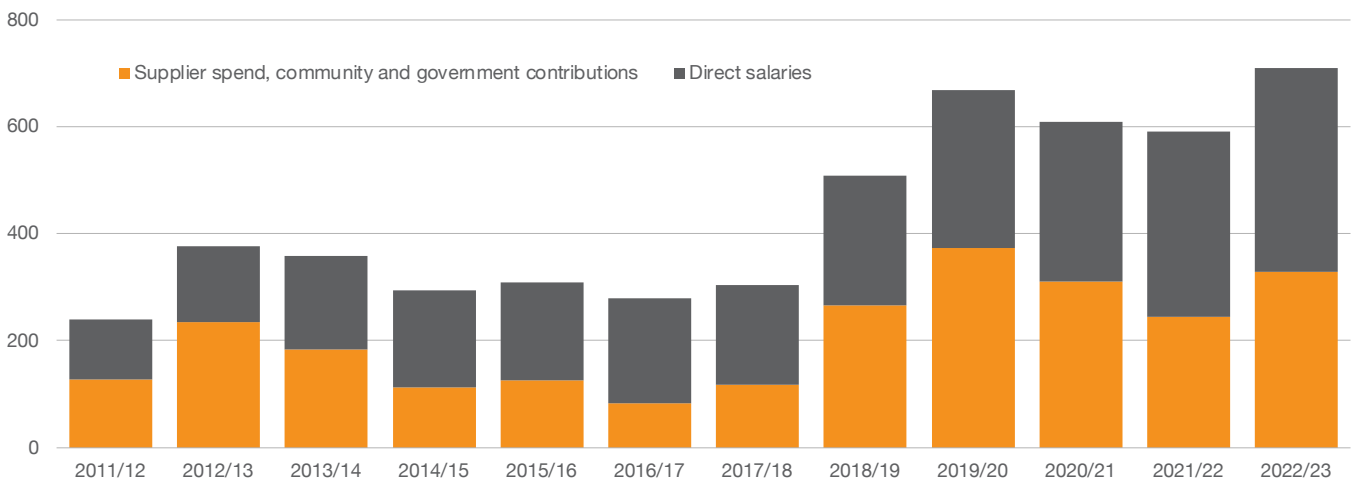
The total economic contribution (direct, indirect and consumption-induced) from the minerals sector in 2022/23 amounted to:

- \$1.2 billion in supplying business purchases;
- \$793.4 million in total wages and salaries paid to workers;
- **\$1.6 billion in gross value added**, or 14.4% of total GRP in this region (\$11.1 billion); and
- **13,947 full-time equivalent jobs**, or 22.4% of the regional workforce.

Since 2011/12, NSW mining companies have generated **\$5.3 billion in direct spending in the North Western region**, comprised of \$2.7 billion in total wages and salaries and \$2.5 billion in business purchases, community contributions and local government payments.

### Direct Expenditure of NSW Mining Companies

North Western (\$ million)



## Northern

### Direct Contribution

In 2022/23, NSW mining companies contributed \$423.7 million in direct spending in the Northern region (representing 24.4% annual growth), through:

- Total workforce of 2,479 FTEs, including 803 contract workers whose place of work was in the region;
- \$216.0 million in wages and salaries to 1,676 direct full-time employees (not including contractors);
- \$197.3 million in purchases of goods and services from 448 local businesses (includes contractors);
- \$0.7 million in contributions to 112 community organisations; and
- \$9.6 million in local government payments.

### Indirect Contribution

This **\$423.7 million in direct spending** supported:

- \$562.9 million in additional supply chain purchases and household consumption; and
- \$253.4 million in wages and salaries associated with a further 6,843 jobs supported in this region.

### Total Contribution

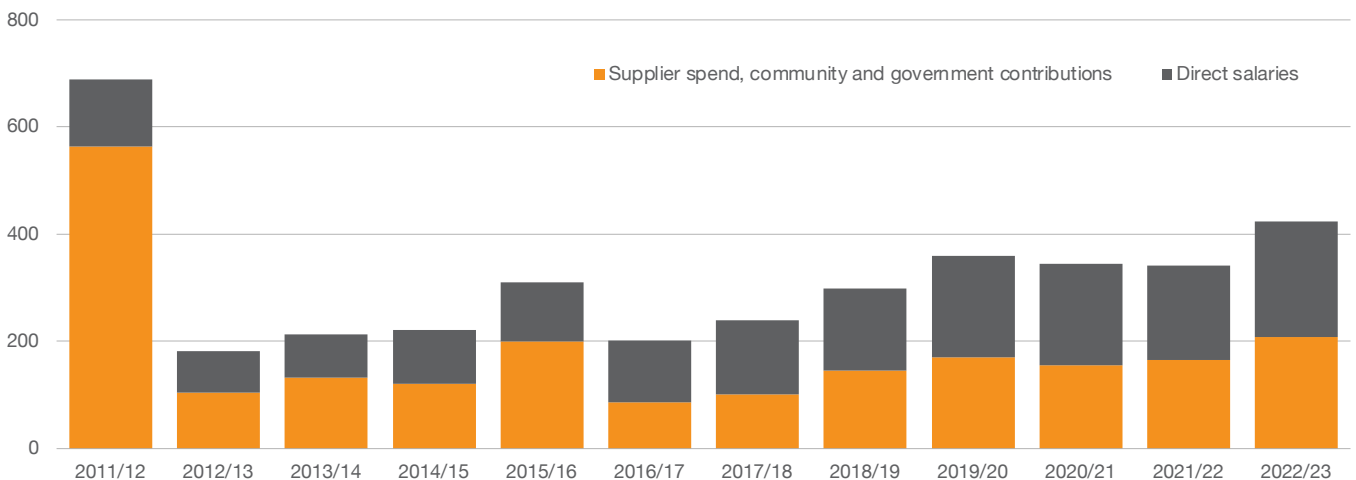
The total economic contribution (direct, indirect and consumption-induced) from the minerals sector in 2022/23 amounted to:

- \$760.2 million in supplying business purchases;
- \$469.4 million in total wages and salaries paid to workers;
- **\$972.8 million in gross value added**, or 5.3% of total GRP in this region (\$18.5 billion); and
- **8,519 full-time equivalent jobs**, or 9.5% of the regional workforce.

Since 2011/12, NSW mining companies have generated **\$3.8 billion in direct spending in the Northern region**, comprised of \$1.7 billion in total wages and salaries and \$2.1 billion in business purchases, community contributions and local government payments.

### Direct Expenditure of NSW Mining Companies

Northern (\$ million)



## Richmond-Tweed

### Direct Contribution

In 2022/23, NSW mining companies contributed \$15.3 million in direct spending in the Richmond-Tweed region (representing 19.4% annual growth), through:

- \$2.7 million in wages and salaries to 19 direct full-time employees (not including contractors); and
- \$12.6 million in purchases of goods and services from 27 local businesses (includes contractors).

### Indirect Contribution

This **\$15.3 million in direct spending** supported:

- \$23.3 million in additional supply chain purchases and household consumption; and
- \$11.7 million in wages and salaries associated with a further 227 jobs supported in this region.

### Total Contribution

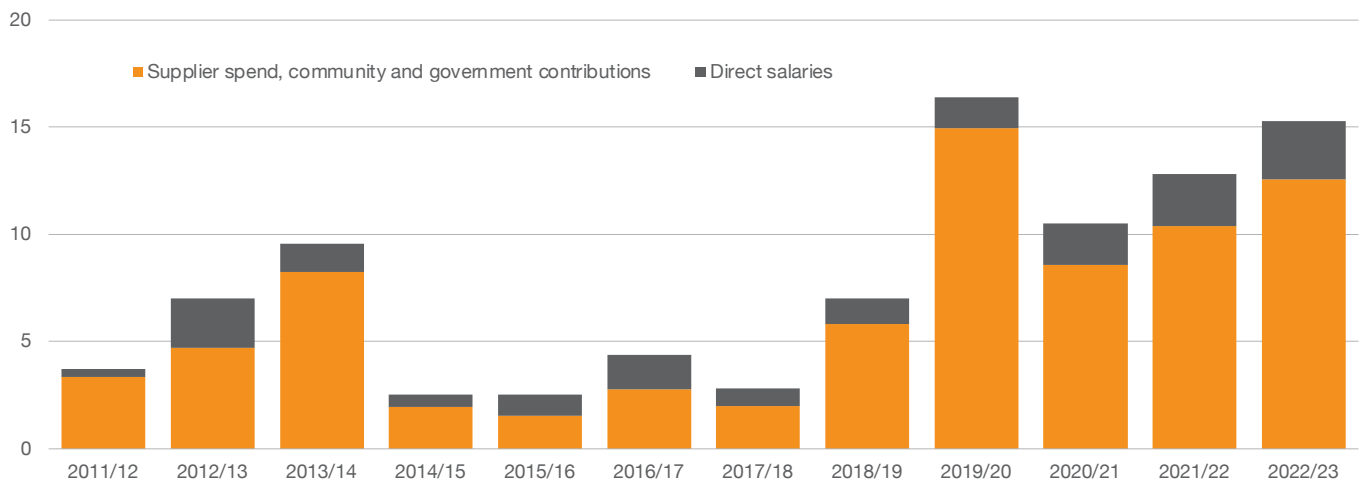
The total economic contribution (direct, indirect and consumption-induced) from the minerals sector in 2022/23 amounted to:

- \$35.8 million in supplying business purchases;
- \$14.4 million in total wages and salaries paid to workers;
- **\$35.8 million in gross value added**, or 0.2% of total GRP in this region (\$16.4 billion); and
- **246 full-time equivalent jobs**, or 0.2% of the regional workforce.

Since 2011/12, NSW mining companies have generated **\$94.3 million in direct spending in the Richmond-Tweed region**, comprised of \$17.6 million in total wages and salaries and \$76.7 million in business purchases, community contributions and local government payments.

### Direct Expenditure of NSW Mining Companies

Richmond-Tweed (\$ million)



## South Eastern

### Direct Contribution

In 2022/23, NSW mining companies contributed \$48.5 million in direct spending in the South Eastern region (representing 16.0% annual growth), through:

- \$11.8 million in wages and salaries to 109 direct full-time employees (not including contractors);
- \$36.4 million in purchases of goods and services from 96 local businesses (includes contractors);
- \$0.2 million in contributions to 22 community organisations; and
- \$0.1 million in local government payments.

### Indirect Contribution

This **\$48.5 million in direct spending** supported:

- \$74.1 million in additional supply chain purchases and household consumption; and
- \$33.0 million in wages and salaries associated with a further 910 jobs supported in this region.

### Total Contribution

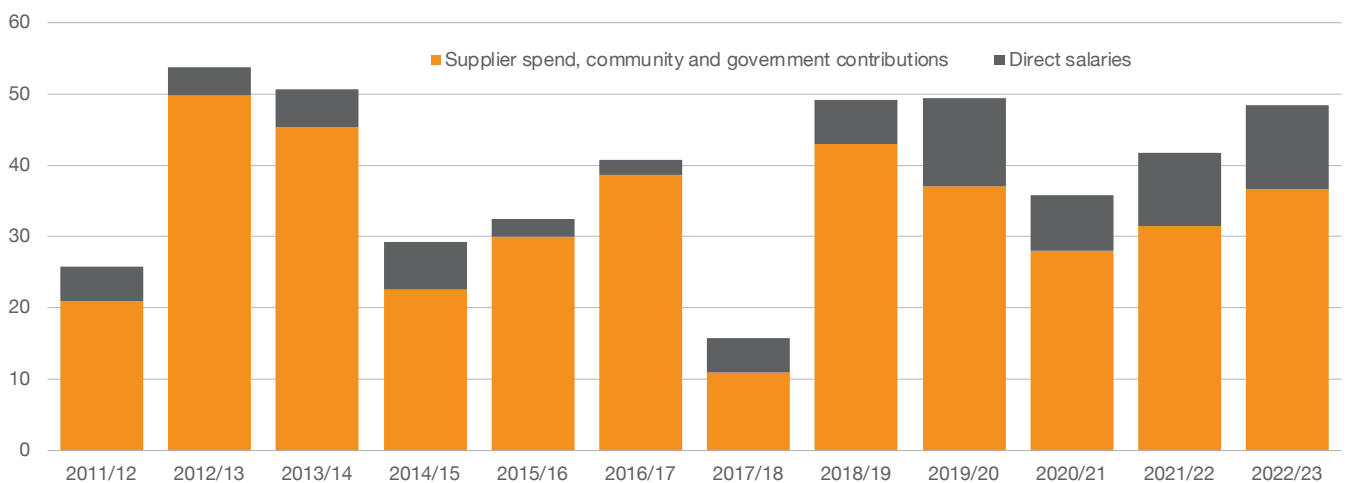
The total economic contribution (direct, indirect and consumption-induced) from the minerals sector in 2022/23 amounted to:

- \$110.5 million in supplying business purchases;
- \$44.7 million in total wages and salaries paid to workers;
- **\$121.3 million in gross value added**, or 0.9% of total GRP in this region (\$13.8 billion); and
- **1,019 full-time equivalent jobs**, or 0.9% of the regional workforce.

Since 2011/12, NSW mining companies have generated **\$473.0 million in direct spending in the South Eastern region**, comprised of \$78.3 million in total wages and salaries and \$394.7 million in business purchases, community contributions and local government payments.

### Direct Expenditure of NSW Mining Companies

South Eastern (\$ million)





## Sydney

### Direct Contribution

In 2022/23, NSW mining companies contributed \$5.9 billion in direct spending in the Sydney region (representing 59.4% annual growth), through:

- Total workforce of 1,416 FTEs, including 569 contract workers whose place of work was in the region;
- \$152.5 million in wages and salaries to 846 direct full-time employees (not including contractors);
- \$5.7 billion in purchases of goods and services from 2,517 local businesses (includes contractors);
- \$1.5 million in contributions to 42 community organisations; and
- \$2.4 million in local government payments.

### Indirect Contribution

This **\$5.9 billion in direct spending** supported:

- \$8.5 billion in additional supply chain purchases and household consumption; and
- \$3.1 billion in wages and salaries associated with a further 37,945 jobs supported in this region.

### Total Contribution

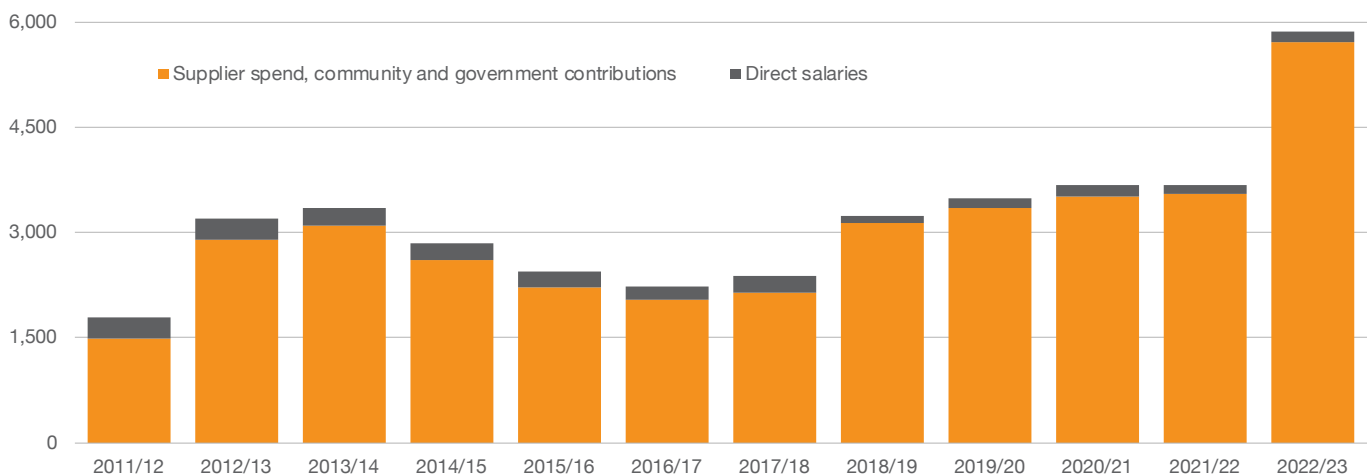
The total economic contribution (direct, indirect and consumption-induced) from the minerals sector in 2022/23 amounted to:

- \$14.2 billion in supplying business purchases;
- \$3.2 billion in total wages and salaries paid to workers;
- **\$12.1 billion in gross value added**, or 2.4% of total GRP in this region (\$492.3 billion); and
- **38,791 full-time equivalent jobs**, or 1.4% of the regional workforce.

Since 2011/12, NSW mining companies have generated **\$38.2 billion in direct spending in the Sydney region**, comprised of \$2.4 billion in total wages and salaries and \$35.7 billion in business purchases, community contributions and local government payments.

### Direct Expenditure of NSW Mining Companies

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 NSW mining companies across New South Wales to the top 20 LGAs by expenditure. Sydney LGA recorded the largest share of direct expenditure in 2022/23 (\$2.9 billion), followed by Newcastle (\$2.4 billion), Singleton (\$1.7 billion), Maitland (\$1.5 billion) and Muswellbrook (\$889.5 million).

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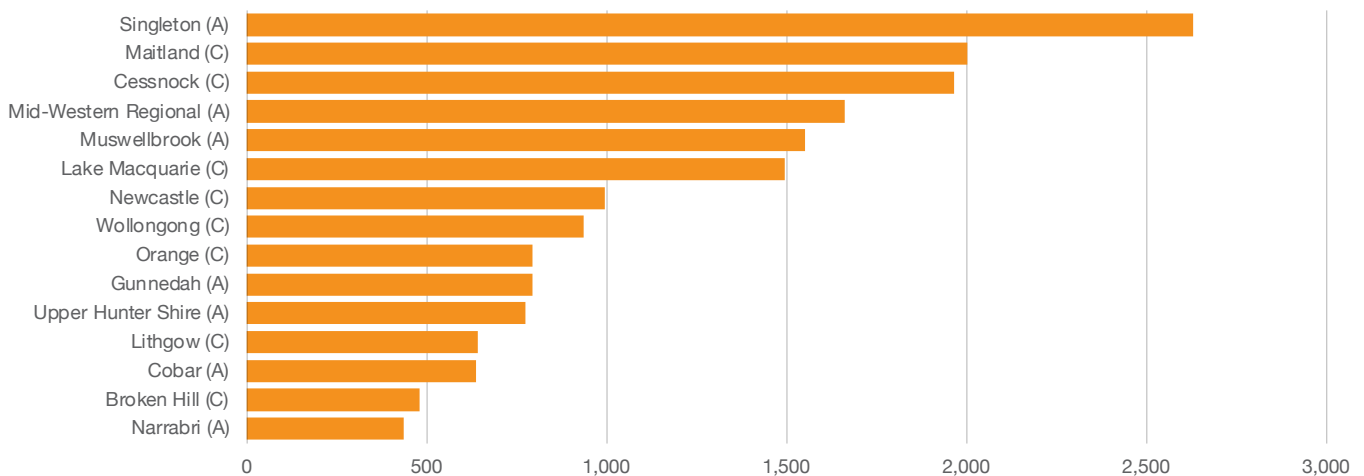
**Sydney recorded the largest share of direct expenditure by local government area in 2022/23 (\$2.9 billion), followed by Newcastle (\$2.4 billion).**

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Direct resident employment was greatest in the Singleton LGA (2,630 FTEs), followed by the Maitland (2,001 FTEs), Cessnock (1,964 FTEs), Mid-Western Regional (1,661 FTEs) and Muswellbrook (1,551 FTEs) LGAs.

### NSW Mining Companies Direct Employment by LGA

New South Wales (FTEs), 2022/23



**Table 9: Direct Impact of NSW Mining Companies, Highest LGAs by Expenditure, 2022/23**

LGA	Residing employees (FTEs)	Associated salaries (\$M)	Total workforce <sup>(a)</sup> (FTEs)	Business purchases, community and govt payments (\$M)	Total direct spending (\$M)	Local suppliers (no.)
Sydney (C)	37	13.8	56	2,923.7	2,937.5	670
Newcastle (C)	995	163.4	995	2,220.7	2,384.1	690
Singleton (A)	2,630	408.4	4,511	1,285.4	1,693.9	466
Maitland (C)	2,001	311.7	2,014	1,233.1	1,544.7	486
Muswellbrook (A)	1,551	226.4	2,669	663.1	889.5	253
Parramatta (C)	11	2.0	11	695.3	697.3	181
Cessnock (C)	1,964	292.7	1,965	386.6	679.2	172
Wollongong (C)	937	126.8	1,551	459.4	586.3	335
Lake Macquarie (C)	1,495	242.1	1,626	339.9	582.0	420
Orange (C)	793	117.6	1,204	408.9	526.5	286
Fairfield (C)	n.a.	n.a.	n.a.	490.5	490.8	110
Mid-Western Regional (A)	1,661	254.9	2,207	184.0	438.9	344
Gunnedah (A)	793	105.6	968	114.3	219.9	164
Canterbury-Bankstown (A)	14	2.1	14	216.7	218.8	86
Broken Hill (C)	479	69.9	992	127.2	197.1	119
Central Coast (C) (NSW)	232	34.4	233	152.7	187.1	125
Lithgow (C)	641	108.4	720	70.1	178.5	112
Wingecarribee (A)	39	5.2	39	164.0	169.2	24
North Sydney (A)	11	2.7	11	156.3	159.0	129
Blacktown (C)	18	1.8	18	154.2	156.1	153

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 NSW mining companies' direct spending for each LGA across New South Wales in 2022/23 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 NSW mining companies to gross regional product (i.e. total estimated value added) occurred in the Sydney LGA, with total estimated value added of \$6.0 billion, followed by Newcastle (\$5.0 billion), Singleton (\$3.4 billion), Maitland (\$3.2 billion) and Muswellbrook (\$1.8 billion)

With regard to employment, the NSW mining sector again had the greatest impact on jobs in the Newcastle LGA, with 24,756 FTEs, followed by the Sydney (18,848 FTEs) and Maitland (17,402 FTEs) LGAs, whilst the regions where the impact of NSW mining companies' direct spending accounted for the largest share of employment were Singleton (93.4%), Muswellbrook (90.4%) and Cobar (81.7%).

**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, Highest LGAs by Gross Value Added, 2022/23 (Type II)**

Region	Total GVA (\$M)	Total value added as % of GRP	Total jobs supported (FTEs)	% of regional employment
Sydney (C)	6,038.5	4.2%	18,848	13.0%
Newcastle (C)	5,002.3	25.2%	24,756	24.7%
Singleton (A)	3,449.1	30.5%	12,552	93.4%
Maitland (C)	3,159.5	64.6%	17,402	37.4%
Muswellbrook (A)	1,803.8	33.6%	7,204	90.4%
Parramatta (C)	1,430.4	4.8%	4,473	3.1%
Wollongong (C)	1,403.2	10.2%	10,039	8.8%
Cessnock (C)	1,400.6	58.5%	9,093	31.5%
Lake Macquarie (C)	1,217.0	10.8%	7,788	6.8%
Orange (C)	1,164.5	32.6%	8,718	37.1%
Fairfield (C)	986.5	8.9%	3,142	3.6%
Mid-Western Regional (A)	918.8	51.7%	7,633	58.4%
Gunnedah (A)	492.6	44.5%	4,196	66.8%
Broken Hill (C)	452.9	23.4%	3,700	43.9%
Canterbury-Bankstown	449.4	2.4%	1,418	0.8%
Central Coast (C) (NSW)	389.7	2.5%	1,511	1.0%
Lithgow (C)	375.9	27.2%	3,100	31.3%
Wingecarribee (A)	371.5	12.0%	2,222	8.4%
Shellharbour (C)	340.5	11.0%	2,622	6.4%
North Sydney (A)	325.7	1.8%	1,033	2.3%

# Conclusion

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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 28 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 NSW mining companies 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 NSW mining companies contributed an estimated \$23.6 billion in direct spending to the state economy in 2022/23, comprised of:

- Total workforce of 31,586 full-time equivalent workers (including direct resident employees and contract workers), which represented an annual increase of 2.0%;
- \$3.4 billion in wages and salaries to approximately 22,905 direct fulltime resident employees (not including contractors), representing an average salary level across the sector of \$147,445 per annum;
- \$14.4 billion in purchases of goods and services from 6,980 local businesses (including contract payments), community contributions and payments to local government (including rates, developer contributions and other payments); and
- \$5.8 billion in state government payments (including royalties, stamp duty, payroll tax and land tax).

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*NSW mining companies contributed **\$23.6 billion** in direct spending to the New South Wales economy in 2022/23.*

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Of the total workforce of 31,586 full-time equivalent workers employed by the 28 companies surveyed, 22,905 were direct full-time employees, or 72.5% of the total workforce – of which 3,088 direct workers, or 14.1% were female – with another 8,681 contract workers.

The economic stimulus provided by NSW mining companies in 2022/23 also extended to other states, with an additional \$8.1 billion in direct spending, which combined with the impact in New South Wales for a total impact of \$31.7 billion for the whole of Australia, comprised of:

- \$3.5 billion in wages and salaries to approximately 23,593 full-time residing employees; and
- \$28.2 billion in purchases of goods and services from local businesses, government (state and local) and community contributions.

The total impact of the \$23.6 billion in direct spending by the resources sector, measured through supply chain and consumption-induced spending effects, amounted to an estimated 7.3% of Gross State Product and 5.6% 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 5.9% to GSP and 3.6% of total state employment.

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*The total economic impact of NSW mining companies was estimated at **\$51.1 billion** in gross value added and **239,744 jobs** supported in 2022/23.*

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Since 2011/12, NSW mining companies surveyed have generated approximately \$349.5 billion in value added, including \$162.7 billion in direct spending.

# Appendix A: Modelling Approach

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## 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 2020-21, 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 Sector by LGA, 2022/23**

Local government area	Residing employees (FTEs)	Associated salaries (\$M)	Total workforce <sup>(a)</sup> FTEs	Business purchases, community and local govt payments (\$M)	Total direct spending (\$M)	Local suppliers (no.)
Albury (C)	12	1.5	11.9	n.a.	1.9	7
Armidale Regional (A)	12	1.2	12.5	2.1	3.3	13
Ballina (A)	5	0.9	5.0	n.a.	1.6	5
Balranald (A)	n.a.	n.a.	n.a.	15.0	15.7	22
Bathurst Regional (A)	277	42.7	280.5	45.2	87.9	89
Bayside (A)	15	2.0	15.3	91.3	93.3	56
Bega Valley (A)	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Bellingen (A)	6	0.6	6.3	6.4	7.0	n.a.
Berrigan (A)	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Blacktown (C)	18	1.8	17.7	154.2	156.1	153
Bland (A)	250	36.5	957.7	50.8	87.3	124
Blayney (A)	223	33.5	231.9	12.9	46.3	69
Blue Mountains (C)	63	9.0	63.5	3.1	12.1	19
Bogan (A)	203	22.5	208.5	4.7	27.2	45
Bourke (A)	8	0.7	8.8	n.a.	n.a.	n.a.
Brewarrina (A)	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Broken Hill (C)	479	69.9	992.4	127.2	197.1	119
Burwood (A)	n.a.	n.a.	n.a.	n.a.	n.a.	8
Byron (A)	n.a.	n.a.	n.a.	11.1	11.2	6
Cabonne (A)	160	22.1	210.3	60.7	82.8	50
Camden (A)	45	5.3	45.2	99.1	104.4	30
Campbelltown (C) (NSW)	30	3.4	29.9	60.9	64.3	62
Canada Bay (A)	15	2.8	15.1	1.7	4.5	21
Canterbury-Bankstown (A)	14	2.1	14.2	216.7	218.8	86
Carrathool (A)	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Central Coast (C) (NSW)	232	34.4	233.4	152.7	187.1	125

**Table B1: Direct Impacts of NSW Mining Companies Sector by LGA, 2022/23**

Local government area	Residing employees (FTEs)	Associated salaries (\$M)	Total workforce <sup>(a)</sup> 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.	8
Cessnock (C)	1,964	292.7	1,965.2	386.6	679.2	172
Clarence Valley (A)	12	1.5	11.8	2.1	3.5	5
Cobar (A)	636	65.0	637.9	67.8	132.8	142
Coffs Harbour (C)	20	1.9	19.7	1.7	3.6	14
Coolamon (A)	6	0.7	5.9	n.a.	n.a.	n.a.
Coonamble (A)	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Cootamundra-Gundagai (A)	6	0.8	5.9	n.a.	n.a.	n.a.
Cowra (A)	29	3.9	29.5	n.a.	4.2	6
Cumberland (A)	11	2.0	10.6	83.6	85.6	60
Dubbo Regional (A)	279	33.9	300.2	73.3	107.1	229
Dungog (A)	181	26.5	181.1	8.3	34.8	19
Edward River (A)	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Eurobodalla (A)	10	0.9	10.1	n.a.	1.2	7
Fairfield (C)	n.a.	n.a.	n.a.	490.5	490.8	110
Federation (A)	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Forbes (A)	118	15.4	128.4	6.2	21.6	45
Georges River (A)	8	0.9	7.7	1.7	2.5	16
Gilgandra (A)	18	2.1	18.4	n.a.	2.2	n.a.
Glen Innes Severn (A)	5	0.8	5.0	n.a.	n.a.	n.a.
Goulburn Mulwaree (A)	22	2.5	21.6	n.a.	3.2	10
Greater Hume Shire (A)	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Griffith (C)	n.a.	n.a.	n.a.	1.7	2.5	11
Gunnedah (A)	793	105.6	968.2	114.3	219.9	164
Gwydir (A)	10	1.2	11.1	2.8	4.1	n.a.
Hawkesbury (C)	13	1.5	13.2	6.9	8.4	21
Hay (A)	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Hilltops (A)	17	2.3	17.4	1.6	4.0	5

**Table B1: Direct Impacts of NSW Mining Companies Sector by LGA, 2022/23**

Local government area	Residing employees (FTEs)	Associated salaries (\$M)	Total workforce <sup>(a)</sup> FTEs	Business purchases, community and local govt payments (\$M)	Total direct spending (\$M)	Local suppliers (no.)
Hornsby (A)	19	2.3	19.0	10.9	13.2	53
Hunters Hill (A)	n.a.	n.a.	n.a.	n.a.	2.5	6
Inner West (A)	25	6.2	25.4	7.1	13.2	46
Inverell (A)	18	1.9	18.1	7.4	9.3	6
Junee (A)	n.a.	n.a.	n.a.	n.a.	1.0	n.a.
Kempsey (A)	8	1.0	8.5	4.5	5.5	n.a.
Kiama (A)	74	10.4	74.3	5.3	15.7	15
Ku-ring-gai (A)	20	6.5	19.7	7.8	14.3	32
Kyogle (A)	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Lachlan (A)	54	7.3	69.2	8.0	15.3	55
Lake Macquarie (C)	1,495	242.1	1,625.5	339.9	582.0	420
Lane Cove (A)	10	3.9	9.6	19.2	23.0	25
Leeton (A)	14	1.7	14.0	33.0	34.8	10
Lismore (C)	n.a.	n.a.	n.a.	n.a.	n.a.	7
Lithgow (C)	641	108.4	719.6	70.1	178.5	112
Liverpool (C)	14	1.6	13.7	41.8	43.4	37
Liverpool Plains (A)	81	10.3	81.4	10.7	21.0	19
Lockhart (A)	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Maitland (C)	2,001	311.7	2,014.5	1,233.1	1,544.7	486
Mid-Coast (A)	188	26.4	187.9	45.2	71.6	56
Mid-Western Regional (A)	1,661	254.9	2,207.4	184.0	438.9	344
Moree Plains (A)	7	0.9	8.9	n.a.	1.1	7
Mosman (A)	n.a.	n.a.	n.a.	n.a.	n.a.	9
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)	1,551	226.4	2,669.5	663.1	889.5	253
Nambucca (A)	8	1.2	8.2	n.a.	1.3	n.a.
Narrabri (A)	436	54.5	1,055.3	33.5	88.0	115

**Table B1: Direct Impacts of NSW Mining Companies Sector by LGA, 2022/23**

Local government area	Residing employees (FTEs)	Associated salaries (\$M)	Total workforce <sup>(a)</sup> FTEs	Business purchases, community and local govt payments (\$M)	Total direct spending (\$M)	Local suppliers (no.)
Narrandera (A)	8	0.8	7.7	n.a.	1.1	n.a.
Narromine (A)	61	6.9	61.2	2.2	9.1	22
Newcastle (C)	995	163.4	995.3	2,220.7	2,384.1	690
North Sydney (A)	11	2.7	11.5	156.3	159.0	129
Northern Beaches (A)	17	5.4	17.0	20.4	25.9	110
Oberon (A)	15	2.3	15.4	25.0	27.3	6
Orange (C)	793	117.6	1,203.6	408.9	526.5	286
Parkes (A)	411	51.1	1,541.9	61.6	112.7	126
Parramatta (C)	11	2.0	11.1	695.3	697.3	181
Penrith (C)	23	2.8	22.6	18.5	21.3	36
Port Macquarie-Hastings (A)	30	3.8	30.3	29.5	33.4	17
Port Stephens (A)	359	56.0	358.7	96.2	152.2	87
Queanbeyan-Palerang Regional (A)	42	3.9	42.3	28.4	32.2	58
Randwick (C)	17	2.7	17.2	152.5	155.2	17
Richmond Valley (A)	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Ryde (C)	13	3.4	13.2	107.8	111.2	107
Shellharbour (C)	345	42.1	345.1	96.2	138.3	25
Shoalhaven (C)	51	5.5	51.4	48.9	54.4	20
Singleton (A)	2,630	408.4	4,510.8	1,285.4	1,693.9	466
Snowy Monaro Regional (A)	n.a.	n.a.	n.a.	n.a.	1.1	n.a.
Snowy Valleys (A)	6	0.8	6.2	1.7	2.5	6
Strathfield (A)	n.a.	n.a.	n.a.	10.2	10.6	16
Sutherland Shire (A)	38	5.3	38.1	66.9	72.2	70
Sydney (C)	37	13.8	56.3	2,923.7	2,937.5	670
Tamworth Regional (A)	303	38.2	307.7	35.2	73.4	113
Temora (A)	13	1.9	13.5	1.1	3.0	5



**Table B1: Direct Impacts of NSW Mining Companies Sector by LGA, 2022/23**

Local government area	Residing employees (FTEs)	Associated salaries (\$M)	Total workforce <sup>(a)</sup> 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)	13	7.3	12.7	31.9	39.2	80
Tweed (A)	5	0.8	5.0	n.a.	1.2	7
Upper Hunter Shire (A)	775	117.0	790.9	32.2	149.2	78
Upper Lachlan Shire (A)	6	0.8	6.1	n.a.	1.2	5
Uralla (A)	n.a.	n.a.	n.a.	n.a.	1.5	n.a.
Wagga Wagga (C)	32	4.0	32.3	27.9	32.0	36
Walcha (A)	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Walgett (A)	12	1.5	15.2	n.a.	1.6	n.a.
Warren (A)	15	1.5	16.4	n.a.	1.8	n.a.
Warrumbungle Shire (A)	61	8.0	64.7	3.8	11.8	10
Waverley (A)	n.a.	n.a.	n.a.	1.8	4.6	11
Weddin (A)	9	1.4	9.4	n.a.	2.2	n.a.
Wentworth (A)	21	2.5	20.8	5.7	8.2	27
Willoughby (C)	11	2.5	10.6	60.3	62.8	85
Wingecarribee (A)	39	5.2	39.4	164.0	169.2	24
Wollondilly (A)	77	9.0	625.8	11.6	20.6	19
Wollongong (C)	937	126.8	1,551.2	459.4	586.3	335
Woollahra (A)	11	3.7	10.6	3.0	6.7	11
Yass Valley (A)	6	0.8	6.0	4.2	5.0	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 by LGA, 2022/23 (Type II)**

Local government area	Total GVA (\$M)	Total value added as % of GRP	Total jobs supported (FTEs)	% of regional employment
Albury (C)	6.2	0.1%	67	0.2%
Armidale Regional (A)	7.9	0.4%	69	0.5%
Ballina (A)	3.8	0.1%	31	0.1%
Balranald (A)	18.5	9.9%	39	2.9%
Bathurst Regional (A)	179.0	5.5%	1,406	5.9%
Bayside (A)	192.1	1.0%	617	0.6%
Bega Valley (A)	1.2	0.1%	11	0.1%
Bellingen (A)	18.7	2.6%	153	2.5%
Berrigan (A)	n.a.	n.a.	8	0.2%
Blacktown (C)	316.3	1.3%	1,020	0.5%
Bland (A)	161.9	38.1%	1,171	38.9%
Blayney (A)	78.8	12.7%	623	15.1%
Blue Mountains (C)	27.1	0.9%	158	0.4%
Bogan (A)	45.6	5.6%	432	32.3%
Bourke (A)	1.1	0.9%	13	1.2%
Brewarrina (A)	n.a.	n.a.	n.a.	n.a.
Broken Hill (C)	452.9	23.4%	3,700	43.9%
Burwood (A)	1.7	0.1%	6	0.0%
Byron (A)	25.2	0.9%	152	0.7%
Cabonne (A)	168.1	22.6%	1,215	15.8%
Camden (A)	216.0	3.8%	726	1.1%
Campbelltown (C)	131.8	1.5%	449	0.5%
Canada Bay (A)	9.9	0.2%	49	0.1%
Canterbury-Bankstown (A)	449.4	2.4%	1,418	0.8%
Carrathool (A)	1.0	0.3%	8	0.5%
Central Coast (C)	389.7	2.5%	1,511	1.0%
Central Darling (A)	1.1	0.7%	8	1.0%

**Table C1: Estimated Total Economic Impact of NSW Mining Companies by LGA, 2022/23 (Type II)**

Local government area	Total GVA (\$M)	Total value added as % of GRP	Total jobs supported (FTEs)	% of regional employment
Cessnock (C)	1,400.6	58.5%	9,093	31.5%
Clarence Valley (A)	7.7	0.3%	63	0.3%
Cobar (A)	277.6	14.7%	1,901	81.7%
Coffs Harbour (C)	8.2	0.2%	77	0.2%
Coolamon (A)	1.2	0.4%	11	0.4%
Coonamble (A)	1.0	0.4%	10	0.5%
Cootamundra-Gundagai (A)	1.5	0.2%	14	0.3%
Cowra (A)	7.6	1.0%	72	1.2%
Cumberland (A)	173.9	1.0%	563	0.5%
Dubbo Regional (A)	256.4	6.9%	2,142	7.1%
Dungog (A)	60.6	15.4%	449	9.6%
Edward River (A)	1.2	0.2%	7	0.2%
Eurobodalla (A)	2.6	0.1%	27	0.2%
Fairfield (C)	986.5	8.9%	3,142	3.6%
Federation (A)	n.a.	n.a.	8	0.1%
Forbes (A)	39.8	5.7%	344	7.1%
Georges River (A)	5.5	0.1%	26	0.0%
Gilgandra (A)	3.5	1.3%	34	1.5%
Glen Innes Severn (A)	1.4	0.2%	11	0.3%
Goulburn Mulwaree (A)	6.1	0.3%	58	0.4%
Greater Hume Shire (A)	1.8	0.2%	15	0.2%
Griffith (C)	3.9	0.2%	21	0.1%
Gunnedah (A)	492.6	44.5%	4,196	66.8%
Gwydir (A)	9.5	2.0%	78	3.3%
Hawkesbury (C)	17.2	0.4%	70	0.2%
Hay (A)	n.a.	n.a.	n.a.	n.a.
Hilltops (A)	7.4	0.6%	60	0.7%
Hornsby (A)	27.8	0.4%	109	0.1%

**Table C1: Estimated Total Economic Impact of NSW Mining Companies by LGA, 2022/23 (Type II)**

Local government area	Total GVA (\$M)	Total value added as % of GRP	Total jobs supported (FTEs)	% of regional employment
Hunters Hill (A)	5.3	0.6%	21	0.3%
Inner West (A)	29.4	0.3%	126	0.1%
Inverell (A)	23.8	2.1%	199	2.6%
Junee (A)	1.6	0.4%	11	0.4%
Kempsey (A)	14.2	1.1%	117	1.1%
Kiama (A)	36.9	3.4%	320	2.6%
Ku-ring-gai (A)	31.6	0.6%	128	0.2%
Kyogle (A)	n.a.	n.a.	n.a.	n.a.
Lachlan (A)	31.1	7.1%	251	8.0%
Lake Macquarie (C)	1,217.0	10.8%	7,788	6.8%
Lane Cove (A)	47.1	1.7%	162	0.8%
Leeton (A)	50.9	5.4%	193	3.4%
Lismore (C)	2.3	0.1%	20	0.1%
Lithgow (C)	375.9	27.2%	3,100	31.3%
Liverpool (C)	89.3	0.7%	295	0.3%
Liverpool Plains (A)	44.9	5.4%	380	10.9%
Lockhart (A)	n.a.	n.a.	n.a.	n.a.
Maitland (C)	3,159.5	64.6%	17,402	37.4%
Mid-Coast (A)	145.9	3.6%	926	2.7%
Mid-Western Regional (A)	918.8	51.7%	7,633	58.4%
Moree Plains (A)	2.1	0.2%	20	0.3%
Mosman (A)	1.6	0.1%	5	0.0%
Murray River (A)	1.4	0.2%	8	0.1%
Murrumbidgee (A)	n.a.	n.a.	n.a.	n.a.
Muswellbrook (A)	1,803.8	33.6%	7,204	90.4%
Nambucca (A)	2.2	0.3%	20	0.3%
Narrabri (A)	175.3	3.3%	1,518	22.9%
Narrandera (A)	1.7	0.4%	15	0.5%

**Table C1: Estimated Total Economic Impact of NSW Mining Companies by LGA, 2022/23 (Type II)**

Local government area	Total GVA (\$M)	Total value added as % of GRP	Total jobs supported (FTEs)	% of regional employment
Narromine (A)	16.3	1.2%	151	4.6%
Newcastle (C)	5,002.3	25.2%	24,756	24.7%
North Sydney (A)	325.7	1.8%	1,033	2.3%
Northern Beaches (A)	54.8	0.4%	196	0.1%
Oberon (A)	38.5	9.0%	145	5.0%
Orange (C)	1,164.5	32.6%	8,718	37.1%
Parkes (A)	251.2	26.1%	2,136	29.2%
Parramatta (C)	1,430.4	4.8%	4,473	3.1%
Penrith (C)	44.7	0.4%	166	0.1%
Port Macquarie-Hastings (A)	86.3	2.0%	692	2.0%
Port Stephens (A)	311.6	5.8%	1,927	5.6%
Queanbeyan-Palerang Regional (A)	84.7	2.4%	700	1.9%
Randwick (C)	319.9	4.3%	1,016	1.4%
Richmond Valley (A)	n.a.	n.a.	6	0.1%
Ryde (C)	227.4	0.9%	732	1.0%
Shellharbour (C)	340.5	11.0%	2,622	6.4%
Shoalhaven (C)	128.3	2.4%	863	1.8%
Singleton (A)	3,449.1	30.5%	12,552	93.4%
Snowy Monaro Regional (A)	2.8	0.2%	24	0.2%
Snowy Valleys (A)	4.0	0.3%	23	0.3%
Strathfield (A)	21.8	0.4%	71	0.3%
Sutherland Shire (A)	149.1	1.4%	508	0.4%
Sydney (C)	6,038.5	4.2%	18,848	13.0%
Tamworth Regional (A)	167.9	3.9%	1,482	4.7%
Temora (A)	4.6	1.1%	32	1.1%
Tenterfield (A)	n.a.	n.a.	5	0.2%
The Hills Shire (A)	82.0	0.7%	282	0.3%
Tweed (A)	3.0	0.1%	27	0.1%

**Table C1: Estimated Total Economic Impact of NSW Mining Companies by LGA, 2022/23 (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)	285.5	29.9%	2,224	29.6%
Upper Lachlan Shire (A)	2.0	0.4%	16	0.4%
Uralla (A)	3.3	0.8%	28	0.9%
Wagga Wagga (C)	46.8	1.0%	198	0.5%
Walcha (A)	1.9	0.6%	15	0.9%
Walgett (A)	2.7	0.7%	25	1.1%
Warren (A)	3.1	1.4%	30	2.2%
Warrumbungle Shire (A)	22.9	5.4%	199	4.5%
Waverley (A)	10.1	0.3%	39	0.1%
Weddin (A)	3.2	1.6%	22	1.3%
Wentworth (A)	15.1	2.5%	107	2.8%
Willoughby (C)	128.4	1.1%	417	1.0%
Wingecarribee (A)	371.5	12.0%	2,222	8.4%
Wollondilly (A)	43.7	0.7%	221	0.7%
Wollongong (C)	1,403.2	10.2%	10,039	8.8%
Woollahra (A)	14.6	0.4%	60	0.2%
Yass Valley (A)	12.7	1.4%	102	1.1%

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 Sector by SED, 2022/23**

State electoral division	Residing employees (FTEs)	Associated salaries (\$M)	Total workforce <sup>(a)</sup> FTEs	Business purchases, community and local govt payments (\$M)	Total direct spending (\$M)	Local suppliers (no.)
Albury	18	2.3	18	1.0	3.3	11
Auburn	n.a.	n.a.	n.a.	62.3	62.9	82
Ballina	6	1.0	6	11.8	12.8	11
Balmain	15	4.2	15	7.1	11.3	35
Bankstown	n.a.	n.a.	n.a.	50.2	50.5	24
Barwon	1,943	235.8	3,125	249.8	485.6	510
Bathurst	1,254	201.5	1,355	160.1	361.6	306
Baulkham Hills	5	1.3	5	17.5	18.9	46
Bega	13	1.3	13	n.a.	1.8	11
Blacktown	n.a.	n.a.	n.a.	82.1	82.1	55
Blue Mountains	62	8.9	62	2.6	11.5	16
Cabramatta	n.a.	n.a.	n.a.	4.1	4.3	n.a.
Camden	48	5.6	48	99.3	104.9	31
Campbelltown	26	3.1	26	2.3	5.4	13
Canterbury	n.a.	n.a.	n.a.	3.8	4.4	8
Castle Hill	6	4.8	6	16.2	21.0	32
Cessnock	2,324	347.6	2,436	523.5	871.1	263
Charlestown	448	74.0	448	158.7	232.7	169
Clarence	14	1.7	14	2.1	3.8	6
Coffs Harbour	20	1.9	20	1.7	3.6	14
Coogee	11	1.8	11	1.9	3.7	16
Cootamundra	343	48.9	1,051	55.1	104.0	145
Cronulla	15	2.2	15	14.7	16.9	34
Davidson	9	4.4	9	6.6	11.0	30

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Drummoyne	15	2.7	15	1.7	4.4	19
Dubbo	1,813	267.0	2,338	242.4	509.4	546
East Hills	6	0.7	6	18.1	18.8	35
Epping	7	1.0	7	8.4	9.4	20
Fairfield	n.a.	n.a.	n.a.	449.3	449.3	47
Gosford	22	2.5	22	52.8	55.3	31
Goulburn	53	6.5	53	161.2	167.7	30
Granville	n.a.	n.a.	n.a.	66.3	67.3	19
Hawkesbury	14	2.6	14	7.6	10.2	28
Heathcote	56	7.4	241	52.8	60.2	39
Heffron	22	3.4	22	24.0	27.4	71
Holsworthy	n.a.	n.a.	n.a.	26.9	27.6	22
Hornsby	13	1.6	13	3.5	5.1	34
Keira	462	63.2	462	96.4	159.6	83
Kiama	204	26.6	204	117.6	144.2	34
Kogarah	5	0.6	5	n.a.	1.4	12
Ku-ring-gai	17	5.1	17	4.0	9.1	24
Lake Macquarie	610	100.1	741	99.4	199.4	158
Lakemba	n.a.	n.a.	n.a.	153.5	154.0	20
Lane Cove	18	8.0	18	64.3	72.3	71
Lismore	9	1.0	9	n.a.	1.4	8
Liverpool	n.a.	n.a.	n.a.	12.2	12.5	11
Londonderry	7	0.8	7	13.0	13.8	19
Macquarie Fields	7	0.7	7	60.9	61.7	52
Maitland	2,001	311.7	2,014	1,233.1	1,544.7	486
Manly	9	2.1	9	3.4	5.5	21
Maroubra	5	1.3	5	224.3	225.7	29
Miranda	8	1.4	8	7.2	8.7	17
Monaro	45	4.0	45	29.2	33.3	62



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Mount Druitt	8	1.0	8	20.9	21.9	30
Mulgoa	8	0.8	8	13.6	14.4	15
Murray	54	6.9	58	57.1	64.0	81
Myall Lakes	73	10.0	73	23.3	33.4	20
Newcastle	472	83.4	472	1,872.7	1,956.1	531
Newtown	9	1.9	9	10.2	12.0	30
North Shore	9	1.9	9	150.8	152.7	128
Northern Tablelands	58	6.6	60	13.5	20.1	35
Oatley	n.a.	n.a.	n.a.	n.a.	1.4	8
Orange	1,482	206.3	3,084	537.4	743.7	508
Oxley	29	3.8	29	23.8	27.5	9
Parramatta	n.a.	n.a.	n.a.	595.0	595.1	90
Penrith	12	1.7	12	2.3	4.0	18
Pittwater	n.a.	n.a.	n.a.	10.1	10.3	35
Port Macquarie	29	3.8	29	17.0	20.8	17
Port Stephens	350	53.6	350	113.1	166.7	94
Prospect	n.a.	n.a.	n.a.	86.0	86.9	82
Riverstone	n.a.	n.a.	n.a.	7.8	8.1	5
Rockdale	8	0.9	8	n.a.	1.4	5
Ryde	9	2.2	9	78.5	80.7	77
Seven Hills	n.a.	n.a.	n.a.	35.9	36.9	67
Shellharbour	365	44.4	389	27.7	72.1	36
South Coast	31	3.1	31	19.8	22.9	9
Strathfield	5	0.7	5	1.9	2.7	26
Summer Hill	9	1.7	9	2.1	3.8	17
Swansea	299	49.8	300	8.3	58.1	45
Sydney	17	10.5	36	2,907.2	2,917.7	595
Tamworth	1,118	146.8	1,298	150.0	296.8	280
Terrigal	30	4.2	30	18.1	22.3	20

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The Entrance	36	5.8	37	65.7	71.5	35
Tweed	5	0.8	5	n.a.	1.2	7
Upper Hunter	5,227	788.8	8,164	1,939.1	2,727.9	848
Vaucluse	11	5.0	11	2.2	7.2	10
Wagga Wagga	36	4.6	36	29.8	34.3	43
Wakehurst	n.a.	n.a.	n.a.	4.9	5.5	38
Wallsend	525	78.6	525	363.4	442.0	158
Willoughby	12	2.8	12	50.9	53.7	85
Wollondilly	98	11.9	646	19.9	31.8	32
Wollongong	303	41.9	709	340.2	382.2	214
Wyong	100	15.6	101	13.0	28.6	29

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 Sector by CED, 2022/23**

Commonwealth electoral division	Residing employees (FTEs)	Associated salaries (\$M)	Total workforce <sup>(a)</sup> FTEs	Business purchases, community and local govt payments (\$M)	Total direct spending (\$M)	Local suppliers (no.)
Banks	9	1.2	9	13.9	15.0	34
Barton	12	1.7	12	3.2	4.9	24
Bennelong	20	4.3	20	110.6	114.9	122
Berowra	18	7.1	18	11.3	18.3	57
Blaxland	7	0.6	7	72.7	73.3	56
Bradfield	26	7.2	26	12.8	20.0	58
Calare	3,791	583.8	4,892	809.2	1,393.0	970
Chifley	12	1.2	12	76.0	77.2	62
Cook	21	3.0	21	17.3	20.2	41
Cowper	51	5.9	51	25.9	31.7	30
Cunningham	772	106.9	1,355	438.7	545.6	308
Dobell	139	21.7	140	75.1	96.8	63
Eden-Monaro	61	6.2	61	35.6	41.8	77
Farrer	78	9.7	82	58.3	68.0	94
Fowler	6	0.6	6	90.8	91.3	22
Gilmore	135	16.6	135	54.2	70.9	40
Grayndler	22	5.5	22	4.7	10.2	39
Greenway	6	0.8	6	84.8	85.7	92
Hughes	22	2.9	22	55.6	58.5	35
Hume	145	17.0	693	85.1	102.1	59
Hunter	6,407	975.1	9,538	2,200.4	3,175.5	1,019
Kingsford Smith	20	3.2	20	243.3	246.6	64
Lindsay	19	2.6	19	6.7	9.3	32
Lyne	766	115.0	766	211.2	326.1	156
Macarthur	50	5.8	50	98.8	104.6	65
Mackellar	6	3.0	6	15.1	18.1	73
Macquarie	77	10.5	77	10.0	20.4	40

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Commonwealth electoral division	Residing employees (FTEs)	Associated salaries (\$M)	Total workforce <sup>(a)</sup> FTEs	Business purchases, community and local govt payments (\$M)	Total direct spending (\$M)	Local suppliers (no.)
McMahon	8	1.1	8	462.6	463.7	128
Mitchell	9	2.2	9	36.5	38.7	83
Newcastle	1,209	171.3	1,231	91.7	263.0	240
New England	952	157.3	952	2,013.5	2,170.8	648
North Sydney	32	10.6	32	231.8	242.4	221
Page	27	2.9	27	2.8	5.7	17
Parkes	3,069	381.4	4,446	437.6	819.0	919
Parramatta	5	1.2	5	667.7	668.9	105
Paterson	2,496	384.4	2,509	1,668.2	2,052.5	606
Reid	22	3.8	22	45.7	49.5	98
Richmond	11	1.8	11	12.1	13.9	17
Riverina	896	118.6	2,745	150.8	269.4	351
Robertson	49	6.4	49	74.4	80.9	51
Shortland	802	130.2	802	204.5	334.7	236
Sydney	37	13.5	56	2,923.9	2,937.3	666
Warringah	13	3.1	13	6.6	9.7	51
Watson	7	1.1	7	159.1	160.1	31
Wentworth	18	7.1	18	5.9	13.0	28
Werriwa	10	1.0	10	21.2	22.2	28
Whitlam	537	65.8	569	266.9	332.7	70

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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