NSW Mining Industry Expenditure Impact Survey 2023/24

December 2024

Prepared for NSW Minerals Council

Executive Summary

Overview

The New South Wales Minerals Council (NSWMC) analysed the expenditure patterns of 31 NSW exploration and mining companies to determine the economic contribution of the industry throughout NSW in 2023/24. 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 $22.0 billion in the NSW economy** in 2023/24, comprised of:

- **Total workforce of 34,977 full-time equivalent workers** (including direct resident employees and contract workers), which represented a significant annual increase of 3,391 workers, or 10.7%;
- **$3.9 billion in wages and salaries** to approximately **24,366 direct fulltime resident employees** (not including contractors), representing an **average salary** level across the sector of **$161,866** per annum;
- **$14.4 billion in purchases of goods and services from 7,139 local businesses** (including contract payments), community contributions and payments to local government (including rates, developer contributions and other payments); and
- **$3.7 billion** in state government payments (including royalties, stamp duty, payroll tax and land tax).

NSW mining companies contributed ***$22.0 billion*** *in direct spending to the State economy in 2023/24.*

The Hunter region recorded the highest direct expenditure in 2023/24, with $8.8 billion (or 40.0% of the total direct spend across NSW), followed by Sydney ($5.5 billion, or 25.0%) and Central West ($1.2 billion, or 5.3%).

Table E1: Direct Impact of NSW Resource Sector by Region, 2023/24

Region	Residing employees (FTEs)	Associated salaries ($M)	Total workforce[(b)]	Business purchases, community and govt payments ($M)	No. of local suppliers	Total direct spending ($M)	% of total direct spend, NSW
Central West	3,149	502.1	6,331	659.1	1,009	1,161.3	5.3%
Far West	488	61.7	1,002	92.2	112	153.9	0.7%
Hunter	13,189	2,182.5	16,564	6,629.8	2,793	8,812.3	40.0%
Illawarra	1,632	242.0	2,092	859.1	453	1,101.1	5.0%
Mid-North Coast	101	13.2	101	57.2	48	70.4	0.3%
Murray	46	5.9	47	20.0	68	25.9	0.1%
Murrumbidgee	89	12.7	89	64.7	75	77.4	0.4%
North Western	2,906	434.4	3,190	386.8	731	821.2	3.7%
Northern	1,571	271.8	3,500	278.7	502	550.5	2.5%
Richmond-Tweed	21	3.4	21	7.5	29	10.9	0.0%
South Eastern	95	12.5	95	52.1	47	64.6	0.3%
Sydney	1,068	200.2	1,919	5,304.1	2,659	5,504.3	25.0%
Unallocated[(a)]	14	1.7	28	2.6		3,661.7	16.6%
Total NSW	**24,366**	**3,944.0**	**34,977**	**14,417.7**	**7,139**	**22,019.1**	**100.0%**
Rest of Australia	786	122.9	787	8,684.2	3,094	13,890.8	
Total Australia	**25,152**	**4,067.0**	**35,764**	**23,102.0**	**10,233**	**35,909.9**	
Overseas	0	0.0	0	144.6	205	144.6	
Other	41	3.4	341	399.2	976	402.6	
Total	**25,193**	**4,070.4**	**36,105**	**23,645.8**	**11,414**	**36,457.2**	

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 2023/24 decreased by $1.6 billion compared to the previous year – due primarily to a decrease of $2.2 billion in state government payments – although, in contrast, the total workforce increased annually by 3,391 FTEs, or 10.7%.

Compared to 2022/23, the total workforce of NSW mining companies **increased substantially by 3,391 FTEs***, or 10.7%.*

Since 2011/12, NSW mining companies surveyed by NSWMC have generated $184.7 billion in direct spending, with average annual expenditure of $14.2 billion.

Since 2011/12, NSW mining companies have contributed **$184.7 billion in direct spending** *to the State economy.*

Direct Expenditure of NSW Mining Companies
New South Wales ($ billion, real)

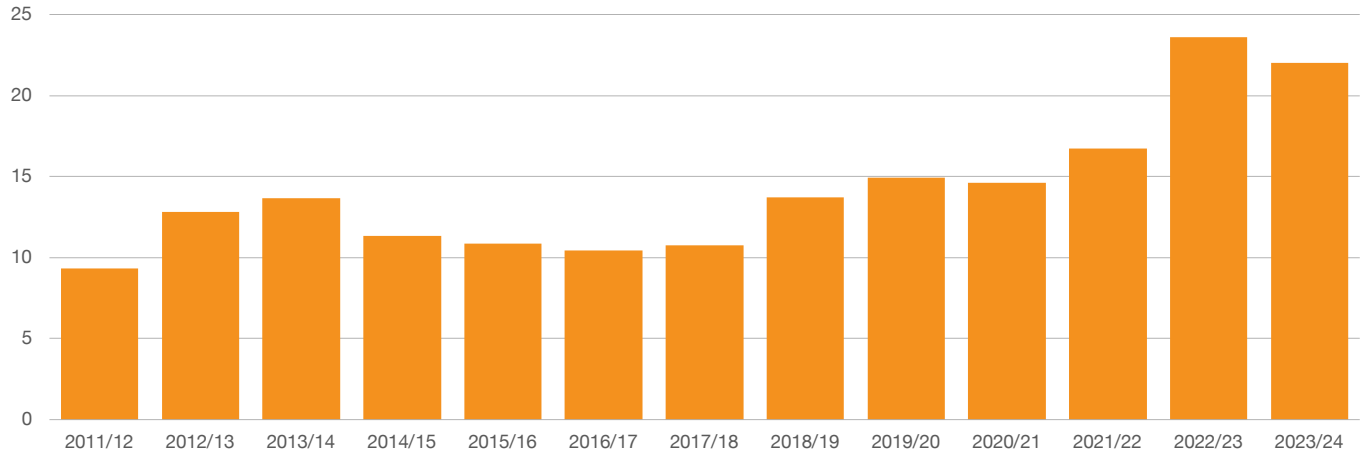


Table E2: Annual Change in Survey Results				
	2023/24	2022/23	2021/22	Annual % change
No. of companies surveyed	31	28	27	10.7%
DIRECT EMPLOYEES				
No. of direct employees (FTEs)	24,366	22,905	19,996	6.4%
No. of apprenticeships and traineeships (FTEs)	363	397	382	-8.4%
Total wages/salaries paid ($M)	3,944.0	3,384.3	2,890.4	16.5%
BUSINESS PURCHASES				
No. of suppliers	7,139	6,980	6,833	2.3%
Total opex spend ($M)	12,616.0	12,389.9	8,976.6	1.8%
Total capex spend ($M)	1,687.5	1,911.0	1,399.1	-11.7%
Total business purchases ($M)	14,303.4	14,300.9	10,375.7	0.0%
COMMUNITY CONTRIBUTIONS				
No. of community organisations supported	1,450	1,319	1,103	9.9%
Total community contributions ($M)	19.4	17.0	12.7	13.9%
LOCAL COUNCIL PAYMENTS				
Total local government payments ($M)	94.9	90.3	84.4	5.1%
STATE GOVERNMENT PAYMENTS				
Total state government payments ($M)	3,657.4	5,809.2	3,370.2	-37.0%
TOTAL SPEND ($M)	**22,019.1**	**23,601.7**	**16,733.5**	**-6.7%**
TOTAL WORKFORCE (FTEs)	**34,977**	**31,586**	**30,981**	**10.7%**

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 2023/24, based on Type II multipliers (i.e. including both indirect industry and consumption-induced effects), amounted to:

- **$53.1 billion in output/turnover** (a measure of direct and supply chain purchases from businesses);
- **$47.5 billion in gross value added (GVA)**, amounting to 6.1% of Gross State Product (GSP) for NSW (which was $777.3 billion in 2022/23) through $22.0 billion in direct effects and $25.4 billion in supply chain and consumption effects;
- **$18.0 billion in income** (wages and salaries) paid to workers; and
- **237,555 full time equivalent jobs** supported, or 5.4% of total employment in NSW during 2023/24.

The total economic impact of the NSW mining companies surveyed to the State economy was estimated at **$47.5 billion** *in gross value added and* **237,555 jobs** *supported in 2023/24.*

In terms of total economic benefit, the 31 companies surveyed had the **highest overall impact in the Hunter region**, with total value added of $18.4 billion, followed by Sydney ($11.4 billion), Illawarra ($2.6 billion) and Central West ($2.6 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 (25.1%), followed by Central West (16.9%), Far West (15.7%) and North Western (15.0%).

With regard to employment, the NSW mining companies surveyed again had the greatest impact on jobs in the Hunter region, supporting 104,775 jobs (FTEs), followed by the Sydney (36,870 FTEs) and Central West (20,961 FTEs) regions.

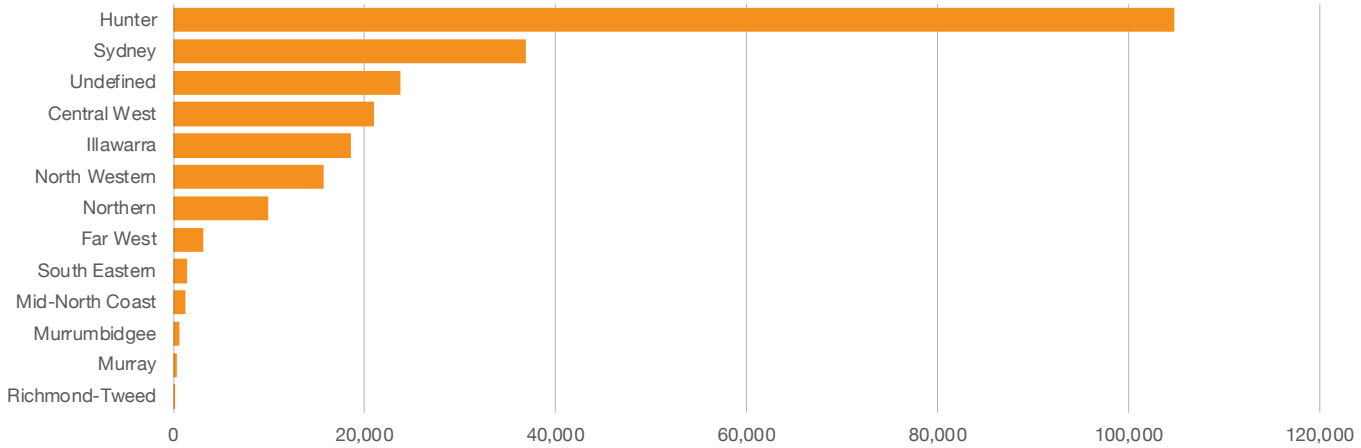
Table E3: Economic Impact of NSW Mining Companies, 2023/24			
	New South Wales	Rest of Australia	Total Australia
Gross Value Added ($M)			
Direct	22,019	13,891	35,910
% of Gross State Product (GSP)	2.8%	0.8%	1.4%
Indirect	16,258	5,788	22,046
Total GVA (Type I)	38,273	19,679	57,952
% of GSP	4.9%	1.1%	2.3%
Consumption-induced	9,183	3,460	12,643
Total GVA (Type II)	**47,457**	**23,139**	**70,595**
% of GSP	6.1%	1.3%	2.8%
Employment (FTEs)			
Direct	24,366	786	25,152
% of total state employment	0.6%	0.0%	0.2%
Indirect	130,845	34,738	165,583
Total employment (Type I)	155,212	35,524	190,736
% of total state employment	3.5%	0.4%	1.4%
Consumption-induced	82,343	21,940	104,283
Total employment (Type II)	**237,555**	**57,464**	**295,020**
% of total state employment	5.4%	0.6%	2.1%
Business spend (incl. community contributions and govt payments) ($M)			
Direct	18,075	8,684	26,759
Indirect	13,184	6,177	19,361
Total business spend (Type I)	31,259	14,861	46,120
Consumption-induced	17,894	6,504	24,398
Total business spend (Type II)	49,153	21,365	70,518
Wages & salaries ($M)			
Direct	3,944	123	4,067
Indirect	8,796	3,009	11,804
Total wages & salaries (Type I)	12,740	3,132	15,871
Consumption-induced	5,223	1,592	6,815
Total wages & salaries (Type II)	17,962	4,724	22,686

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, 2023/24				
Region	Total GVA ($M)	Total value added as % of GRP	Total jobs supported (FTEs)	% of regional employment
Central West	2,593.7	16.9%	20,961	20.4%
Far West	363.6	15.7%	3,139	37.5%
Hunter	18,413.0	25.1%	104,775	25.7%
Illawarra	2,621.0	8.9%	18,565	8.0%
Mid-North Coast	166.1	1.0%	1,293	1.1%
Murray	50.3	0.5%	355	0.5%
Murrumbidgee	122.3	0.8%	594	0.7%
North Western	1,853.1	15.0%	15,755	26.9%
Northern	1,222.3	5.9%	9,927	9.9%
Richmond-Tweed	26.8	0.1%	201	0.2%
South Eastern	167.8	1.1%	1,387	1.1%
Sydney	11,363.3	2.1%	36,870	1.3%
Undefined	8,493.5		23,733	
Total New South Wales	**47,456.8**	**6.1%**	**237,555**	**5.4%**
Rest of Australia	23,138.7	1.3%	57,464	0.6%
Total Australia	70,595.5	2.8%	295,020	2.1%

Total Employment Supported by NSW Mining Companies by Region

New South Wales (FTEs), 2023/24



Local Suppliers

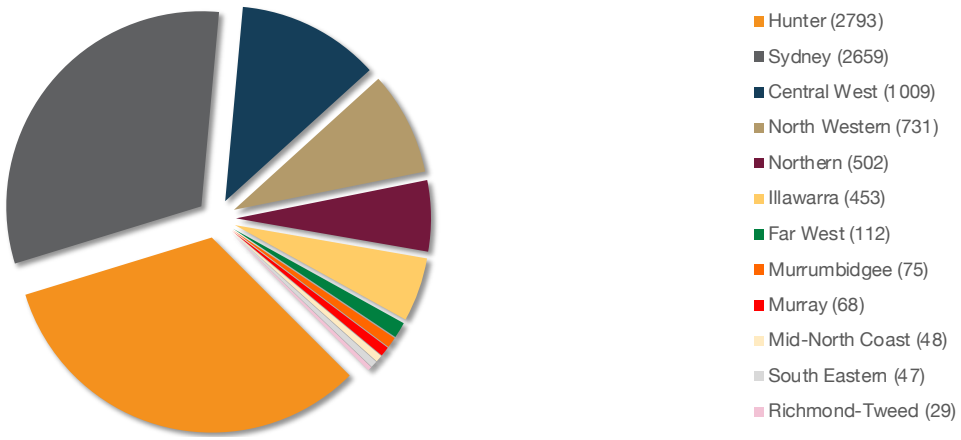
Approximately 7,139 unique businesses in New South Wales received payments for goods and services supplied during 2023/24 from the mining sector. The highest number of businesses was recorded in the Hunter region (2,793), followed by Sydney (2,659), Central West (1,009), North Western (731) and Northern (502).

Table E5: Number of Businesses Supported by Region, 2023/24

Region	Number of local suppliers
Central West	1,009
Far West	112
Hunter	2,793
Illawarra	453
Mid-North Coast	48
Murray	68
Murrumbidgee	75
North Western	731
Northern	502
Richmond-Tweed	29
South Eastern	47
Sydney	2,659
Total New South Wales	**7,139**

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, 2023/24



Community Support

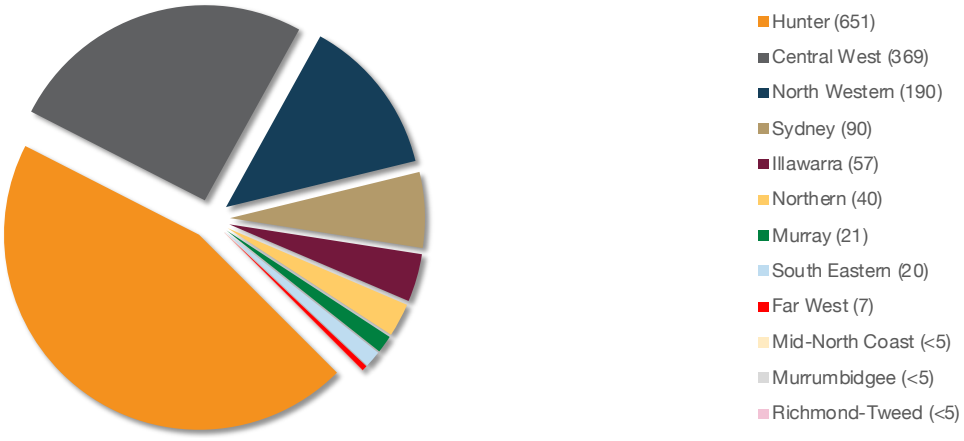
During 2023/24, NSW mining companies directly contributed over $19.4 million to 1,450 separate community groups across New South Wales in a wide range of areas including health, education, environment and the arts. The Hunter region recorded the highest number of community organisations supported (651), followed by Central West (369).

Table E6: Number of Community Organisations Supported by Region, 2023/24

Region	No. of community groups	% of total	Total contribution ($)
Central West	369	25.4%	5,240,979
Far West	7	0.5%	8,167
Hunter	651	44.9%	7,543,084
Illawarra	57	4.0%	1,153,646
Mid-North Coast	<5	0.1%	35,000
Murray	21	1.4%	71,391
Murrumbidgee	<5	0.1%	720
North Western	190	13.1%	1,355,886
Northern	40	2.8%	2,665,801
Richmond-Tweed	<5	n.p.	n.p.
South Eastern	20	1.4%	53,559
Sydney	90	6.2%	1,252,039
Total New South Wales	**1,450**	**100.0%**	**19,402,627**

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, 2023/24



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 2023/24, NSW mining companies reported direct contributions to local councils totalling $94.9 million, which represented a significant annual increase of $10.5 million, or 12.4% from the level for 2022/23. Rates ($70.2 million) comprised the largest proportion of local council payments, followed by Other contributions ($14.6 million) and Voluntary Planning Agreements (VPA)/developer contributions ($10.1 million).

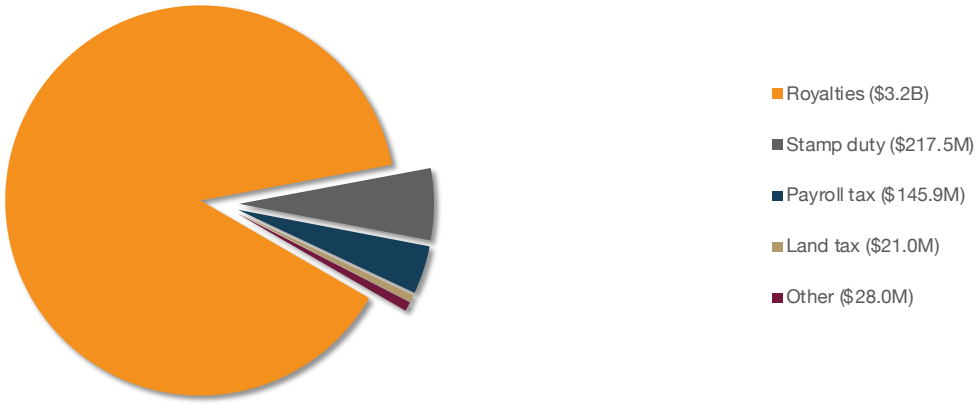
Table E7: Local Council Contributions by Region, 2023/24

Region	Rates ($)	VPA/Developer ($)	Other ($)	Total contributions ($)
Central West	14,543,760	556,293	6,506,153	21,606,206
Far West	3,480,395	0	0	3,480,395
Hunter	29,704,189	6,274,372	2,213,699	38,216,202
Illawarra	2,078,827	1,192	26	2,080,045
Mid-North Coast	15,681	0	0	15,681
Murray	2,416,082	0	0	2,416,082
Murrumbidgee	0	0	0	0
North Western	13,306,764	1,568,233	1,546,780	16,421,776
Northern	2,109,053	1,667,831	4,235,224	8,012,107
Richmond-Tweed	0	0	0	0
South Eastern	0	0	110,420	110,420
Sydney	2,434,700	25,608	550	2,460,859
Total New South Wales	**70,185,424**	**10,092,957**	**14,611,770**	**94,914,093**
Annual % change	7.1%	28.8%	32.1%	12.4%

State Government Payments

During 2023/24, the direct contribution made by NSW mining companies in state government payments was approximately $3.7 billion. Total state government payments were comprised of royalties ($3.2 billion), stamp duty ($217.5 million), payroll tax ($145.9 million), other ($28.0 million) and land tax ($21.0 million).

State Government Contributions by NSW Mining Companies by Category
New South Wales, 2023/24



Contents

Introduction

The NSW Minerals Council (NSWMC) commissioned Lawrence Consulting to determine the total direct, indirect and consumption-induced economic benefit to the state economy based on expenditure data provided by 31 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 2023/24 and the multiplier and consumption-induced effects that are generated by that initial stimulus. The analysis is an update of previous studies completed since 2011/12, available to download at www.nswmining.com.au.

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

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

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

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

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

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

Company Survey

The process was initiated in July 2024 when NSWMC distributed an expenditure survey form to New South Wales exploration and mining companies, which were asked to disclose total operational spending in 2023/24 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.

Thirty one (31) 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 2023/24 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
Australian Strategic Materials Ltd (ASM)	Newmont Cadia
Aurelia Metals	Peabody Energy Australia
Bengalla Mining Company Pty Ltd	Perilya Limited
BHP Billiton NSW Energy Coal	Regis Resources Limited
Bloomfield Collieries Pty Ltd	RZ Resources
Bowdens Silver	SIMEC Tahmoor
Centennial Coal Company Limited	South 32 Illawarra Coal
CSA Copper	Sunrise Energy
Dartbrook Operations Pty Ltd	Thiess Pty Limited
Evolution Mining	Tronox Holdings
Glencore Coal (NSW) Pty Ltd	Whitehaven Coal Limited
Idemitsu Australia Resources Pty Ltd	Wyong Areas Coal Joint Venture
Iluka Resources	Yancoal Australia

Economic Benefits

Direct Impact

Direct Spending

Expenditure data provided by the 31 NSW mining companies surveyed indicated that these companies **contributed an estimated $22.0 billion in the NSW economy** in 2023/24, comprised of:

- **Total workforce of 34,977 full-time equivalent workers** (including direct resident employees and contract workers), which represented a significant annual increase of 3,391 workers, or 10.7%;
- **$3.9 billion in wages and salaries** to approximately **24,366 direct fulltime resident employees** (not including contractors), representing an **average salary** level across the sector of **$161,866** per annum;
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NSW mining companies contributed ***$22.0 billion*** *in direct spending to the State economy in 2023/24.*

The direct economic stimulus provided by NSW mining companies in 2023/24 also extended to other states, with an additional $13.9 billion in direct spending, which combined with the impact in New South Wales for a **total direct impact of $35.9 billion for the whole of Australia**, comprised of:

- $4.1 billion in wages and salaries to approximately 25,152 full-time residing employees; and
- $31.8 billion in purchases of goods and services from local businesses, government and community contributions.

When overseas and other unallocated spending of $547.2 million was also included, the total direct expenditure relating to the NSW mining sector was approximately $36.5 billion in 2023/24.

Based on whole-of-survey totals, the direct expenditure in NSW by mining companies in 2023/24 decreased by $1.6 billion compared to the previous year – due primarily to a decrease of $2.2 billion in state government payments – although, in contrast, the total workforce increased annually by 3,391 FTEs, or 10.7%.

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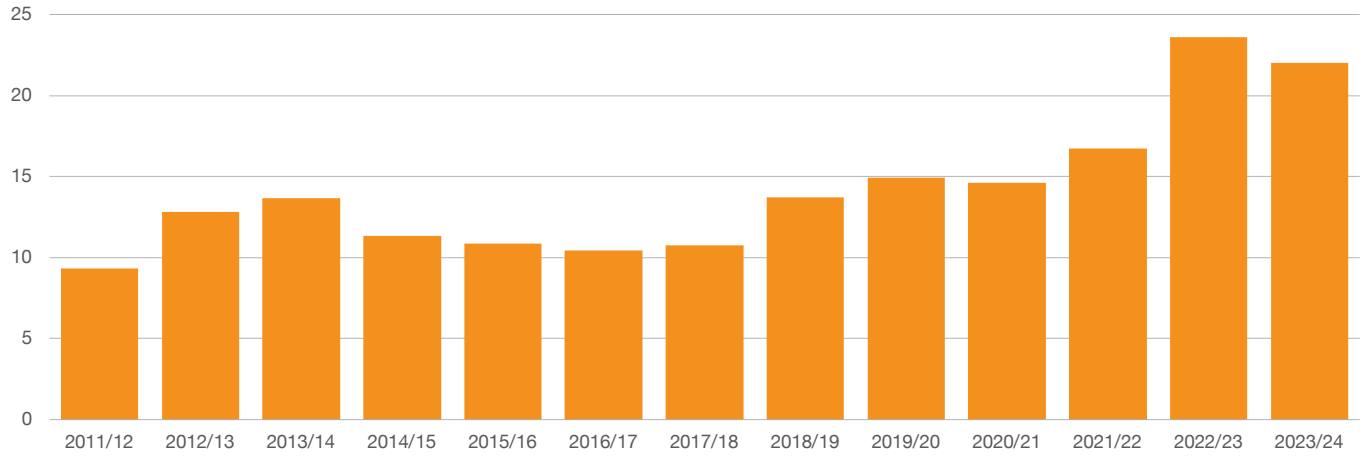

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STATE GOVERNMENT PAYMENTS				
Total state government payments ($M)	3,657.4	5,809.2	3,370.2	-37.0%
TOTAL SPEND ($M)	**22,019.1**	**23,601.7**	**16,733.5**	**-6.7%**
TOTAL WORKFORCE (FTEs)	**34,977**	**31,586**	**30,981**	**10.7%**

Local Suppliers

Approximately 7,139 unique businesses in New South Wales received payments for goods and services supplied during 2023/24 from the mining sector. The highest number of businesses was recorded in the Hunter region (2,793), followed by Sydney (2,659), Central West (1,009), North Western (731) and Northern (502).

Table 3: Number of Businesses Supported by Region, 2023/24

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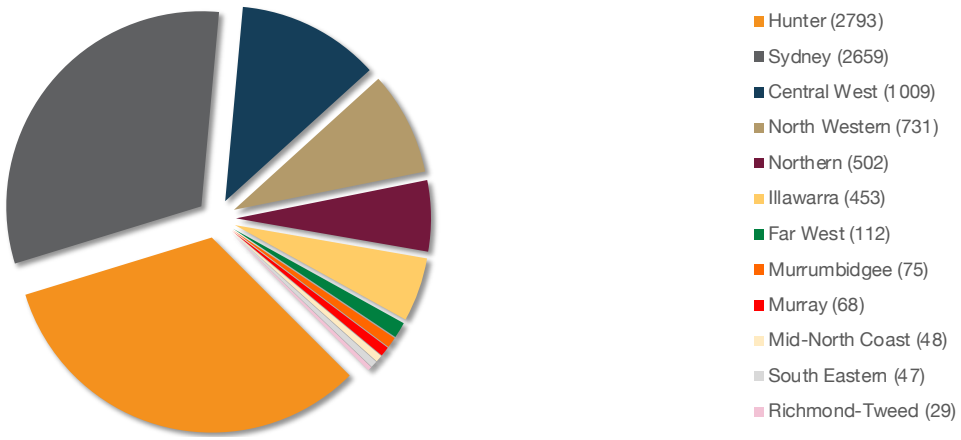
Local Businesses Supported by NSW Mining Companies by Region
New South Wales, 2023/24



Community Support

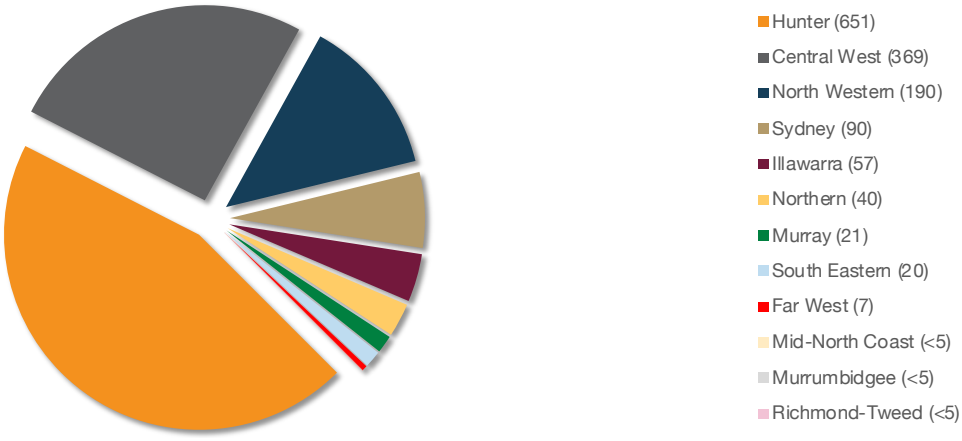
During 2023/24, NSW mining companies directly contributed over $19.4 million to 1,450 separate community groups across New South Wales in a wide range of areas including health, education, environment and the arts. The Hunter region recorded the highest number of community organisations supported (651), followed by Central West (369).

Table 4: Number of Community Organisations Supported by Region, 2023/24

Region	No. of community groups	% of total	Total contribution ($)
Central West	369	25.4%	5,240,979
Far West	7	0.5%	8,167
Hunter	651	44.9%	7,543,084
Illawarra	57	4.0%	1,153,646
Mid-North Coast	<5	0.1%	35,000
Murray	21	1.4%	71,391
Murrumbidgee	<5	0.1%	720
North Western	190	13.1%	1,355,886
Northern	40	2.8%	2,665,801
Richmond-Tweed	<5	n.p.	n.p.
South Eastern	20	1.4%	53,559
Sydney	90	6.2%	1,252,039
Total New South Wales	**1,450**	**100.0%**	**19,402,627**

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, 2023/24



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 $18.1 billion and the employment expenditure of $3.9 billion. These impacts have been modelled separately and then aggregated to identify the level of impacts on output, incomes, employment and industry value added in New South Wales. In 2023/24, the $22.0 billion in direct spending by NSW mining companies supported additional supply chain and consumption-induced effects of 213,187 fulltime jobs and $45.1 billion in aggregate spending ($14.0 billion in wages and salaries and $31.1 billion in purchases of goods and services).

In 2023/24, NSW mining companies supported an **additional 213,187 fulltime jobs and $45.1 billion in aggregate spending** *($14.0 billion in wages and $31.1 billion in purchases of goods and services).*

Total Impact

The results of the I-O modelling allow forecasts to be made about the total size of impacts from the 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 2023/24 amounted to:

- **$53.1 billion in output/turnover** (or purchases from supplying businesses);
- **$47.5 billion in gross value added** (contribution to gross state product);
- **$18.0 billion in income** (wages and salaries); and
- **237,555 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 $22.0 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 **$47.5 billion in gross value added** ($22.0 billion in direct effects, and $25.4 billion in supply chain and consumption effects) in 2023/24 and was responsible for supporting approximately **237,555 jobs** (24,366 in direct employment and 213,187 in additional employment). This means that NSW mining companies contributed an estimated **6.1% of Gross State Product** (based on the figure of $777.3 billion in 2022/23) and **5.4% of total employment** (4,377,776 persons) in New South Wales in 2023/24.

The total economic impact of NSW mining companies was estimated at **$47.5 billion** *in gross value added and* **237,555 jobs** *supported in 2023/24.*

Under the more conservative Type I scenario (i.e. excluding consumption-induced effects), direct spending by the companies surveyed and flow-on impacts contributed 4.9% to GSP and 3.5% of total state employment.

Since 2011/12, companies surveyed by the NSWMC have generated approximately $397.0 billion in value added, including $184.7 billion in direct spending.

Since 2011/12, companies surveyed by the NSWMC have **generated approximately $397.0 billion in value added***.*

Table 5: Economic Impact of NSW Mining Companies, 2023/24			
	New South Wales	Rest of Australia	Total Australia
Gross Value Added ($M)			
Direct	22,019	13,891	35,910
% of Gross State Product (GSP)	2.8%	0.8%	1.4%
Indirect	16,258	5,788	22,046
Total GVA (Type I)	38,273	19,679	57,952
% of GSP	4.9%	1.1%	2.3%
Consumption-induced	9,183	3,460	12,643
Total GVA (Type II)	**47,457**	**23,139**	**70,595**
% of GSP	6.1%	1.3%	2.8%
Employment (FTEs)			
Direct	24,366	786	25,152
% of total state employment	0.6%	0.0%	0.2%
Indirect	130,845	34,738	165,583
Total employment (Type I)	155,212	35,524	190,736
% of total state employment	3.5%	0.4%	1.4%
Consumption-induced	82,343	21,940	104,283
Total employment (Type II)	**237,555**	**57,464**	**295,020**
% of total state employment	5.4%	0.6%	2.1%
Business spend (incl. community contributions and govt payments) ($M)			
Direct	18,075	8,684	26,759
Indirect	13,184	6,177	19,361
Total business spend (Type I)	31,259	14,861	46,120
Consumption-induced	17,894	6,504	24,398
Total business spend (Type II)	49,153	21,365	70,518
Wages & salaries ($M)			
Direct	3,944	123	4,067
Indirect	8,796	3,009	11,804
Total wages & salaries (Type I)	12,740	3,132	15,871
Consumption-induced	5,223	1,592	6,815
Total wages & salaries (Type II)	17,962	4,724	22,686

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 2023/24 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 2023/24 was in the Hunter region ($8.8 billion), followed by the Sydney ($5.5 billion), Central West ($1.2 billion) and Illawarra ($1.1 billion) regions.

***Hunter** recorded the largest share of direct expenditure by region in 2023/24 ($8.8 billion), followed by Sydney ($5.5 billion) and Central West ($1.2 billion).*

With regard to employment, the largest workforce share (i.e. number of direct full-time resident employees and contract workers by place of operation) across New South Wales was also recorded in the Hunter region (16,564 FTEs, or 47.4%), followed by the Central West (6,331 FTEs, or 18.1%), Northern (3,500 FTEs, or 10.0%), North Western (3,190 FTEs, or 9.1%) and Illawarra (2,092 FTEs, or 6.0%).

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*The **average salary** for workers directly employed by NSW mining companies was approximately **$161,866** in 2023/24.*

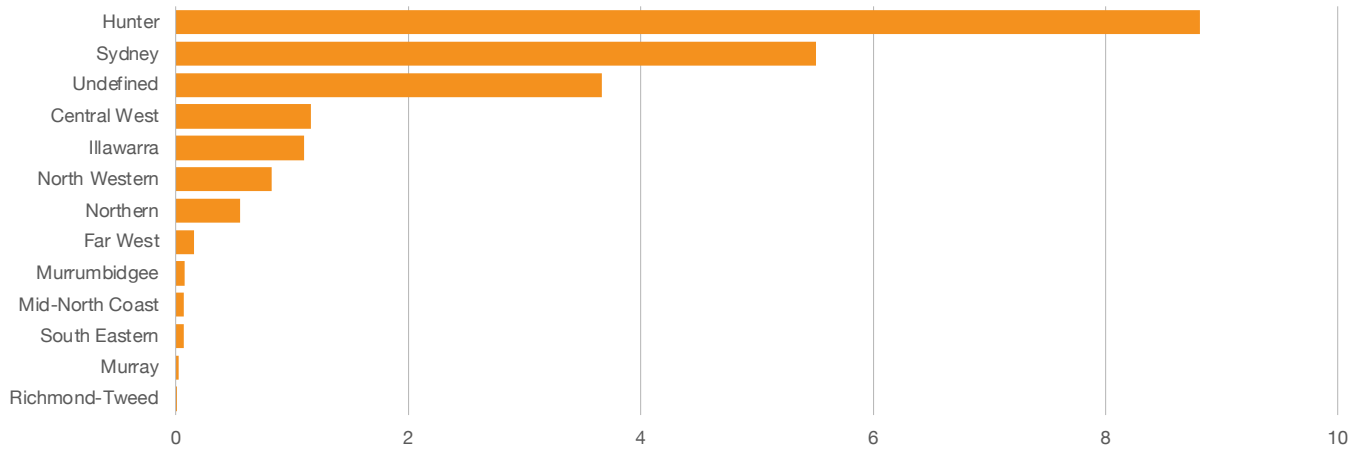
Table 6: Direct Impact of NSW Mining Companies by Region, 2023/24

Region	Residing employees (FTEs)	Associated salaries ($M)	Total workforce[(b)]	Business purchases, community and govt payments ($M)	No. of local suppliers	Total direct spending ($M)	% of total direct spend, NSW
Central West	3,149	502.1	6,331	659.1	1,009	1,161.3	5.3%
Far West	488	61.7	1,002	92.2	112	153.9	0.7%
Hunter	13,189	2,182.5	16,564	6,629.8	2,793	8,812.3	40.0%
Illawarra	1,632	242.0	2,092	859.1	453	1,101.1	5.0%
Mid-North Coast	101	13.2	101	57.2	48	70.4	0.3%
Murray	46	5.9	47	20.0	68	25.9	0.1%
Murrumbidgee	89	12.7	89	64.7	75	77.4	0.4%
North Western	2,906	434.4	3,190	386.8	731	821.2	3.7%
Northern	1,571	271.8	3,500	278.7	502	550.5	2.5%
Richmond-Tweed	21	3.4	21	7.5	29	10.9	0.0%
South Eastern	95	12.5	95	52.1	47	64.6	0.3%
Sydney	1,068	200.2	1,919	5,304.1	2,659	5,504.3	25.0%
Unallocated[(a)]	14	1.7	28	2.6		3,661.7	16.6%
Total NSW	**24,366**	**3,944.0**	**34,977**	**14,417.7**	**7,139**	**22,019.1**	**100.0%**

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), 2023/24



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, 2023/24 (Type II)

Region	Indirect full-time employees (FTEs)	Associated salaries ($M)	Supply of goods and services ($M)	Total indirect value added ($M)
Central West	17,813	659.2	1,468.7	1,432.5
Far West	2,651	114.6	237.5	209.7
Hunter	91,586	5,471.3	11,475.9	9,600.7
Illawarra	16,934	872.1	1,720.4	1,519.9
Mid-North Coast	1,192	43.3	97.5	95.7
Murray	308	13.4	27.7	24.3
Murrumbidgee	505	21.1	47.1	45.0
North Western	12,849	477.3	1,059.0	1,031.9
Northern	8,356	310.5	689.8	671.9
Richmond-Tweed	180	9.2	18.0	16.0
South Eastern	1,292	46.6	104.8	103.2
Sydney	35,803	2,902.8	7,971.3	5,859.0
Undefined[(a)]	23,720	3,076.8	6,159.8	4,831.8
Total New South Wales	**213,187**	**14,018.2**	**31,077.6**	**25,441.4**

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 $18.4 billion, meaning these companies contributed 25.1% to gross regional product ($73.4 billion) in 2023/24. The impact in the Hunter region was significantly higher than other regional economies, the next highest of which was Sydney ($11.4 billion in value added) and Illawarra ($2.6 billion).

The Hunter region recorded the highest proportion of GRP contributed by the mining sector (25.1%), followed by the Central West (16.9%), Far West (15.7%), North Western (15.0%) and Illawarra (8.9%) regions.

*The **Hunter** region had the highest proportion of GRP contributed by the resource sector (25.1%), followed by Central West (16.9%) and Far West (15.7%).*

With regard to employment, the NSW mining sector again had the highest impact on jobs in the Hunter region, supporting 104,775 FTEs, comprising 25.7% of the total regional workforce. The Sydney (36,870 FTEs), Central West (20,961 FTEs) and Illawarra (18,565 FTEs) regions recorded the next highest number of employees. The Far West region recorded the greatest proportion of total jobs (37.5%) from the impact of NSW mining companies.

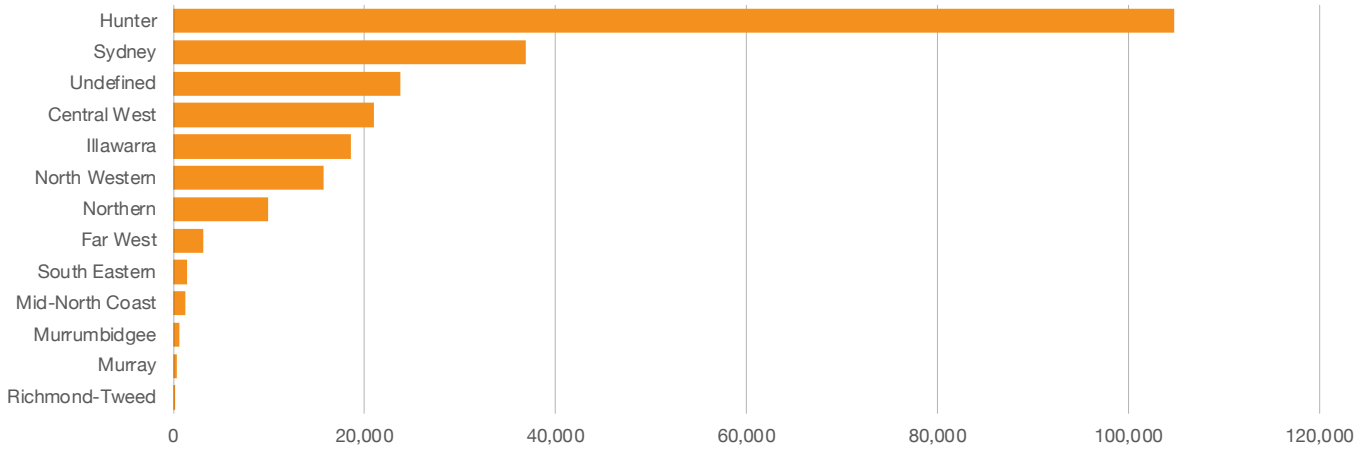
Table 8: Total Economic Impact of Minerals and Energy Sector by Region, 2023/24

Region	Total GVA ($M)	Total value added as % of GRP	Total jobs supported (FTEs)	% of regional employment
Central West	2,593.7	16.9%	20,961	20.4%
Far West	363.6	15.7%	3,139	37.5%
Hunter	18,413.0	25.1%	104,775	25.7%
Illawarra	2,621.0	8.9%	18,565	8.0%
Mid-North Coast	166.1	1.0%	1,293	1.1%
Murray	50.3	0.5%	355	0.5%
Murrumbidgee	122.3	0.8%	594	0.7%
North Western	1,853.1	15.0%	15,755	26.9%
Northern	1,222.3	5.9%	9,927	9.9%
Richmond-Tweed	26.8	0.1%	201	0.2%
South Eastern	167.8	1.1%	1,387	1.1%
Sydney	11,363.3	2.1%	36,870	1.3%
Undefined[(a)]	8,493.5	n.a.	23,733	n.a.
Total New South Wales	**47,456.8**	**6.1%**	**237,555**	**5.4%**

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), 2023/24



Central West

Direct Contribution

In 2023/24, NSW mining companies contributed $1.2 billion in direct spending in the Central West region, through:

- Total workforce of 6,331 FTEs, including 3,183 contract workers whose place of work was in the region;
- $502.1 million in wages and salaries to 3,149 direct full-time employees (not including contractors);
- $632.3 million in purchases of goods and services from 1,009 local businesses (includes contractors);
- $5.2 million in contributions to 369 community organisations; and
- $21.6 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
- $659.2 million in wages and salaries associated with a further 17,813 jobs supported in this region.

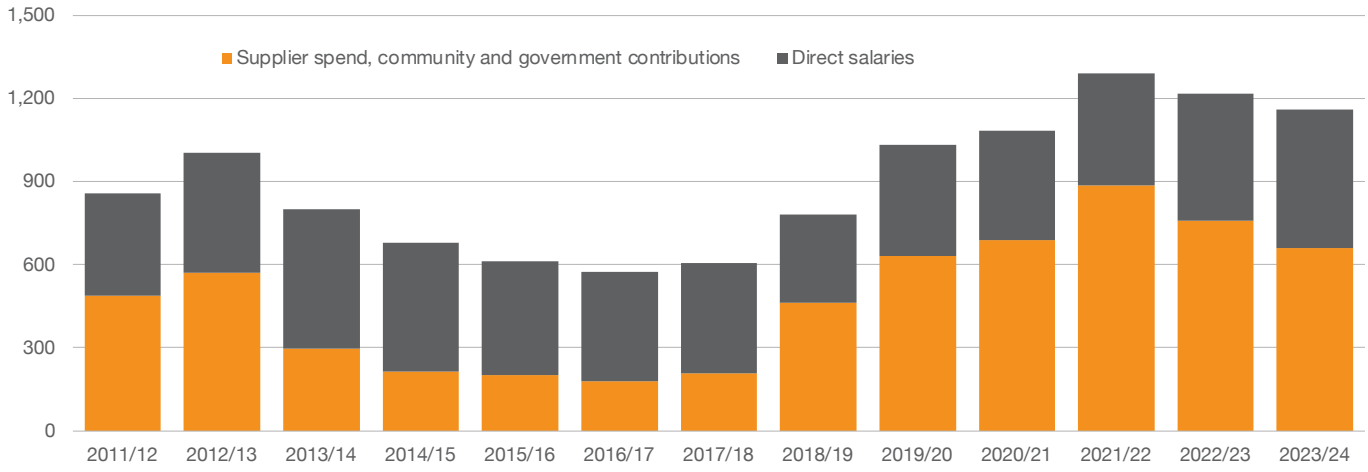
Total Contribution

The total economic contribution (direct, indirect and consumption-induced) from the minerals sector in 2023/24 amounted to:

- $2.1 billion in supplying business purchases;
- $1.2 billion in total wages and salaries paid to workers;
- **$2.6 billion in gross value added**, or 16.9% of total GRP in this region ($15.4 billion); and
- **20,961 full-time equivalent jobs**, or 20.4% of the regional workforce.

Since 2011/12, NSW mining companies have generated ***$11.7 billion in direct spending in the Central West region****, comprised of $5.5 billion in total wages and salaries and $6.2 million in business purchases, community contributions and local government payments.*

Direct Expenditure of NSW Mining Companies
Central West ($ million)



Far West

Direct Contribution

In 2023/24, NSW mining companies contributed $153.9 million in direct spending in the Far West region through:

- Total workforce of 1,002 FTEs, including 514 contract workers whose place of work was in the region;
- $61.7 million in wages and salaries to 488 direct full-time employees (not including contractors);
- $88.8 million in purchases of goods and services from 112 local businesses (includes contractors);
- $0.01 million in contributions to 7 community organisations; and
- $3.5 million in local government payments.

Indirect Contribution

This **$153.9 million in direct spending** supported:

- $237.5 million in additional supply chain purchases and household consumption; and
- $114.6 million in wages and salaries associated with a further 2,651 jobs supported in this region.

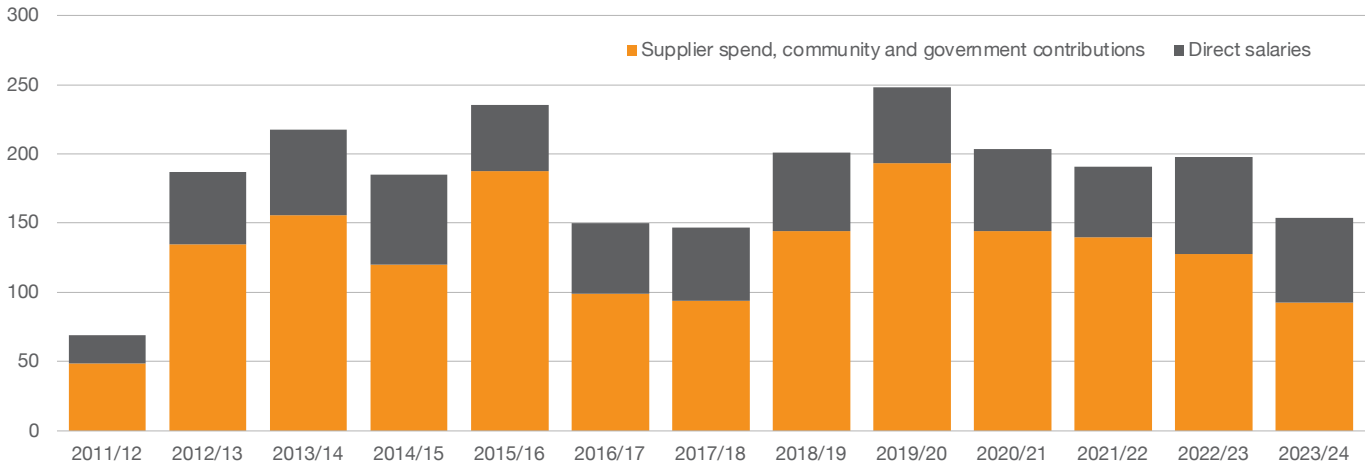
Total Contribution

The total economic contribution (direct, indirect and consumption-induced) from the minerals sector in 2023/24 amounted to:

- $326.3 million in supplying business purchases;
- $176.3 million in total wages and salaries paid to workers;
- **$363.6 million in gross value added**, or 15.7% of total GRP in this region ($2.3 billion); and
- **3,139 full-time equivalent jobs**, or 37.5% of the regional workforce.

Since 2011/12, NSW mining companies have generated ***$2.4 billion in direct spending in the Far West region****, comprised of $704.9 million in total wages and salaries and $1.7 billion in business purchases, community contributions and local government payments.*

Direct Expenditure of NSW Mining Companies
Far West ($ million)



Hunter

Direct Contribution

In 2023/24, NSW mining companies contributed $8.8 billion in direct spending in the Hunter region (representing 7.7% annual growth), through:

- Total workforce of 16,564 FTEs, including 3,376 contract workers whose place of work was in the region;
- $2.2 billion in wages and salaries to 13,189 direct full-time employees (not including contractors);
- $6.6 billion in purchases of goods and services from 2,793 local businesses (includes contractors);
- $7.5 million in contributions to 651 community organisations; and
- $38.2 million in local government payments.

Indirect Contribution

This **$8.8 billion in direct spending** supported:

- $11.5 billion in additional supply chain purchases and household consumption; and
- $5.5 billion in wages and salaries associated with a further 91,586 jobs supported in this region.

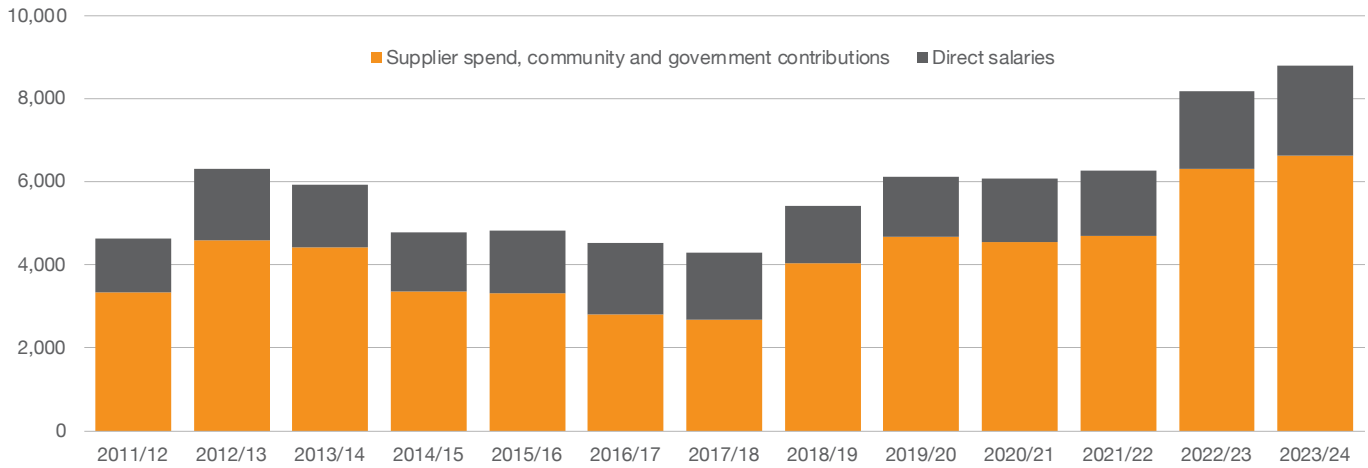
Total Contribution

The total economic contribution (direct, indirect and consumption-induced) from the minerals sector in 2023/24 amounted to:

- $18.1 billion in supplying business purchases;
- $7.7 billion in total wages and salaries paid to workers;
- **$18.4 billion in gross value added**, or 25.1% of total GRP in this region ($73.4 billion); and
- **104,775 full-time equivalent jobs**, or 25.7% of the regional workforce.

Since 2011/12, NSW mining companies have generated ***$76.2 billion in direct spending in the Hunter region****, comprised of $20.7 billion in total wages and salaries and $55.4 billion in business purchases, community contributions and local government payments.*

Direct Expenditure of NSW Mining Companies
Hunter ($ million)



Illawarra

Since 2011/12, NSW mining companies have generated **$12.0 billion in direct spending in the Illawarra region**, *comprised of $2.8 billion in total wages and salaries and $9.3 billion in business purchases, community contributions and local government payments.*

Direct Contribution

In 2023/24, NSW mining companies contributed $1.1 billion in direct spending in the Illawarra region (representing 14.2% annual growth), through:

- Total workforce of 2,092 FTEs, including 460 contract workers whose place of work was in the region;
- $242.0 million in wages and salaries to 1,632 direct full-time employees (not including contractors);
- $855.8 million in purchases of goods and services from 453 local businesses (includes contractors);
- $1.2 million in contributions to 57 community organisations; and
- $2.1 million in local government payments.

Indirect Contribution

This **$1.1 billion in direct spending** supported:

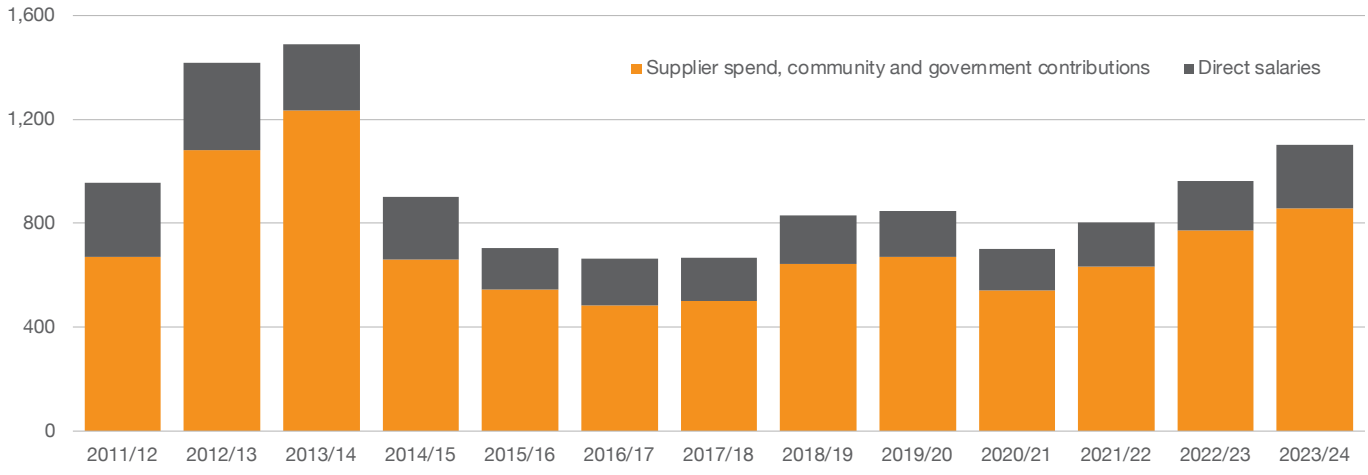
- $1.7 billion in additional supply chain purchases and household consumption; and
- $872.1 million in wages and salaries associated with a further 16,934 jobs supported in this region.

Total Contribution

The total economic contribution (direct, indirect and consumption-induced) from the minerals sector in 2023/24 amounted to:

- $2.6 billion in supplying business purchases;
- $1.1 billion in total wages and salaries paid to workers;
- **$2.6 billion in gross value added**, or 8.9% of total GRP in this region ($29.5 billion); and
- **18,565 full-time equivalent jobs**, or 8.0% of the regional workforce.

Direct Expenditure of NSW Mining Companies
Illawarra ($ million)



Mid-North Coast

Since 2011/12, NSW mining companies have generated **$548.7 million in direct spending in the Mid-North Coast region**, *comprised of $90.4 million in total wages and salaries and $458.4 million in business purchases, community contributions and local government payments.*

Direct Contribution

In 2023/24, NSW mining companies contributed $70.4 million in direct spending in the Mid-North Coast region (representing 29.6% annual growth), through:

- $13.2 million in wages and salaries to 101 direct full-time employees (not including contractors); and
- $57.1 million in purchases of goods and services from 48 local businesses (includes contractors).

Indirect Contribution

This **$70.4 million in direct spending** supported:

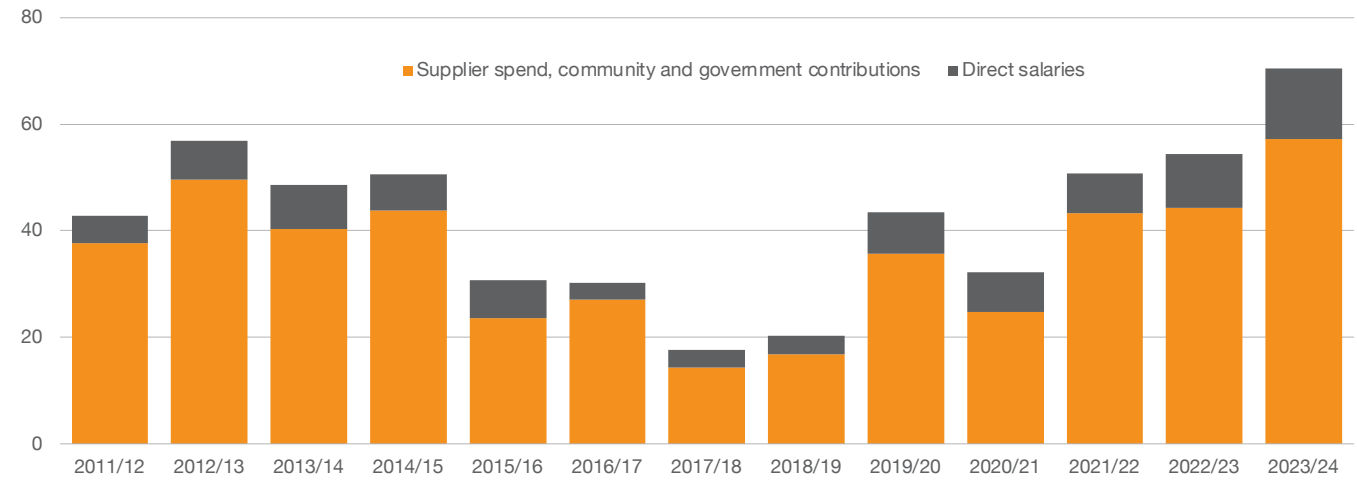
- $97.5 million in additional supply chain purchases and household consumption; and
- $43.3 million in wages and salaries associated with a further 1,192 jobs supported in this region.

Total Contribution

The total economic contribution (direct, indirect and consumption-induced) from the minerals sector in 2023/24 amounted to:

- $154.7 million in supplying business purchases;
- $56.5 million in total wages and salaries paid to workers;
- **$166.1 million in gross value added**, or 1.0% of total GRP in this region ($17.0 billion); and
- **1,293 full-time equivalent jobs**, or 1.1% of the regional workforce.

Direct Expenditure of NSW Mining Companies
Mid-North Coast ($ million)



Murray

Since 2011/12, NSW mining companies have generated ***$197.5 million in direct spending in the Murray region****, comprised of $40.4 million in total wages and salaries and $157.1 million in business purchases, community contributions and local government payments.*

Direct Contribution

In 2023/24, NSW mining companies contributed $25.9 million in direct spending in the Murray region through:

- $5.9 million in wages and salaries to 46 direct full-time employees (not including contractors);
- $17.5 million in purchases of goods and services from 68 local businesses (includes contractors); and
- $2.4 million in local government payments.

Indirect Contribution

This **$25.9 million in direct spending** supported:

- $27.7 million in additional supply chain purchases and household consumption; and
- $13.4 million in wages and salaries associated with a further 308 jobs supported in this region.

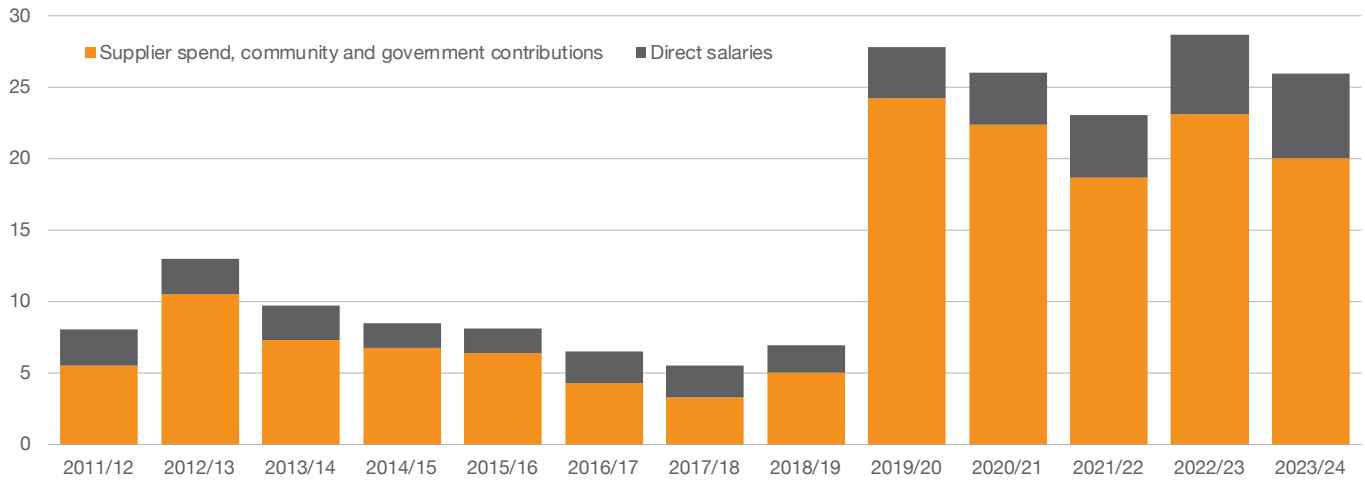
Total Contribution

The total economic contribution (direct, indirect and consumption-induced) from the minerals sector in 2023/24 amounted to:

- $45.2 million in supplying business purchases;
- $19.3 million in total wages and salaries paid to workers;
- **$50.3 million in gross value added**, or 0.5% of total GRP in this region ($9.8 billion); and
- **355 full-time equivalent jobs**, or 0.5% of the regional workforce.

Direct Expenditure of NSW Mining Companies

Murray ($ million)



Murrumbidgee

Since 2011/12, NSW mining companies have generated ***$581.9 million in direct spending in the Murrumbidgee region****, comprised of $92.0 million in total wages and salaries and $489.9 million in business purchases, community contributions and local government payments.*

Direct Contribution

In 2023/24, NSW mining companies contributed $77.4 million in direct spending in the Murrumbidgee region through:

- $12.7 million in wages and salaries to 89 direct full-time employees (not including contractors); and
- $64.7 million in purchases of goods and services from 75 local businesses (includes contractors).

Indirect Contribution

This **$77.4 million in direct spending** supported:

- $47.1 million in additional supply chain purchases and household consumption; and
- $21.1 million in wages and salaries associated with a further 505 jobs supported in this region.

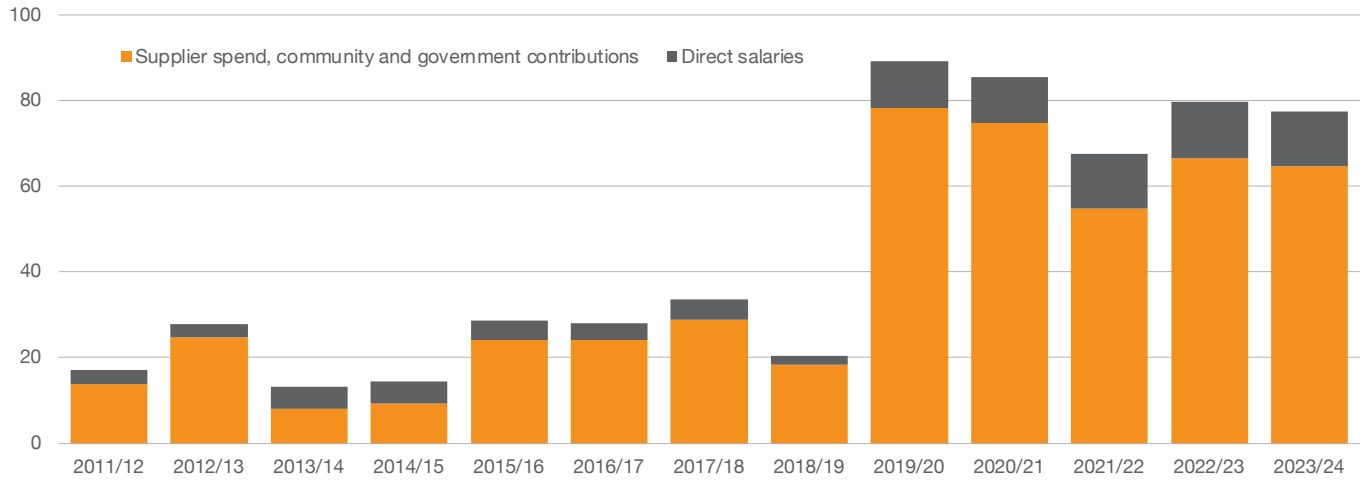
Total Contribution

The total economic contribution (direct, indirect and consumption-induced) from the minerals sector in 2023/24 amounted to:

- $111.8 million in supplying business purchases;
- $33.8 million in total wages and salaries paid to workers;
- **$122.3 million in gross value added**, or 0.8% of total GRP in this region ($14.4 billion); and
- **594 full-time equivalent jobs**, or 0.7% of the regional workforce.

Direct Expenditure of NSW Mining Companies

Murrumbidgee ($ million)



North Western

Since 2011/12, NSW mining companies have generated **$6.1 billion in direct spending in the North Western region**, *comprised of $3.2 billion in total wages and salaries and $2.9 billion in business purchases, community contributions and local government payments.*

Direct Contribution

In 2023/24, NSW mining companies contributed $821.2 million in direct spending in the North Western region (representing 15.7% annual growth), through:

- Total workforce of 3,190 FTEs, including 284 contract workers whose place of work was in the region;
- $434.4 million in wages and salaries to 2,906 direct full-time employees (not including contractors);
- $369.0 million in purchases of goods and services from 731 local businesses (includes contractors);
- $1.4 million in contributions to 190 community organisations; and
- $16.4 million in local government payments.

Indirect Contribution

This **$821.2 million in direct spending** supported:

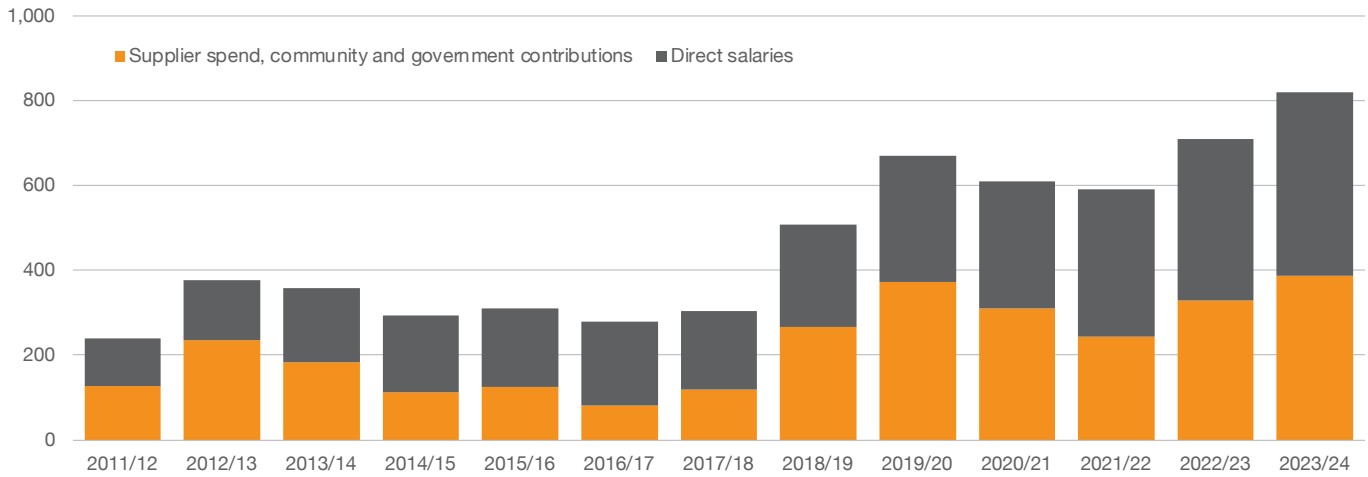
- $1.1 billion in additional supply chain purchases and household consumption; and
- $477.3 million in wages and salaries associated with a further 12,849 jobs supported in this region.

Total Contribution

The total economic contribution (direct, indirect and consumption-induced) from the minerals sector in 2023/24 amounted to:

- $1.4 billion in supplying business purchases;
- $911.7 million in total wages and salaries paid to workers;
- **$1.9 billion in gross value added**, or 15.0% of total GRP in this region ($12.4 billion); and
- **15,755 full-time equivalent jobs**, or 26.9% of the regional workforce.

Direct Expenditure of NSW Mining Companies
North Western ($ million)



Northern

Since 2011/12, NSW mining companies have generated ***$4.4 billion in direct spending in the Northern region****, comprised of $1.9 billion in total wages and salaries and $2.4 billion in business purchases, community contributions and local government payments.*

Direct Contribution

In 2023/24, NSW mining companies contributed $550.5 million in direct spending in the Northern region (representing 29.9% annual growth), through:

- Total workforce of 3,500 FTEs, including 1,929 contract workers whose place of work was in the region;
- $271.8 million in wages and salaries to 1,571 direct full-time employees (not including contractors);
- $268.0 million in purchases of goods and services from 502 local businesses (includes contractors);
- $2.7 million in contributions to 40 community organisations; and
- $8.0 million in local government payments.

Indirect Contribution

This **$550.5 million in direct spending** supported:

- $689.8 million in additional supply chain purchases and household consumption; and
- $310.5 million in wages and salaries associated with a further 8,356 jobs supported in this region.

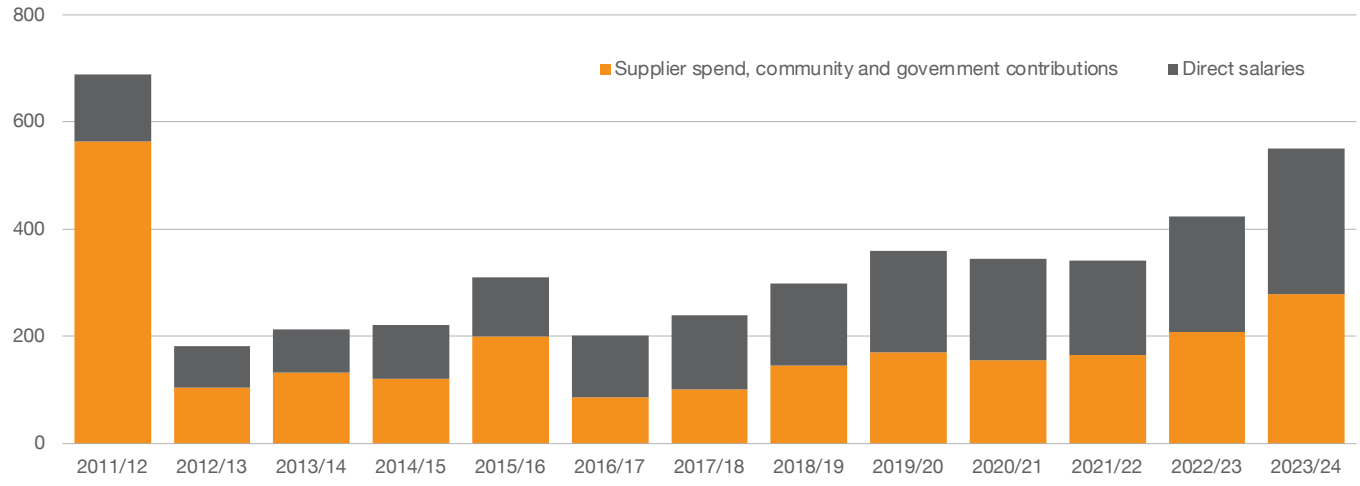
Total Contribution

The total economic contribution (direct, indirect and consumption-induced) from the minerals sector in 2023/24 amounted to:

- $957.8 million in supplying business purchases;
- $582.3 million in total wages and salaries paid to workers;
- **$1.2 billion in gross value added**, or 5.9% of total GRP in this region ($20.6 billion); and
- **9,927 full-time equivalent jobs**, or 9.9% of the regional workforce.

Direct Expenditure of NSW Mining Companies

Northern ($ million)



Richmond-Tweed

Since 2011/12, NSW mining companies have generated **$105.2 million in direct spending in the Richmond-Tweed region**, *comprised of $21.0 million in total wages and salaries and $84.3 million in business purchases, community contributions and local government payments.*

Direct Contribution

In 2023/24, NSW mining companies contributed $10.9 million in direct spending in the Richmond-Tweed region through:

- $3.4 million in wages and salaries to 21 direct full-time employees (not including contractors); and
- $7.5 million in purchases of goods and services from 29 local businesses (includes contractors).

Indirect Contribution

This **$10.9 million in direct spending** supported:

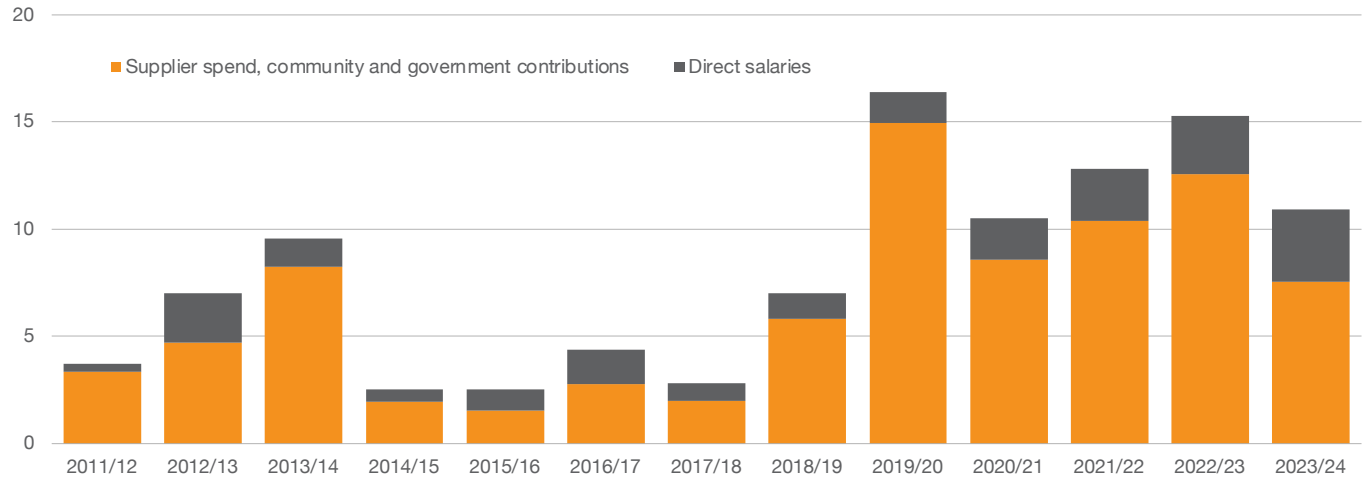
- $18.0 million in additional supply chain purchases and household consumption; and
- $9.2 million in wages and salaries associated with a further 180 jobs supported in this region.

Total Contribution

The total economic contribution (direct, indirect and consumption-induced) from the minerals sector in 2023/24 amounted to:

- $25.5 million in supplying business purchases;
- $12.6 million in total wages and salaries paid to workers;
- **$26.8 million in gross value added**, or 0.1% of total GRP in this region ($18.3 billion); and
- **201 full-time equivalent jobs**, or 0.2% of the regional workforce.

Direct Expenditure of NSW Mining Companies
Richmond-Tweed ($ million)



South Eastern

Since 2011/12, NSW mining companies have generated ***$537.6 million in direct spending in the South Eastern region****, comprised of $90.8 million in total wages and salaries and $446.8 million in business purchases, community contributions and local government payments.*

Direct Contribution

In 2023/24, NSW mining companies contributed $64.6 million in direct spending in the South Eastern region (representing 33.2% annual growth), through:

- $12.5 million in wages and salaries to 95 direct full-time employees (not including contractors);
- $51.9 million in purchases of goods and services from 47 local businesses (includes contractors);
- $0.1 million in contributions to 20 community organisations; and
- $0.1 million in local government payments.

Indirect Contribution

This **$64.6 million in direct spending** supported:

- $104.8 million in additional supply chain purchases and household consumption; and
- $46.6 million in wages and salaries associated with a further 1,292 jobs supported in this region.

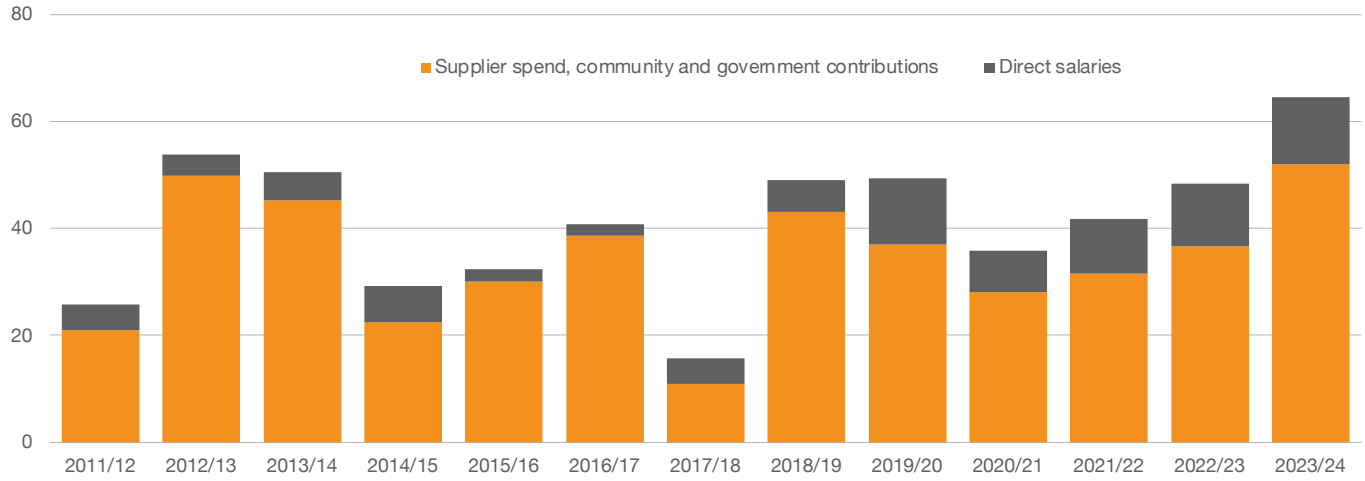
Total Contribution

The total economic contribution (direct, indirect and consumption-induced) from the minerals sector in 2023/24 amounted to:

- $156.8 million in supplying business purchases;
- $59.0 million in total wages and salaries paid to workers;
- **$167.8 million in gross value added**, or 1.1% of total GRP in this region ($15.4 billion); and
- **1,387 full-time equivalent jobs**, or 1.1% of the regional workforce.

Direct Expenditure of NSW Mining Companies

South Eastern ($ million)



Sydney

Direct Contribution

In 2023/24, NSW mining companies contributed $5.5 billion in direct spending in the Sydney region through:

- Total workforce of 1,919 FTEs, including 851 contract workers whose place of work was in the region;
- $200.2 million in wages and salaries to 1,068 direct full-time employees (not including contractors);
- $5.3 billion in purchases of goods and services from 2,659 local businesses (includes contractors);
- $1.3 million in contributions to 90 community organisations; and
- $2.5 million in local government payments.

Indirect Contribution

This **$5.5 billion in direct spending** supported:

- $8.0 billion in additional supply chain purchases and household consumption; and
- $2.9 billion in wages and salaries associated with a further 35,803 jobs supported in this region.

Since 2011/12, NSW mining companies have generated ***$43.7 billion in direct spending in the Sydney region****, comprised of $2.7 billion in total wages and salaries and $41.0 billion in business purchases, community contributions and local government payments.*

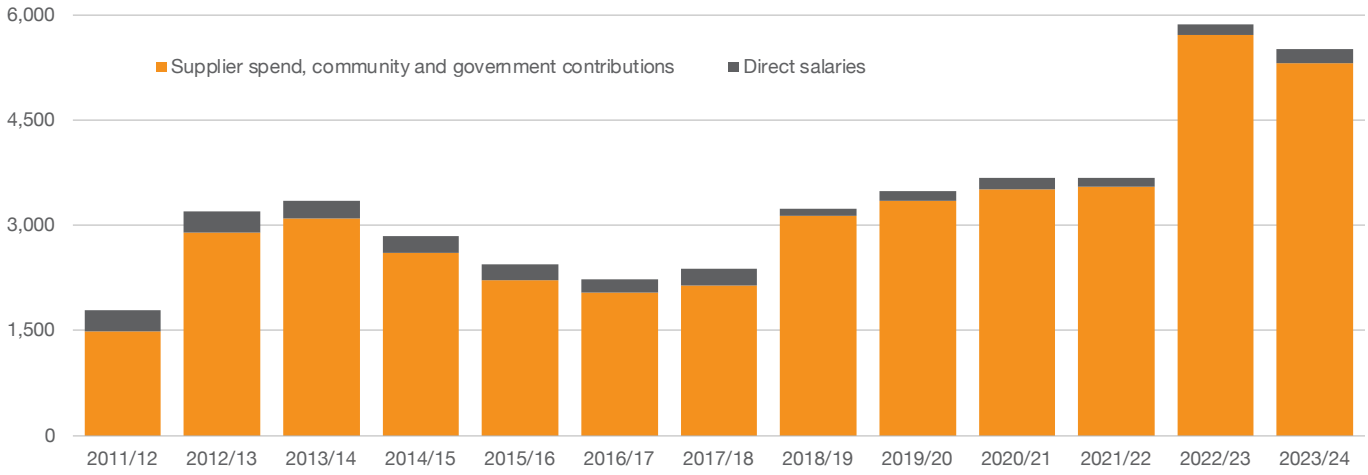
Total Contribution

The total economic contribution (direct, indirect and consumption-induced) from the minerals sector in 2023/24 amounted to:

- $13.3 billion in supplying business purchases;
- $3.1 billion in total wages and salaries paid to workers;
- **$11.4 billion in gross value added**, or 2.1% of total GRP in this region ($548.8 billion); and
- **36,870 full-time equivalent jobs**, or 1.3% of the regional workforce.

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 2023/24 ($2.7 billion), followed by Newcastle ($2.6 billion), Maitland ($1.9 billion), Singleton ($1.6 billion), and Muswellbrook ($912.5 million).

***Sydney** recorded the largest share of direct expenditure by local government area in 2023/24 ($2.7 billion), followed by Newcastle ($2.6 billion).*

Direct resident employment was greatest in the Singleton LGA (2,804 FTEs), followed by the Maitland (2,259 FTEs), Cessnock (2,202 FTEs), Mid-Western Regional (1,726 FTEs) and Muswellbrook (1,698 FTEs) LGAs.

NSW Mining Companies Direct Employment by LGA
New South Wales (FTEs), 2023/24

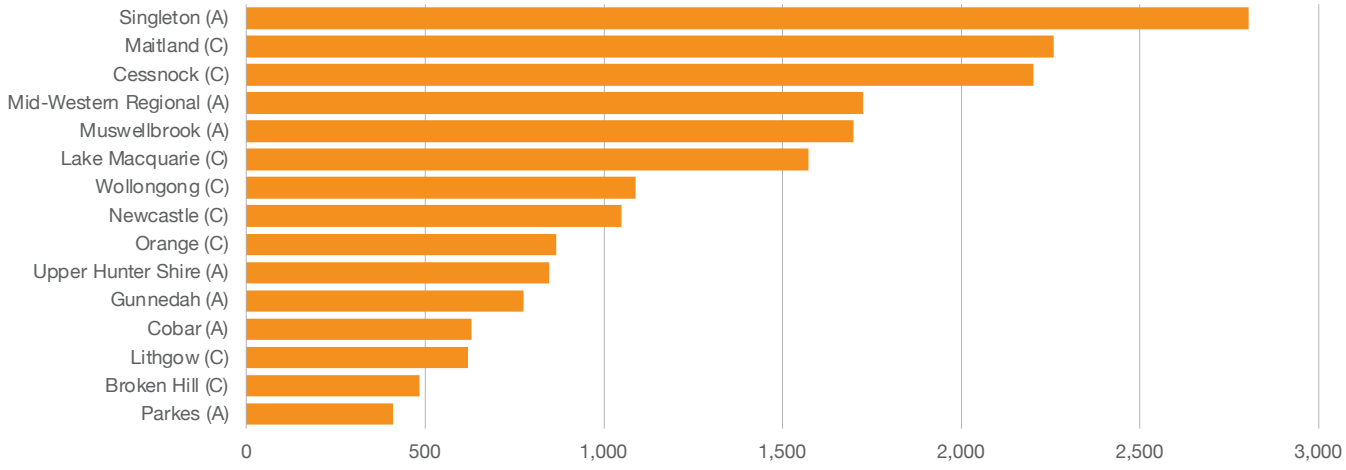


Table 9: Direct Impact of NSW Mining Companies, Highest LGAs by Expenditure, 2023/24						
LGA	Residing employees (FTEs)	Associated salaries ($M)	Total workforce[(a)] (FTEs)	Business purchases, community and govt payments ($M)	Total direct spending ($M)	Local suppliers (no.)
Sydney (C)	41	12.4	48	2,735.4	2,747.8	670
Newcastle (C)	1,048	186.6	1,048	2,381.2	2,567.8	690
Maitland (C)	2,259	380.4	2,279	1,512.0	1,892.4	486
Singleton (A)	2,804	472.9	4,660	1,140.1	1,613.0	466
Muswellbrook (A)	1,698	260.7	3,110	651.8	912.5	253
Cessnock (C)	2,202	354.3	2,203	356.3	710.6	172
Wollongong (C)	1,089	166.7	1,549	538.2	704.9	335
Lake Macquarie (C)	1,572	273.6	1,641	353.4	627.0	420
Fairfield (C)	2	0.4	2	546.0	546.4	110
Mid-Western Regional (A)	1,726	292.2	1,971	226.1	518.3	344
Orange (C)	868	139.4	1,895	331.0	470.4	286
Parramatta (C)	16	3.7	16	373.8	377.5	181
Gunnedah (A)	775	132.9	1,308	179.1	312.0	164
Central Coast (C)	237	37.7	239	181.7	219.4	125
Wingecarribee (A)	65	9.7	65	189.6	199.3	24
Port Stephens (A)	386	64.1	386	124.9	189.0	87
Lithgow (C)	620	110.8	677	71.4	182.2	112
Canterbury-Bankstown (A)	13	2.1	13	171.9	174.0	86
Upper Hunter Shire (A)	848	132.2	867	37.8	170.1	78
Randwick (C)	19	3.0	19	156.0	159.1	17

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 2023/24 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 $5.6 billion, followed by Newcastle ($5.4 billion), Maitland ($3.9 billion), Singleton ($3.3 billion) and Muswellbrook ($1.9 billion)

With regard to employment, the NSW mining sector had the greatest impact on jobs in the Newcastle LGA, with 26,677 FTEs, followed by the Maitland (21,184 FTEs) and Sydney (17,636 FTEs) LGAs, whilst the regions where the impact of NSW mining companies' direct spending accounted for the largest share of employment were Cobar (97.0%), Muswellbrook (88.7%) and Singleton (85.9%).

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, 2023/24 (Type II)

Region	Total GVA ($M)	Total value added as % of GRP	Total jobs supported (FTEs)	% of regional employment
Sydney (C)	5,649.7	3.5%	17,636	11.7%
Newcastle (C)	5,390.2	24.3%	26,677	26.2%
Maitland (C)	3,885.3	71.3%	21,184	41.9%
Singleton (A)	3,263.8	25.9%	12,248	85.9%
Muswellbrook (A)	1,851.4	30.9%	7,519	88.7%
Wollongong (C)	1,691.9	11.0%	12,113	10.9%
Cessnock (C)	1,462.0	54.8%	9,741	30.9%
Lake Macquarie (C)	1,310.2	10.4%	8,381	7.4%
Fairfield (C)	1,115.0	9.0%	3,495	4.2%
Mid-Western Regional (A)	1,081.5	54.6%	8,731	63.9%
Orange (C)	1,037.0	26.0%	7,912	32.5%
Parramatta (C)	770.8	2.3%	2,438	1.5%
Gunnedah (A)	674.1	54.6%	5,281	73.6%
Central Coast (C)	455.1	2.6%	1,727	1.0%
Wingecarribee (A)	438.8	12.7%	2,655	10.4%
Port Stephens (A)	387.9	6.5%	2,327	6.5%
Lithgow (C)	383.1	24.9%	3,122	31.0%
Broken Hill (C)	361.2	16.7%	3,118	40.7%
Canterbury-Bankstown (A)	358.0	1.7%	1,130	0.6%
Randwick (C)	328.1	3.9%	1,043	1.3%

Conclusion

This report contains the outcomes of two key pieces of analysis. The first is the collection of primary data by the NSW Minerals Council (NSWMC) that identifies the direct impact of 31 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 $22.0 billion in direct spending to the state economy in 2023/24, comprised of:

- Total workforce of 34,977 full-time equivalent workers (including direct resident employees and contract workers), which represented a significant annual increase of 3,391 workers, or 10.7%;
- $3.9 billion in wages and salaries to approximately 24,366 direct fulltime resident employees (not including contractors), representing an average salary level across the sector of $161,866 per annum;
- $14.4 billion in purchases of goods and services from 7,139 local businesses (including contract payments), community contributions and payments to local government (including rates, developer contributions and other payments); and
- $3.7 billion in state government payments (including royalties, stamp duty, payroll tax and land tax).

NSW mining companies contributed ***$22.0 billion*** *in direct spending to the New South Wales economy in 2023/24.*

Of the total workforce of 34,977 full-time equivalent workers employed by the 31 companies surveyed, 24,366 were direct full-time employees, or 69.7% of the total workforce – of which 3,336 direct workers, or 14.5% were female – with another 10,611 contract workers.

The economic stimulus provided by NSW mining companies in 2023/24 also extended to other states, with an additional $13.9 billion in direct spending, which combined with the impact in New South Wales for a total direct impact of $35.9 billion for the whole of Australia, comprised of:

- $4.1 billion in wages and salaries to approximately 25,152 full-time residing employees; and
- $31.8 billion in purchases of goods and services from local businesses, government (federal, state and local) and community contributions.

The total impact of the $22.0 billion in direct spending by the resources sector, measured through supply chain and consumption-induced spending effects, amounted to an estimated 6.1% of Gross State Product and 5.4% of employment in New South Wales. Using a conservative approach of excluding consumption-induced effects, direct spending by the companies surveyed and flow-on impacts still contributed 4.9% to GSP and 3.5% of total state employment.

The total economic impact of NSW mining companies was estimated at **$47.5 billion** *in gross value added and* **237,555 jobs** *supported in 2023/24.*

Since 2011/12, NSW mining companies surveyed have generated approximately $397.0 billion in value added, including $184.7 billion in direct spending.

Appendix A: Modelling Approach

Input-Output Modelling

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

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

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

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

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

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

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

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

Output

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

Income

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

Employment

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

Value Added

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

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

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

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

Construction of Regional I-O Models

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

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

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

All the necessary data for the regionalisation procedure were collected from the Australian Bureau of Statistics as well as other reliable sources for secondary data such as regional household expenditure patterns, income and productivity measures. The latest available national I-O tables were 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, 2023/24

Local government area	Residing employees (FTEs)	Associated salaries ($M)	Total workforce[a] FTEs	Business purchases, community and local govt payments ($M)	Total direct spending ($M)	Local suppliers (no.)
Albury (C)	14	1.8	13.9	n.a.	2.8	10
Armidale Regional (A)	13	1.8	13.5	3.1	4.9	15
Ballina (A)	7	1.1	7.0	n.a.	1.4	8
Balranald (A)	n.a.	n.a.	n.a.	13.0	13.6	22
Bathurst Regional (A)	299	48.5	300.3	43.1	91.6	84
Bayside (A)	15	2.3	15.2	93.1	95.3	62
Bega Valley (A)	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Bellingen (A)	5	1.0	5.4	1.1	2.1	n.a.
Berrigan (A)	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Blacktown (C)	18	2.4	18.1	123.2	125.7	160
Bland (A)	240	38.2	590.0	46.8	85.0	124
Blayney (A)	213	33.9	221.4	13.4	47.3	91
Blue Mountains (C)	60	9.7	59.5	2.1	11.8	16
Bogan (A)	175	20.8	180.0	8.8	29.5	39
Bourke (A)	5	0.6	5.8	n.a.	n.a.	n.a.
Brewarrina (A)	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Broken Hill (C)	484	61.2	997.3	91.6	152.8	103
Burwood (A)	n.a.	n.a.	n.a.	n.a.	1.2	8
Byron (A)	n.a.	n.a.	n.a.	6.5	6.7	n.a.
Cabonne (A)	169	25.5	288.5	49.8	75.4	51
Camden (A)	49	5.9	48.9	123.0	128.9	45
Campbelltown (C) (NSW)	198	34.5	198.1	68.0	102.5	63
Canada Bay (A)	12	2.7	12.2	1.6	4.2	20
Canterbury-Bankstown (A)	13	2.1	13.1	171.9	174.0	88
Carrathool (A)	5	0.7	5.3	n.a.	n.a.	n.a.
Central Coast (C) (NSW)	237	37.7	239.1	181.7	219.4	134

Table B1: Direct Impacts of NSW Mining Companies Sector by LGA, 2023/24

Local government area	Residing employees (FTEs)	Associated salaries ($M)	Total workforce[a] FTEs	Business purchases, community and local govt payments ($M)	Total direct spending ($M)	Local suppliers (no.)
Central Darling (A)	n.a.	n.a.	n.a.	n.a.	1.1	9
Cessnock (C)	2,202	354.3	2,203.5	356.3	710.6	190
Clarence Valley (A)	17	1.9	16.8	1.9	3.9	8
Cobar (A)	631	75.5	632.8	72.3	147.9	93
Coffs Harbour (C)	17	2.4	16.7	4.4	6.8	11
Coolamon (A)	5	0.7	5.3	n.a.	n.a.	n.a.
Coonamble (A)	7	0.8	10.1	n.a.	n.a.	n.a.
Cootamundra-Gundagai (A)	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Cowra (A)	34	5.0	34.2	n.a.	5.6	n.a.
Cumberland (A)	10	1.3	10.2	66.4	67.7	70
Dubbo Regional (A)	310	40.9	333.9	79.0	119.9	221
Dungog (A)	198	30.8	197.9	15.5	46.4	21
Edward River (A)	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Eurobodalla (A)	7	0.9	7.1	n.a.	1.7	n.a.
Fairfield (C)	n.a.	n.a.	n.a.	546.0	546.4	108
Federation (A)	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Forbes (A)	111	15.7	125.7	7.3	23.0	42
Georges River (A)	7	1.1	7.3	3.1	4.1	21
Gilgandra (A)	13	1.9	13.2	n.a.	2.0	n.a.
Glen Innes Severn (A)	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Goulburn Mulwaree (A)	18	2.3	18.3	n.a.	2.8	n.a.
Greater Hume Shire (A)	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Griffith (C)	8	0.9	8.0	1.5	2.4	12
Gunnedah (A)	775	132.9	1,307.8	179.1	312.0	188
Gwydir (A)	10	1.4	13.6	3.3	4.8	n.a.
Hawkesbury (C)	13	2.0	13.1	12.4	14.4	20
Hay (A)	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Hilltops (A)	15	2.3	15.4	3.1	5.4	11

Table B1: Direct Impacts of NSW Mining Companies Sector by LGA, 2023/24

Local government area	Residing employees (FTEs)	Associated salaries ($M)	Total workforce[(a)] FTEs	Business purchases, community and local govt payments ($M)	Total direct spending ($M)	Local suppliers (no.)
Hornsby (A)	19	3.4	19.4	10.8	14.2	53
Hunters Hill (A)	n.a.	n.a.	n.a.	n.a.	3.8	n.a.
Inner West (A)	29	6.3	28.7	6.7	12.9	49
Inverell (A)	16	2.4	16.1	1.2	3.6	7
Junee (A)	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Kempsey (A)	15	2.1	15.0	3.1	5.2	n.a.
Kiama (A)	72	11.1	71.9	6.9	18.0	16
Ku-ring-gai (A)	21	8.0	21.2	8.1	16.1	33
Kyogle (A)	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Lachlan (A)	48	7.1	55.0	9.2	16.3	56
Lake Macquarie (C)	1,572	273.6	1,640.6	353.4	627.0	430
Lane Cove (A)	9	3.6	9.4	15.9	19.5	26
Leeton (A)	11	1.6	11.0	30.3	31.9	9
Lismore (C)	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Lithgow (C)	620	110.8	677.4	71.4	182.2	111
Liverpool (C)	13	2.0	12.6	52.6	54.6	40
Liverpool Plains (A)	67	14.5	135.4	7.3	21.8	23
Lockhart (A)	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Maitland (C)	2,259	380.4	2,279.1	1,512.0	1,892.4	490
Mid-Coast (A)	172	26.8	172.5	56.7	83.6	53
Mid-Western Regional (A)	1,726	292.2	1,971.0	226.1	518.3	364
Moree Plains (A)	9	1.4	12.7	n.a.	1.7	5
Mosman (A)	n.a.	n.a.	n.a.	1.3	2.0	11
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)	1,698	260.7	3,109.8	651.8	912.5	271
Nambucca (A)	9	1.2	9.0	n.a.	1.9	n.a.
Narrabri (A)	371	64.1	1,685.8	32.6	96.6	118

Table B1: Direct Impacts of NSW Mining Companies Sector by LGA, 2023/24

Local government area	Residing employees (FTEs)	Associated salaries ($M)	Total workforce[(a)] FTEs	Business purchases, community and local govt payments ($M)	Total direct spending ($M)	Local suppliers (no.)
Narrandera (A)	5	0.8	5.2	n.a.	1.0	n.a.
Narromine (A)	62	7.2	62.1	3.9	11.1	27
Newcastle (C)	1,048	186.6	1,048.4	2,381.2	2,567.8	703
North Sydney (A)	11	3.1	11.0	117.4	120.5	128
Northern Beaches (A)	23	7.7	23.0	18.8	26.5	114
Oberon (A)	17	2.7	16.8	4.9	7.6	6
Orange (C)	868	139.4	1,895.0	331.0	470.4	260
Parkes (A)	409	55.5	2,000.0	60.7	116.2	139
Parramatta (C)	16	3.7	16.0	373.8	377.5	183
Penrith (C)	30	3.9	30.0	51.1	55.0	50
Port Macquarie-Hastings (A)	38	4.6	38.4	46.0	50.6	20
Port Stephens (A)	386	64.1	386.0	124.9	189.0	83
Queanbeyan-Palerang Regional (A)	36	4.6	36.2	39.7	44.3	12
Randwick (C)	19	3.0	18.8	156.0	159.1	15
Richmond Valley (A)	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Ryde (C)	12	3.6	12.5	103.4	107.0	108
Shellharbour (C)	349	46.2	349.2	73.5	119.7	30
Shoalhaven (C)	56	8.4	56.4	50.8	59.2	22
Singleton (A)	2,804	472.9	4,659.9	1,140.1	1,613.0	442
Snowy Monaro Regional (A)	n.a.	n.a.	n.a.	n.a.	1.5	n.a.
Snowy Valleys (A)	5	0.8	5.1	1.5	2.3	5
Strathfield (A)	n.a.	n.a.	n.a.	10.1	10.3	17
Sutherland Shire (A)	50	8.2	50.1	67.5	75.7	75
Sydney (C)	41	12.4	48.3	2,735.4	2,747.8	676
Tamworth Regional (A)	299	51.5	304.1	50.0	101.5	133
Temora (A)	11	1.7	10.9	n.a.	2.4	n.a.

Table B1: Direct Impacts of NSW Mining Companies Sector by LGA, 2023/24

Local government area	Residing employees (FTEs)	Associated salaries ($M)	Total workforce[(a)] FTEs	Business purchases, community and local govt payments ($M)	Total direct spending ($M)	Local suppliers (no.)
Tenterfield (A)	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
The Hills Shire (A)	14	4.2	14.4	38.3	42.5	86
Tweed (A)	7	1.1	7.0	n.a.	1.7	10
Upper Hunter Shire (A)	848	132.2	866.8	37.8	170.1	110
Upper Lachlan Shire (A)	n.a.	n.a.	n.a.	n.a.	1.0	7
Uralla (A)	n.a.	n.a.	n.a.	1.5	1.8	n.a.
Wagga Wagga (C)	27	3.7	26.5	30.0	33.7	35
Walcha (A)	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Walgett (A)	11	1.6	14.4	n.a.	1.7	n.a.
Warren (A)	15	1.8	16.7	n.a.	2.1	n.a.
Warrumbungle Shire (A)	61	9.2	64.4	4.5	13.7	14
Waverley (A)	5	2.7	5.4	4.4	7.1	15
Weddin (A)	11	1.8	11.4	12.2	14.0	n.a.
Wentworth (A)	24	2.9	24.0	3.8	6.7	31
Willoughby (C)	12	2.7	11.7	53.8	56.5	81
Wingecarribee (A)	65	9.7	65.0	189.6	199.3	28
Wollondilly (A)	88	11.4	929.8	83.8	95.2	67
Wollongong (C)	1,089	166.7	1,549.3	538.2	704.9	357
Woollahra (A)	9	3.6	9.5	1.5	5.1	12
Yass Valley (A)	n.a.	n.a.	n.a.	6.5	7.1	n.a.

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

Appendix C: Total Impact by Local Government Area

Table C1: Estimated Total Economic Impact of NSW Mining Companies by LGA, 2023/24 (Type II)

Local government area	Total GVA ($M)	Total value added as % of GRP	Total jobs supported (FTEs)	% of regional employment
Albury (C)	7.9	0.2%	80	0.3%
Armidale Regional (A)	11.3	0.5%	93	0.6%
Ballina (A)	3.6	0.1%	32	0.1%
Balranald (A)	17.5	8.5%	52	3.8%
Bathurst Regional (A)	189.1	5.2%	1,509	6.2%
Bayside (A)	196.2	0.9%	630	0.6%
Bega Valley (A)	1.9	0.1%	18	0.1%
Bellingen (A)	4.7	0.6%	38	0.7%
Berrigan (A)	n.a.	n.a.	n.a.	n.a.
Blacktown (C)	256.9	0.9%	828	0.4%
Bland (A)	186.7	39.4%	1,511	49.1%
Blayney (A)	81.8	11.8%	637	14.9%
Blue Mountains (C)	26.6	0.8%	153	0.4%
Bogan (A)	54.0	5.9%	480	39.8%
Bourke (A)	1.0	0.8%	10	0.9%
Brewarrina (A)	n.a.	n.a.	n.a.	n.a.
Broken Hill (C)	361.2	16.7%	3,118	40.7%
Burwood (A)	2.4	0.1%	9	0.0%
Byron (A)	15.6	0.5%	98	0.5%
Cabonne (A)	156.9	18.9%	1,180	15.0%
Camden (A)	266.2	4.2%	888	1.1%
Campbelltown (C)	220.6	2.3%	941	1.1%
Canada Bay (A)	9.4	0.1%	44	0.1%
Canterbury-Bankstown (A)	358.0	1.7%	1,130	0.6%
Carrathool (A)	1.2	0.3%	10	0.7%
Central Coast (C)	455.1	2.6%	1,727	1.0%
Central Darling (A)	2.0	1.2%	16	2.2%

Table C1: Estimated Total Economic Impact of NSW Mining Companies by LGA, 2023/24 (Type II)

Local government area	Total GVA ($M)	Total value added as % of GRP	Total jobs supported (FTEs)	% of regional employment
Cessnock (C)	1,462.0	54.8%	9,741	30.9%
Clarence Valley (A)	8.3	0.3%	72	0.3%
Cobar (A)	307.7	14.6%	2,028	97.0%
Coffs Harbour (C)	16.6	0.3%	139	0.4%
Coolamon (A)	1.1	0.3%	10	0.4%
Coonamble (A)	1.5	0.5%	14	0.9%
Cootamundra-Gundagai (A)	1.5	0.2%	13	0.3%
Cowra (A)	9.8	1.1%	86	1.4%
Cumberland (A)	139.2	0.7%	446	0.4%
Dubbo Regional (A)	291.3	7.1%	2,451	8.9%
Dungog (A)	82.7	18.9%	567	11.3%
Edward River (A)	1.7	0.2%	9	0.2%
Eurobodalla (A)	3.8	0.2%	33	0.2%
Fairfield (C)	1,115.0	9.0%	3,495	4.2%
Federation (A)	n.a.	n.a.	n.a.	n.a.
Forbes (A)	44.2	5.7%	375	7.4%
Georges River (A)	8.8	0.1%	36	0.0%
Gilgandra (A)	3.1	1.0%	27	1.4%
Glen Innes Severn (A)	1.2	0.2%	9	0.2%
Goulburn Mulwaree (A)	5.5	0.2%	52	0.3%
Greater Hume Shire (A)	2.1	0.3%	18	0.3%
Griffith (C)	3.8	0.1%	25	0.2%
Gunnedah (A)	674.1	54.6%	5,281	73.6%
Gwydir (A)	10.0	1.9%	75	3.0%
Hawkesbury (C)	29.6	0.6%	109	0.3%
Hay (A)	n.a.	n.a.	n.a.	n.a.
Hilltops (A)	12.5	0.8%	104	1.1%
Hornsby (A)	30.2	0.4%	118	0.1%

Table C1: Estimated Total Economic Impact of NSW Mining Companies by LGA, 2023/24 (Type II)

Local government area	Total GVA ($M)	Total value added as % of GRP	Total jobs supported (FTEs)	% of regional employment
Hunters Hill (A)	8.1	0.9%	30	0.4%
Inner West (A)	28.6	0.2%	127	0.1%
Inverell (A)	7.5	0.6%	65	0.7%
Junee (A)	1.3	0.3%	9	0.4%
Kempsey (A)	12.3	0.8%	104	0.9%
Kiama (A)	42.5	3.6%	356	3.1%
Ku-ring-gai (A)	35.9	0.6%	145	0.2%
Kyogle (A)	n.a.	n.a.	n.a.	n.a.
Lachlan (A)	34.6	7.1%	276	8.7%
Lake Macquarie (C)	1,310.2	10.4%	8,381	7.4%
Lane Cove (A)	40.2	1.3%	139	0.6%
Leeton (A)	47.7	4.5%	187	3.4%
Lismore (C)	1.2	0.0%	11	0.0%
Lithgow (C)	383.1	24.9%	3,122	31.0%
Liverpool (C)	111.8	0.8%	366	0.3%
Liverpool Plains (A)	41.8	4.5%	316	8.0%
Lockhart (A)	n.a.	n.a.	n.a.	n.a.
Maitland (C)	3,885.3	71.3%	21,184	41.9%
Mid-Coast (A)	171.0	3.8%	1,027	2.7%
Mid-Western Regional (A)	1,081.5	54.6%	8,731	63.9%
Moree Plains (A)	3.2	0.2%	27	0.4%
Mosman (A)	4.1	0.2%	16	0.1%
Murray River (A)	1.7	0.2%	10	0.1%
Murrumbidgee (A)	n.a.	n.a.	n.a.	n.a.
Muswellbrook (A)	1,851.4	30.9%	7,519	88.7%
Nambucca (A)	3.6	0.4%	29	0.4%
Narrabri (A)	187.9	3.2%	1,502	20.7%
Narrandera (A)	1.6	0.4%	12	0.5%

Table C1: Estimated Total Economic Impact of NSW Mining Companies by LGA, 2023/24 (Type II)

Local government area	Total GVA ($M)	Total value added as % of GRP	Total jobs supported (FTEs)	% of regional employment
Narromine (A)	21.1	1.4%	187	6.2%
Newcastle (C)	5,390.2	24.3%	26,677	26.2%
North Sydney (A)	247.8	1.2%	787	1.7%
Northern Beaches (A)	57.0	0.3%	212	0.1%
Oberon (A)	13.4	2.8%	87	2.9%
Orange (C)	1,037.0	26.0%	7,912	32.5%
Parkes (A)	256.8	23.9%	2,161	28.6%
Parramatta (C)	770.8	2.3%	2,438	1.5%
Penrith (C)	114.3	0.8%	391	0.3%
Port Macquarie-Hastings (A)	119.3	2.5%	893	2.3%
Port Stephens (A)	387.9	6.5%	2,327	6.5%
Queanbeyan-Palerang Regional (A)	117.9	3.0%	959	2.4%
Randwick (C)	328.1	3.9%	1,043	1.3%
Richmond Valley (A)	1.0	0.1%	10	0.1%
Ryde (C)	220.3	0.8%	705	0.9%
Shellharbour (C)	296.5	8.6%	2,356	6.0%
Shoalhaven (C)	140.0	2.3%	949	2.1%
Singleton (A)	3,263.8	25.9%	12,248	85.9%
Snowy Monaro Regional (A)	3.6	0.2%	31	0.2%
Snowy Valleys (A)	3.7	0.3%	21	0.3%
Strathfield (A)	21.1	0.3%	68	0.2%
Sutherland Shire (A)	157.7	1.3%	555	0.4%
Sydney (C)	5,649.7	3.5%	17,636	11.7%
Tamworth Regional (A)	226.9	4.7%	1,862	5.3%
Temora (A)	3.8	0.8%	27	1.0%
Tenterfield (A)	n.a.	n.a.	6	0.2%
The Hills Shire (A)	87.9	0.7%	297	0.3%
Tweed (A)	4.2	0.1%	37	0.1%

Table C1: Estimated Total Economic Impact of NSW Mining Companies by LGA, 2023/24 (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)	325.7	30.6%	2,500	32.2%
Upper Lachlan Shire (A)	1.9	0.4%	16	0.3%
Uralla (A)	4.3	1.0%	33	1.0%
Wagga Wagga (C)	52.0	0.9%	232	0.7%
Walcha (A)	1.5	0.4%	11	0.7%
Walgett (A)	2.8	0.6%	25	1.1%
Warren (A)	3.5	1.4%	32	2.6%
Warrumbungle Shire (A)	25.3	5.4%	204	4.9%
Waverley (A)	15.1	0.3%	56	0.1%
Weddin (A)	36.3	16.6%	291	16.2%
Wentworth (A)	13.6	2.0%	112	2.7%
Willoughby (C)	116.1	0.9%	378	0.9%
Wingecarribee (A)	438.8	12.7%	2,655	10.4%
Wollondilly (A)	197.1	2.9%	711	2.2%
Wollongong (C)	1,691.9	11.0%	12,113	10.9%
Woollahra (A)	11.3	0.3%	49	0.1%
Yass Valley (A)	18.8	1.8%	151	1.5%

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

Appendix D: Direct Impact by State Electorate

Table D1: Direct Impacts of NSW Mining Companies Sector by SED, 2023/24

State electoral division	Residing employees (FTEs)	Associated salaries ($M)	Total workforce[(a)] FTEs	Business purchases, community and local govt payments ($M)	Total direct spending ($M)	Local suppliers (no.)
Albury	18	2.5	18	1.6	4.1	12
Auburn	9	1.2	9	71.6	72.8	94
Ballina	8	1.4	8	6.8	8.2	13
Balmain	18	4.5	18	9.0	13.6	32
Bankstown	n.a.	n.a.	n.a.	28.5	29.1	26
Barwon	1,839	246.6	3,709	223.0	469.7	448
Bathurst	1,244	211.8	1,317	140.3	352.1	327
Baulkham Hills	6	1.6	6	24.8	26.3	47
Bega	12	1.5	12	1.1	2.6	7
Blacktown	n.a.	n.a.	n.a.	58.0	58.1	60
Blue Mountains	60	9.7	60	1.6	11.3	14
Cabramatta	n.a.	n.a.	n.a.	5.2	5.4	n.a.
Camden	51	6.3	51	123.4	129.6	47
Campbelltown	185	32.3	185	11.0	43.3	16
Canterbury	n.a.	n.a.	n.a.	n.a.	1.0	6
Castle Hill	7	2.2	7	16.3	18.5	36
Cessnock	2,591	418.8	2,701	491.9	910.7	283
Charlestown	486	84.7	486	150.6	235.2	168
Clarence	20	2.3	20	2.0	4.3	9
Coffs Harbour	17	2.4	17	4.4	6.8	11
Coogee	12	1.8	12	4.1	5.9	17
Cootamundra	329	51.5	679	63.8	115.3	144
Cronulla	21	3.3	21	21.1	24.4	36
Davidson	11	5.1	11	6.3	11.4	26

Table D1: Direct Impacts of NSW Mining Companies Sector by SED, 2023/24

State electoral division	Residing employees (FTEs)	Associated salaries ($M)	Total workforce[(a)] FTEs	Business purchases, community and local govt payments ($M)	Total direct spending ($M)	Local suppliers (no.)
Drummoyne	12	2.6	12	1.5	4.1	19
Dubbo	1,908	308.7	2,158	288.8	597.5	556
East Hills	n.a.	n.a.	n.a.	26.2	26.7	36
Epping	6	1.6	6	9.2	10.7	18
Fairfield	n.a.	n.a.	n.a.	489.2	489.3	47
Gosford	22	3.2	22	67.9	71.0	33
Goulburn	48	6.2	48	186.2	192.4	27
Granville	n.a.	n.a.	n.a.	33.6	34.1	22
Hawkesbury	15	2.5	15	13.1	15.6	27
Heathcote	62	10.5	62	47.5	57.9	38
Heffron	16	3.4	16	29.0	32.4	69
Holsworthy	n.a.	n.a.	n.a.	33.7	34.4	24
Hornsby	13	2.1	13	2.8	4.9	33
Keira	500	77.0	500	99.3	176.3	93
Kiama	203	29.6	203	96.0	125.6	36
Kogarah	6	0.9	6	2.1	3.0	11
Ku-ring-gai	17	6.7	17	3.8	10.5	24
Lake Macquarie	611	108.6	679	109.4	218.1	157
Lakemba	n.a.	n.a.	n.a.	124.0	124.4	21
Lane Cove	19	9.4	19	58.2	67.6	71
Lismore	7	1.0	7	n.a.	1.2	8
Liverpool	6	0.8	6	15.4	16.2	11
Londonderry	11	1.1	11	13.4	14.5	23
Macquarie Fields	14	2.5	14	59.8	62.3	49
Maitland	2,259	380.4	2,279	1,512.0	1,892.4	490
Manly	11	3.3	11	3.1	6.4	28
Maroubra	8	1.6	8	227.9	229.6	33
Miranda	11	2.0	11	8.5	10.4	19
Monaro	41	5.2	41	40.6	45.8	14

Table D1: Direct Impacts of NSW Mining Companies Sector by SED, 2023/24

State electoral division	Residing employees (FTEs)	Associated salaries ($M)	Total workforce[(a)] FTEs	Business purchases, community and local govt payments ($M)	Total direct spending ($M)	Local suppliers (no.)
Mount Druitt	7	1.2	7	26.3	27.4	28
Mulgoa	11	1.2	11	18.7	19.9	15
Murray	56	7.3	57	50.3	57.6	85
Myall Lakes	76	11.8	76	29.0	40.8	19
Newcastle	487	89.4	487	2,003.2	2,092.6	539
Newtown	10	2.2	10	8.5	10.7	27
North Shore	12	2.9	12	114.7	117.6	129
Northern Tablelands	55	8.1	62	9.4	17.5	37
Oatley	n.a.	n.a.	n.a.	n.a.	1.6	14
Orange	1,557	236.1	4,309	448.8	685.0	491
Oxley	38	5.3	38	18.5	23.9	12
Parramatta	n.a.	n.a.	n.a.	294.3	295.7	87
Penrith	12	2.1	12	29.7	31.9	28
Pittwater	n.a.	n.a.	n.a.	9.3	9.6	41
Port Macquarie	35	4.3	35	32.8	37.1	19
Port Stephens	377	61.9	377	147.1	208.9	89
Prospect	n.a.	n.a.	n.a.	83.5	84.1	81
Riverstone	n.a.	n.a.	n.a.	6.9	7.5	6
Rockdale	n.a.	n.a.	n.a.	n.a.	n.a.	8
Ryde	8	2.1	8	75.3	77.4	77
Seven Hills	n.a.	n.a.	n.a.	25.9	26.5	71
Shellharbour	384	50.2	411	48.0	98.2	43
South Coast	33	4.7	33	19.1	23.8	9
Strathfield	n.a.	n.a.	n.a.	4.1	4.7	27
Summer Hill	10	1.8	10	1.9	3.7	18
Swansea	317	56.2	318	11.3	67.5	55
Sydney	27	9.2	34	2,714.9	2,724.1	607
Tamworth	1,093	188.4	1,699	229.4	417.8	325
Terrigal	36	5.2	36	23.0	28.3	24

Table D1: Direct Impacts of NSW Mining Companies Sector by SED, 2023/24

State electoral division	Residing employees (FTEs)	Associated salaries ($M)	Total workforce[(a)] FTEs	Business purchases, community and local govt payments ($M)	Total direct spending ($M)	Local suppliers (no.)
The Entrance	37	6.1	37	77.1	83.2	33
Tweed	6	0.9	6	n.a.	1.5	9
Upper Hunter	5,600	907.1	8,792	1,802.9	2,710.1	882
Vaucluse	10	4.5	10	1.3	5.8	13
Wagga Wagga	30	4.3	30	31.5	35.8	40
Wakehurst	5	1.0	5	5.0	5.9	34
Wallsend	565	96.2	565	394.2	490.4	164
Willoughby	11	2.9	11	43.8	46.7	80
Wollondilly	133	18.6	975	94.5	113.1	85
Wollongong	402	63.2	835	397.4	460.5	225
Wyong	99	16.4	100	11.3	27.7	32

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, 2023/24

Commonwealth electoral division	Residing employees (FTEs)	Associated salaries ($M)	Total workforce[a] FTEs	Business purchases, community and local govt payments ($M)	Total direct spending ($M)	Local suppliers (no.)
Banks	7	1.0	7	23.7	24.7	39
Barton	10	1.4	10	3.2	4.6	26
Bennelong	18	5.0	18	106.3	111.3	121
Berowra	17	4.1	17	11.3	15.3	58
Blaxland	7	1.1	7	49.7	50.8	68
Bradfield	28	9.2	28	12.6	21.8	58
Calare	3,936	656.4	5,400	743.5	1,399.9	981
Chifley	11	1.7	11	67.4	69.1	65
Cook	29	4.5	29	23.4	27.9	45
Cowper	58	7.8	58	36.5	44.3	32
Cunningham	911	143.0	1,335	497.3	640.3	324
Dobell	139	22.9	140	84.0	106.9	66
Eden-Monaro	55	7.2	55	49.3	56.4	27
Farrer	78	10.2	79	52.1	62.3	97
Fowler	n.a.	n.a.	n.a.	101.6	102.1	24
Gilmore	135	20.3	135	58.2	78.5	41
Grayndler	25	5.7	25	4.2	9.9	38
Greenway	8	0.8	8	59.3	60.2	98
Hughes	26	4.5	26	51.6	56.0	37
Hume	153	19.5	995	173.7	193.2	116
Hunter	6,916	1,132.7	10,252	2,065.7	3,198.4	1,035
Kingsford Smith	24	4.2	24	248.7	252.9	64
Lindsay	27	3.5	27	37.2	40.7	45
Lyne	828	134.4	828	244.6	379.0	157
Macarthur	220	37.2	220	115.5	152.8	73
Mackellar	10	4.0	10	13.8	17.8	70
Macquarie	73	11.7	73	14.5	26.2	36

Table E1: Direct Impacts of NSW Mining Companies Sector by CED, 2023/24

Commonwealth electoral division	Residing employees (FTEs)	Associated salaries ($M)	Total workforce[(a)] FTEs	Business purchases, community and local govt payments ($M)	Total direct spending ($M)	Local suppliers (no.)
McMahon	6	0.7	6	503.9	504.6	126
Mitchell	12	2.8	12	46.1	48.9	90
Newcastle	1,256	204.7	1,352	104.4	309.2	300
New England	998	178.5	998	2,113.2	2,291.7	660
North Sydney	31	11.8	31	183.1	194.9	217
Page	30	3.8	30	2.9	6.6	19
Parkes	2,977	426.7	5,404	481.7	908.3	874
Parramatta	8	1.8	8	330.1	331.9	106
Paterson	2,798	464.0	2,819	1,983.0	2,447.1	606
Reid	21	3.9	21	54.9	58.8	104
Richmond	15	2.4	15	7.3	9.8	19
Riverina	872	125.7	2,827	161.6	287.4	360
Robertson	55	8.0	55	95.4	103.4	57
Shortland	864	149.9	864	205.8	355.8	244
Sydney	41	12.0	48	2,734.8	2,746.8	672
Warringah	19	5.3	19	6.5	11.9	60
Watson	7	1.1	7	128.8	130.0	30
Wentworth	18	6.9	18	7.5	14.5	34
Werriwa	10	1.5	10	26.2	27.7	28
Whitlam	580	78.0	616	287.6	365.5	83

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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