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# NSW Mining Industry Expenditure Impact Survey 2024/25

January 2026

# Executive Summary

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## Overview

The New South Wales Minerals Council (NSWMC) analysed the expenditure patterns of 29 NSW exploration and mining companies to determine the economic contribution of the industry throughout NSW in 2024/25. 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 \$21.9 billion in the NSW economy** in 2024/25, comprised of:

- **Total workforce of 35,136 full-time equivalent workers** (including direct resident employees and contract workers), which represented an annual increase of 159 workers, or 0.5%;
- **\$4.0 billion in wages and salaries** to approximately **24,969 direct fulltime resident employees** (not including contractors), representing an **average salary** level across the sector of **\$159,913** per annum;
- **\$14.3 billion in purchases of goods and services from 7,522 local businesses** (including contract payments), community contributions and payments to local government (including rates, developer contributions and other payments); and
- **\$3.6 billion** in state government payments (including royalties, stamp duty, payroll tax and land tax).

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*NSW mining companies contributed **\$21.9 billion** in direct spending to the State economy in 2024/25.*

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The Hunter region recorded the highest direct expenditure in 2024/25, with \$9.4 billion (or 42.9% of the total direct spend across NSW), followed by Sydney (\$4.9 billion, or 22.3%) and Central West (\$1.1 billion, or 5.2%).

**Table E1: Direct Impact of NSW Resource Sector by Region, 2024/25**

Region	Residing employees (FTEs)	Associated salaries (\$M)	Total workforce <sup>(b)</sup>	Business purchases, community and govt payments (\$M)	No. of local suppliers	Total direct spending (\$M)	% of total direct spend, NSW
Central West	3,341	504.7	6,506	635.7	899	1,140.4	5.2%
Far West	419	53.6	909	96.3	125	149.9	0.7%
Hunter	13,275	2,246.9	16,085	7,143.7	3,410	9,390.7	42.9%
Illawarra	1,713	226.3	2,274	788.9	491	1,015.3	4.6%
Mid-North Coast	110	14.9	110	52.2	51	67.0	0.3%
Murray	37	4.9	150	20.5	88	25.4	0.1%
Murrumbidgee	92	15.3	94	59.2	77	74.4	0.3%
North Western	2,924	445.3	4,090	434.9	888	880.2	4.0%
Northern	1,869	276.1	3,253	265.5	463	541.6	2.5%
Richmond-Tweed	28	3.9	28	12.0	28	15.9	0.1%
South Eastern	191	22.5	199	65.0	162	87.6	0.4%
Sydney	962	177.8	1,421	4,708.1	2,847	4,886.0	22.3%
Unallocated <sup>(a)</sup>	12	1.5	24	2.7		3,608.0	16.5%
<b>Total NSW</b>	<b>24,969</b>	<b>3,992.8</b>	<b>35,136</b>	<b>14,284.8</b>	<b>7,522</b>	<b>21,881.5</b>	<b>100.0%</b>
Rest of Australia	740	112.3	745	8,612.8	2,906	10,086.5	
<b>Total Australia</b>	<b>25,708</b>	<b>4,105.2</b>	<b>35,881</b>	<b>22,897.6</b>	<b>10,428</b>	<b>31,968.0</b>	
Overseas	<5	0.3	<5	376.5	392	376.7	
Other	103	19.9	103	357.5	131	377.4	
<b>Total</b>	<b>25,811</b>	<b>4,125.3</b>	<b>35,984</b>	<b>23,631.6</b>	<b>10,951</b>	<b>32,722.1</b>	

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

Based on whole-of-survey totals, the direct expenditure in NSW by mining companies in 2024/25 decreased marginally by \$137.6 million, or 0.6%, compared to the previous year, although, in contrast, the total workforce increased annually by 159 FTEs, or 0.5%.

Since 2011/12, NSW mining companies surveyed by NSWMC have generated \$206.6 billion in direct spending, with average annual expenditure of \$14.8 billion.

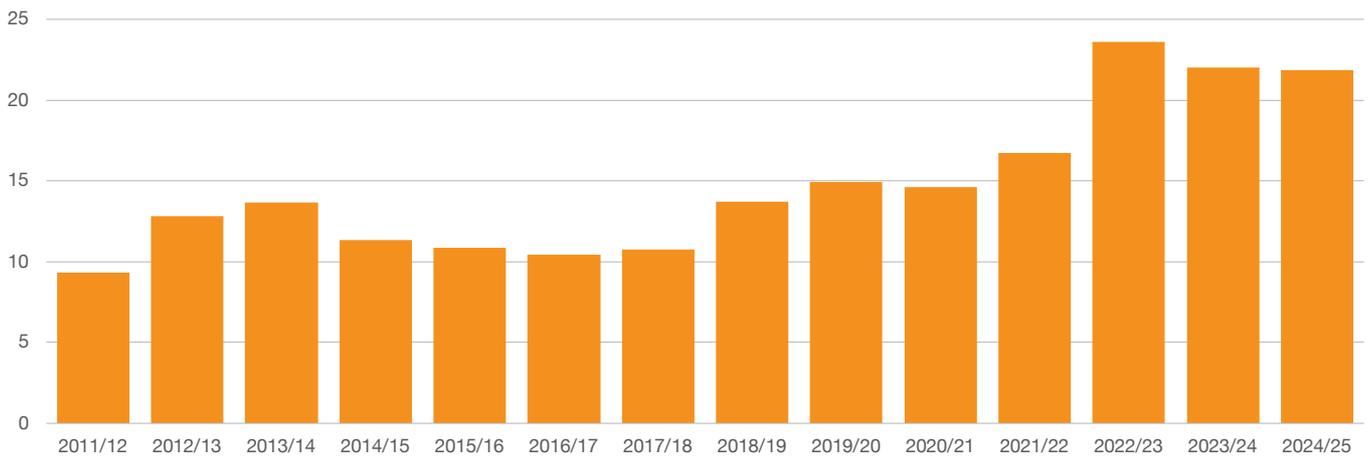
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*Since 2011/12, NSW mining companies have contributed \$206.6 billion in direct spending to the State economy.*

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**Direct Expenditure of NSW Mining Companies**

New South Wales (\$ billion, real)



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

	2024/25	2023/24	2022/23	Annual % change
No. of companies surveyed	29	30	28	-3.3%
<b>DIRECT EMPLOYEES</b>				
No. of direct employees (FTEs)	24,969	24,366	22,905	2.5%
No. of apprenticeships and traineeships (FTEs)	337	363	397	-7.3%
Total wages/salaries paid (\$M)	3,992.8	3,944.0	3,384.3	1.2%
<b>BUSINESS PURCHASES</b>				
No. of suppliers	7,522	7,139	6,980	5.4%
Total opex spend (\$M)	13,233.0	12,616.0	12,389.9	4.9%
Total capex spend (\$M)	927.5	1,687.5	1,911.0	-45.0%
Total business purchases (\$M)	14,160.5	14,303.4	14,300.9	-1.0%
<b>COMMUNITY CONTRIBUTIONS</b>				
No. of community organisations supported	1,254	1,450	1,319	-13.5%
Total community contributions (\$M)	22.7	19.4	17.0	17.2%
<b>LOCAL COUNCIL PAYMENTS</b>				
Total local government payments (\$M)	101.6	94.9	90.3	7.0%
<b>STATE GOVERNMENT PAYMENTS</b>				
Total state government payments (\$M)	3,603.9	3,657.4	5,809.2	-1.5%
<b>TOTAL SPEND (\$M)</b>	<b>21,881.5</b>	<b>22,019.1</b>	<b>23,601.7</b>	<b>-0.6%</b>
<b>TOTAL WORKFORCE (FTEs)</b>	<b>35,136</b>	<b>34,977</b>	<b>31,586</b>	<b>0.5%</b>

## Indirect and Total Economic Impacts

Economic modelling of the flow-on effects of the surveyed companies' direct expenditure allowed the indirect and total economic impact to be estimated. Across NSW, the total economic impact of the surveyed companies in 2024/25, based on Type II multipliers (i.e. including both indirect industry and consumption-induced effects), amounted to:

- **\$52.9 billion in output/turnover** (a measure of direct and supply chain purchases from businesses);
- **\$47.4 billion in gross value added (GVA)**, amounting to 5.5% of Gross State Product (GSP) for NSW (\$855,408 billion) through \$21.9 billion in direct effects and \$25.5 billion in supply chain and consumption effects;
- **\$18.1 billion in income** (wages and salaries) paid to workers; and
- **240,615 full time equivalent jobs** supported, or 5.4% of total employment in NSW during 2024/25.

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*The total economic impact of the NSW mining companies surveyed to the State economy was estimated at **\$47.4 billion in gross value added and 240,615 jobs supported in 2024/25.***

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In terms of total economic benefit, the 29 companies surveyed had the **highest overall impact in the Hunter region**, with total value added of \$19.7 billion, followed by Sydney (\$10.1 billion), Central West (\$2.5 billion) and Illawarra (\$2.5 billion). With regard to economic contribution, the total gross value added from the NSW companies surveyed comprised the largest share of gross regional product in the Hunter region (25.9%), followed by North Western (15.3%), Central West (15.0%) and Far West (14.0%).

With regard to employment, the NSW mining companies surveyed again had the greatest impact on jobs in the Hunter region, supporting 111,128 jobs (FTEs), followed by the Sydney (32,731 FTEs) and Central West (20,213 FTEs) regions.

**Table E3: Economic Impact of NSW Mining Companies, 2024/25**

	New South Wales	Rest of Australia	Total Australia
<b>Gross Value Added (\$M)</b>			
Direct	21,882	10,086	31,968
% of Gross State Product (GSP)	2.6%	0.5%	1.2%
Indirect	16,332	5,742	22,074
Total GVA (Type I)	38,214	15,828	54,043
% of GSP	4.5%	0.8%	1.9%
Consumption-induced	9,161	3,430	12,591
<b>Total GVA (Type II)</b>	<b>47,376</b>	<b>19,258</b>	<b>66,634</b>
% of GSP	5.5%	1.0%	2.4%
<b>Employment (FTEs)</b>			
Direct	24,969	740	25,708
% of total state employment	0.6%	0.0%	0.2%
Indirect	132,169	34,373	166,542
Total employment (Type I)	157,145	35,112	192,257
% of total state employment	3.5%	0.4%	1.3%
Consumption-induced	83,470	21,748	105,218
<b>Total employment (Type II)</b>	<b>240,615</b>	<b>56,860</b>	<b>297,475</b>
% of total state employment	5.4%	0.6%	2.1%
<b>Business spend (incl. community contributions and govt payments) (\$M)</b>			
Direct	17,889	8,613	26,501
Indirect	13,110	6,120	19,229
Total business spend (Type I)	30,998	14,732	45,731
Consumption-induced	17,876	6,447	24,322
Total business spend (Type II)	48,874	21,179	70,053
<b>Wages &amp; salaries (\$M)</b>			
Direct	3,993	112	4,105
Indirect	8,818	2,982	11,800
Total wages & salaries (Type I)	12,811	3,095	15,906
Consumption-induced	5,240	1,578	6,818
Total wages & salaries (Type II)	18,051	4,673	22,724

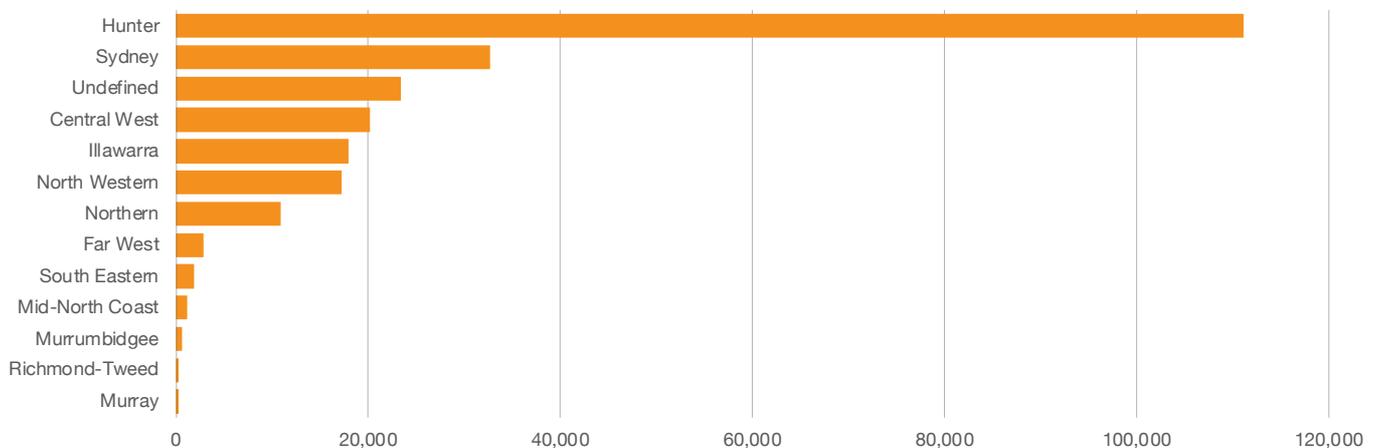
Note: Consumption-induced impacts seek to measure the change in consumption for all goods and services that arise from an increase in final output from the industry in question. Direct employment and wages relate specifically to full-time equivalent residing direct employees (not including contractors).

**Table E4: Total Economic Impact of NSW Mining Companies by Region, 2024/25**

Region	Total GVA (\$M)	Total value added as % of GRP	Total jobs supported (FTEs)	% of regional employment
Central West	2,498.7	15.0%	20,213	19.6%
Far West	344.7	14.0%	2,873	34.8%
Hunter	19,731.4	25.9%	111,128	28.2%
Illawarra	2,472.9	7.8%	17,987	7.8%
Mid-North Coast	153.5	0.8%	1,185	1.0%
Murray	44.4	0.4%	280	0.4%
Murrumbidgee	118.3	0.7%	586	0.7%
North Western	2,025.5	15.3%	17,198	29.6%
Northern	1,264.5	5.4%	10,888	10.4%
Richmond-Tweed	38.8	0.2%	284	0.2%
South Eastern	222.4	1.3%	1,877	1.5%
Sydney	10,091.5	1.6%	32,731	1.1%
Undefined	8,369.2	n.a.	23,384	n.a.
<b>Total New South Wales</b>	<b>47,375.8</b>	<b>5.5%</b>	<b>240,615</b>	<b>5.4%</b>
<b>Rest of Australia</b>	<b>19,258.1</b>	<b>1.0%</b>	<b>56,860</b>	<b>0.6%</b>
<b>Total Australia</b>	<b>66,633.8</b>	<b>2.4%</b>	<b>297,475</b>	<b>2.1%</b>

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

New South Wales (FTEs), 2024/25



## Local Suppliers

Approximately 7,522 unique businesses in New South Wales received payments for goods and services supplied during 2024/25 from the mining sector. The highest number of businesses was recorded in the Hunter region (3,410), followed by Sydney (2,847), Central West (899), North Western (888) and Illawarra (491).

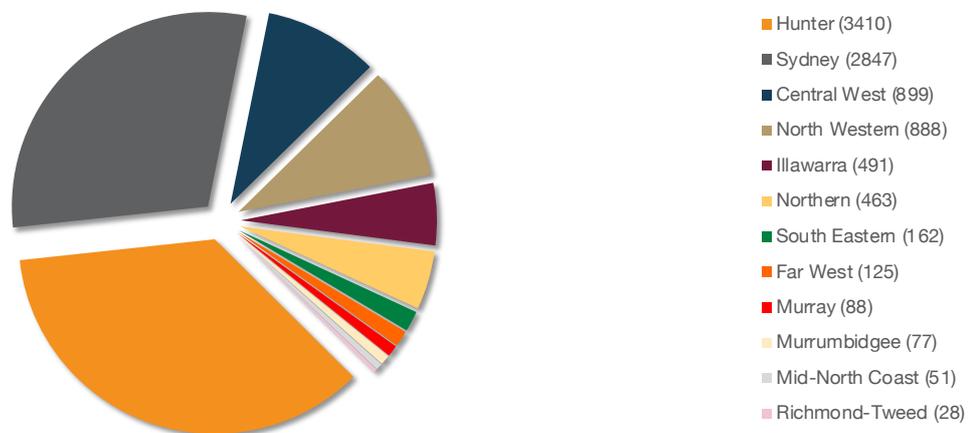
**Table E5: Number of Businesses Supported by Region, 2024/25**

Region	Number of local suppliers
Central West	899
Far West	125
Hunter	3,410
Illawarra	491
Mid-North Coast	51
Murray	88
Murrumbidgee	77
North Western	888
Northern	463
Richmond-Tweed	28
South Eastern	162
Sydney	2,847
<b>Total New South Wales</b>	<b>7,522</b>

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

### Local Businesses Supported by NSW Mining Companies by Region

New South Wales, 2024/25



## Community Support

During 2024/25, NSW mining companies directly contributed over \$22.7 million to 1,254 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 (669), followed by Central West (215).

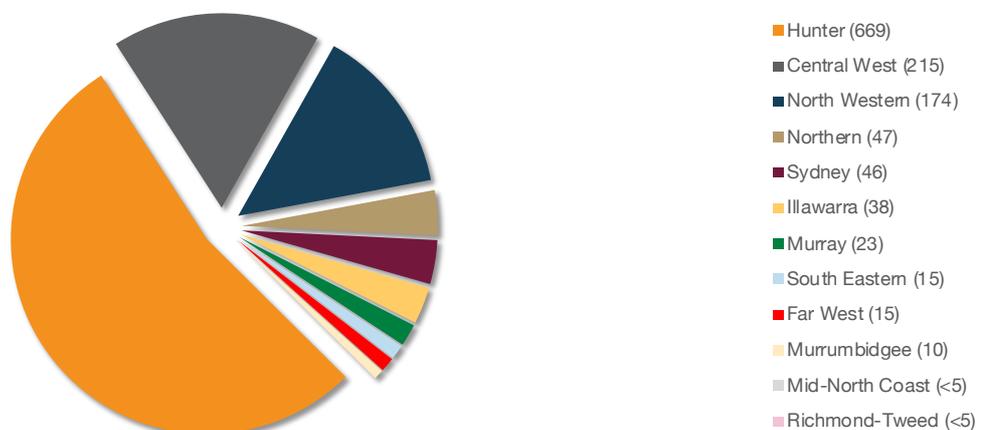
**Table E6: Number of Community Organisations Supported by Region, 2024/25**

Region	No. of community groups	% of total	Total contribution (\$)
Central West	215	17.2%	7,951,335
Far West	15	1.2%	30,793
Hunter	669	53.4%	10,934,825
Illawarra	38	3.0%	708,766
Mid-North Coast	<5	0.1%	33,308
Murray	23	1.8%	75,564
Murrumbidgee	10	0.8%	35,854
North Western	174	13.9%	1,469,925
Northern	47	3.7%	720,367
Richmond-Tweed	<5	0.0%	n.a.
South Eastern	15	1.2%	26,070
Sydney	46	3.6%	740,264
<b>Total New South Wales</b>	<b>1,254</b>	<b>100.0%</b>	<b>22,728,096</b>

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

### Community Organisations Supported by NSW Mining Companies by Region

New South Wales, 2024/25



## 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 2024/25, NSW mining companies reported direct contributions to local councils totalling \$101.6 million, which represented a significant annual increase of \$6.7 million, or 7.0% from the level for 2023/24. Rates (\$79.5 million) comprised the largest proportion of local council payments, followed by Other contributions (\$12.3 million) and Voluntary Planning Agreements (VPA)/developer contributions (\$9.6 million).

**Table E7: Local Council Contributions by Region, 2024/25**

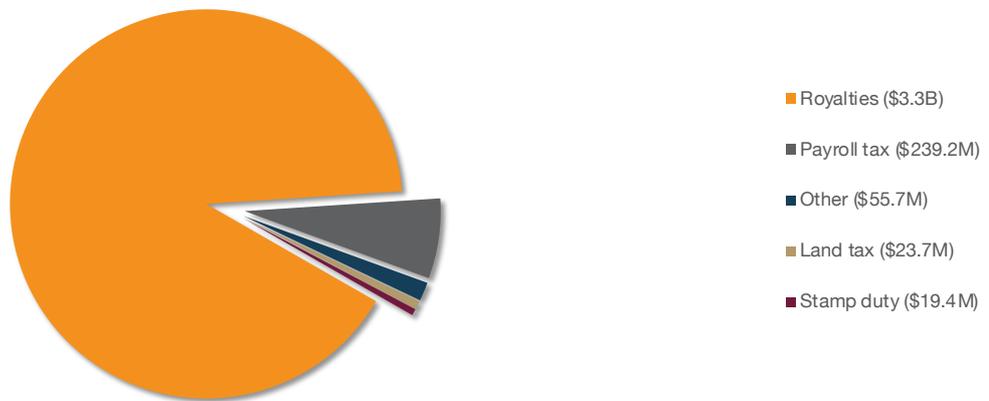
Region	Rates (\$)	VPA/Developer (\$)	Other (\$)	Total contributions (\$)
Central West	13,746,128	706,584	7,619,184	22,087,086
Far West	2,720,813	0	282,875	3,003,688
Hunter	33,918,206	4,827,045	2,624,187	41,417,299
Illawarra	1,392,193	1	0	1,392,194
Mid-North Coast	16,139	0	0	16,139
Murray	1,809,190	1,827,657	13,550	3,650,398
Murrumbidgee	0	0	9,976	9,976
North Western	16,613,809	1,597,543	1,520,273	19,749,813
Northern	5,084,169	672,511	218,916	5,975,597
Richmond-Tweed	0	0	0	0
South Eastern	0	6,529	0	55,146
Sydney	4,119,742	0	0	4,119,743
<b>Total New South Wales</b>	<b>79,504,687</b>	<b>9,638,411</b>	<b>12,299,838</b>	<b>101,572,794</b>
Annual % change	13.3%	-4.5%	-15.8%	7.0%

## State Government Payments

During 2024/25, the direct contribution made by NSW mining companies in state government payments was approximately \$3.6 billion. Total state government payments were comprised of royalties (\$3.3 billion), payroll tax (\$239.2 million), other (\$55.7 million), land tax (\$23.7 million) and stamp duty (\$19.4 million).

### State Government Contributions by NSW Mining Companies by Category

New South Wales, 2024/25



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# Introduction

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The NSW Minerals Council (NSWMC) commissioned Lawrence Consulting to determine the total direct, indirect and consumption-induced economic benefit to the state economy based on expenditure data provided by 29 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 2024/25 and the multiplier and consumption-induced effects that are generated by that initial stimulus. The analysis is an update of previous studies completed since 2011/12, available to download at [www.nswmining.com.au](http://www.nswmining.com.au).

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

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

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

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

- State (the whole area of New South Wales);
- Regional (represented by 12 former Statistical Divisions in NSW);
- Local (represented by 128 Local Government Areas in NSW);
- State electoral divisions (represented by 93 SEDs in NSW); and
- Commonwealth electoral divisions (represented by 46 CEDs in NSW).

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

# Company Survey

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The process was initiated in July 2025 when NSWMC distributed an expenditure survey form to New South Wales exploration and mining companies, which were asked to disclose total operational spending in 2024/25 in the following categories:

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

Twenty-nine (29) 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 46 CEDs in NSW).

The current analysis of the economic contribution of the NSW mining companies surveyed in 2024/25 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	Iluka Resources
Alkane Resources Limited	Mach Energy Australia Pty Ltd
Australian Strategic Materials Ltd (ASM)	Malabar Coal Limited
Aurelia Metals	Newmont Cadia
Bengalla Mining Company Pty Ltd	Peabody Energy Australia
BHP Billiton NSW Energy Coal	Perilya Limited
Bloomfield Collieries Pty Ltd	Regis Resources Limited
Bowdens Silver	RZ Resources
Centennial Coal Company Limited	Sunrise Energy
CSA Copper	Thiess Pty Limited
Develop Global Ltd	Tronox Holdings
Evolution Mining	Whitehaven Coal Limited
Glencore Coal (NSW) Pty Ltd	Wyong Areas Coal Joint Venture
GM <sup>3</sup>	Yancoal Australia
Idemitsu Australia Resources Pty Ltd	

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#### **Disclaimer**

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

# Economic Benefits

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## Direct Impact

### Direct Spending

Expenditure data provided by the 29 NSW mining companies surveyed indicated that these companies **contributed an estimated \$21.9 billion in the NSW economy** in 2024/25, comprised of:

- **Total workforce of 35,136 full-time equivalent workers** (including direct resident employees and contract workers), which represented an annual increase of 159 workers, or 0.5%;
- **\$4.0 billion in wages and salaries** to approximately **24,969 direct fulltime resident employees** (not including contractors), representing an **average salary** level across the sector of **\$159,913** per annum;
- **\$14.3 billion in purchases of goods and services from 7,522 local businesses** (including contract payments), community contributions and payments to local government (including rates, developer contributions and other payments); and
- **\$3.6 billion** in state government payments (including royalties, stamp duty, payroll tax and land tax).

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The direct economic stimulus provided by NSW mining companies in 2024/25 also extended to other states, with an additional \$10.1 billion in direct spending, which combined with the impact in New South Wales for a **total direct impact of \$32.0 billion for the whole of Australia**, comprised of:

- \$4.1 billion in wages and salaries to approximately 25,708 full-time residing employees; and
- \$28.0 billion in purchases of goods and services from local businesses, government and community contributions.

When overseas and other unallocated spending of \$754.1 million was also included, the total direct expenditure relating to the NSW mining sector was approximately \$32.7 billion in 2024/25.

Based on whole-of-survey totals, the direct expenditure in NSW by mining companies in 2024/25 decreased marginally by \$137.6 million, or 0.6%, compared to the previous year, although, in contrast, the total workforce increased annually by 159 FTEs, or 0.5%.

Since 2011/12, NSW mining companies surveyed by NSWMC have generated \$206.6 billion in direct spending, with average annual expenditure of \$14.8 billion.

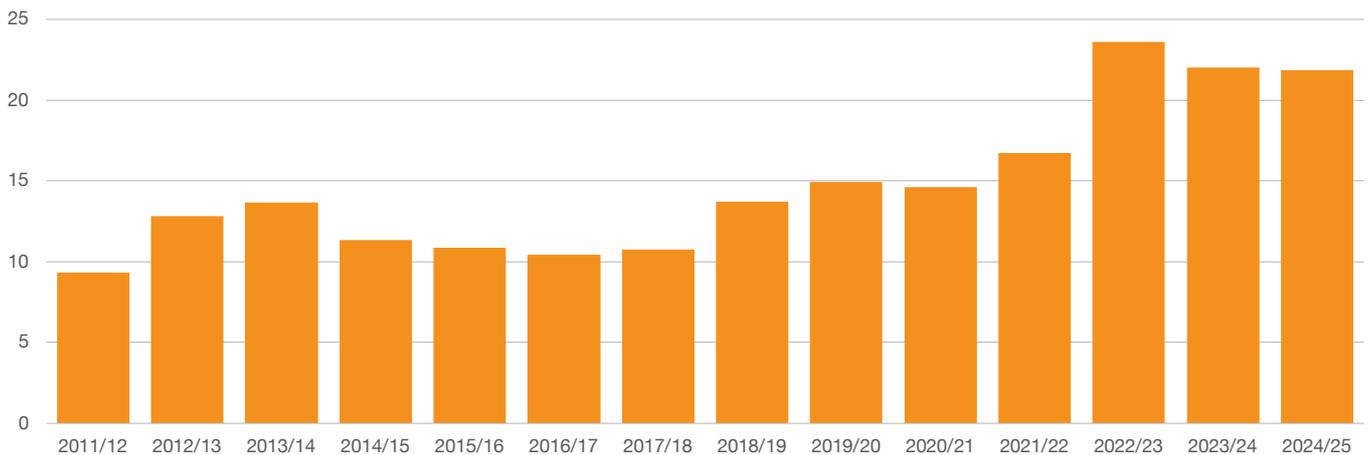
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*Since 2011/12, NSW mining companies have contributed \$206.6 billion in direct spending to the State economy.*

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### Direct Expenditure of NSW Mining Companies

New South Wales (\$ billion, real)



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

	2024/25	2023/24	2022/23	Annual % change
No. of companies surveyed	29	30	28	-3.3%
<b>DIRECT EMPLOYEES</b>				
No. of direct employees (FTEs)	24,969	24,366	22,905	2.5%
No. of apprenticeships and traineeships (FTEs)	337	363	397	-7.3%
Total wages/salaries paid (\$M)	3,992.8	3,944.0	3,384.3	1.2%
<b>BUSINESS PURCHASES</b>				
No. of suppliers	7,522	7,139	6,980	5.4%
Total opex spend (\$M)	13,233.0	12,616.0	12,389.9	4.9%
Total capex spend (\$M)	927.5	1,687.5	1,911.0	-45.0%
Total business purchases (\$M)	14,160.5	14,303.4	14,300.9	-1.0%
<b>COMMUNITY CONTRIBUTIONS</b>				
No. of community organisations supported	1,254	1,450	1,319	-13.5%
Total community contributions (\$M)	22.7	19.4	17.0	17.2%
<b>LOCAL COUNCIL PAYMENTS</b>				
Total local government payments (\$M)	101.6	94.9	90.3	7.0%
<b>STATE GOVERNMENT PAYMENTS</b>				
Total state government payments (\$M)	3,603.9	3,657.4	5,809.2	-1.5%
<b>TOTAL SPEND (\$M)</b>	<b>21,881.5</b>	<b>22,019.1</b>	<b>23,601.7</b>	<b>-0.6%</b>
<b>TOTAL WORKFORCE (FTEs)</b>	<b>35,136</b>	<b>34,977</b>	<b>31,586</b>	<b>0.5%</b>

## Local Suppliers

Approximately 7,522 unique businesses in New South Wales received payments for goods and services supplied during 2024/25 from the mining sector. The highest number of businesses was recorded in the Hunter region (3,410), followed by Sydney (2,847), Central West (899), North Western (888) and Illawarra (491).

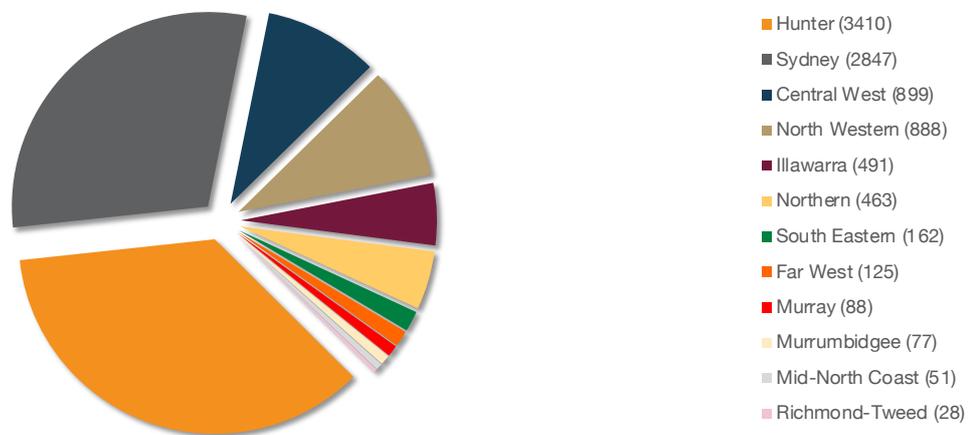
**Table 3: Number of Businesses Supported by Region, 2024/25**

Region	Number of local suppliers
Central West	899
Far West	125
Hunter	3,410
Illawarra	491
Mid-North Coast	51
Murray	88
Murrumbidgee	77
North Western	888
Northern	463
Richmond-Tweed	28
South Eastern	162
Sydney	2,847
<b>Total New South Wales</b>	<b>7,522</b>

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

### Local Businesses Supported by NSW Mining Companies by Region

New South Wales, 2024/25



## Community Support

During 2024/25, NSW mining companies directly contributed over \$22.7 million to 1,254 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 (669), followed by Central West (215).

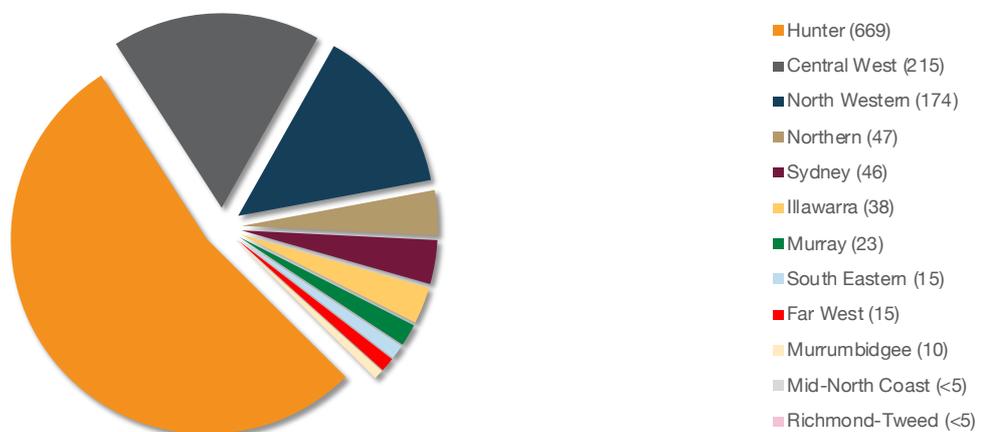
**Table 4: Number of Community Organisations Supported by Region, 2024/25**

Region	No. of community groups	% of total	Total contribution (\$)
Central West	215	17.2%	7,951,335
Far West	15	1.2%	30,793
Hunter	669	53.4%	10,934,825
Illawarra	38	3.0%	708,766
Mid-North Coast	<5	0.1%	33,308
Murray	23	1.8%	75,564
Murrumbidgee	10	0.8%	35,854
North Western	174	13.9%	1,469,925
Northern	47	3.7%	720,367
Richmond-Tweed	<5	0.0%	n.a.
South Eastern	15	1.2%	26,070
Sydney	46	3.6%	740,264
<b>Total New South Wales</b>	<b>1,254</b>	<b>100.0%</b>	<b>22,728,096</b>

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

### Community Organisations Supported by NSW Mining Companies by Region

New South Wales, 2024/25



## 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 \$17.9 billion and the employment expenditure of \$4.0 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 2024/25, the \$21.9 billion in direct spending by NSW mining companies supported additional supply chain and consumption-induced effects of 215,639 fulltime jobs and \$45.0 billion in aggregate spending (\$14.1 billion in wages and salaries and \$31.0 billion in purchases of goods and services).

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*In 2024/25, NSW mining companies supported an **additional 215,639 fulltime jobs and \$45.0 billion in aggregate spending** (\$14.1 billion in wages and salaries and \$31.0 billion in purchases of goods and services).*

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## Total Impact

The results of the I-O modelling allow forecasts to be made about the total size of impacts from the NSW mining companies surveyed on the economy. For each key measure, the total impact on the economy is the sum of the direct effects from industry, the indirect effects through the business chain, and the final consumption-induced effects. The total economic impact (i.e. direct, indirect and induced, or Type II impact) from the minerals and energy sector to the New South Wales economy in 2024/25 amounted to:

- **\$52.9 billion in output/turnover** (or purchases from supplying businesses);
- **\$47.4 billion in gross value added** (contribution to gross state product);
- **\$18.1 billion in income** (wages and salaries); and
- **240,615 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 \$21.9 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 **\$47.4 billion in gross value added** (\$21.9 billion in direct effects, and \$25.5 billion in supply chain and consumption effects) in 2024/25 and was responsible for supporting approximately **240,615 jobs** (24,969 in direct employment and 215,639 in additional employment). This means that NSW mining companies contributed an estimated **5.5% of Gross State Product** (\$855.4 billion) and **5.4% of total employment** (4,450,873 persons) in New South Wales in 2024/25.

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*The total economic impact of NSW mining companies was estimated at **\$47.4 billion in gross value added and 240,615 jobs supported in 2024/25.***

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Under the more conservative Type I scenario (i.e. excluding consumption-induced effects), direct spending by the companies surveyed and flow-on impacts contributed 4.5% to GSP and 3.5% of total state employment.

Since 2011/12, companies surveyed by the NSWMC have generated approximately \$444.3 billion in value added, including \$206.6 billion in direct spending.

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*Since 2011/12, companies surveyed by the NSWMC have generated approximately **\$444.3 billion in value added.***

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**Table 5: Economic Impact of NSW Mining Companies, 2024/25**

	New South Wales	Rest of Australia	Total Australia
<b>Gross Value Added (\$M)</b>			
Direct	21,882	10,086	31,968
% of Gross State Product (GSP)	2.6%	0.5%	1.2%
Indirect	16,332	5,742	22,074
Total GVA (Type I)	38,214	15,828	54,043
% of GSP	4.5%	0.8%	1.9%
Consumption-induced	9,161	3,430	12,591
<b>Total GVA (Type II)</b>	<b>47,376</b>	<b>19,258</b>	<b>66,634</b>
% of GSP	5.5%	1.0%	2.4%
<b>Employment (FTEs)</b>			
Direct	24,969	740	25,708
% of total state employment	0.6%	0.0%	0.2%
Indirect	132,169	34,373	166,542
Total employment (Type I)	157,145	35,112	192,257
% of total state employment	3.5%	0.4%	1.3%
Consumption-induced	83,470	21,748	105,218
<b>Total employment (Type II)</b>	<b>240,615</b>	<b>56,860</b>	<b>297,475</b>
% of total state employment	5.4%	0.6%	2.1%
<b>Business spend (incl. community contributions and govt payments) (\$M)</b>			
Direct	17,889	8,613	26,501
Indirect	13,110	6,120	19,229
Total business spend (Type I)	30,998	14,732	45,731
Consumption-induced	17,876	6,447	24,322
Total business spend (Type II)	48,874	21,179	70,053
<b>Wages &amp; salaries (\$M)</b>			
Direct	3,993	112	4,105
Indirect	8,818	2,982	11,800
Total wages & salaries (Type I)	12,811	3,095	15,906
Consumption-induced	5,240	1,578	6,818
Total wages & salaries (Type II)	18,051	4,673	22,724

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 2024/25 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 2024/25 was in the Hunter region (\$9.4 billion), followed by the Sydney (\$4.9 billion), Central West (\$1.1 billion) and Illawarra (\$1.0 billion) regions.

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**Hunter recorded the largest share of direct expenditure by region in 2024/25 (\$9.4 billion), followed by Sydney (\$4.9 billion) and Central West (\$1.1 billion).**

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With regard to employment, the largest workforce share (i.e. number of direct full-time resident employees and contract workers by place of operation) across New South Wales was also recorded in the Hunter region (16,085 FTEs, or 45.8%), followed by the Central West (6,506 FTEs, or 18.5%), North Western (4,090 FTEs, or 11.6%), Northern (3,253 FTEs, or 9.3%) and Illawarra (2,274 FTEs, or 6.5%).

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**The average salary for workers directly employed by NSW mining companies was approximately \$159,913 in 2024/25.**

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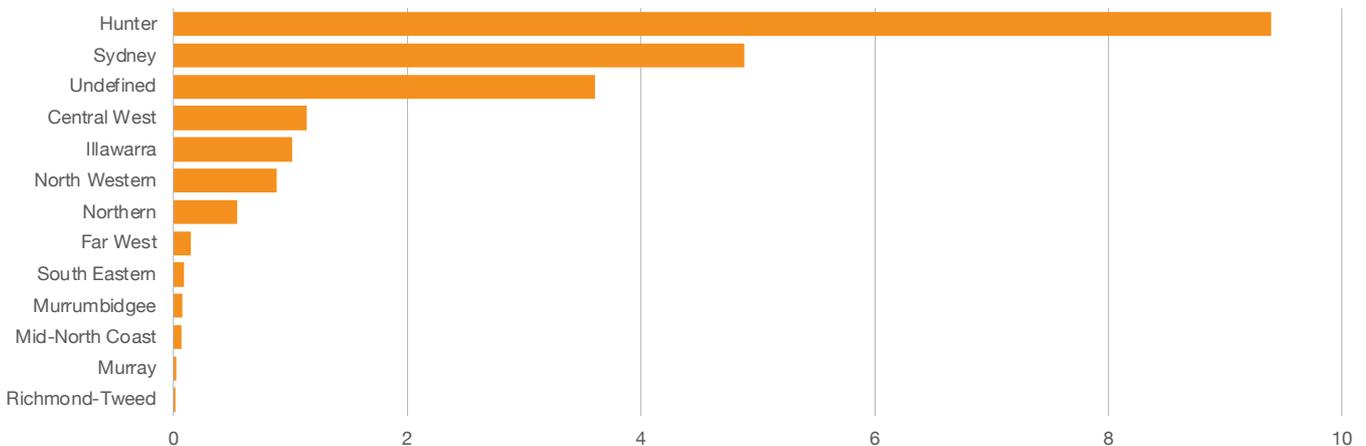
**Table 6: Direct Impact of NSW Mining Companies by Region, 2024/25**

Region	Residing employees (FTEs)	Associated salaries (\$M)	Total workforce <sup>(b)</sup>	Business purchases, community and govt payments (\$M)	No. of local suppliers	Total direct spending (\$M)	% of total direct spend, NSW
Central West	3,341	504.7	6,506	635.7	899	1,140.4	5.2%
Far West	419	53.6	909	96.3	125	149.9	0.7%
Hunter	13,275	2,246.9	16,085	7,143.7	3,410	9,390.7	42.9%
Illawarra	1,713	226.3	2,274	788.9	491	1,015.3	4.6%
Mid-North Coast	110	14.9	110	52.2	51	67.0	0.3%
Murray	37	4.9	150	20.5	88	25.4	0.1%
Murrumbidgee	92	15.3	94	59.2	77	74.4	0.3%
North Western	2,924	445.3	4,090	434.9	888	880.2	4.0%
Northern	1,869	276.1	3,253	265.5	463	541.6	2.5%
Richmond-Tweed	28	3.9	28	12.0	28	15.9	0.1%
South Eastern	191	22.5	199	65.0	162	87.6	0.4%
Sydney	962	177.8	1,421	4,708.1	2,847	4,886.0	22.3%
Unallocated <sup>(a)</sup>	12	1.5	24	2.7		3,608.0	16.5%
<b>Total NSW</b>	<b>24,969</b>	<b>3,992.8</b>	<b>35,136</b>	<b>14,284.8</b>	<b>7,522</b>	<b>21,881.5</b>	<b>100.0%</b>

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

**NSW Mining Companies Direct Spend by Region**

New South Wales (\$ billion), 2024/25



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, 2024/25 (Type II)**

Region	Indirect full-time employees (FTEs)	Associated salaries (\$M)	Supply of goods and services (\$M)	Total indirect value added (\$M)
Central West	16,872	626.3	1,394.4	1,358.3
Far West	2,454	106.2	220.4	194.9
Hunter	97,853	5,876.8	12,348.3	10,340.7
Illawarra	16,274	833.2	1,642.6	1,457.7
Mid-North Coast	1,075	39.2	88.3	86.4
Murray	242	10.5	21.7	19.0
Murrumbidgee	494	20.7	46.3	43.9
North Western	14,273	528.4	1,173.7	1,145.4
Northern	9,018	333.2	740.5	722.9
Richmond-Tweed	256	13.1	25.8	22.9
South Eastern	1,686	61.0	137.1	134.8
Sydney	31,769	2,577.7	7,076.2	5,205.5
Undefined <sup>(a)</sup>	23,373	3,031.8	6,069.7	4,761.1
<b>Total New South Wales</b>	<b>215,639</b>	<b>14,058.0</b>	<b>30,985.1</b>	<b>25,493.5</b>

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

Table 8 shows that the direct expenditure of NSW mining companies has the highest overall impact in the Hunter region, with estimated total value added of \$19.7 billion, meaning these companies contributed 25.9% to gross regional product (\$76.1 billion) in 2024/25. The impact in the Hunter region was significantly higher than other regional economies, the next highest of which was Sydney (\$10.1 billion in value added), Central West (\$2.5 billion) and Illawarra (\$2.5 billion).

The Hunter region recorded the highest proportion of GRP contributed by the mining sector (25.9%), followed by the North Western (15.3%), Central West (15.0%), Far West (14.0%) and Illawarra (7.8%) regions.

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*The Hunter region had the highest proportion of GRP contributed by the resource sector (25.9%), followed by North Western (15.3%) and Central West (15.0%).*

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With regard to employment, the NSW mining sector again had the highest impact on jobs in the Hunter region, supporting 111,128 FTEs, comprising 28.2% of the total regional workforce. The Sydney (32,731 FTEs), Central West (20,213 FTEs) and Illawarra (17,198 FTEs) regions recorded the next highest number of employees. The Far West region recorded the greatest proportion of total jobs (34.8%) from the impact of NSW mining companies.

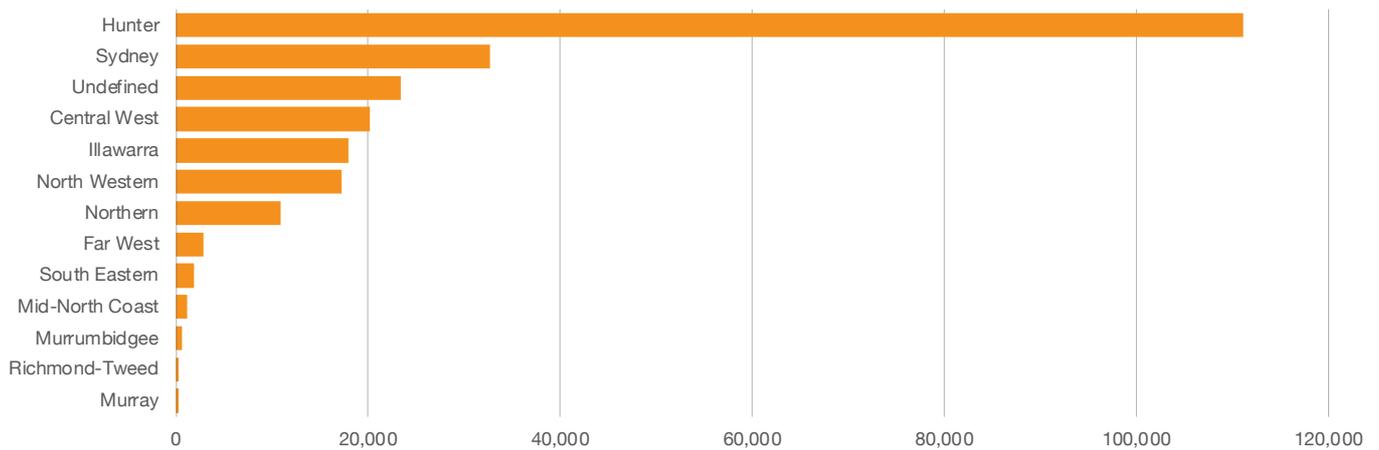
**Table 8: Total Economic Impact of Minerals and Energy Sector by Region, 2024/25**

Region	Total GVA (\$M)	Total value added as % of GRP	Total jobs supported (FTEs)	% of regional employment
Central West	2,498.7	15.0%	20,213	19.6%
Far West	344.7	14.0%	2,873	34.8%
Hunter	19,731.4	25.9%	111,128	28.2%
Illawarra	2,472.9	7.8%	17,987	7.8%
Mid-North Coast	153.5	0.8%	1,185	1.0%
Murray	44.4	0.4%	280	0.4%
Murrumbidgee	118.3	0.7%	586	0.7%
North Western	2,025.5	15.3%	17,198	29.6%
Northern	1,264.5	5.4%	10,888	10.4%
Richmond-Tweed	38.8	0.2%	284	0.2%
South Eastern	222.4	1.3%	1,877	1.5%
Sydney	10,091.5	1.6%	32,731	1.1%
Undefined <sup>(a)</sup>	8,369.2	n.a.	23,384	n.a.
<b>Total New South Wales</b>	<b>47,375.8</b>	<b>5.5%</b>	<b>240,615</b>	<b>5.4%</b>

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

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

New South Wales (FTEs), 2024/25



## Central West

### Direct Contribution

In 2024/25, NSW mining companies contributed \$1.1 billion in direct spending in the Central West region, through:

- Total workforce of 6,506 FTEs, including 3,164 contract workers whose place of work was in the region;
- \$504.7 million in wages and salaries to 3,341 direct full-time employees (not including contractors);
- \$605.6 million in purchases of goods and services from 899 local businesses (includes contractors);
- \$8.0 million in contributions to 215 community organisations; and
- \$22.1 million in local government payments.

### Indirect Contribution

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

- \$1.4 billion in additional supply chain purchases and household consumption; and
- \$626.3 million in wages and salaries associated with a further 16,872 jobs supported in this region.

### Total Contribution

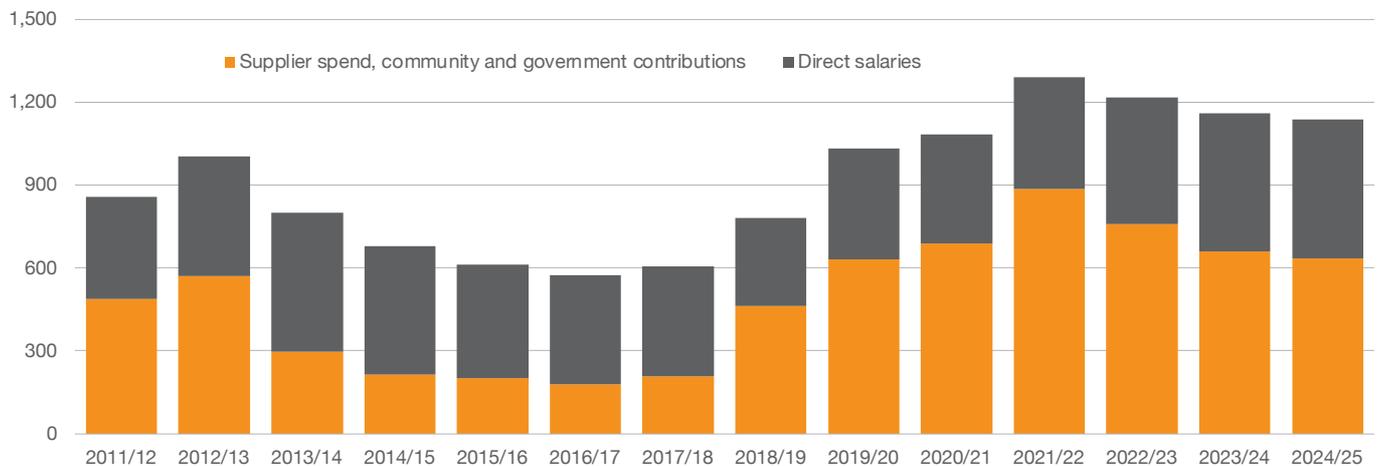
The total economic contribution (direct, indirect and consumption-induced) from the minerals sector in 2024/25 amounted to:

- \$2.0 billion in supplying business purchases;
- \$1.1 billion in total wages and salaries paid to workers;
- **\$2.5 billion in gross value added**, or 15.0% of total GRP in this region (\$16.7 billion); and
- **20,213 full-time equivalent jobs**, or 19.6% of the regional workforce.

Since 2011/12, NSW mining companies have generated **\$12.8 billion in direct spending in the Central West region**, comprised of \$6.0 billion in total wages and salaries and \$6.9 billion in business purchases, community contributions and local government payments.

### Direct Expenditure of NSW Mining Companies

Central West (\$ million)



## Far West

### Direct Contribution

In 2024/25, NSW mining companies contributed \$149.9 million in direct spending in the Far West region through:

- Total workforce of 909 FTEs, including 490 contract workers whose place of work was in the region;
- \$53.6 million in wages and salaries to 419 direct full-time employees (not including contractors);
- \$93.3 million in purchases of goods and services from 125 local businesses (includes contractors);
- \$0.03 million in contributions to 15 community organisations; and
- \$3.0 million in local government payments.

### Indirect Contribution

This **\$149.9 million in direct spending** supported:

- \$220.4 million in additional supply chain purchases and household consumption; and
- \$106.2 million in wages and salaries associated with a further 2,454 jobs supported in this region.

### Total Contribution

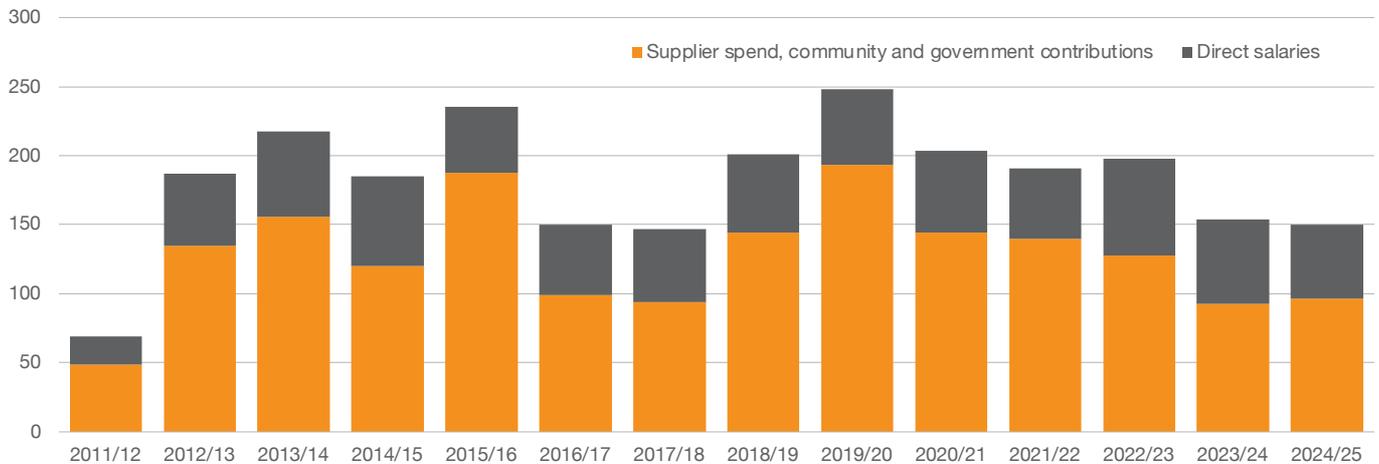
The total economic contribution (direct, indirect and consumption-induced) from the minerals sector in 2024/25 amounted to:

- \$313.7 million in supplying business purchases;
- \$159.7 million in total wages and salaries paid to workers;
- **\$344.7 million in gross value added**, or 14.0% of total GRP in this region (\$2.5 billion); and
- **2,873 full-time equivalent jobs**, or 34.8% of the regional workforce.

Since 2011/12, NSW mining companies have generated **\$2.5 billion in direct spending in the Far West region**, comprised of \$758.5 million in total wages and salaries and \$1.8 billion in business purchases, community contributions and local government payments.

### Direct Expenditure of NSW Mining Companies

Far West (\$ million)



## Hunter

### Direct Contribution

In 2024/25, NSW mining companies contributed \$9.4 billion in direct spending in the Hunter region (representing 6.6% annual growth), through:

- Total workforce of 16,085 FTEs, including 2,810 contract workers whose place of work was in the region;
- \$2.2 billion in wages and salaries to 13,275 direct full-time employees (not including contractors);
- \$7.1 billion in purchases of goods and services from 3,410 local businesses (includes contractors);
- \$10.9 million in contributions to 669 community organisations; and
- \$41.4 million in local government payments.

### Indirect Contribution

This **\$9.4 billion in direct spending** supported:

- \$12.3 billion in additional supply chain purchases and household consumption; and
- \$5.9 billion in wages and salaries associated with a further 97,853 jobs supported in this region.

### Total Contribution

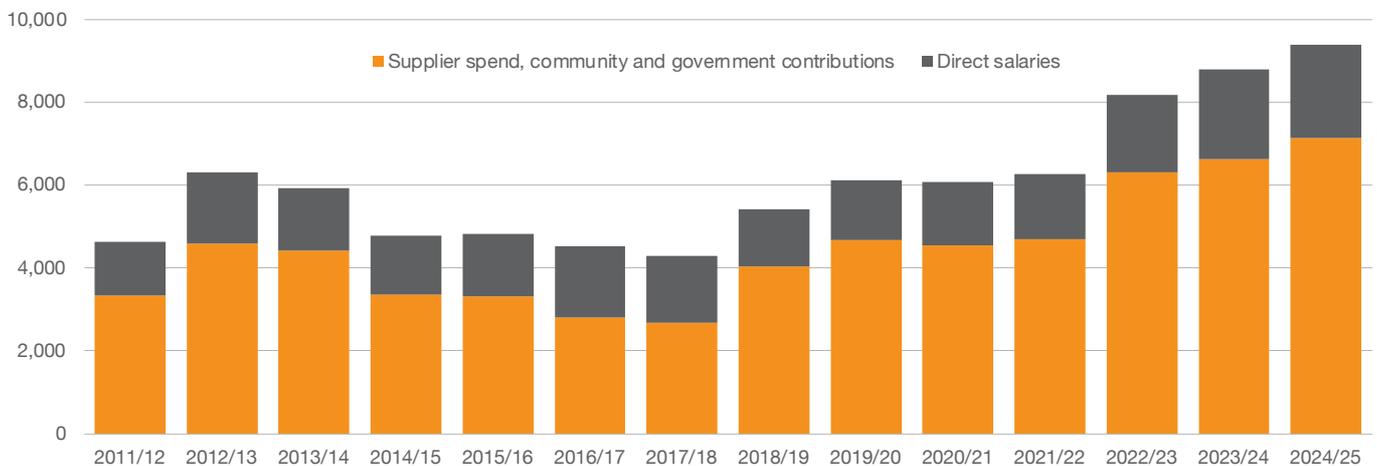
The total economic contribution (direct, indirect and consumption-induced) from the minerals sector in 2024/25 amounted to:

- \$19.4 billion in supplying business purchases;
- \$8.1 billion in total wages and salaries paid to workers;
- **\$19.7 billion in gross value added**, or 25.9% of total GRP in this region (\$76.1 billion); and
- **111,128 full-time equivalent jobs**, or 28.2% of the regional workforce.

Since 2011/12, NSW mining companies have generated **\$85.6 billion in direct spending in the Hunter region**, comprised of \$23.0 billion in total wages and salaries and \$62.3 billion in business purchases, community contributions and local government payments.

### Direct Expenditure of NSW Mining Companies

Hunter (\$ million)



## Illawarra

### Direct Contribution

In 2024/25, NSW mining companies contributed \$1.0 billion in direct spending in the Illawarra region through:

- Total workforce of 2,274 FTEs, including 561 contract workers whose place of work was in the region;
- \$226.3 million in wages and salaries to 1,713 direct full-time employees (not including contractors);
- \$786.8 million in purchases of goods and services from 491 local businesses (includes contractors);
- \$0.7 million in contributions to 38 community organisations; and
- \$1.4 million in local government payments.

### Indirect Contribution

This **\$1.0 billion in direct spending** supported:

- \$1.6 billion in additional supply chain purchases and household consumption; and
- \$833.2 million in wages and salaries associated with a further 16,274 jobs supported in this region.

### Total Contribution

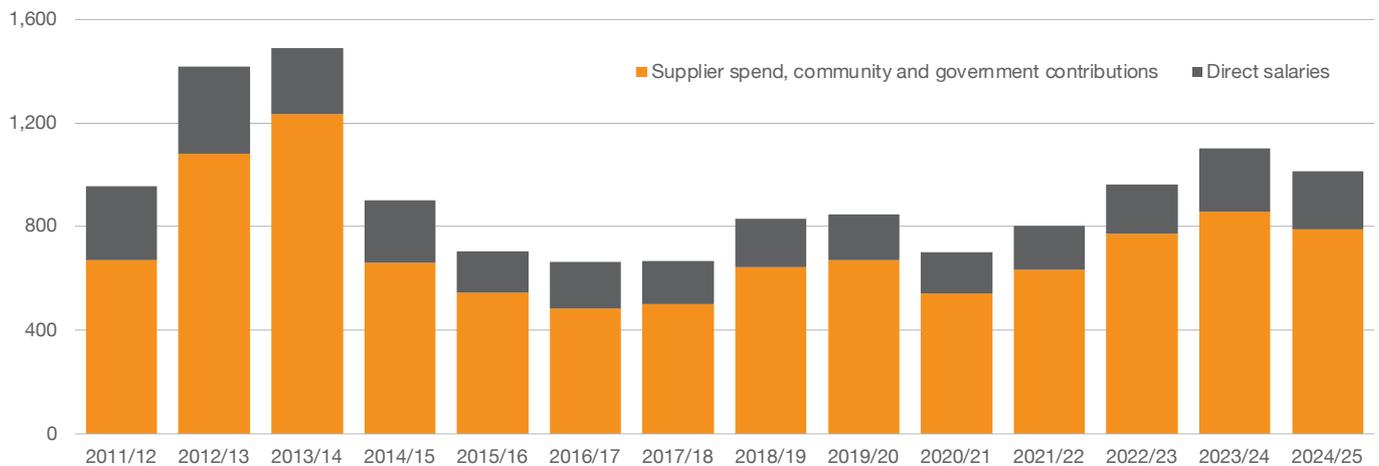
The total economic contribution (direct, indirect and consumption-induced) from the minerals sector in 2024/25 amounted to:

- \$2.4 billion in supplying business purchases;
- \$1.1 billion in total wages and salaries paid to workers;
- **\$2.5 billion in gross value added**, or 7.8% of total GRP in this region (\$31.5 billion); and
- **17,987 full-time equivalent jobs**, or 7.8% of the regional workforce.

Since 2011/12, NSW mining companies have generated **\$13.1 billion in direct spending in the Illawarra region**, comprised of \$3.0 billion in total wages and salaries and \$10.1 billion in business purchases, community contributions and local government payments.

### Direct Expenditure of NSW Mining Companies

Illawarra (\$ million)



## Mid-North Coast

### Direct Contribution

In 2024/25, NSW mining companies contributed \$67.0 million in direct spending in the Mid-North Coast region through:

- \$14.9 million in wages and salaries to 110 direct full-time employees (not including contractors); and
- \$52.1 million in purchases of goods and services from 51 local businesses (includes contractors).

### Indirect Contribution

This **\$67.0 million in direct spending** supported:

- \$88.3 million in additional supply chain purchases and household consumption; and
- \$39.2 million in wages and salaries associated with a further 1,075 jobs supported in this region.

### Total Contribution

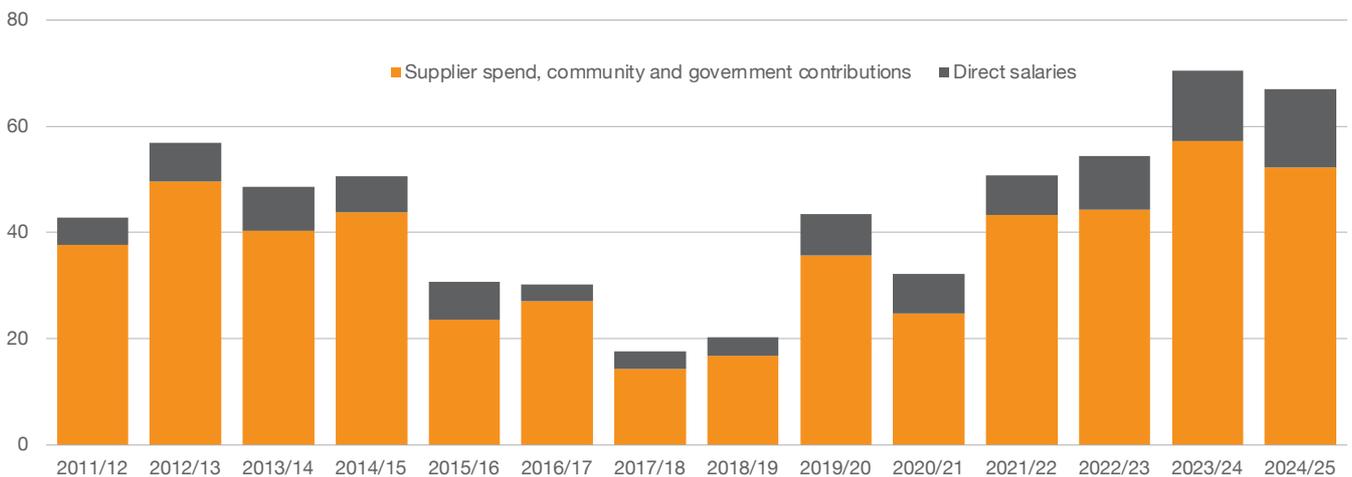
The total economic contribution (direct, indirect and consumption-induced) from the minerals sector in 2024/25 amounted to:

- \$140.4 million in supplying business purchases;
- \$54.1 million in total wages and salaries paid to workers;
- **\$153.5 million in gross value added**, or 0.8% of total GRP in this region (\$18.6 billion); and
- **1,185 full-time equivalent jobs**, or 1.0% of the regional workforce.

Since 2011/12, NSW mining companies have generated **\$615.8 million in direct spending in the Mid-North Coast region**, comprised of \$105.2 million in total wages and salaries and \$510.6 million in business purchases, community contributions and local government payments.

### Direct Expenditure of NSW Mining Companies

Mid-North Coast (\$ million)



## Murray

### Direct Contribution

In 2024/25, NSW mining companies contributed \$25.4 million in direct spending in the Murray region through:

- \$4.9 million in wages and salaries to 37 direct full-time employees (not including contractors);
- \$16.8 million in purchases of goods and services from 88 local businesses (includes contractors); and
- \$3.7 million in local government payments.

### Indirect Contribution

This **\$25.4 million in direct spending** supported:

- \$21.7 million in additional supply chain purchases and household consumption; and
- \$10.5 million in wages and salaries associated with a further 242 jobs supported in this region.

### Total Contribution

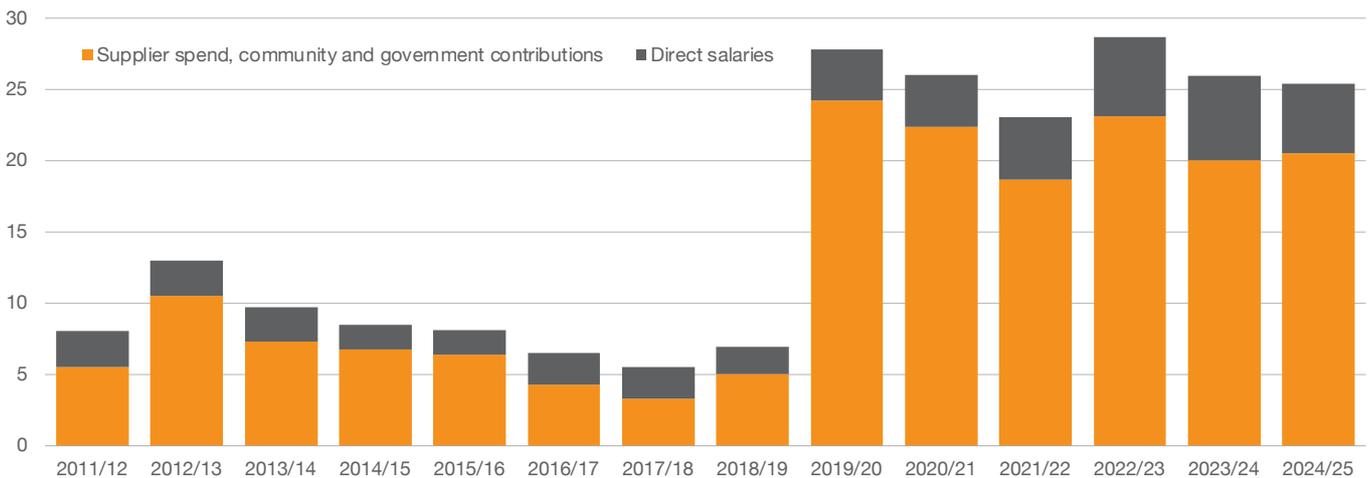
The total economic contribution (direct, indirect and consumption-induced) from the minerals sector in 2024/25 amounted to:

- \$38.5 million in supplying business purchases;
- \$15.4 million in total wages and salaries paid to workers;
- **\$44.4 million in gross value added**, or 0.4% of total GRP in this region (\$10.8 billion); and
- **280 full-time equivalent jobs**, or 0.4% of the regional workforce.

Since 2011/12, NSW mining companies have generated **\$222.9 million in direct spending in the Murray region**, comprised of \$45.3 million in total wages and salaries and \$177.6 million in business purchases, community contributions and local government payments.

### Direct Expenditure of NSW Mining Companies

Murray (\$ million)



## Murrumbidgee

### Direct Contribution

In 2024/25, NSW mining companies contributed \$74.4 million in direct spending in the Murrumbidgee region through:

- \$15.3 million in wages and salaries to 92 direct full-time employees (not including contractors); and
- \$59.1 million in purchases of goods and services from 77 local businesses (includes contractors).

### Indirect Contribution

This **\$74.4 million in direct spending** supported:

- \$46.3 million in additional supply chain purchases and household consumption; and
- \$20.7 million in wages and salaries associated with a further 494 jobs supported in this region.

### Total Contribution

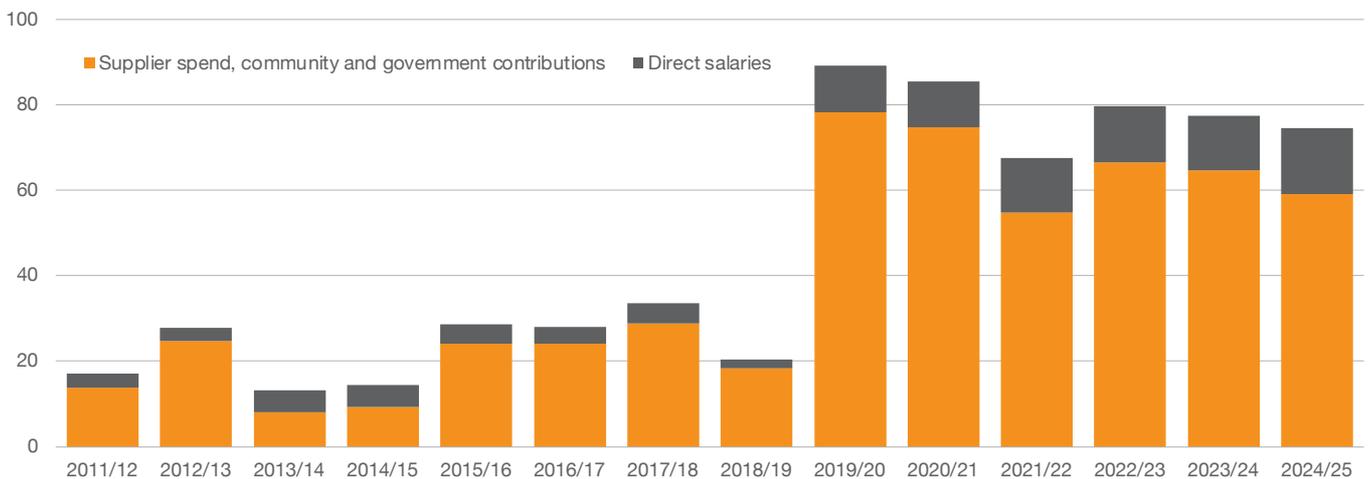
The total economic contribution (direct, indirect and consumption-induced) from the minerals sector in 2024/25 amounted to:

- \$105.5 million in supplying business purchases;
- \$35.9 million in total wages and salaries paid to workers;
- **\$118.3 million in gross value added**, or 0.7% of total GRP in this region (\$15.8 billion); and
- **586 full-time equivalent jobs**, or 0.7% of the regional workforce.

Since 2011/12, NSW mining companies have generated **\$656.3 million in direct spending in the Murrumbidgee region**, comprised of \$107.2 million in total wages and salaries and \$549.1 million in business purchases, community contributions and local government payments.

### Direct Expenditure of NSW Mining Companies

Murrumbidgee (\$ million)



## North Western

### Direct Contribution

In 2024/25, NSW mining companies contributed \$880.2 million in direct spending in the North Western region (representing 7.2% annual growth), through:

- Total workforce of 4,090 FTEs, including 1,166 contract workers whose place of work was in the region;
- \$445.3 million in wages and salaries to 2,924 direct full-time employees (not including contractors);
- \$413.7 million in purchases of goods and services from 888 local businesses (includes contractors);
- \$1.5 million in contributions to 174 community organisations; and
- \$19.7 million in local government payments.

### Indirect Contribution

This **\$880.2 million in direct spending** supported:

- \$1.2 billion in additional supply chain purchases and household consumption; and
- \$528.4 million in wages and salaries associated with a further 14,273 jobs supported in this region.

### Total Contribution

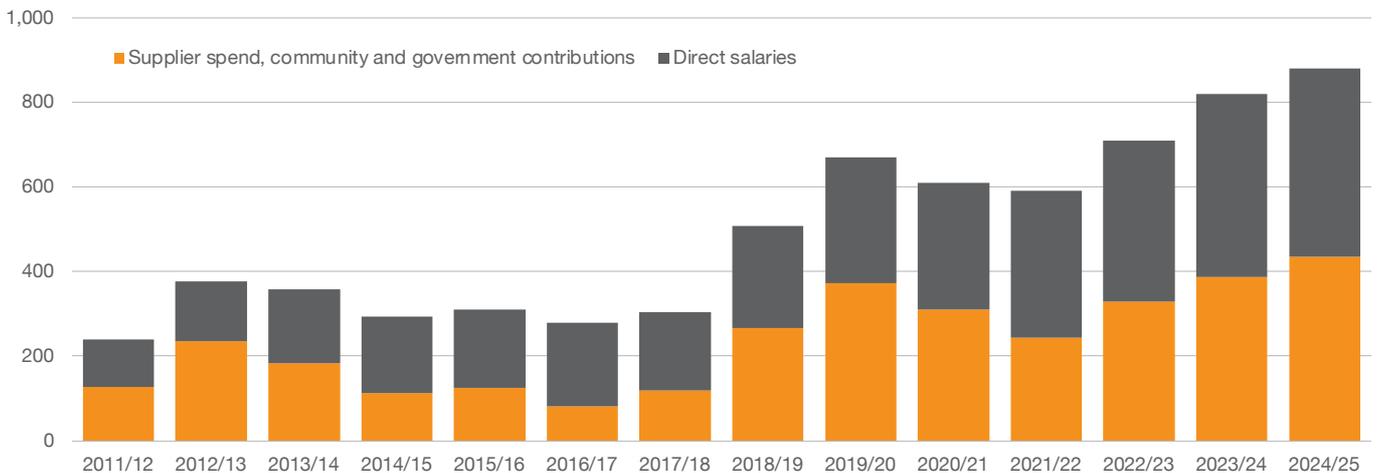
The total economic contribution (direct, indirect and consumption-induced) from the minerals sector in 2024/25 amounted to:

- \$1.6 billion in supplying business purchases;
- \$973.6 million in total wages and salaries paid to workers;
- **\$2.0 billion in gross value added**, or 15.3% of total GRP in this region (\$13.3 billion); and
- **17,198 full-time equivalent jobs**, or 29.6% of the regional workforce.

Since 2011/12, NSW mining companies have generated **\$7.0 billion in direct spending in the North Western region**, comprised of \$3.6 billion in total wages and salaries and \$3.3 billion in business purchases, community contributions and local government payments.

### Direct Expenditure of NSW Mining Companies

North Western (\$ million)



## Northern

### Direct Contribution

In 2024/25, NSW mining companies contributed \$541.6 million in direct spending in the Northern region through:

- Total workforce of 3,253 FTEs, including 1,384 contract workers whose place of work was in the region;
- \$276.1 million in wages and salaries to 1,869 direct full-time employees (not including contractors);
- \$258.8 million in purchases of goods and services from 463 local businesses (includes contractors);
- \$0.7 million in contributions to 47 community organisations; and
- \$6.0 million in local government payments.

### Indirect Contribution

This **\$541.6 million in direct spending** supported:

- \$740.5 million in additional supply chain purchases and household consumption; and
- \$333.2 million in wages and salaries associated with a further 9,018 jobs supported in this region.

### Total Contribution

The total economic contribution (direct, indirect and consumption-induced) from the minerals sector in 2024/25 amounted to:

- \$999.4 million in supplying business purchases;
- \$609.3 million in total wages and salaries paid to workers;
- **\$1.3 billion in gross value added**, or 5.4% of total GRP in this region (\$23.3 billion); and
- **10,888 full-time equivalent jobs**, or 10.4% of the regional workforce.

Since 2011/12, NSW mining companies have generated **\$4.9 billion in direct spending in the Northern region**, comprised of \$2.2 billion in total wages and salaries and \$2.7 billion in business purchases, community contributions and local government payments.

### Direct Expenditure of NSW Mining Companies

Northern (\$ million)



## Richmond-Tweed

### Direct Contribution

In 2024/25, NSW mining companies contributed \$15.9 million in direct spending in the Richmond-Tweed region (representing 45.8% annual growth), through:

- \$3.9 million in wages and salaries to 28 direct full-time employees (not including contractors); and
- \$12.0 million in purchases of goods and services from 28 local businesses (includes contractors).

### Indirect Contribution

This **\$15.9 million in direct spending** supported:

- \$25.8 million in additional supply chain purchases and household consumption; and
- \$13.1 million in wages and salaries associated with a further 256 jobs supported in this region.

### Total Contribution

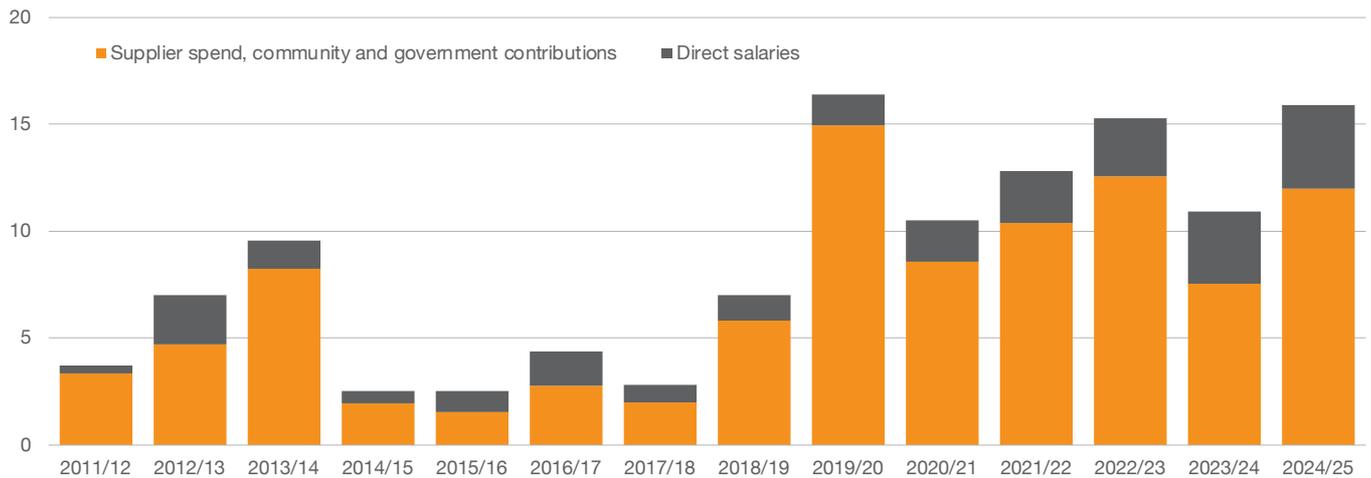
The total economic contribution (direct, indirect and consumption-induced) from the minerals sector in 2024/25 amounted to:

- \$37.8 million in supplying business purchases;
- \$17.0 million in total wages and salaries paid to workers;
- **\$38.8 million in gross value added**, or 0.2% of total GRP in this region (\$18.9 billion); and
- **284 full-time equivalent jobs**, or 0.2% of the regional workforce.

Since 2011/12, NSW mining companies have generated **\$121.1 million in direct spending in the Richmond-Tweed region**, comprised of \$24.9 million in total wages and salaries and \$96.2 million in business purchases, community contributions and local government payments.

### Direct Expenditure of NSW Mining Companies

Richmond-Tweed (\$ million)



## South Eastern

### Direct Contribution

In 2024/25, NSW mining companies contributed \$87.6 million in direct spending in the South Eastern region (representing 35.6% annual growth), through:

- \$22.5 million in wages and salaries to 191 direct full-time employees (not including contractors);
- \$65.0 million in purchases of goods and services from 162 local businesses (includes contractors); and
- \$0.1 million in local government payments.

### Indirect Contribution

This **\$87.6 million in direct spending** supported:

- \$137.1 million in additional supply chain purchases and household consumption; and
- \$61.0 million in wages and salaries associated with a further 1,686 jobs supported in this region.

### Total Contribution

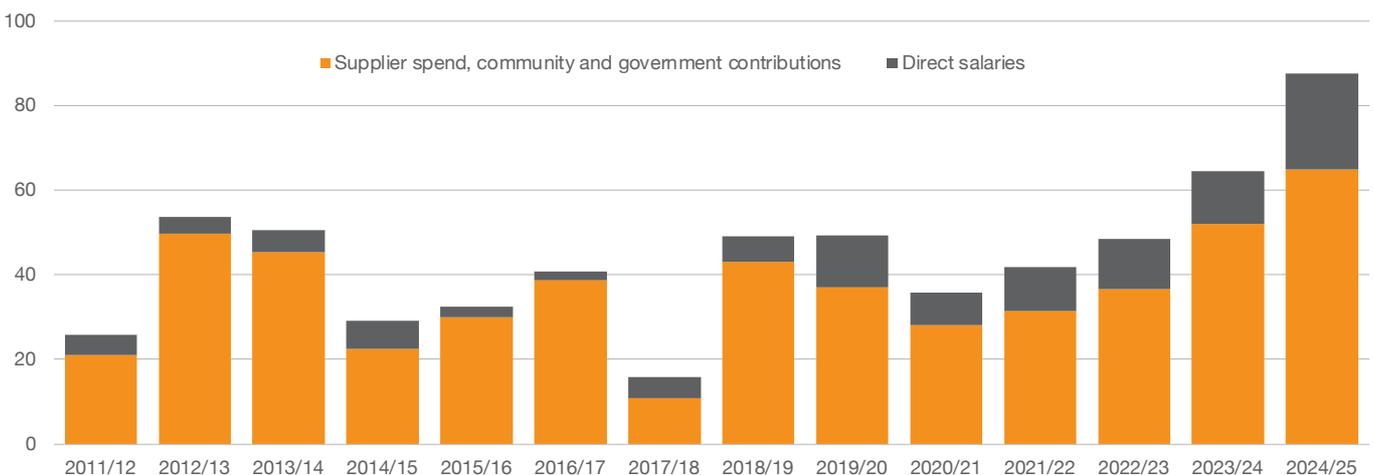
The total economic contribution (direct, indirect and consumption-induced) from the minerals sector in 2024/25 amounted to:

- \$202.1 million in supplying business purchases;
- \$83.6 million in total wages and salaries paid to workers;
- **\$222.4 million in gross value added**, or 1.3% of total GRP in this region (\$16.6 billion); and
- **1,877 full-time equivalent jobs**, or 1.5% of the regional workforce.

Since 2011/12, NSW mining companies have generated **\$625.2 million in direct spending in the South Eastern region**, comprised of \$113.4 million in total wages and salaries and \$511.8 million in business purchases, community contributions and local government payments.

### Direct Expenditure of NSW Mining Companies

South Eastern (\$ million)



## Sydney

### Direct Contribution

In 2024/25, NSW mining companies contributed \$4.9 billion in direct spending in the Sydney region through:

- Total workforce of 1,421 FTEs, including 458 contract workers whose place of work was in the region;
- \$177.8 million in wages and salaries to 962 direct full-time employees (not including contractors);
- \$4.7 billion in purchases of goods and services from 2,847 local businesses (includes contractors);
- \$0.7 million in contributions to 46 community organisations; and
- \$4.1 million in local government payments.

### Indirect Contribution

This **\$4.9 billion in direct spending** supported:

- \$7.1 billion in additional supply chain purchases and household consumption; and
- \$2.6 billion in wages and salaries associated with a further 31,769 jobs supported in this region.

### Total Contribution

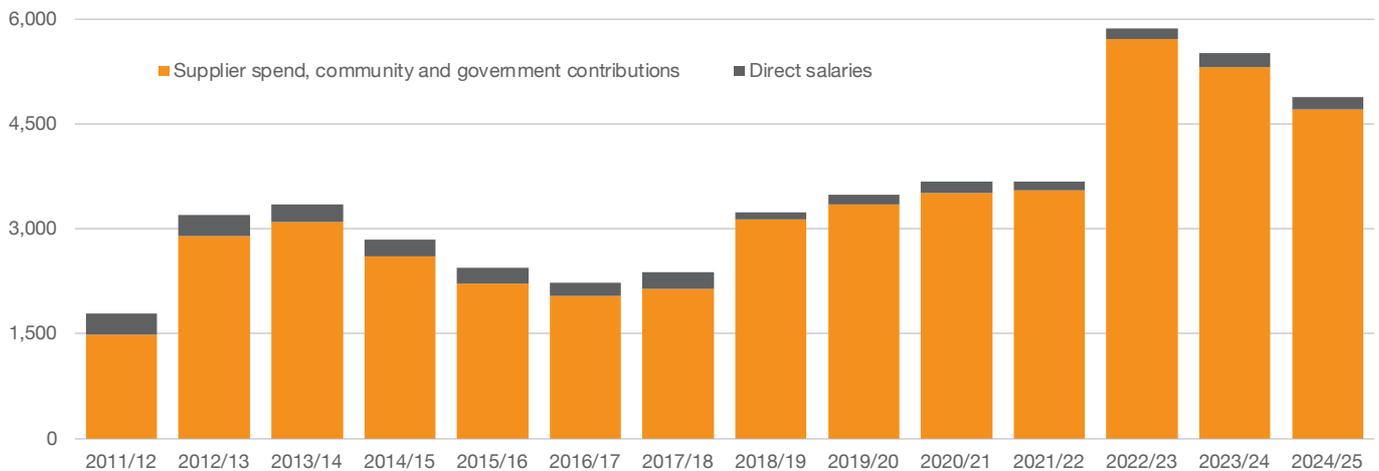
The total economic contribution (direct, indirect and consumption-induced) from the minerals sector in 2024/25 amounted to:

- \$11.8 billion in supplying business purchases;
- \$2.8 billion in total wages and salaries paid to workers;
- **\$10.1 billion in gross value added**, or 1.6% of total GRP in this region (\$612.7 billion); and
- **32,731 full-time equivalent jobs**, or 1.1% of the regional workforce.

Since 2011/12, NSW mining companies have generated **\$48.6 billion in direct spending in the Sydney region**, comprised of \$2.8 billion in total wages and salaries and \$45.7 billion in business purchases, community contributions and local government payments.

### Direct Expenditure of NSW Mining Companies

Sydney (\$ million)



## Local Impact

### Direct Spending

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

Table 9 shows the distribution of total direct spending (i.e. salaries, business purchases and community contributions) from NSW mining companies across New South Wales to the top 20 LGAs by expenditure. Newcastle LGA recorded the largest share of direct expenditure in 2024/25 (\$2.5 billion), followed by Maitland (\$2.0 billion), Singleton (\$1.8 billion), Sydney (\$1.8 billion) and Lake Macquarie (\$866.0 million).

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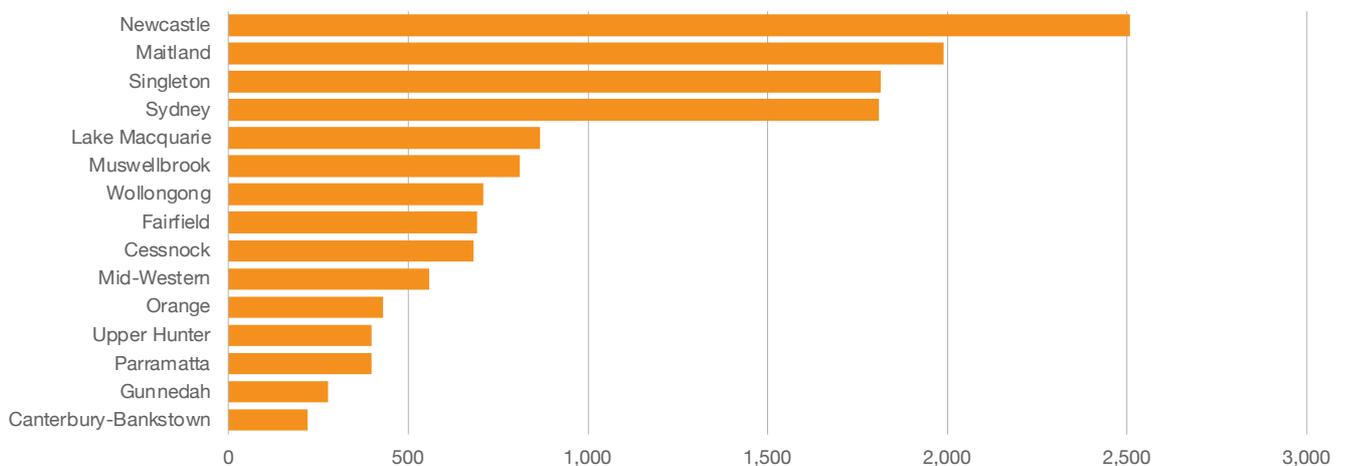
**Newcastle recorded the largest share of direct expenditure by local government area in 2024/25 (\$2.5 billion), followed by Maitland (\$2.0 billion).**

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Direct resident employment was greatest in the Singleton LGA (2,804 FTEs), followed by the Cessnock (2,268 FTEs), Maitland (2,264 FTEs), Mid-Western Regional (1,791 FTEs) and Muswellbrook (1,779 FTEs) LGAs.

### NSW Mining Companies Direct Employment by LGA

New South Wales (FTEs), 2024/25



**Table 9: Direct Impact of NSW Mining Companies, Highest LGAs by Expenditure, 2024/25**

LGA	Residing employees (FTEs)	Associated salaries (\$M)	Total workforce <sup>(a)</sup> (FTEs)	Business purchases, community and govt payments (\$M)	Total direct spending (\$M)	Local suppliers (no.)
Newcastle	1,036	191.2	1,036.2	2,317.2	2,508.4	834
Maitland	2,264	395.9	2,281.2	1,592.4	1,988.3	623
Singleton	2,804	478.9	4,780.9	1,334.9	1,813.7	582
Sydney	39	11.4	47.5	1,798.3	1,809.8	831
Lake Macquarie	1,490	269.5	1,490.3	596.4	866.0	524
Muswellbrook	1,779	275.2	2,581.7	535.8	811.0	323
Wollongong	1,071	143.2	1,631.8	566.3	709.5	391
Fairfield	n.a.	n.a.	n.a.	690.3	690.7	112
Cessnock	2,268	372.4	2,268.8	308.6	681.0	243
Mid-Western	1,791	302.1	2,415.4	256.2	558.3	447
Orange	981	125.4	2,041.9	304.8	430.2	246
Upper Hunter	872	137.6	883.2	261.2	398.8	93
Parramatta	16	3.7	16.4	394.9	398.6	197
Gunnedah	908	137.0	1,178.6	139.9	276.9	176
Canterbury-Bankstown	12	1.9	11.6	219.4	221.3	90
Central Coast (NSW)	242	39.6	244.2	171.1	210.7	131
Cumberland	13	1.4	13.5	199.4	200.8	74
Port Stephens	378	65.2	378.1	120.9	186.0	103
Lithgow	572	116.9	572.4	60.9	177.8	110
Ryde	14	3.8	14.3	171.0	174.7	119

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 2024/25 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 Newcastle LGA, with total estimated value added of \$5.3 billion, followed by Maitland (\$4.1 billion), Sydney (\$3.7 billion), Singleton (\$3.7 billion) and Lake Macquarie (\$1.8 billion)

With regard to employment, the NSW mining sector again had the greatest impact on jobs in the Newcastle LGA, with 26,159 FTEs, followed by the Maitland (22,366 FTEs) and Wollongong (12,380 FTEs) LGAs, whilst the regions where the impact of NSW mining companies' direct spending accounted for the largest share of employment were Cobar (90.2%), Singleton (88.8%) and Muswellbrook (84.1%).

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

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

**Table 11: Total Economic Impact of NSW Mining Companies, Highest LGAs by Gross Value Added, 2024/25 (Type II)**

Region	Total GVA (\$M)	Total value added as % of GRP	Total jobs supported (FTEs)	% of regional employment
Newcastle	5,281.1	22.6%	26,159	26.3%
Maitland	4,136.4	74.4%	22,366	46.9%
Sydney	3,721.7	2.1%	11,635	7.5%
Singleton	3,700.4	29.3%	11,692	88.8%
Lake Macquarie	1,820.2	13.8%	10,663	9.6%
Wollongong	1,725.0	10.5%	12,380	11.3%
Muswellbrook	1,642.1	27.5%	6,571	84.1%
Fairfield	1,411.9	10.4%	4,419	5.2%
Cessnock	1,399.9	51.6%	9,561	32.3%
Mid-Western	1,197.5	55.7%	9,753	71.2%
Orange	903.9	20.8%	6,852	27.9%
Parramatta	818.5	2.2%	2,573	1.5%
Upper Hunter	807.3	75.7%	4,774	66.3%
Gunnedah	622.3	44.5%	5,220	69.5%
Canterbury-Bankstown	455.7	2.0%	1,431	0.8%
Central Coast (NSW)	441.7	2.3%	1,681	1.0%
Cumberland	410.3	1.9%	1,301	1.1%
Port Stephens	383.2	6.3%	2,298	6.8%
Lithgow	364.7	22.1%	2,899	29.0%
Ryde	360.4	1.1%	1,141	1.4%

# Conclusion

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This report contains the outcomes of two key pieces of analysis. The first is the collection of primary data by the NSW Minerals Council (NSWMC) that identifies the direct impact of 30 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 \$21.9 billion in direct spending to the state economy in 2024/25, comprised of:

- Total workforce of 35,136 full-time equivalent workers (including direct resident employees and contract workers);
- \$4.0 billion in wages and salaries to approximately 24,969 direct fulltime resident employees (not including contractors), representing an average salary level across the sector of \$159,913 per annum;
- \$14.3 billion in purchases of goods and services from 7,522 local businesses (including contract payments), community contributions and payments to local government (including rates, developer contributions and other payments); and
- \$3.6 billion in state government payments (including royalties, stamp duty, payroll tax and land tax).

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*NSW mining companies contributed **\$21.9 billion** in direct spending to the New South Wales economy in 2024/25.*

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Of the total workforce of 35,984 full-time equivalent workers employed by the 30 companies surveyed, 25,811 were direct full-time employees, or 71.7% of the total workforce – of which 3,842 direct workers, or 14.9% were female – with another 10,173 contract workers.

The economic stimulus provided by NSW mining companies in 2024/25 also extended to other states, with an additional \$10.1 billion in direct spending, which combined with the impact in New South Wales for a total direct impact of \$32.0 billion for the whole of Australia, comprised of:

- \$4.1 billion in wages and salaries to approximately 25,708 full-time residing employees; and
- \$28.0 billion in purchases of goods and services from local businesses, government (federal, state and local) and community contributions.

The total impact of the \$21.9 billion in direct spending by the resources sector, measured through supply chain and consumption-induced spending effects, amounted to an estimated 5.5% 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 4.5% to GSP and 3.5% of total state employment.

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*The total economic impact of NSW mining companies was estimated at **\$47.4 billion in gross value added and 240,615 jobs supported in 2024/25.***

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Since 2011/12, NSW mining companies surveyed have generated approximately \$444.3 billion in value added, including \$206.6 billion in direct spending.

# Appendix A: Modelling Approach

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## Input-Output Modelling

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

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

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

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

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

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

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

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

#### **Output**

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

#### **Income**

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

#### **Employment**

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

#### **Value Added**

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

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

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

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

## Construction of Regional I-O Models

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

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

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

All the necessary data for the regionalisation procedure were collected from the Australian Bureau of Statistics as well as other reliable sources for secondary data such as regional household expenditure patterns, income and productivity measures. The latest available national I-O tables were 2022-23, 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, 2024/25**

Local government area	Residing employees (FTEs)	Associated salaries (\$M)	Total workforce <sup>(a)</sup> FTEs	Business purchases, community and local govt payments (\$M)	Total direct spending (\$M)	Local suppliers (no.)
Albury	14	2.3	13.9	1.1	3.4	15
Armidale	16	2.3	16.3	4.0	6.3	15
Ballina	10	1.4	10.0	n.a.	2.1	6
Balranald	n.a.	n.a.	n.a.	12.8	13.4	30
Bathurst	321	48.5	325.3	36.1	84.7	102
Bayside (NSW)	12	2.1	12.1	79.7	81.8	71
Bega Valley	6	0.7	6.3	n.a.	n.a.	n.a.
Bellingen	n.a.	n.a.	n.a.	1.3	2.0	n.a.
Berrigan	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Blacktown	24	2.9	23.9	145.8	148.8	174
Bland	255	48.9	811.7	44.0	92.9	77
Blayney	241	30.0	246.6	16.5	46.5	77
Blue Mountains	54	9.9	53.5	2.9	12.7	29
Bogan	157	21.5	178.0	6.0	27.5	39
Bourke	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Brewarrina	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Broken Hill	415	53.1	860.1	95.5	148.6	118
Burwood	n.a.	n.a.	n.a.	1.0	1.7	7
Byron	n.a.	n.a.	n.a.	6.2	6.3	n.a.
Cabonne	191	23.5	313.2	47.3	70.7	45
Camden	53	6.3	53.0	134.9	141.2	34
Campbelltown (NSW)	42	4.8	41.5	60.2	65.0	64
Canada Bay	10	2.4	10.2	1.8	4.2	16
Canterbury-Bankstown	12	1.9	11.6	219.4	221.3	90
Carrathool	7	1.1	8.8	n.a.	1.2	n.a.
Central Coast (NSW)	242	39.6	244.2	171.1	210.7	131
Central Darling	n.a.	n.a.	n.a.	n.a.	1.2	7

**Table B1: Direct Impacts of NSW Mining Companies Sector by LGA, 2024/25**

Local government area	Residing employees (FTEs)	Associated salaries (\$M)	Total workforce <sup>(a)</sup> FTEs	Business purchases, community and local govt payments (\$M)	Total direct spending (\$M)	Local suppliers (no.)
Cessnock	2,268	372.4	2,268.8	308.6	681.0	243
Clarence Valley	13	1.8	13.1	n.a.	2.4	9
Cobar	524	69.1	931.6	69.8	138.9	136
Coffs Harbour	24	2.9	23.6	9.1	11.9	14
Coolamon	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Coonamble	6	0.8	16.6	n.a.	n.a.	n.a.
Cootamundra-Gundagai	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Cowra	43	5.2	43.5	n.a.	5.4	n.a.
Cumberland	13	1.4	13.5	199.4	200.8	74
Dubbo	383	47.3	462.3	114.0	161.3	245
Dungog	194	32.2	194.2	16.6	48.8	23
Edward River	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Eurobodalla	15	1.8	14.9	n.a.	2.7	7
Fairfield	n.a.	n.a.	n.a.	690.3	690.7	112
Federation	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Forbes	113	17.2	125.9	9.8	27.0	36
Georges River	7	0.9	6.7	2.8	3.7	22
Gilgandra	17	2.5	16.5	n.a.	2.7	n.a.
Glen Innes Severn	6	0.8	6.4	n.a.	n.a.	n.a.
Goulburn Mulwaree	70	7.9	77.0	4.7	12.7	42
Greater Hume	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Griffith	7	1.1	7.0	2.6	3.7	11
Gunnedah	908	137.0	1,178.6	139.9	276.9	176
Gwydir	11	1.6	13.1	3.8	5.4	6
Hawkesbury	12	1.4	12.3	11.0	12.4	23
Hay	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Hilltops	18	2.2	18.0	2.7	4.9	5
Hornsby	17	3.3	17.4	8.3	11.5	61

**Table B1: Direct Impacts of NSW Mining Companies Sector by LGA, 2024/25**

Local government area	Residing employees (FTEs)	Associated salaries (\$M)	Total workforce <sup>(a)</sup> FTEs	Business purchases, community and local govt payments (\$M)	Total direct spending (\$M)	Local suppliers (no.)
Hunters Hill	n.a.	n.a.	n.a.	n.a.	4.1	8
Inner West	25	5.8	24.6	7.4	13.3	38
Inverell	20	2.9	20.2	3.0	5.9	5
Junee	6	1.0	5.9	n.a.	1.2	n.a.
Kempsey	11	1.8	11.4	2.0	3.8	n.a.
Kiama	82	11.2	82.4	6.7	18.0	18
Ku-ring-gai	26	11.5	26.1	7.0	18.5	29
Kyogle	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Lachlan	48	8.0	59.7	8.7	16.7	40
Lake Macquarie	1,490	269.5	1,490.3	596.4	866.0	524
Lane Cove	7	3.5	7.4	11.0	14.6	29
Leeton	8	1.3	8.0	28.9	30.3	7
Lismore	n.a.	n.a.	n.a.	n.a.	n.a.	7
Lithgow	572	116.9	572.4	60.9	177.8	110
Liverpool	15	2.6	15.5	51.1	53.7	27
Liverpool Plains	77	11.2	89.2	3.7	14.9	19
Lockhart	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Maitland	2,264	395.9	2,281.2	1,592.4	1,988.3	623
Mid-Coast	190	28.8	190.3	59.8	88.6	63
Mid-Western	1,791	302.1	2,415.4	256.2	558.3	447
Moree Plains	13	1.8	15.7	n.a.	2.5	n.a.
Mosman	n.a.	n.a.	n.a.	n.a.	n.a.	12
Murray River	n.a.	n.a.	n.a.	n.a.	1.1	n.a.
Murrumbidgee	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Muswellbrook	1,779	275.2	2,581.7	535.8	811.0	323
Nambucca Valley	11	1.5	11.2	n.a.	1.9	n.a.
Narrabri	424	61.7	1,516.8	41.3	103.0	105
Narrandera	n.a.	n.a.	n.a.	n.a.	1.2	n.a.

**Table B1: Direct Impacts of NSW Mining Companies Sector by LGA, 2024/25**

Local government area	Residing employees (FTEs)	Associated salaries (\$M)	Total workforce <sup>(a)</sup> FTEs	Business purchases, community and local govt payments (\$M)	Total direct spending (\$M)	Local suppliers (no.)
Narromine	69	7.3	68.8	3.7	11.0	25
Newcastle	1,036	191.2	1,036.2	2,317.2	2,508.4	834
North Sydney	10	2.6	9.7	142.7	145.2	138
Northern Beaches	23	4.9	23.0	23.7	28.7	116
Oberon	16	2.6	16.2	3.4	6.0	6
Orange	981	125.4	2,041.9	304.8	430.2	246
Parkes	435	58.0	1,812.3	66.4	124.4	119
Parramatta	16	3.7	16.4	394.9	398.6	197
Penrith	36	4.8	35.5	26.1	30.9	58
Port Macquarie-Hastings	47	6.2	46.9	38.8	45.0	21
Port Stephens	378	65.2	378.1	120.9	186.0	103
Queanbeyan-Palerang	61	6.9	60.7	48.9	55.8	77
Randwick	19	3.4	19.3	124.5	127.9	17
Richmond Valley	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Ryde	14	3.8	14.3	171.0	174.7	119
Shellharbour	425	53.4	424.8	25.1	78.5	31
Shoalhaven	79	10.9	79.4	43.6	54.5	22
Singleton	2,804	478.9	4,780.9	1,334.9	1,813.7	582
Snowy Monaro	n.a.	n.a.	n.a.	1.0	1.5	n.a.
Snowy Valleys	7	0.7	7.1	n.a.	1.5	6
Strathfield	n.a.	n.a.	n.a.	18.1	18.7	19
Sutherland	58	9.2	57.6	78.5	87.8	81
Sydney	39	11.4	47.5	1,798.3	1,809.8	831
Tamworth	383	55.2	387.4	67.2	122.4	121
Temora	14	2.6	14.0	n.a.	3.4	n.a.
Tenterfield	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
The Hills	22	4.5	21.5	42.1	46.6	89
Tweed	11	1.6	11.0	4.1	5.7	9

**Table B1: Direct Impacts of NSW Mining Companies Sector by LGA, 2024/25**

Local government area	Residing employees (FTEs)	Associated salaries (\$M)	Total workforce <sup>(a)</sup> FTEs	Business purchases, community and local govt payments (\$M)	Total direct spending (\$M)	Local suppliers (no.)
Upper Hunter	872	137.6	883.2	261.2	398.8	93
Upper Lachlan	12	1.4	12.7	n.a.	1.8	18
Uralla	n.a.	n.a.	n.a.	1.7	2.0	n.a.
Wagga Wagga	28	5.2	27.6	24.8	30.0	36
Walcha	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Walgett	11	1.3	21.9	n.a.	1.5	n.a.
Warren	16	2.0	21.6	n.a.	2.2	n.a.
Warrumbungle	65	9.9	79.3	4.3	14.2	16
Waverley	5	2.2	5.4	1.3	3.4	15
Weddin	9	1.6	9.5	18.0	19.6	n.a.
Wentworth	16	1.7	17.6	5.1	6.7	36
Willoughby	12	4.1	11.6	59.0	63.1	80
Wingecarribee	55	7.6	55.3	147.2	154.8	30
Wollondilly	112	13.5	559.5	18.1	31.6	27
Wollongong	1,071	143.2	1,631.8	566.3	709.5	391
Woollahra	11	3.4	10.9	3.9	7.3	9
Yass Valley	6	1.0	6.3	6.3	7.3	5

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, 2024/25 (Type II)**

Local government area	Total GVA (\$M)	Total value added as % of GRP	Total jobs supported (FTEs)	% of regional employment
Albury	10.4	0.2%	104	0.3%
Armidale	15.1	0.5%	126	0.8%
Ballina	5.1	0.2%	46	0.2%
Balranald	15.6	7.0%	31	2.3%
Bathurst	174.8	4.4%	1,441	5.8%
Bayside (NSW)	168.6	0.7%	540	0.5%
Bega Valley	1.7	0.1%	16	0.1%
Bellingen	4.7	0.6%	39	0.7%
Berrigan	n.a.	n.a.	n.a.	n.a.
Blacktown	303.3	1.0%	972	0.4%
Bland	197.0	38.9%	1,555	51.2%
Blayney	83.1	11.1%	693	16.2%
Blue Mountains	28.6	0.8%	154	0.4%
Bogan	47.5	4.9%	406	34.0%
Bourke	n.a.	n.a.	n.a.	n.a.
Brewarrina	n.a.	n.a.	n.a.	n.a.
Broken Hill	342.1	14.9%	2,851	37.9%
Burwood	3.6	0.1%	15	0.1%
Byron	14.6	0.4%	90	0.5%
Cabonne	139.1	15.2%	1,034	12.9%
Camden	290.0	4.0%	971	1.2%
Campbelltown (NSW)	135.1	1.3%	469	0.5%
Canada Bay	9.2	0.1%	41	0.1%
Canterbury-Bankstown	455.7	2.0%	1,431	0.8%
Carrathool	1.8	0.4%	14	0.9%
Central Coast (NSW)	441.7	2.3%	1,681	1.0%
Central Darling	2.2	1.3%	16	2.2%

**Table C1: Estimated Total Economic Impact of NSW Mining Companies by LGA, 2024/25 (Type II)**

Local government area	Total GVA (\$M)	Total value added as % of GRP	Total jobs supported (FTEs)	% of regional employment
Cessnock	1,399.9	51.6%	9,561	32.3%
Clarence Valley	5.1	0.1%	46	0.2%
Cobar	292.1	12.9%	1,863	90.2%
Coffs Harbour	29.9	0.5%	248	0.7%
Coolamon	1.1	0.3%	9	0.4%
Coonamble	1.5	0.5%	13	0.8%
Cootamundra-Gundagai	1.6	0.2%	11	0.2%
Cowra	9.5	1.0%	95	1.6%
Cumberland	410.3	1.9%	1,301	1.1%
Dubbo	400.8	9.0%	3,378	12.2%
Dungog	87.2	19.9%	583	12.6%
Edward River	n.a.	n.a.	n.a.	n.a.
Eurobodalla	5.4	0.2%	48	0.3%
Fairfield	1,411.9	10.4%	4,419	5.2%
Federation	n.a.	n.a.	n.a.	n.a.
Forbes	53.4	6.5%	443	8.9%
Georges River	7.9	0.1%	33	0.0%
Gilgandra	4.1	1.3%	35	1.8%
Glen Innes Severn	1.5	0.2%	14	0.3%
Goulburn Mulwaree	27.5	1.0%	254	1.6%
Greater Hume	n.a.	n.a.	n.a.	n.a.
Griffith	5.2	0.2%	24	0.2%
Gunnedah	622.3	44.5%	5,220	69.5%
Gwydir	12.8	2.1%	104	4.0%
Hawkesbury	25.4	0.5%	94	0.2%
Hay	n.a.	n.a.	n.a.	n.a.
Hilltops	11.3	0.7%	98	1.1%
Hornsby	24.8	0.3%	99	0.1%

**Table C1: Estimated Total Economic Impact of NSW Mining Companies by LGA, 2024/25 (Type II)**

Local government area	Total GVA (\$M)	Total value added as % of GRP	Total jobs supported (FTEs)	% of regional employment
Hunters Hill	8.7	0.8%	32	0.4%
Inner West	29.3	0.2%	124	0.1%
Inverell	13.4	0.9%	114	1.3%
Junee	2.0	0.4%	14	0.5%
Kempsey	8.6	0.5%	72	0.6%
Kiama	42.9	3.3%	372	3.2%
Ku-ring-gai	42.1	0.7%	174	0.3%
Kyogle	n.a.	n.a.	6	0.2%
Lachlan	35.9	6.9%	288	9.1%
Lake Macquarie	1,820.2	13.8%	10,663	9.6%
Lane Cove	30.4	0.9%	105	0.4%
Leeton	44.7	3.9%	168	3.1%
Lismore	1.5	0.0%	13	0.1%
Lithgow	364.7	22.1%	2,899	29.0%
Liverpool	110.3	0.7%	365	0.3%
Liverpool Plains	27.2	2.6%	229	5.5%
Lockhart	n.a.	n.a.	n.a.	n.a.
Maitland	4,136.4	74.4%	22,366	46.9%
Mid-Coast	181.4	3.5%	1,097	2.7%
Mid-Western	1,197.5	55.7%	9,753	71.2%
Moree Plains	5.0	0.3%	45	0.6%
Mosman	1.6	0.1%	7	0.0%
Murray River	1.7	0.2%	10	0.1%
Murrumbidgee	n.a.	n.a.	n.a.	n.a.
Muswellbrook	1,642.1	27.5%	6,571	84.1%
Nambucca Valley	3.4	0.4%	30	0.4%
Narrabri	218.6	3.3%	1,864	24.6%
Narrandera	1.9	0.4%	13	0.5%

**Table C1: Estimated Total Economic Impact of NSW Mining Companies by LGA, 2024/25 (Type II)**

Local government area	Total GVA (\$M)	Total value added as % of GRP	Total jobs supported (FTEs)	% of regional employment
Narromine	20.8	1.3%	191	6.4%
Newcastle	5,281.1	22.6%	26,159	26.3%
North Sydney	298.7	1.3%	943	2.0%
Northern Beaches	60.6	0.3%	219	0.1%
Oberon	9.8	1.9%	63	2.0%
Orange	903.9	20.8%	6,852	27.9%
Parkes	275.6	23.9%	2,318	30.9%
Parramatta	818.5	2.2%	2,573	1.5%
Penrith	65.2	0.4%	245	0.2%
Port Macquarie-Hastings	100.3	1.8%	732	1.7%
Port Stephens	383.2	6.3%	2,298	6.8%
Queanbeyan-Palerang	147.3	3.4%	1,206	3.1%
Randwick	264.3	2.8%	846	1.0%
Richmond Valley	2.0	0.1%	14	0.1%
Ryde	360.4	1.1%	1,141	1.4%
Shellharbour	201.5	5.4%	1,863	4.8%
Shoalhaven	132.3	2.1%	945	2.1%
Singleton	3,700.4	29.3%	11,692	88.8%
Snowy Monaro	3.7	0.2%	31	0.2%
Snowy Valleys	2.5	0.2%	18	0.3%
Strathfield	38.0	0.5%	123	0.4%
Sutherland	183.5	1.4%	642	0.5%
Sydney	3,721.7	2.1%	11,635	7.5%
Tamworth	289.4	5.3%	2,469	6.8%
Temora	5.3	1.0%	37	1.4%
Tenterfield	n.a.	n.a.	7	0.2%
The Hills	96.8	0.7%	331	0.3%
Tweed	14.0	0.2%	104	0.2%

**Table C1: Estimated Total Economic Impact of NSW Mining Companies by LGA, 2024/25 (Type II)**

Local government area	Total GVA (\$M)	Total value added as % of GRP	Total jobs supported (FTEs)	% of regional employment
Upper Hunter	807.3	75.7%	4,774	66.3%
Upper Lachlan	3.2	0.5%	30	0.6%
Uralla	5.1	1.0%	42	1.3%
Wagga Wagga	47.5	0.8%	223	0.6%
Walcha	1.4	0.3%	11	0.6%
Walgett	2.4	0.5%	23	1.1%
Warren	3.5	1.3%	32	2.7%
Warrumbungle	27.1	5.5%	226	5.6%
Waverley	7.6	0.2%	32	0.1%
Weddin	52.1	22.0%	416	23.2%
Wentworth	11.6	1.6%	77	1.9%
Willoughby	130.5	0.9%	423	1.0%
Wingecarribee	359.2	9.9%	2,282	9.2%
Wollondilly	67.1	0.9%	332	1.0%
Wollongong	1,725.0	10.5%	12,380	11.3%
Woollahra	15.8	0.3%	64	0.2%
Yass Valley	19.2	1.7%	154	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, 2024/25**

State electoral division	Residing employees (FTEs)	Associated salaries (\$M)	Total workforce <sup>(a)</sup> FTEs	Business purchases, community and local govt payments (\$M)	Total direct spending (\$M)	Local suppliers (no.)
Albury	17	2.7	17	1.7	4.4	12
Auburn	6	0.3	6	166.5	166.8	94
Ballina	23	3.1	23	27.3	30.4	13
Balmain	11	1.5	11	6.8	8.4	32
Bankstown	14	4.1	14	5.3	9.4	26
Barwon	n.a.	n.a.	n.a.	152.8	153.4	448
Bathurst	1,699	232.1	3,781	229.8	462.0	327
Baulkham Hills	1,268	217.3	1,292	137.1	354.5	47
Bega	21	2.5	21	1.0	3.6	7
Blacktown	5	0.8	5	55.9	56.8	60
Blue Mountains	54	9.9	54	2.9	12.7	14
Cabramatta	n.a.	n.a.	n.a.	4.1	4.5	n.a.
Camden	41	4.8	41	134.4	139.2	47
Campbelltown	37	4.1	37	3.9	8.0	16
Canterbury	n.a.	n.a.	n.a.	n.a.	1.6	6
Castle Hill	6	2.2	6	19.5	21.6	36
Cessnock	2,219	363.1	2,221	384.4	747.6	283
Charlestown	509	93.3	509	304.4	397.6	168
Clarence	14	1.9	14	1.3	3.3	9
Coffs Harbour	24	2.9	24	9.1	11.9	11
Coogee	11	2.0	11	2.2	4.2	17
Cootamundra	359	63.5	916	66.8	130.3	144
Cronulla	24	3.7	24	24.4	28.1	36
Davidson	17	6.2	17	5.8	12.0	26

**Table D1: Direct Impacts of NSW Mining Companies Sector by SED, 2024/25**

State electoral division	Residing employees (FTEs)	Associated salaries (\$M)	Total workforce <sup>(a)</sup> FTEs	Business purchases, community and local govt payments (\$M)	Total direct spending (\$M)	Local suppliers (no.)
Drummoyne	10	2.3	10	2.3	4.6	19
Dubbo	2,125	337.4	2,815	353.6	691.0	556
East Hills	n.a.	n.a.	n.a.	38.4	38.8	36
Epping	n.a.	n.a.	n.a.	8.5	9.6	18
Fairfield	n.a.	n.a.	n.a.	591.7	591.7	47
Gosford	21	3.5	21	52.2	55.7	33
Goulburn	107	12.7	115	145.4	158.2	27
Granville	n.a.	n.a.	n.a.	40.6	41.1	22
Hawkesbury	16	1.8	16	24.6	26.5	27
Heathcote	154	20.6	354	77.8	98.4	38
Heffron	14	3.4	14	29.8	33.2	69
Holsworthy	6	1.1	6	26.6	27.7	24
Hornsby	11	1.8	11	2.0	3.9	33
Keira	489	66.6	747	259.6	326.2	93
Kiama	11	1.9	11	10.2	12.1	36
Kogarah	255	32.8	255	47.8	80.6	11
Ku-ring-gai	6	0.7	6	2.0	2.7	24
Lake Macquarie	530	98.3	530	148.1	246.4	157
Lakemba	15	9.2	15	71.6	80.7	21
Lane Cove	8	1.0	8	19.2	20.2	71
Lismore	10	1.2	10	n.a.	1.9	8
Liverpool	5	0.8	5	13.6	14.4	11
Londonderry	11	1.1	11	26.0	27.1	23
Macquarie Fields	7	1.2	7	49.3	50.5	49
Maitland	1,953	340.0	1,970	1,463.1	1,803.1	490
Manly	13	3.2	13	4.2	7.5	28
Maroubra	12	2.1	12	181.7	183.9	33
Miranda	14	2.4	14	7.3	9.8	19
Monaro	64	7.4	64	49.9	57.3	14

**Table D1: Direct Impacts of NSW Mining Companies Sector by SED, 2024/25**

State electoral division	Residing employees (FTEs)	Associated salaries (\$M)	Total workforce <sup>(a)</sup> FTEs	Business purchases, community and local govt payments (\$M)	Total direct spending (\$M)	Local suppliers (no.)
Mount Druitt	n.a.	n.a.	n.a.	23.3	23.7	28
Mulgoa	45	6.1	160	50.9	57.0	15
Murray	96	13.9	96	35.7	49.5	85
Myall Lakes	436	84.9	436	1,872.8	1,957.6	19
Newcastle	11	2.4	11	8.4	10.9	539
Newtown	9	2.1	9	138.8	140.9	27
North Shore	74	10.5	78	13.4	23.8	129
Northern Tablelands	n.a.	n.a.	n.a.	1.0	1.5	37
Oatley	1,720	224.1	4,293	428.2	652.3	14
Orange	37	5.2	37	20.7	25.9	491
Oxley	8	1.9	8	369.1	371.0	12
Parramatta	17	2.4	17	3.5	6.0	87
Penrith	n.a.	n.a.	n.a.	12.2	12.7	28
Pittwater	41	5.6	41	22.1	27.7	41
Port Macquarie	378	64.4	378	138.7	203.1	19
Port Stephens	6	0.9	6	130.5	131.5	89
Prospect	8	0.8	8	15.9	16.7	81
Riverstone	n.a.	n.a.	n.a.	1.2	1.6	6
Rockdale	11	2.3	11	109.7	112.0	8
Ryde	423	53.1	423	20.8	74.0	77
Seven Hills	52	7.5	52	18.6	26.1	71
Shellharbour	8	1.7	8	10.3	12.0	43
South Coast	n.a.	n.a.	n.a.	1.4	2.3	9
Strathfield	312	58.1	312	68.0	126.0	27
Summer Hill	26	8.1	35	1,780.3	1,788.3	18
Swansea	1,369	203.5	1,655	210.8	414.3	55
Sydney	32	5.1	32	17.7	22.7	607
Tamworth	45	7.2	45	72.5	79.7	325
Terrigal	9	1.5	9	3.8	5.3	24

**Table D1: Direct Impacts of NSW Mining Companies Sector by SED, 2024/25**

State electoral division	Residing employees (FTEs)	Associated salaries (\$M)	Total workforce <sup>(a)</sup> FTEs	Business purchases, community and local govt payments (\$M)	Total direct spending (\$M)	Local suppliers (no.)
<b>The Entrance</b>	6,312	1,038.7	9,103	2,307.3	3,346.0	33
<b>Tweed</b>	13	4.7	13	4.5	9.2	9
<b>Upper Hunter</b>	33	5.8	33	25.2	31.0	882
<b>Vaucluse</b>	15	6.5	15	5.2	11.8	13
<b>Wagga Wagga</b>	6	0.9	6	6.3	7.2	40
<b>Wakehurst</b>	571	98.9	571	428.1	527.0	34
<b>Wallsend</b>	14	5.1	14	64.3	69.4	164
<b>Willoughby</b>	7	1.0	7	31.1	32.1	80
<b>Wollondilly</b>	146	18.4	593	31.1	49.5	85
<b>Wollongong</b>	301	40.8	405	263.4	304.2	225
<b>Wyong</b>	100	16.6	101	21.8	38.4	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, 2024/25**

Commonwealth electoral division	Residing employees (FTEs)	Associated salaries (\$M)	Total workforce <sup>(a)</sup> FTEs	Business purchases, community and local govt payments (\$M)	Total direct spending (\$M)	Local suppliers (no.)
Banks	7	1.0	7	31.4	32.4	39
Barton	7	1.0	7	2.9	3.9	26
Bennelong	26	11.7	26	184.6	196.3	121
Berowra	22	5.2	22	9.5	14.7	58
Blaxland	9	0.6	9	129.1	129.7	68
Bradfield	37	15.3	37	65.6	80.8	58
Calare	4,151	653.7	5,979	729.0	1,382.7	981
Chifley	10	1.3	10	66.2	67.4	65
Cook	37	5.8	37	32.1	37.9	45
Cowper	67	9.2	67	29.0	38.2	32
Cunningham	888	120.2	1,426	536.6	656.8	324
Dobell	147	24.2	149	90.8	115.1	66
Eden-Monaro	144	16.6	151	55.2	71.7	27
Farrer	65	9.3	180	52.6	61.9	97
Fowler	n.a.	n.a.	n.a.	148.8	149.5	24
Gilmore	173	23.4	173	50.9	74.3	41
Grayndler	19	3.9	19	6.0	9.8	38
Greenway	14	1.5	14	52.0	53.6	98
Hughes	27	4.4	27	62.1	66.5	37
Hume	159	19.1	606	134.8	153.9	116
Hunter	5,533	936.1	7,511	1,818.9	2,754.9	1,035
Kingsford Smith	23	4.4	23	203.2	207.5	64
Lindsay	28	3.7	28	10.3	14.1	45
Lyne	843	141.3	843	264.2	405.4	157
Macarthur	45	5.0	45	70.8	75.8	73
Mackellar	10	1.4	10	18.6	20.0	70
Macquarie	69	11.8	69	14.5	26.3	36

**Table E1: Direct Impacts of NSW Mining Companies Sector by CED, 2024/25**

Commonwealth electoral division	Residing employees (FTEs)	Associated salaries (\$M)	Total workforce <sup>(a)</sup> FTEs	Business purchases, community and local govt payments (\$M)	Total direct spending (\$M)	Local suppliers (no.)
McMahon	10	1.4	10	636.8	638.2	126
Mitchell	17	3.0	17	37.1	40.1	90
Newcastle	3,175	488.3	4,007	880.6	1,369.0	300
New England	990	183.9	990	2,033.7	2,217.6	660
Page	30	3.9	30	4.0	8.0	19
Parkes	3,838	545.0	8,208	604.4	1,149.4	874
Parramatta	13	2.8	13	328.6	331.4	106
Paterson	2,470	427.6	2,487	1,864.2	2,291.8	606
Reid	19	3.5	19	134.2	137.8	104
Richmond	20	3.0	20	10.8	13.8	19
Riverina	154	22.3	154	54.6	76.9	360
Robertson	50	8.2	50	73.3	81.5	57
Shortland	854	155.2	855	393.2	548.3	244
Sydney	45	13.4	54	1,798.2	1,811.6	672
Warringah	25	6.5	25	146.1	152.7	60
Watson	7	1.4	7	184.1	185.5	30
Wentworth	22	6.6	22	7.6	14.2	34
Werriwa	11	1.8	11	21.8	23.6	28
Whitlam	663	84.0	686	202.0	286.0	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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