



Mining in Australia

The supply/demand fundamentals that governed the earlier period of commodity investment “boom” are undergoing a radical transition. Although commodity prices have recovered, the fundamentals for each commodity are very different. The key challenges for contractors and suppliers to the mining industry is to understand these differences, identify which commodities and regions are best placed for recovery and be prepared for opportunities as they emerge through the next stage of the commodity cycle.

This online service is the only source of consistent market information and forecasts for Australian mining activities at each stage of the **mining life cycle**, covering: exploration, investment, mining operations (including contract mining) and maintenance. **Commodities include** oil and gas, coal, iron ore, copper, gold, silver-lead-zinc, mineral sands, other metal ores (nickel, uranium and bauxite), and other mining (construction materials quarrying, diamonds and salt).

Coverage of Activity

1. Global Commodity Market Overview

State of play and outlook for world economic growth by region, implications for commodities demand, and developments in supply. Historical data/forecasts for commodity prices – in US\$ and A\$.

2. Mining Exploration in Australia

Historical data and forecasts for mining, oil and gas exploration by commodity and state, along with a written rationale of the key drivers and the outlook.

3. Mining Investment in Australia

Historical data and thoroughly researched ‘bottom up’ forecasts for fixed capital investment of mines and supporting infrastructure – by commodity, split into buildings and structures v’s plant and equipment, based on our extensive major project lists and macroeconomic outlook. This is accompanied by individual commodity commentaries and comprehensive Major Project Lists.

4. Mining Operations & Contracting in Australia

Data and forecasts by commodity for mining activities undertaken by both contractors and owner operators, including total production volumes by state, and the value of contract work. This unique volume servicing the contract mining industry in Australia includes the Mining Contractor Database.

5. Mining Maintenance in Australia

Contains data, forecasts and commentary on maintenance activities in the mining sector, by commodity, by who performs the work (in-house v’s contractors), and by type of activity.

How the service is used

An invaluable planning and strategy tool for organisations operating in the mining sector, the quarterly updated service assists with demand forecasting, budgeting, labour resourcing, business and capex planning, marketing strategy and tracking industry developments, throughout the year.



Features of the Service

For timely/accessible info for our subscribers, we’re implementing these improvements:

- **NEW Slide Deck report format** sequenced by activity, per below (PDF)
- **Supporting Chartbook** – graphs from Slide Deck (PPT)
- **Data and Forecasts** – for all mining activities annually, by commodity to 2021/22, followed by two five-year averages to 2031/32 (Excel)
- **Major Project Lists** – which underpin our forecasts, with assumed timings and values (Excel) – updated May and Nov
- **Mining Contractor Database (Excel)** – updated May and Nov
- **Quarterly Updates of the Slide Deck and Excel datasets** – as new data/forecasts become available – for commodity prices, exploration, investment and production by commodity (maintenance forecasts provided annually)
- **Subscriber Enquiry Service** – with access to our team of mining analysts/economists during the year



Subscription Options

- **Full Online service:** Access to all above elements – including Slide Deck (PPT), data and forecasts (XLS), major project and contractor listings (XLS), and Quarterly Updates. OR
- **Option of Single Issue** using latest data/forecasts (sent via email)
 - Specific Activity by Stage of Life Cycle (per above) OR
 - Individual Commodity Vertical Outlook (available separately for Coal / Oil & Gas / Iron Ore)

Commodity Vertical Outlook

As an alternative to the full service, individual, self contained Commodity Vertical Outlooks include data/forecasts for global demand, supply, and prices, and the outlook in Australia for exploration, investment, production, contract mining and maintenance for an individual commodity, with supporting information and project lists.

New Global Coverage

With an expanded global coverage as part of the UK headquartered Oxford Economics group, 250+ economists worldwide, covering 200 countries, 100 industries, 3,000 cities and fully integrated global modelling, we're now able to bring

significantly expanded capabilities to our clients. For mining subscribers, we can provide additional bespoke work analysing the impact of various scenarios – so we are ideally placed to provide insights and help inform strategic and investment decisions.

We have developed the world's leading globally integrated economic model, relied on by over 1500 leading organisations around the world. Our model replicates the world economy by interlinking 200 countries, 6 regional blocs and the Eurozone. Our team of economists (including 40 within Australia) set underlying global assumptions and ensure that the data, forecasts and formulas in these models are fully up-to-date. The global economic model feeds into a series of industry, sub-regional and city models. So, you can quantify the impact of domestic and global events on a consistent basis down to your industry and local markets.

Presentation/Workshop

Tailored individual and interactive Briefing Workshops, to discuss current and forecast market conditions, emerging issues and examine the implications for client business. Highly useful for internal planning and strategy sessions.

Methodology

In this study we employ a range of approaches and techniques, drawing on BIS Oxford Economics' diverse capabilities.

Compiling and Analysing Available Data

The first stage of the project involves compiling and analysing existing information on the mining sector and contract services.

Sources of information include:

- Australian Bureau of Statistics (ABS) mining industry data.
- BREE data on production volumes and commodity prices.
- Our Engineering Construction in Australia and Maintenance in Australia reports.
- BIS Oxford Economics' database of mines and mining projects

Industry Interviews

We conduct interviews with staff at corporate offices and mine sites and with other industry participants.

We use the interview information to:

- Help us estimate the size of the market, in each sub-sector, and calculate various breakdowns.
- Provide input to the forecasting process.
- Identify key issues affecting the market and likely future developments affecting suppliers.

Forecasting

In our forecasting of construction, mining and maintenance activity, by mineral sub-sector, we analyse all the key drivers – which include undertaking commodity price forecasting, global supply and demand analysis by commodity and compiling individual project details.

We forecast total activity, and then forecast the proportions of activity which will be done by contractors and by owner-operators. This involves examination of arrangements at major mines (current and future) and an analysis of likely general trends in rates and methods of contracting.

Contact us

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