



South Australian Mining and METS Sector

Hiring Intentions Insights, Q1 20-21

Introduction

RESA's Hiring Intentions report highlights real-time employment activity based on jobs for South Australian residents advertised in the Resources and Energy sectors. Although job ad data does not provide an accurate indicator of actual jobs, it does provide insights into demand, growth, shortages at the occupation and sector levels.

Job Opportunity Trends

What is happening now?

RESA's Hiring Intentions data indicates **564 job advertisements** have been placed for the SA resources sector in Q1 2020-21, this reflects a strong response and recovery following two quarters of uncertainty as coronavirus response measures were developed and implemented. Although this is a **43% decrease** when compared to the same period in FY2019-20, the vacancy data reflects the highest level of vacancy activity since Q2 FY19-20.

The **36% increase** in job ads from Q4 FY 19-20 to Q1 FY20-21 follows on from falling vacancy numbers throughout FY19-20.

Industry Activity

During Q1 **commodity prices were strong** for South Australia's main mineral commodities supporting mine production and exploration activity: **gold reached a record high** of US\$2063, **copper achieved a two year high** of US\$3.10/lb and **iron ore reached a one year high** of US\$125/tonne (62% Fe).

Production continued at the major mining operations with BHP and OZ Minerals indicating copper and gold production were expected to remain at, or slightly above, guidance levels during the quarter. Iluka signaled mineral sands mining continued at the Jacintha-Ambrosia operation, while SIMEC Mining's

mining operations continued to supply the Whyalla steel works and iron ore export markets.

Following the easing of Q4 Covid-19 restrictions, **field exploration recommenced** for a number of companies including: Havilah Resources, Investigator Resources, Hillgrove Resources, Alliance Resources, Marmota, Andromeda Minerals and Barton Gold.

In addition to normal turnover, **job vacancies** during the quarter may also have been **underpinned by** the continued **ramp up of production** at the OZ Minerals Carrapateena mine and the **preparatory work** for the crane replacement program at Olympic Dam.

Future support for the mining sector was demonstrated by key announcements during the quarter. Several small cap mining and exploration companies undertook **successful capital raisings** providing **opportunities for expanded operations** and **job vacancies over the next 12 months**. Macquarie Capital signed an agreement with Iron Road Limited to become a joint developer of the Cape Hardy Stage I port project. Rex Minerals released a Feasibility Study update for its Hillside Copper-gold Project while Oak Resources invested in a SART copper/gold processing plant at its White Dam mine.

Industry Activities: C Moore Solutions



564 Job Advertisements
in **147** companies.



43% decrease in
job ads from Q1
FY2019-20



Trades and Operators
55% of vacancies

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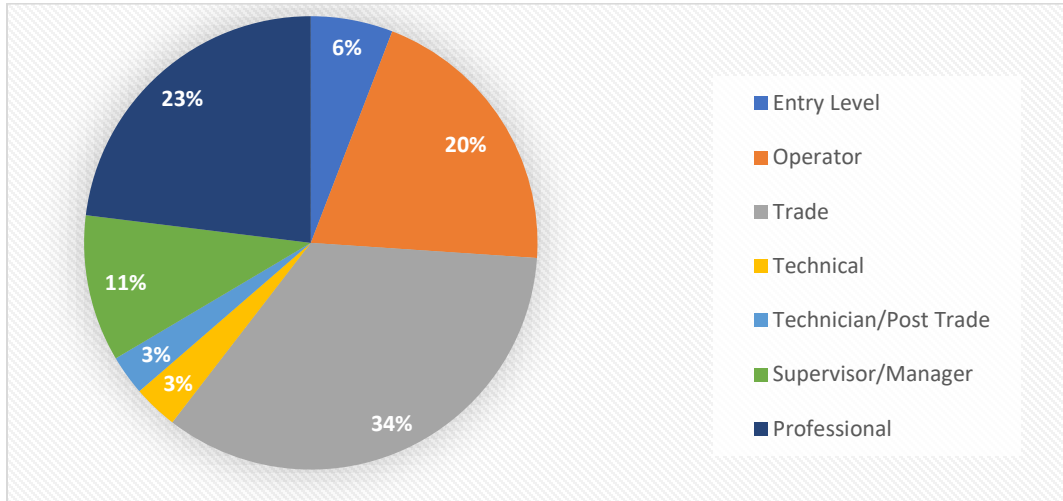
Hiring Intentions Data – Q1 20-21

Occupational Demand

Vacancy Distribution

There has been a slight shift in the distribution of the level of jobs with **Professional** job advertisements **down 6%** to 23% of total jobs. The **highest demand** (55%) continues to be for Trade and Operator occupations, with highest demand in **heavy diesel, auto electrical and mechanical fitter trades and plant operators**.

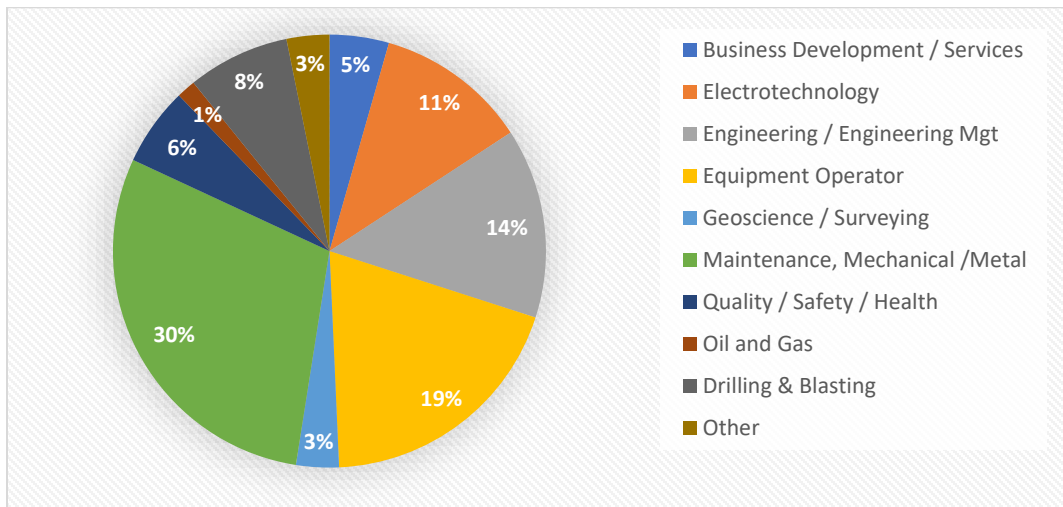
Q1 FY20-21 Vacancy Distribution - Occupation Level



Q1 FY20-21 Vacancy Distribution Occupation Level represents % of total job advertisements that fall into the Occupation Level classification indicated based on the minimum entry requirements and characteristics of the occupation.

The Q1 FY20-21 Vacancy Distribution – Occupation Level graph shows the % of total job advertisements that fall into the Occupation Level classification indicated based on the minimum entry requirements and characteristics of the position.

Q1 FY20-21 Vacancy Distribution - Sector



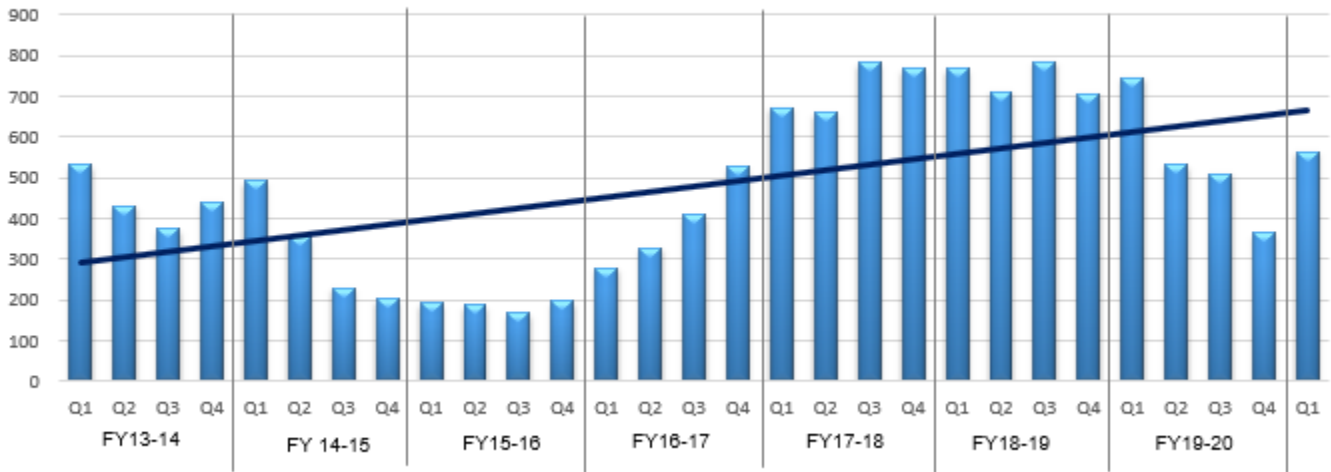
The Q1 FY20-21 Vacancy Distribution – Sector represents % of jobs advertised that fall into the occupational sector categories identified. This is determined by the job role rather than the field of operation of the organisation.

There has been a shift in the distribution of vacancies across subsectors with continuing demand in **Mechanical/Maintenance** (30%), **Equipment Operations** (19%), **Engineering** (14%) **Electrotechnology** (11%) and **Drilling and Blasting** (8%), roles. This is consistent with operations focusing continuing to focus on critical production and maintenance roles.

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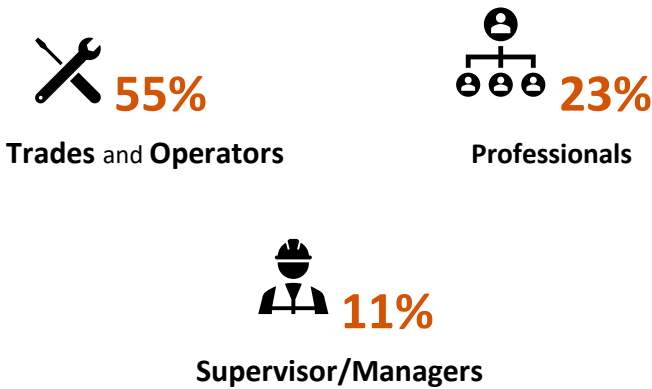
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Quarterly Job Advertisements

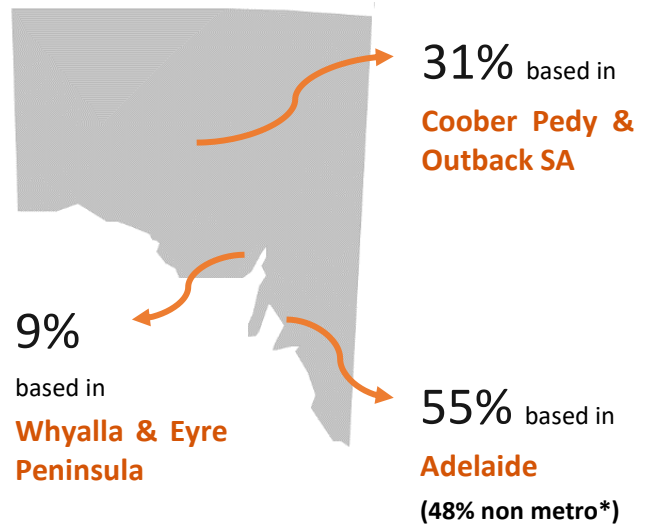


Q1 FY20-21 jobs advertised **highest** reflect the level of **vacancy activity since Q2 FY19-20**.

Top 3 Advertised Roles



Regional Distribution



*Job vacancies identified as **non-metro** includes occupations managed from a metropolitan location but usually undertaken in a non-metropolitan region. eg: drillers, dump truck operators.

Regional Distribution

The distribution of vacancies across the state indicates 13% shift away from the Coober Pedy and Outback region to Adelaide and Whyalla and Eyre Peninsula vacancies. This would be partially attributed to Adelaide based organisations advertising for occupations that would be undertaken in the regions which represented 48% of Adelaide vacancies. In the Whyalla and Eyre Peninsula region, vacancies were listed by 16 different companies.