



South Australian Mining and METS Sector

Hiring Intentions Insights, Q2 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 **545 job advertisements** have been placed for the SA resources sector in Q2 2020-21. This is a **6% increase** when compared to the same period in FY2019-2.

Industry Activity

Balancing COVID-19 restrictions with maintaining production continued for the mining sector during Q2. This included operations reducing FIFO activities and increasing support for remote working or local workforce options.

Prices were strong for South Australia's main mineral commodities during the quarter; **copper** achieved a **seven year high of US\$3.60/lb** and **iron ore** reached a **nine year high of US\$163/tonne (62% Fe)**. Conversely, as COVID restrictions eased across the world, **gold declined to \$US1860/ounce** from its peak of US\$2063/ounce.

Production continued at 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. BHP announced its highest quarterly copper production in five years of 52 kilotonnes (kt) in the September quarter and a total of 99 kt in the second half of 2020. OZ Minerals December quarter production was 27 kt of contained copper and Iluka signaled mineral sands mining continued at the Jacintha-Ambrosia operation, while SIMEC Mining operations continued

to supply Whyalla steel works and iron ore export markets.

Industry announcements in the quarter included:

BHPs Brownfield Expansion project discontinued instead focusing on debottlenecking investments, plant upgrades and infrastructure modernization,

OZ Minerals Carrapateena mine reached planned mine production rate of 4.25 Mtpa; commissioning of a 270 km electricity transmission line connecting the Prominent Hill and Carrapateena mines with the Davenport Substation outside Port Augusta; approval for Carrapateena Block Cave expansion, with early commencing Q4 2021; studies confirmed potential expansion of Prominent Hill operations.

Exploration company **field exploration** continued and BHP announced the third phase of the Oak Dam drilling program has delivered encouraging results.

Capital raisings by several small companies demonstrated investor support for the mining sector over the next 12 months.

Boss Energy continued plans to restart Honeymoon uranium operations by reducing operating costs and increasing operational efficiencies.

Two Spencer Gulf iron ore export port proposals progressed: Port Playford facility at Port Augusta was assessed by the State Commission Assessment Panel and Macquarie Capital signed an agreement with Iron Road to become a joint developer of the Cape Hardy Stage 1 port facility.

Industry Activities: C Moore Solutions



545 Job Advertisements
in **150** companies.



6% increase in
job ads from Q2
FY2019-20



Trades and Operators
47% of vacancies

Contact Us

Jodie Badcock
Chief Executive Officer
**Resources and Engineering
Skills Alliance**

e info@resa.org.au
w www.resa.org.au

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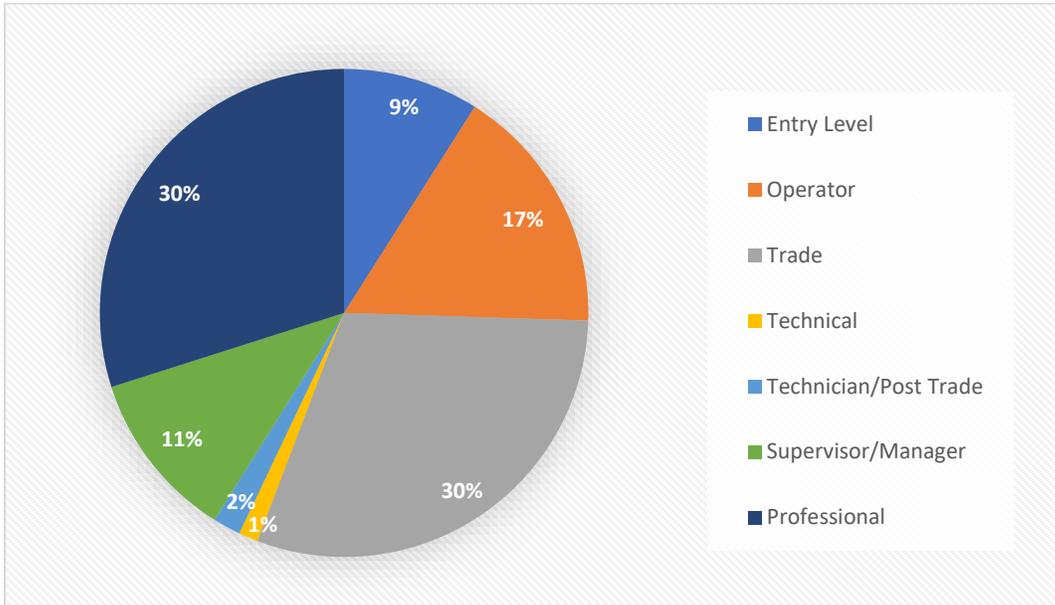
Hiring Intentions Data – Q2 20-21

Occupational Demand

Vacancy Distribution

There has been a slight shift in the distribution of the level of jobs with **Professional** job advertisements **up 7%** to 30% of total jobs. The **highest demand** (47%) continues to be for Trade and Operator occupations, with highest demand in **heavy diesel, auto electrical and mechanical fitter trades and plant operators**.

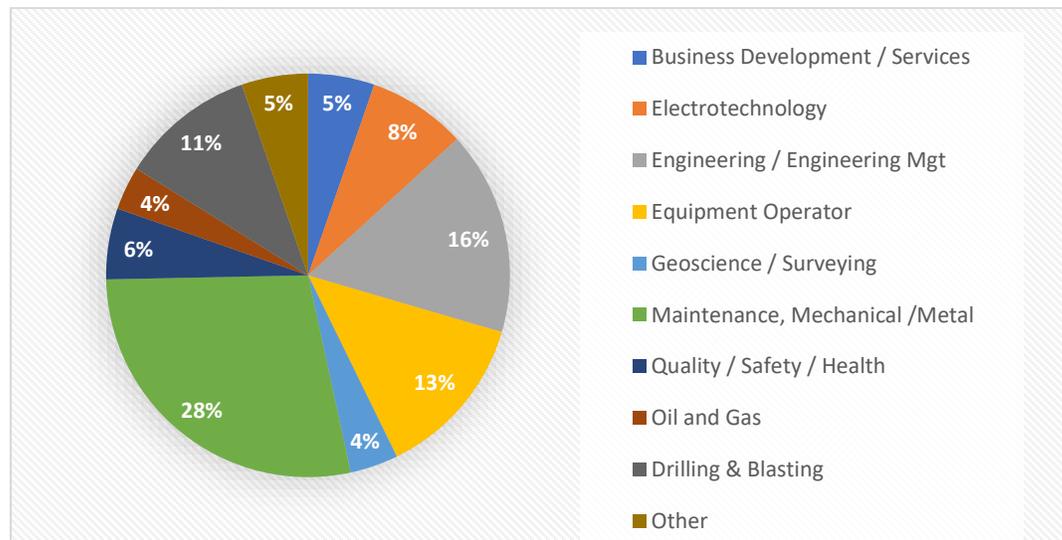
Q2 FY20-21 Vacancy Distribution - Occupation Level



Q2 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.

There has been a shift in the distribution of vacancies across sectors with continuing demand in **Mechanical/Maintenance** (28%), **Equipment Operations** (13%), **Engineering** (11%) **Electrotechnology** (8%) and **Drilling and Blasting** (11%), roles. **Other** occupations represented 5% of total vacancies, reflecting increased demand in **Exploration/Field Services, Environment** and **Human Resources / Training** roles.

Q2 FY20-21 Vacancy Distribution - Sector

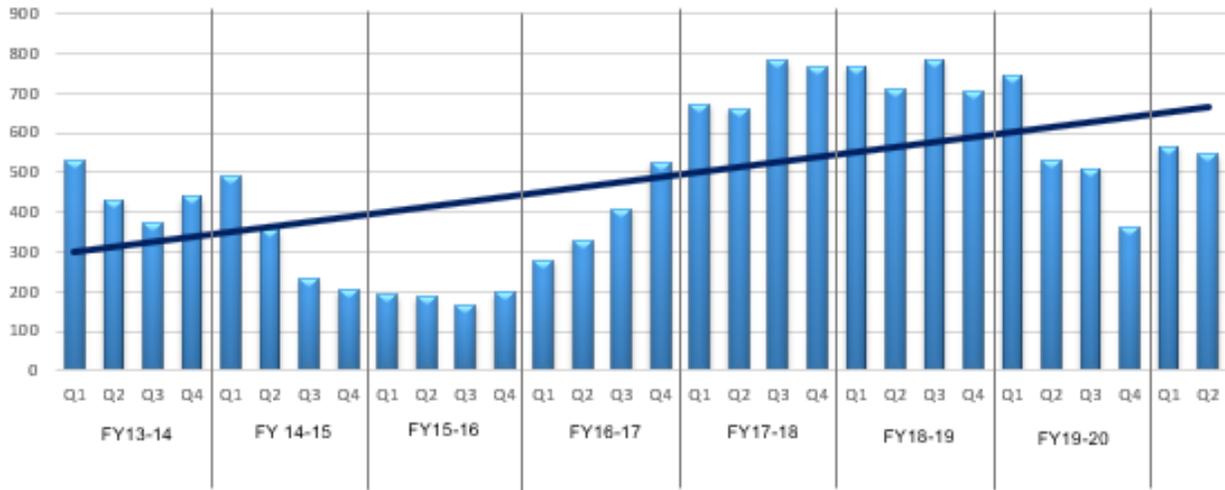


The Q2 FY20-21 Vacancy Distribution – Sector represents % of jobs advertised that fall into the occupational sector categories identified. This is determined by the job role rather than the field of operation of the organisation.

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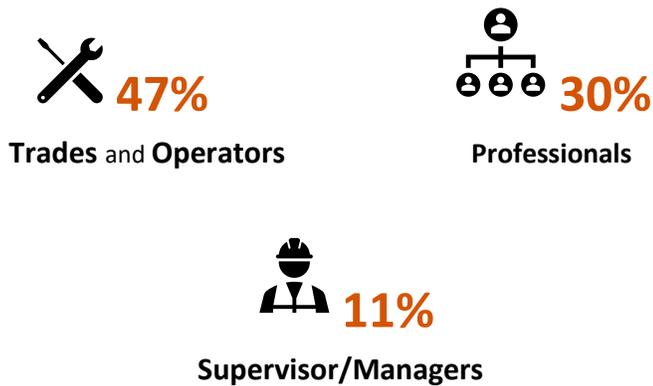
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Quarterly Job Advertisements

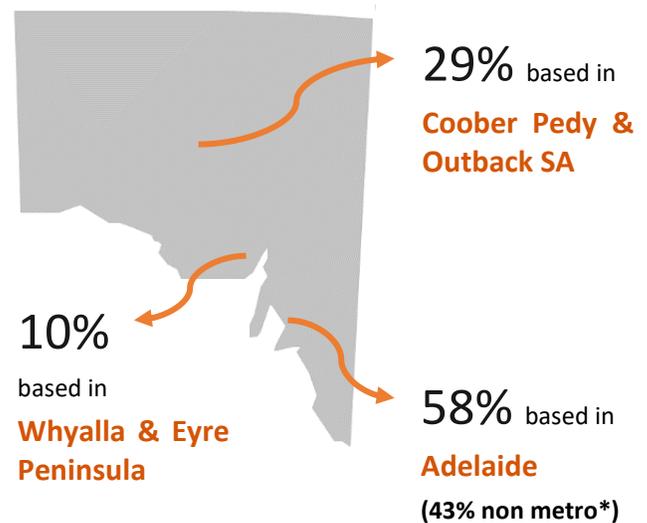


Q2 FY20-21 jobs advertised reflects **steady demand** across the resources and energy sectors.

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 is consistent with Q1 FY20-21. Adelaide advertised jobs represented 58% of the total, with 43% for occupations more likely to be undertaken in regional SA.

57 job opportunities advertised in South Australia (not included in total) were for positions requiring relocation interstate or overseas, increased from 47 in Q1 - resulting in a ratio of 9:1 for SA based to interstate/overseas. External (non SA based) demand is for heavy automotive & maintenance trades and drilling operations - creating a challenge for SA operations in retaining these high demand skills.