

NSW MINERALS COUNCIL

KEY
INDUSTRY
STATISTICS
2010



NEW SOUTH WALES
MINERALS COUNCIL LTD
MININGENUITY™

INDUSTRY OVERVIEW

The NSW minerals industry values:

- the **health and safety** of our workforce
- the **communities** where we live and work
- our culture of **learning and innovation**
- our **proud history** of contributing to the future prosperity of the State

We represent real people, in real jobs, in real communities across NSW. Mining and minerals processing directly employs 69,000 people and 310,000 indirectly, representing 9% of the State's workforce.

We're responsible stewards of the land we manage on behalf of the people of NSW. We are implementing improved rehabilitation and biodiversity practices, and a record \$1.18 billion in environmental securities will ensure that disturbed land is returned to agreed post-mining land uses.

We are listening to our communities, learning from them and responding to them. The community is moving its focus beyond the boundaries of individual mine sites and we are shifting our focus as well. We are taking a fresh approach to the impacts of mining and the collective footprint of the industry through programs like the Upper Hunter Mining Dialogue and the Upper Hunter Air Quality Monitoring Network.

“The minerals sector will make an increasingly important contribution in this State, generating \$6.8 billion in royalty payments to the people of NSW over the next four years. The combined scale of that growth brings enormous responsibility and throws up a number of challenges. That's why the industry is thinking about things differently and is open-minded about doing things differently. The community has spoken and we are listening.”

Dr Nikki Williams
Chief Executive
NSW Minerals Council

KEY INDUSTRY STATISTICS

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HEALTH AND SAFETY

STATISTICAL SUMMARY

- The NSW minerals industry is committed to zero injury mining. The industry, unions and government regulators work closely together on the safety journey through the NSW Mine Safety Advisory Council, which in 2009-10 has focused on fatigue management, reducing the risk of musculoskeletal disorders and building a world-leading OHS culture.
- There were no fatalities in the NSW minerals industry in 2009-10.
- The decade-long trend of a decreasing Lost Time Injury Frequency Rate has continued.
- The industry continues to report a low number of serious injuries.

Table 1 Number of fatalities in NSW minerals industry 2000-2010

	1999-00	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10
Coal Underground	3	2	1	0	2	0	0	1	0	3	0
Coal Open Cut	0	0	0	0	1	0	0	0	0	0	0
Coal Total	3	2	1	0	3	0	0	1	0	3	0
Metalliferous Underground	6	0	0	1	0	0	0	1	0	0	0
Metalliferous Open Cut	0	0	0	0	0	0	0	0	0	0	0
Metalliferous Total	6	0	0	1	0	0	0	1	0	0	0
Extractives	2	1	0	0	0	1	0	0	0	0	0
Metalliferous and Extractives Total	8	1	0	1	0	1	0	1	0	0	0
All NSW Mining¹	11	3	1	1	3	1	0	2	0	3	0

(1) Comprises coal, metalliferous and extractives

Source: Industry & Investment NSW (I&I NSW)

Table 2 Lost Time Injury Frequency Rates in NSW minerals industry 2000-2010

	1999-00 (r)	2000-01 (r)	2001-02 (r)	2002-03	2003-04 (r)	2004-05 (r)	2005-06 (r)	2006-07 (r)	2007-08 (r) ^{1,4}	2008-09 (r) ^{2,3}	2009-10 (p)
Coal Underground	43.0	42.0	37.8	35.5	32.9	27.3	23.9	23.7	14.84	13.55	11.32
Coal Open Cut	21.3	22.0	14.4	11.1	10.4	7.9	6.3	8.9	2.73	3.25	3.16
Coal Total	34.0	33.0	27.3	23.5	21.5	17.7	15.2	16.3	8.27	8.20	7.02
Metalliferous Underground	15.8	23.3	13.2	14.4	8.3	6.4	6.3	6.9	6.47	4.10	6.45
Metalliferous Open Cut	9.6	4.4	1.2	1.3	1.3	1.0	2.3	4.6	1.40	1.82	2.02
Metalliferous Total	14.3	17.6	9.6	9.7	6.6	4.3	4.6	6.0	4.45	3.26	4.70
Extractives	3.3	6.3	20.5	26.5	30.2	9.0	8.3	7.0	5.67	15.79	12.17
Metalliferous and Extractives Total	7.6	13.3	13.2	14.1	10.8	5.5	5.7	6.3	4.85	6.92	6.62
All NSW Mining⁵	22.2	23.8	23.1	20.5	17.6	13.9	12.5	13.2	7.26	7.83	6.92

- (1) From 2007-08 Coal LTIFR is now calculated from data supplied in quarterly reports from coal operators. This could result in under-reporting of LTIs for workers they do not directly employ. Previous years were sourced from Coal Services Pty Ltd.
- (2) From 2008-09 Metalliferous and Extractives LTIFR is calculated from data supplied in quarterly reports by mine operators from 1 October 2008. This could result in under-reporting of LTIs for workers they do not directly employ.
- (3) Metalliferous and Extractives 2008-09 LTIFRs were based on nine months of data (Q2,Q3,Q4).
- (4) Metalliferous and Extractives 2007-08 LTIFRs assumed the workforce grew by 10%, as some workforce data from external sources was problematic.
- (5) Comprises coal, metalliferous and extractives
- (p) Preliminary figures
- (r) Revised

Source: Industry & Investment NSW (I&I NSW)

Table 3 Serious Bodily Injuries in NSW minerals industry 2000-2010

	1999-00	2000-01 (r)	2001-02 (r)	2002-03	2003-04	2004-05	2005-06	2006-07 (r)	2007-08 (r)	2008-09 (r) ¹	2009-10 (p) ²
Coal Underground	26	34	27	26	43	25	24	27	18	22	24
Coal Open Cut	11	6	9	11	5	9	11	5	7	6	8
Coal Total	37	40	36	37	48	34	35	32	25	28	32
Metalliferous Underground	8	8	8	1	7	4	7	11	4	8	3
Metalliferous Open Cut	0	3	0	3	5	2	7	6	1	2	2
Metalliferous Total	8	11	8	4	12	6	14	17	5	10	5
Extractives	10	3	7	7	7	2	4	10	2	5	3
Metalliferous and Extractives Total	18	14	15	11	19	8	18	27	7	15	8
All NSW Mining³	55	54	51	48	67	42	53	59	32	43	40

- (1) As the term Serious Bodily Injury is no longer defined under the Coal Mines Health and Safety Act 2002, for the purpose of comparison, all injuries notified under CMHSR 2006 – Clauses 55 and 57 have been counted as a Serious Bodily Injury.
- (2) All injuries notified under MHSR 2007 – Clauses 145-147 have been reported as a Serious Bodily Injury to simplify comparison with coal, and replacing the term Serious Injury (SI) used in past reporting.
- (3) Comprises coal, metalliferous and extractives
- (p) Preliminary figures
- (r) Revised

Source: Industry & Investment NSW (I&I NSW)

PRODUCTION

STATISTICAL SUMMARY

- Coal production in NSW continues to increase, with a 5% growth in saleable coal production from 2008-09 to 2009-10.
- Coal exports grew by 6.4% in the last year, while domestic sales of coal remained steady.
- The coal mining industry in NSW expanded in 2009-10. Four new mines commenced operations and one mine ceased production. An additional 2,157 jobs were created, increasing employment by 13% from 2008-09.
- Saleable output of coal per employee continues to trend downwards with a 2.4% decrease from 2008-09 to 2009-10. This, however, was less than the 11% decrease the year prior.
- In the metalliferous sector, production of zircon increased by nearly 60% in 2009-10. Silver and lead production also increased with silver production up 15.5%. Zinc and gold production decreased in 2009-10, while copper and rutile production remained strong.

Table 4 Summary statistics for coal production in NSW 2005-2010

	2004-05	2005-06	2006-07	2007-08	2008-09 (r)	2009-10 (p)
Raw coal production ('000 tonnes)	156,309	161,140	170,324	177,167	181,978	188,805
Underground mines	51,907	52,232	57,241	61,316	63,069	62,812
Open cut mines	104,402	108,908	113,083	115,851	118,909	125,993
Saleable coal production ('000 tonnes)	122,063	124,611	131,334	135,149	138,456	145,376
Underground mines	43,186	42,297	46,202	48,974	51,609	50,772
Open cut mines	78,877	82,314	85,132	86,175	86,847	94,604
Number of mines¹	55	58	60	60	60	63
Underground mines	28	30	29	29	29	30
Open cut mines	27	28	31	31	31	33
Employment	11,290	12,658	13,392	15,387	16,958	19,115
Underground mines	5,620	6,541	6,792	7,469	8,478	8,683
Open cut mines	5,670	6,117	6,600	7,918	8,480	10,432
Saleable output per employee (tonnes)	11,680	10,240	9,970	9,430	8,410	8,210
Underground mines	8,170	6,820	6,860	6,970	6,320	5,870
Open cut mines	15,280	13,800	13,230	11,810	10,480	10,440
Exports ('000 tonnes)²	86,568	89,839	91,533	100,465	103,275	109,903
Metallurgical	18,553	17,881	20,376	25,342	21,160	28,827
Steaming	68,015	71,958	71,157	75,123	82,115	81,076
Domestic sales ('000 tonnes)	33,904	34,129	36,264	36,841	34,937	34,349
Power stations	27,786	28,503	30,439	30,764	30,599	28,657
Steel industry	5,026	4,576	4,903	4,994	3,480	4,453
Other	1,092	1,050	922	1,083	858	1,239
Mine stocks ('000 tonnes)¹	7,802	8,542	11,220	9,374	10,033	11,118

(1) As at end of June

(2) Includes small tonnages of imported coal

(p) Preliminary figures

(r) Revised

Source: Coal Services Pty Ltd (CSPL)

Table 5 Summary statistics for metals production in NSW 2000-2010

Year	Copper (tonnes)	Gold (kilograms) ²	Rutile (tonnes) ¹	Zircon (tonnes)	Silver (kilograms)	Lead (tonnes)	Zinc (tonnes)	Antimony (tonnes)
1999-00	124,000	20,170	10,120	4,100	144,000	151,000	266,000	1,585
2000-01	130,000	18,590	7,346	4,230	141,000	125,000	269,000	1,251
2001-02	122,000	18,810	4,891	5,422	113,000	115,000	236,000	1,604
2002-03	144,000	26,490	5,923	4,556	88,000	107,000	238,000	0
2003-04	163,000	28,000	696	530	78,000	105,000	225,000	0
2004-05	175,000	29,000	0	0	96,000	103,000	205,000	0
2005-06	204,000	29,000	0	0	96,000	109,000	178,000	0
2006-07	195,000	32,000	55,715	39,007	81,000	91,000	147,000	0
2007-08	146,000	34,000	63,000	48,000	77,000	75,000	140,000	1,000
2008-09 (r)	158,000	28,000	80,000	56,000	71,000	73,000	122,000	0
2009-10 (p)	158,000	26,000	80,000	89,000	82,000	77,000	102,000	0

(1) Includes the metallic contents of zircon-rutile concentrates recovered in NSW and finally separated in Queensland. The metallic contents of zircon-rutile concentrates recovered in Queensland and finally separated in NSW are excluded in all years. The metallic contents of zircon-rutile concentrates recovered in Sri Lanka and finally separated in NSW are excluded in all years.

(2) Content of fine metal

(p) Provisional

(r) Revised

Source: Industry & Investment NSW – Primary Industries – Mineral Resources

Table 6 Saleable outputs (tonnes) of coal in NSW per employee per hour 1999-2010

Year	Underground Mines					Open Cuts	All Mines
	Singleton - North West ¹	Newcastle ²	West	South	Total		
1998-99	4.29	3.16	4.43	3.06	3.59	7.19	5.05
1999-00	4.48	3.18	4.36	3.46	3.75	7.90	5.36
2000-01	4.43	3.54	5.64	3.78	4.20	8.34	5.91
2001-02	3.65	3.55	5.96	3.87	4.11	7.92	5.81
2002-03	3.72	3.66	5.89	3.67	4.12	7.53	5.80
2003-04	5.58	4.08	5.44	2.72	4.20	7.41	5.82
2004-05	5.37	3.82	6.23	2.45	4.04	7.44	5.73
2005-06	4.19	2.99	5.00	2.25	3.32	6.63	4.95
2006-07	4.36	3.88	4.76	2.03	3.42	6.33	4.87
2007-08	4.33	4.05	4.71	2.20	3.59	5.79	4.74
2008-09 (r)	3.78	3.46	4.92	1.73	3.18	5.07	4.15
2009-10	3.40	3.42	4.56	1.71	3.02	5.04	4.09

(1) The Singleton-North West District incorporates the Gunnedah and Hunter Coalfields

(2) The Newcastle District incorporates the Gloucester Basin

(r) Revised

Source: Coal Services Pty Ltd (CSPL)

EXPORTS

STATISTICAL SUMMARY

- Exports comprised 76% of NSW coal produced in 2009-10. A further 20% was used for domestic electricity production, and the remaining 4% was used for other domestic purposes, including iron and steel, cement and cokeworks.
- Coal exports from NSW grew to 109.9 million tonnes during 2009-10, an increase of 6.4% over the previous year.
- The value of coal exports declined significantly over the same period, dropping from \$17.1 billion in 2008-09 to \$11.2 billion in 2009-10. According to ABARE, this fall is mainly due to a significant drop in Japanese contract prices for thermal coal, and the appreciation of the Australian dollar.
- NSW coal was exported to 20 countries in 2009-10.
- Japan continued to be the destination for more than half of NSW's export coal (52.8%). China more than doubled its imports of NSW coal, from 4.7% in 2008-09 to 10.1% in 2009-10 and remains the fourth largest export market behind the Republic of Korea and Taiwan.
- Other minerals and metals exports also experienced a drop in value, with decreases in iron and steel, copper and aluminium.
- The value of zinc exports increased by 114.6% in the 2009-10 year which was driven by heavy demand from China, according to ABARE.
- The total value of NSW minerals and metals exports decreased by 30.7%, from \$22 billion in 2008-2009 to \$15.3 billion in 2009-10.

Table 7 Estimated total value of mineral and metal exports from NSW 2004-2010

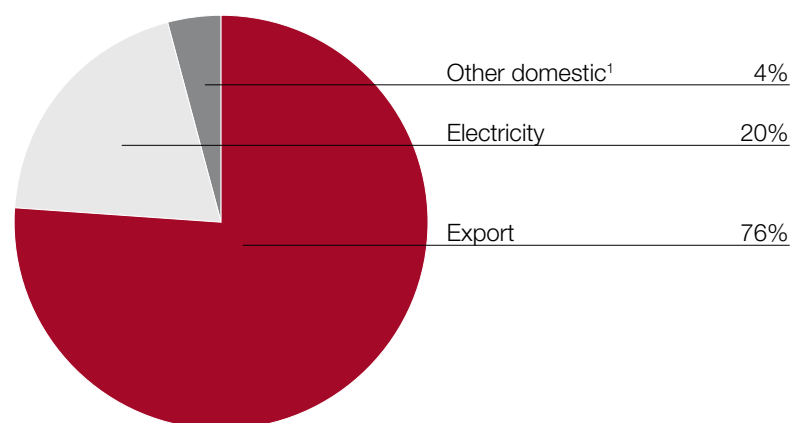
Year	Coal (Value \$'000)	Petroleum (Value \$'000)	Iron and Steel (Value \$'000)	Copper (Value \$'000)	Aluminium (Value \$'000)	Zinc (Value \$'000)	Total (Value \$'000)
2003-04	3,727,000	641,000	296,000	317,000	1,397,000	8,970	6,386,970
2004-05	5,494,000	894,000	356,000	324,000	1,530,000	2,100	8,600,100
2005-06	6,729,000	1,281,000	472,000	390,000	1,979,000	2,340	10,853,340
2006-07	6,200,000	1,242,000	644,000	520,000	2,458,000	9,200	11,073,200
2007-08	8,185,000	1,635,000	883,000	589,000	2,092,000	6,799	13,390,799
2008-09 (r)	17,120,000	1,407,000	904,000	515,000	2,057,000	1,977	22,004,977
2009-10 (p)	11,220,000	1,116,000	811,000	456,000	1,643,000	4,242	15,250,242

(p) Preliminary figures

(r) Revised

Source: Industry & Investment NSW – Primary Industries – Mineral Resources

Chart 1 Market for NSW coal 2009-10



(1) Other domestic includes iron and steel, cokeworks, cement and other non-specified.

Source: Coal Services Pty Ltd (CSPL)

Table 8 Market share for NSW coal exports by country 2003-2010

Country	2002-03 %	2003-04 %	2004-05 %	2005-06 %	2006-07 %	2007-08 %	2008-09 %	2009-10 ⁽¹⁾ %
Japan	54.0	59.9	55.0	54.3	55.1	61.0	54.5	52.8
Korea, Republic of	8.7	7.6	10.7	12.8	10.3	13.8	16.5	16.5
Taiwan	14.3	11.9	15.9	14.4	14.2	13.6	12.0	11.5
China	2.8	1.5	1.5	2.8	2.6	1.1	4.7	10.1
India	3.3	3.1	3.2	2.5	3.1	2.8	3.2	3.4
Mexico	4.1	2.7	4.7	6.3	6.1	1.0	2.0	2.8
Thailand	0.0	0.0	0.0	0.6	1.7	1.5	1.9	0.9
Malaysia	2.2	2.0	3.2	2.3	2.5	1.2	1.8	0.4
France	0.0	0.5	0.2	0.1	0.2	0.1	1.1	0.1
Netherlands	0.8	1.1	0.1	0.5	0.4	0.4	0.5	0.2
Italy	0.8	0.9	0.6	0.4	0.5	0.5	0.3	0.2
Brazil	0.8	0.7	0.6	0.5	0.3	0.2	0.2	0.1
New Caledonia	0.3	0.3	0.3	0.2	0.3	0.3	0.2	0.4
Pakistan	0.5	0.5	0.3	0.1	0.1	0.2	0.2	0.1
Turkey	0.3	0.2	0.1	0.0	0.0	0.4	0.2	0.1
Egypt	0.0	0.0	0.0	0.0	0.4	0.1	0.1	0.1
Germany	1.1	0.8	0.7	0.6	0.5	0.3	0.1	0.1
Hong Kong	0.6	1.3	0.4	0.0	0.2	-	0.1	0.1
New Zealand	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1
Sweden	0.1	0.1	0.2	0.1	0.2	0.1	0.1	0.1
Belgium/Luxembourg	0.0	0.0	0.1	0.0	0.0	0.1	0.1	-
United Kingdom	0.3	0.7	0.9	0.4	0.6	0.2	0.1	-
Vietnam	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-
Ireland	0.4	0.5	0.0	0.0	0.3	0.5	-	-
Philippines	0.0	0.1	0.7	0.3	0.1	0.3	-	-
Argentina	0.2	0.0	0.0	0.0	0.0	-	-	-
Bosnia & Herzegovina	0.0	0.0	0.0	0.0	0.0	-	-	-
Chile	0.8	1.0	0.2	0.1	0.2	0.0	-	-
Croatia	0.0	0.2	0.0	0.0	0.1	-	-	-
Denmark	0.3	0.3	0.0	0.1	0.2	-	-	-
Finland	0.1	0.0	0.0	0.0	0.0	-	-	-
Greece	0.0	0.0	0.0	0.0	0.0	-	-	-
Indonesia	0.0	0.0	0.0	0.0	0.0	-	-	-
Iran	0.0	0.0	0.0	0.0	0.0	-	-	-
Israel	0.8	0.8	0.0	0.0	0.0	-	-	-
Morocco	0.0	0.0	0.0	0.0	0.0	-	-	-
Peru	0.0	0.1	0.0	0.0	0.0	-	-	-
Portugal	1.0	0.3	0.0	0.0	0.0	-	-	-
Romania	0.0	0.1	0.0	0.0	0.0	-	-	-
South Africa	0.3	0.3	0.3	0.2	0.1	-	-	-
Spain	0.5	0.5	0.0	0.0	0.0	-	-	-
United States of America	0.3	0.0	0.0	0.0	0.0	-	-	-

(1) Order based on 2009-10 exports.

(0.0) Indicates that there was a small tonnage exported.

(-) Indicates that there was no tonnage exported.

Source: Coal Services Pty Ltd (CSPL)

VALUE

STATISTICAL SUMMARY

- From a high of \$22.8 billion in 2008-09, the total value of all NSW minerals production has decreased to just under \$17 billion in 2009-10. This decline reflects a 30% drop in the value of coal from \$20.2 billion in 2008-09 to \$14.2 billion the following year.
- Although the value of NSW coal exports dropped from \$13 billion in 2008-09 to \$8.5 billion in 2009-10, coal remained the State's biggest merchandise export earner, four times the size of the next largest sector, metalliferous ores and metal scrap.
- Other minerals such as copper, rutile, silver, lead and zinc performed more positively in value terms. The value of silver production grew by 30.8% to \$51 million. Lead production value grew by 28.9% to \$183 million in 2009-10 from 2008-09.
- Royalties from NSW minerals remain at historically high levels. The industry paid \$985 million in royalties in 2009-10, down from the previous year's \$1.28 billion. NSW 2010-11 Budget Papers estimate total revenues from royalties over the next four years at \$6.8 billion.

Table 9 Value of NSW minerals production at average market prices 2000-2010

Year	Coal (\$'000)	Copper (\$'000)	Gold (\$'000)	Rutile (\$'000)	Zircon (\$'000)	Silver (\$'000)	Lead (\$'000)	Zinc (\$'000)	Antimony (\$'000)	Total Mining (\$'000)
1999-00	4,635,447	344,800	293,000	7,858	2,116	39,000	112,000	487,000	2,174	5,923,395
2000-01	5,606,085	438,300	303,000	6,717	3,086	40,000	112,000	533,000	2,372	7,044,560
2001-02	6,671,876	350,700	332,000	4,478	3,902	31,000	104,000	356,000	2,887	7,856,843
2002-03	5,469,322	389,300	482,000	4,745	3,520	22,000	81,000	313,000	0	6,764,887
2003-04	5,245,633	533,800	493,000	557	387	20,000	103,000	305,000	0	6,701,377
2004-05	7,462,733	735,000	525,000	0	0	29,000	132,000	320,000	0	9,203,733
2005-06	9,035,554	1,384,200	659,000	0	124	38,000	155,000	505,000	0	11,776,878
2006-07	8,718,200	1,771,800	843,000	43,000	47,000	43,000	198,000	692,000	0	12,356,000
2007-08 (r)	10,919,000	1,264,000	1,000,000	47,000	45,000	42,000	241,000	404,000	2,000	13,964,000
2008-09	20,169,000	1,040,000	1,049,000	45,000	44,000	39,000	142,000	228,000	0	22,756,000
2009-10 (p)	14,174,000	1,176,000	1,037,000	53,000	44,000	51,000	183,000	232,000	0	16,950,000

(p) Preliminary figures

(r) Revised

Source: Industry & Investment NSW – Primary Industries – Mineral Resources

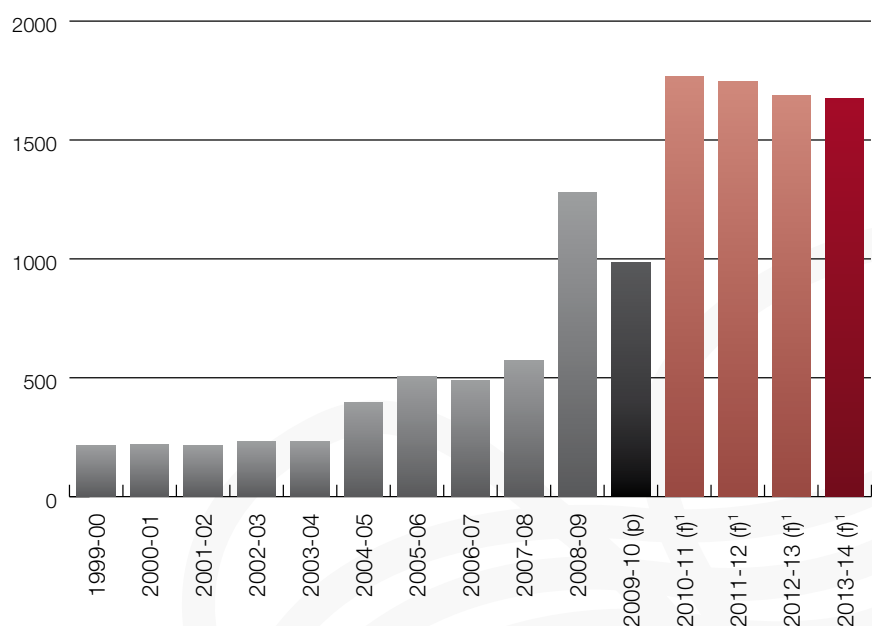
Table 10 Total value of major merchandise exports from NSW 2001-2010

	2000-01 (\$'000)	2001-02 (\$'000)	2002-03 (\$'000)	2003-04 (\$'000)	2004-05 (\$'000)	2005-06 (\$'000)	2006-07 (\$'000)	2007-08 (\$'000)	2008-09 (\$'000)	2009-10 (\$'000)
Coal, coke and briquettes	3,831,739	4,287,671	2,979,949	2,855,457	4,453,819	5,026,450	4,894,785	6,224,613	13,078,062	8,534,216
Non-ferrous metals	2,089,779	2,083,890	1,856,482	1,739,621	1,871,243	2,413,922	3,053,337	2,744,407	2,605,579	2,135,818
Metalliferous ores and metal scrap	706,341	619,712	744,525	946,916	1,138,956	2,062,973	2,550,670	2,413,078	1,948,332	2,222,960
Medicinal and pharmaceutical products	1,088,628	900,951	692,128	746,226	898,827	1,446,451	1,846,074	1,899,512	1,463,473	1,389,621
Meat and meat preparations	1,386,835	1,591,315	1,201,115	1,136,305	1,367,919	1,183,031	1,292,512	1,161,345	1,331,896	1,130,895
Petroleum, petroleum products and related materials	838,469	670,137	682,138	655,231	893,286	1,286,088	1,242,508	1,638,148	1,404,710	1,116,223
Miscellaneous manufactured articles	565,941	582,486	740,849	818,306	857,163	915,377	999,208	2,211,880	975,311	883,796
Textile fibres and their wastes	2,228,077	1,821,914	1,540,999	1,205,390	1,089,235	1,105,082	980,242	514,986	472,391	855,070
Professional, scientific and controlling instruments	435,895	545,157	339,115	358,257	492,277	685,060	856,734	892,311	1,063,859	907,054

Source: Australian Bureau of Statistics, *International Merchandise Trade* [data available on request].

Table 11 Royalties collected from NSW minerals 2000-2010

Year	\$ million
1999-00	215
2000-01	220
2001-02	216
2002-03	233
2003-04	233
2004-05	396
2005-06	504
2006-07	489
2007-08	573
2008-09	1,280
2009-10 (p)	985
2010-11 (f) ¹	1,768
2011-12 (f) ¹	1,745
2012-13 (f) ¹	1,687
2013-14 (f)¹	1,676



(1) Forecast figures sourced from NSW Treasury, *NSW 2010-11 Budget Papers*

(f) Forecast

(p) Preliminary figures

Source: Industry & Investment NSW – Primary Industries – Mineral Resources

EMPLOYMENT

STATISTICAL SUMMARY

- The NSW minerals industry remains a significant employer. Employment in coal mining continued its upwards trend with 19,115 people employed at June 2010, an increase of 13% from June 2009. More than half these jobs were located in the Singleton-North West area. All coal mining regions experienced job growth over the year, but Singleton-North West also saw the biggest increase, from 9,444 jobs in June 2009 to 11,153 in June 2010.
- Total employment in NSW mining increased by 7.2% from 29,649 people in 2009 to 31,778 people in 2010. The biggest increase was in the Northern, North West and Central West area. The Hunter region saw a 17% drop in mining jobs from 14,309 to 11,896.
- NSW coal mine employees had an average age of 41.5 years in December 2009, with open-cut employees slightly younger than underground mine employees.

Table 12 Employment in NSW coal mines 1999-2010

As at:	Singleton-North West ¹	Newcastle ²	West	South	NSW	Underground Mines	Open Cuts
1999							
June	5,072	2,282	1,472	1,574	10,400	6,063	4,337
December	4,822	2,178	1,379	1,429	9,748	5,734	4,014
2000							
June	4,770	2,131	1,276	1,406	9,583	5,615	3,968
December	4,532	2,124	1,295	1,518	9,469	5,685	3,784
2001							
June	4,897	2,181	1,197	1,546	9,821	5,737	4,084
December	5,097	2,031	1,163	1,641	9,932	5,701	4,231
2002							
June	5,336	2,048	1,175	1,493	10,052	5,497	4,555
December	5,446	1,719	1,186	1,412	9,763	5,052	4,711
2003							
June	5,223	1,628	1,187	1,720	9,758	5,064	4,694
December	5,298	1,593	1,088	1,696	9,675	4,873	4,802
2004							
June	5,577	1,481	1,155	1,785	9,998	5,054	4,944
December	5,493	1,549	1,170	1,762	9,974	4,930	5,044
2005							
June	6,306	1,642	1,331	2,011	11,290	5,620	5,670
December	6,486	1,882	1,353	2,275	11,996	6,055	5,941
2006							
June	6,825	1,945	1,399	2,489	12,658	6,541	6,117
December	6,864	1,993	1,567	2,592	13,016	6,740	6,276
2007							
June	7,212	2,062	1,642	2,476	13,392	6,792	6,600
December	7,568	2,141	1,666	2,426	13,801	6,988	6,813
2008							
June	8,709	2,177	1,865	2,636	15,387	7,469	7,918
December	9,386	2,279	2,009	2,916	16,590	8,151	8,439
2009							
June	9,444	2,369	2,154	2,947	16,914	8,478	8,436
December	9,766	2,467	2,050	2,996	17,279	8,697	8,582
2010 (p)							
June	11,153	2,511	2,371	3,080	19,115	8,683	10,432

(1) The Singleton-North West District incorporates the Gunnedah and Hunter Coalfields

(2) The Newcastle District incorporates the Gloucester Basin

(p) Preliminary figures

Source: Coal Services Pty Ltd (CSPL)

Table 13 Average age NSW coal mine employees 1998-2009

	Singleton-North West ¹	Newcastle ²	West	South	NSW
Underground Mines					
End of:					
December 1998	41.0	43.8	40.5	44.3	42.8
March 2000	41.4	44.8	41.8	45.5	43.7
December 2000	41.8	45.3	42.2	46.0	44.0
December 2001	42.1	45.1	42.6	45.7	44.2
December 2002	41.3	45.2	42.7	46.3	44.1
December 2003	40.8	46.0	43.4	45.0	44.1
December 2004	40.1	47.1	42.9	43.5	43.6
December 2005	41.2	45.0	42.4	42.9	43.1
December 2006	40.5	44.2	42.2	41.9	42.3
December 2007	39.3	45.0	42.7	42.8	42.6
December 2008	39.0	43.9	41.0	41.7	41.5
December 2009	39.4	42.9	42.0	42.0	42.0
Open Cut					
December 1998	42.1	40.2	42.3	-	42.0
March 2000	42.3	41.4	44.3	-	42.4
December 2000	41.8	42.5	44.6	-	42.0
December 2001	42.6	42.5	42.7	-	42.6
December 2002	42.8	42.5	42.7	-	42.8
December 2003	42.7	43.6	43.7	-	42.8
December 2004	43.2	42.8	42.6	-	43.2
December 2005	42.2	43.0	40.6	-	42.2
December 2006	41.6	44.4	40.5	-	41.7
December 2007	42.2	43.1	39.3	-	42.1
December 2008	41.1	43.8	36.3	-	41.0
December 2009	41.1	44.2	36.5	-	40.9
All Mines					
December 1998	41.9	43.3	40.8	44.3	42.5
March 2000	42.1	44.4	42.2	45.5	43.2
December 2000	41.8	45.0	42.6	46.0	43.2
December 2001	42.5	44.7	42.7	45.7	43.5
December 2002	42.4	44.8	42.7	46.3	43.5
December 2003	42.3	45.6	43.4	45.0	43.5
December 2004	42.6	46.2	42.9	43.5	43.4
December 2005	42.0	44.7	42.1	42.9	42.7
December 2006	41.4	44.3	41.9	41.9	42.0
December 2007	41.6	44.7	41.9	42.8	42.4
December 2008	40.6	43.8	40.3	41.7	41.3
December 2009	40.9	43.1	40.9	42.0	41.5

(1) The Singleton-North West District incorporates the Gunnedah and Hunter Coalfields

(2) The Newcastle District incorporates the Gloucester Basin

Source: Coal Services Pty Ltd (CSPL)

EMPLOYMENT

Table 14 Total employment in NSW mining by region 2001 – 2010¹

Region	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Sydney	2,339	1,790	2,649	2,625	2,488	3,605	3,678	4,749	4,375	4,891
Hunter	8,124	4,816	7,367	8,140	12,257	10,856	11,823	12,630	14,309	11,896
Illawarra and South East	3,212	1,264	1,281	1,793	3,291	1,674	1,979	3,543	4,254	5,869
Northern, Far West, North West and Central West	1,742	5,930	2,391	3,764	3,208	3,486	5,317	9,732	6,124	8,162
Richmond, Tweed and Mid North Coast	347	387	880	376	0	371	692	–	587	478
Murray-Murrumbidgee	0	966	401	605	0	0	0	–	–	482
Total	15,764	15,153	14,969	17,304	21,244	19,992	23,490	30,654	29,649	31,778

(1) May quarter figures

Source: Australian Bureau of Statistics

EXPLORATION

STATISTICAL SUMMARY

- Private expenditure on exploration has fallen nationally since peaking at nearly \$2.5 billion in 2007-08. Increased exploration spending in Queensland over 2009-10 has seen national expenditure improve marginally.
- In NSW, spending fell from \$175.3 million in 2008-09 to \$130.4 million in 2009-10, a drop of 25.6%. This is mainly due to reduced expenditure on coal exploration in NSW, which has fallen from \$105 million in 2008-09 to \$39.7 million in 2009-10.
- Expenditure on selected base metals and diamonds rose slightly in 2009-10. Expenditure on gold exploration increased significantly, jumping by 128% from \$21.4 million in 2008-09 to \$48.8 million.

Table 15 Exploration expenditure by State 1999-2010

	1998-99 (\$ million)	1999-00 (\$ million)	2000-01 (\$ million)	2001-02 (\$ million)	2002-03 (\$ million)	2003-04 (\$ million)	2004-05 (\$ million)	2005-06 (\$ million)	2006-07 (\$ million)	2007-08 (\$ million)	2008-09 (\$ million)	2009-10 (\$ million)
New South Wales	65.6	56.1	57.2	48.3	58.8	50.5	73.6	114.0	144.1	189.9	175.3	130.4
Victoria	37.0	33.8	32.7	33.9	46.2	53.5	51.5	74.1	82.5	93.7	62.2	84.8
Queensland	93.8	82.6	83.1	92.7	114.2	125.2	166.4	218.8	272.3	397.8	351.7	436.6
South Australia	41.9	22.6	29.6	32.1	36.7	41.7	66.9	146.5	260.7	355.2	220.7	166.5
Western Australia	523.1	415.0	424.1	381.1	423.6	465.8	606.0	590.2	839.1	1259.8	1246.8	1244.1
Tasmania	11.9	8.8	9.2	4.0	4.3	7.5	8.3	22.6	23.7	32.4	20.4	20.7
Northern Territory	64.5	57.5	47.5	48.4	49.0	42.5	55.6	74.7	92.2	132.7	146.1	149.5
Australia	837.8	676.3	683.3	640.6	732.8	786.7	1028.3	1240.7	1714.6	2461.4	2223.1	2232.5

Source: Australian Bureau of Statistics

Table 16 Exploration by mineral type in NSW 2000-2010

	1999-00 (\$ million)	2000-01 (\$ million)	2001-02 (\$ million)	2002-03 (\$ million)	2003-04 (\$ million)	2004-05 (\$ million)	2005-06 (\$ million)	2006-07 (\$ million)	2007-08 (\$ million)	2008-09 (\$ million)	2009-10 (\$ million)
Copper	2.8	3.3	2.5	2.1	4.3	8.4	19.5	24.5	31.7	14.4	18.2
Silver, lead, zinc	8.5	8.0	2.7	7.4	np	5.5	6.7	np	28.3	np	10.2
Nickel, cobalt	8.8	6.9	np	np	np	0.4	0.9	np	2.8	np	0.3
Selected base metals total ¹	20.1	18.2	np	np	9.4	14.3	27.1	47.5	62.9	27.2	28.7
Coal	14.7	11.3	np	15.6	13.6	28.1	56.0	59.8	69.6	105.0	39.7
Gold	14.3	16.3	15.7	19.9	20.5	24.8	22.1	22.8	37.3	21.4	48.8
Other ²	2.2	2.8	0.9	2.1	1.9	np	3.5	6.4	13.0	13.1	7.6
Iron ore	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	np	1.2	0.4
Mineral sands	4.7	8.3	np	np	4.7	3.1	4.2	6.5	6.6	7.2	4.0
Uranium	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0
Diamonds	0.1	0.3	0.1	0.4	np	0.7	1.0	1.2	np	0.2	1.1
Total	56.1	57.2	48.3	58.8	50.5	73.6	114.0	144.1	189.9	175.3	130.4

(1) Selected base metals total comprises copper, silver, lead, zinc, nickel and cobalt.

(2) Other metallic minerals, other non-metallic minerals, tin, tungsten, scheelite, wolfram and construction materials are included in this category.

(np) Not available for publication but included in totals where applicable.

Source: Australian Bureau of Statistics

ENERGY SUPPLY

STATISTICAL SUMMARY

- Electricity load forecast in NSW (and the ACT) is expected to increase by 15.6% over the ten years from 2008-09. Combined Cycle electricity generation accounted for 2.5% of total generation in 2008-09, an increase from the previous year's 1.4%. Hydro power also increased its percentage in the market, accounting for just under 2% of total generation.
- Black-coal fired steam generation accounts for the bulk of electricity generation in NSW (and the ACT), at 95.3% of total generation.

Table 17 NSW and ACT electricity load forecast^{1,2}

		NSW & ACT
2008-09 (actual)	System average load (MW)	8,503
	System peak load (MW) – summer	14,514
	System peak load (MW) – winter	14,274
	System energy (GWh)	74,485
2009-10	System average load (MW)	8,615
	System peak load (MW)	14,445
	System energy (GWh)	75,470
2010-11	System average load (MW)	8,679
	System peak load (MW)	14,706
	System energy (GWh)	76,030
2011-12	System average load (MW)	8,710
	System peak load (MW)	15,132
	System energy (GWh)	76,510
2012-13	System average load (MW)	8,895
	System peak load (MW)	15,428
	System energy (GWh)	77,920
2013-14	System average load (MW)	8,944
	System peak load (MW)	15,741
	System energy (GWh)	78,350
2014-15	System average load (MW)	9,086
	System peak load (MW)	15,945
	System energy (GWh)	79,590
2015-16	System average load (MW)	9,303
	System peak load (MW)	16,309
	System energy (GWh)	81,720
2016-17	System average load (MW)	9,503
	System peak load (MW)	16,680
	System energy (GWh)	83,250
2017-18	System average load (MW)	9,666
	System peak load (MW)	17,061
	System energy (GWh)	84,670
2018-19	System average load (MW)	9,829
	System peak load (MW)	17,452
	System energy (GWh)	86,100

(1) System peak load is based on generation terminal demand. System energy and average demand are calculated on a sent-out basis.

(2) System energy projections are inclusive of scheduled, semi-scheduled and significant non-scheduled generation.

Table 18 NSW and ACT electricity generation: GWh by plant (year ending June 2009)¹

Plant type ²		NSW & ACT ³	% Change
Hydro (excluding pump storage plants)		1,462.1	
Steam		69,928.2	
Gas turbine		154.1	
Combined cycle		1,843.4	
Reciprocating engine		0.0	
Photovoltaic		0.0	
Wind ⁴		10.9	
Total generation		73,398.8	
Total generation^{3,4}	2005	65,942.1	-0.5
	2006	67,889.3	3.0
	2007	69,749.4	2.7
	2008	72,870.9	4.5
	2009	73,398.8	-
Energy sent out		68,786.0	-
Energy purchased⁵		3,682.7	9.4
Import		7,125.8 ⁶	-
Export		1,274.5 ⁶	-
Net imports⁷		5,851.3⁶	-
Trade losses		152.7	-
Total available energy^{3,4}	2005	73,690.7	0.5
	2006	75,931.7	3.0
	2007	76,957.6	1.4
	2008	77,493.1	0.7
	2009	78,167.2	-

(1) This table represents generation for public consumption only and does not include generation for own use by private generators.

(2) Figures shown by plant type represent generation from scheduled, semi-scheduled and large non-scheduled intermittent generators only.

(3) The Snowy region was abolished on 1 July 2008. Generation plant previously included within the Snowy region have been reallocated to New South Wales and Victoria, therefore generation output figures presented for those regions should not be compared to previous years.

(4) Wind generation data for 2008-09 includes output from semi-scheduled and large non-scheduled generating units, therefore figures presented should not be compared to previous years.

(5) Energy purchased includes energy purchased from IPPs, non-grid and embedded generation for public consumption.

(6) Following the abolition of the Snowy region on 1 July 2008, the notional interconnectors between the Victoria and Snowy regions and the Snowy and New South Wales regions were replaced with a single notional interconnector between Victoria and New South Wales. As a result, import/export figures for New South Wales and Victoria should not be compared with previous years.

(7) Import and export of energy refers to interstate trading.

Source: Energy Supply Association of Australia (esaa) (AEMO, IMO, company annual reports)

ENVIRONMENT

STATISTICAL SUMMARY

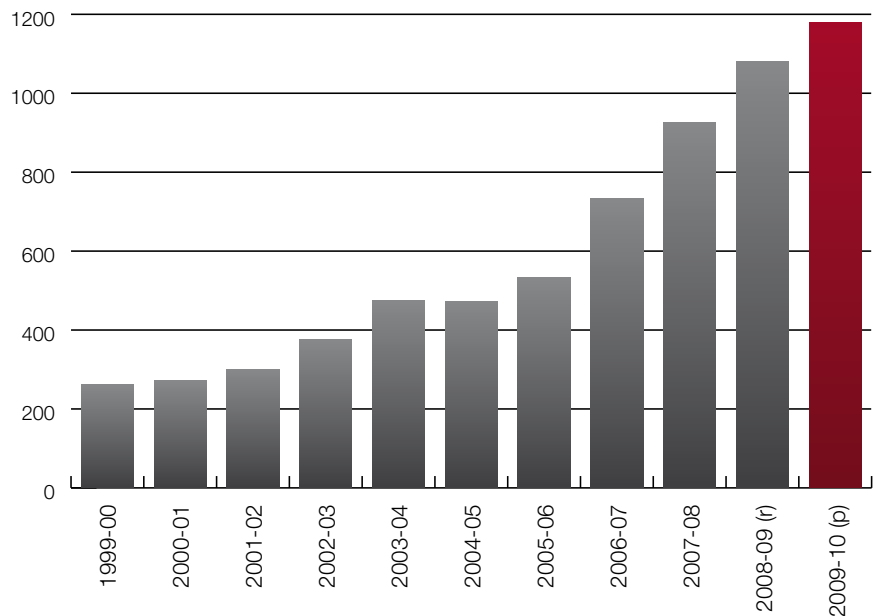
- Environmental securities are bonds lodged by mine operators with Industry & Investment NSW. They are retained until the land is successfully rehabilitated after mining operations cease. Rehabilitation requirements, including post-mining land use, are determined in the planning process before a mine licence is approved.
- The NSW Government holds \$1,180 million in environmental securities in 2009-10, up from \$1,080 million in 2008-09. Environmental securities have more than doubled in the past five years from \$533 million in 2005-06 to the current \$1,180 million.
- The NSW minerals industry is committed to positive environmental outcomes. The NSW Minerals Council promotes leading industry practices in land management, environmental protection and rehabilitation.

Table 19 NSW environmental securities 2000-2010

Year	\$ million
1999-00	262
2000-01	272
2001-02	301
2002-03	375
2003-04	474
2004-05	473
2005-06	533
2006-07	733
2007-08	927
2008-09 (r)	1,080
2009-10 (p)	1,180

(p) Preliminary figure as at 10 June 2010
 (r) Revised

Source: Industry & Investment NSW –
 Primary Industries – Mineral Resources



MINING COMMUNITIES

Table 20 Major NSW coal and metalliferous mines and their communities 2010

Mine Site	Community (City/Town)	Mineral	Sole or Major Owner (parent company in brackets)
Central West			
Airly	Lithgow	Coal	Centennial Coal Company Ltd
Angus Place	Lithgow	Coal	Centennial Coal Company Ltd
Baal Bone	Lithgow	Coal	Wallerawang Collieries Ltd (Xstrata Coal Pty Ltd)
Cadia Valley Operations	Orange	Copper, gold	Newcrest Mining Limited
Charbon	Kandos-Rylstone	Coal	Centennial Coal Company Ltd
Clarence	Lithgow	Coal	Centennial Coal Company Ltd
Cowal	West Wyalong	Gold	Barrick Gold
Cullen Valley	Lithgow	Coal	Coalpac Pty Ltd
Invincible	Lithgow	Coal	Coalpac Pty Ltd
Moolarben	Mudgee	Coal	Moolarben Coal Mines Pty Ltd (Yancoal Australia Pty Ltd)
Northparkes	Parkes	Copper, gold	Rio Tinto Group/Sumitomo Group
Pine Dale	Blackmans Flat	Coal	Enhance Place Pty Ltd
Springvale	Lithgow	Coal	Centennial Coal Company Ltd
Ulan	Mudgee	Coal	Ulan Coal Mines Ltd (Xstrata Coal Australia Pty Ltd)
Wilpinjong	Mudgee	Coal	Wilpinjong Coal Pty Ltd (Peabody Energy Australia)
Far West and Orana			
Broken Hill	Broken Hill	Lead, zinc, silver	Perilya Limited
CSA	Cobar	Copper	Cobar Management Pty Ltd (Glencore International AG)
Endeavour	Cobar	Silver, lead, zinc	CBH Resources Ltd
Ginkgo	Broken Hill	Titanium minerals, zircon	Bemax Resources Ltd
Peak Gold	Cobar	Copper, gold	New Gold
Tritton	Nyngan	Copper	Straits Resources Limited
Illawarra			
Appin/ Appin West	Appin-Douglas Park	Coal	Illawarra Coal Holdings Pty Ltd (BHP Billiton)
Dendrobium	Wollongong- Mt Kembla	Coal	Dendrobium Coal Pty Ltd (BHP Billiton)
Metropolitan	Wollongong- Helensburgh	Coal	Helensburgh Coal Pty Ltd (Peabody Energy Australia)
NRE No. 1	Wollongong	Coal	Gujarat NRE Coking Coal Ltd
NRE Wongawilli	Wollongong	Coal	Gujarat NRE Coking Coal Ltd
Tahmoor	Wollongong- Tahmoor	Coal	Xstrata Coal Pty Ltd
West Cliff	Appin-Wollongong	Coal	Illawarra Coal Holdings Pty Ltd (BHP Billiton)

MINING COMMUNITIES

Mine Site	Community (City/Town)	Mineral	Sole or Major Owner (parent company in brackets)
Lower Hunter			
Abel	Newcastle	Coal	Donaldson Coal Pty Ltd
Austar	Cessnock	Coal	Yancoal Australia Pty Ltd
Awaba	Lake Macquarie-Awaba	Coal	Centennial Coal Company Ltd
Bloomfield	East Maitland	Coal	Bloomfield Group
Chain Valley	Wyong-Lake Macquarie	Coal	LDO Coal Pty Ltd
Donaldson	Newcastle	Coal	Donaldson Coal Pty Ltd
Duralie	Gloucester-Stroud	Coal	Gloucester Coal Ltd
Mandalong	Lake Macquarie-Morriset	Coal	Centennial Coal Company Ltd
Manning	Lake Macquarie-Manning Park	Coal	Centennial Coal Company Ltd
Myuna	Lake Macquarie-Wangi Wangi	Coal	Centennial Coal Company Ltd
Stratford	Gloucester	Coal	Gloucester Coal Ltd
Tasman	Seahampton	Coal	Donaldson Coal Pty Ltd
West Wallsend	Newcastle-Killingworth	Coal	Xstrata Coal Pty Ltd
Westside	Newcastle	Coal	Xstrata Coal Pty Ltd
Upper Hunter			
Ashton	Singleton	Coal	Ashton Coal Operations Ltd (Yancoal Australia Pty Ltd)
Beltana	Singleton	Coal	Xstrata Coal Pty Ltd
Bengalla	Muswellbrook	Coal	Coal and Allied (Rio Tinto)
Bulga	Singleton	Coal	Xstrata Coal Pty Ltd
Drayton	Muswellbrook	Coal	Anglo American Metallurgical Coal Pty Ltd
Hunter Valley Operations	Singleton	Coal	Coal and Allied Industries Ltd (Rio Tinto)
Integra Coal Operations	Singleton	Coal	Integra Coal Operations Pty Ltd (Vale Australia)
Liddell	Singleton	Coal	Liddell Coal Operations Pty Ltd (Xstrata Coal Pty Ltd)
Mount Arthur Coal	Muswellbrook	Coal	Mt Arthur Coal Pty Ltd (BHP Billiton)
Mount Owen Complex	Singleton	Coal	Xstrata Mt Owen
Mount Thorley Warkworth	Singleton	Coal	Coal and Allied (Rio Tinto)
Muswellbrook	Muswellbrook	Coal	Idemitsu Australia Resources Pty Ltd
Narama	Singleton	Coal	Xstrata Coal Pty Ltd
Ravensworth Operations	Singleton	Coal	Xstrata Coal Pty Ltd
Rix's Creek	Singleton	Coal	Rix's Creek Ltd (Bloomfield Group)
Wambo	Singleton	Coal	Wambo Coal Pty Ltd (Peabody Energy Australia)

Mine Site	Community (City/Town)	Mineral	Sole or Major Owner (parent company in brackets)
New England/North West			
Boggabri	Boggabri	Coal	Boggabri Coal Pty Ltd (Idemitsu Australia Resources Pty Ltd)
Narrabri North	Narrabri	Coal	Narrabri Coal Operations Pty Ltd (Whitehaven Coal Mining Ltd)
Rocglen	Boggabri	Coal	Whitehaven Coal Mining Ltd
Sunnyside	Gunnedah	Coal	Whitehaven Coal Mining Ltd
Tarrawonga	Boggabri	Coal	Whitehaven Coal Mining Ltd/ Idemitsu Australian Resources Pty Ltd
Werris Creek	Quirindi	Coal	Werris Creek Coal Pty Ltd (Whitehaven Coal Mining Ltd)

ABOUT THE NSW MINERALS COUNCIL

The NSW Minerals Council (NSWMC) represents the State's \$17 billion minerals industry.

As the pre-eminent representative of minerals explorers, producers, operators, extractive material producers and related services in NSW, we provide a united voice and focus for best practice.

NSWMC works closely with industry, government and the community to foster a dynamic, efficient and sustainable minerals industry. We are committed to healthy working conditions, strong growth, responsible environmental outcomes and vital regional communities throughout the State.

NSWMC and its member companies continue to work with dedication and commitment to ensure that the minerals industry in NSW is at the forefront of innovative ways to develop knowledge and know-how for implementing sustainable solutions to the challenges we face.

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