

McCure
CONSULTING

**Industry
Projections**



EXECUTIVE RECRUITMENT – MINING. GLOBALLY. NOW.

Today We'll Cover:

1. What's happening in the **Professional Mining Employment Market?**
2. What does this mean for **Investors and Suppliers?**
3. Is there a **correlation** between them these markets?
4. My **Prediction:**

Genuine Optimism with some Caution

Five Year Industry Projections to May 2022



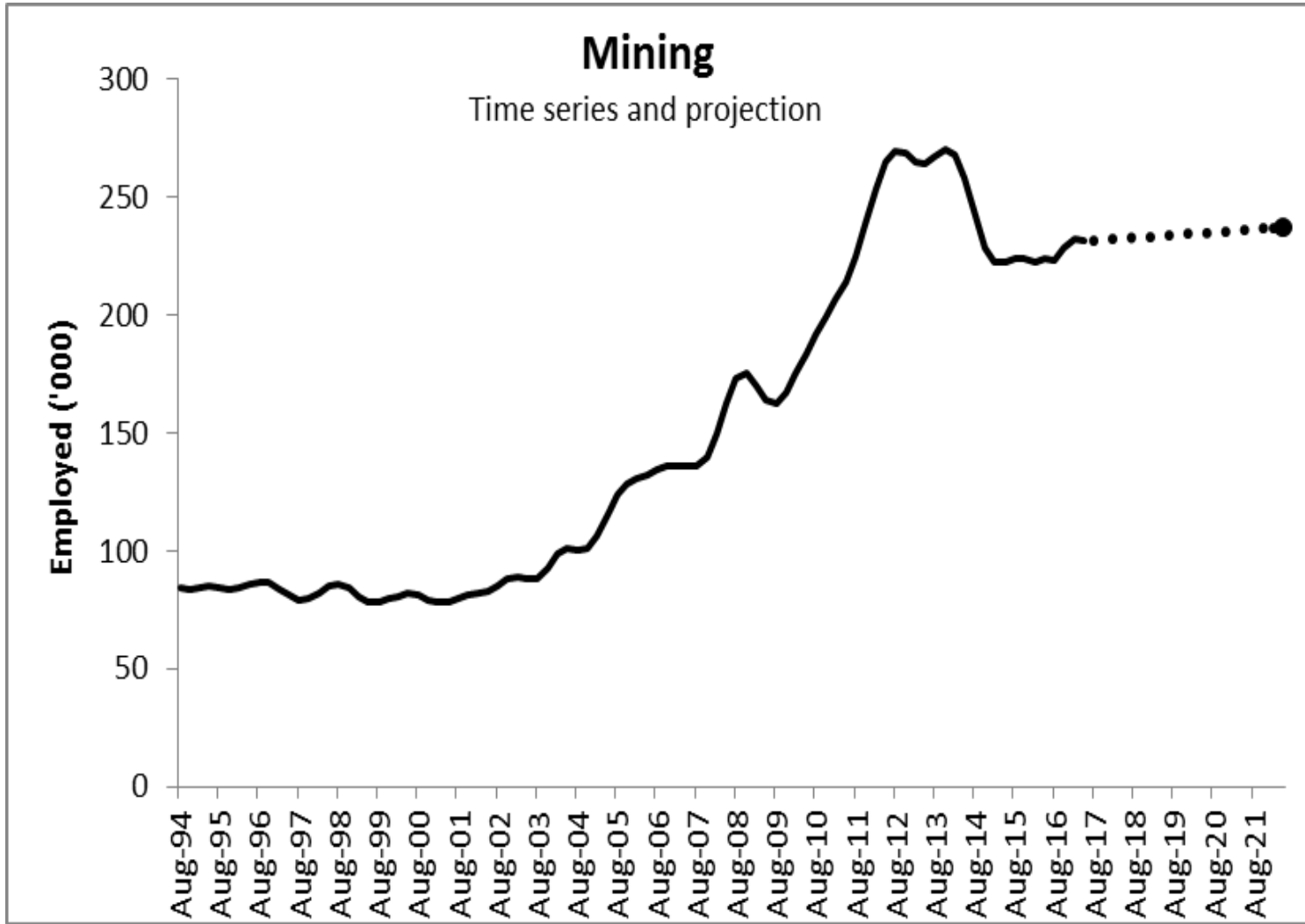
Industry	('000)	(%)
Health Care and Social Assistance	250.5	16.1
Professional, Scientific and Technical Services	126.4	12.5
Education and Training	116.2	12.0
Accommodation and Food Services	97.6	11.2
Construction	120.7	10.9
Arts and Recreation Services	21.4	9.9
Public Administration and Safety	75.0	9.3
Rental, Hiring and Real Estate Services	18.0	8.5
Administrative and Support Services	34.9	8.4
Transport, Postal and Warehousing	40.3	6.5
Financial and Insurance Services	24.6	5.6
Retail Trade	45.6	3.7
Information Media and Telecommunications	6.9	3.3
Mining	5.6	2.4
Wholesale Trade	1.9	0.5
Agriculture, Forestry and Fishing	-2.4	-0.8
Manufacturing	-38.3	-4.2

Job Type – Projected Five Growth to May 2022



Occupation	Projected employment growth - five years to May 2022	
	('000)	(%)
Carers and Aides	138.5	27.0
Health Professionals	129.8	21.3
Engineering Professionals	13.7	9.4
Accountants, Auditors and Company Secretaries	17.3	8.3
Solicitors	3.9	5.5
<u>Main Job Type Categories</u>		
Clerical and Administrative Workers	242.9	19.2
Professionals	344.4	12.1
Managers	120.0	7.8
Labourers	64.3	5.3
Technicians and Trades Workers	82.0	4.8
Machinery Operators and Drivers	27.9	3.6
Sales Workers	39.4	3.6
Clerical and Administrative Workers	27.4	1.7
Geologists , Geophysicists and Hydrogeologists	0.1	0.6
Mining Engineers	1.0	8.8
ALL OCCUPATIONS	948.4	7.8

Industry Employment Projections 2017 Report



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And the Big Question...

Where Is the Investment
Market Heading?

Looking ahead...

FY17 was a great year for resources

So what's next?

We believe we are in a MULTI-YEAR RECOVERY PHASE for the commodity cycle that started in January 2016

Is the Investment Market that
Prospective *Now*?

So are Investors Really Excited
Yet?

- ✓ 2017 better than 2016, *much* better than 2015...
- ✓ More Jobs being filled, more recruitment activity

Reasons for Caution

- Are we just catching up the lost ground?
 - Re-filling **Org Charts**?
 - Catching up on **Maintenance**?
- Not Enough **New Projects**

- **It's a dislocated Employment Market... Good news for some, still not for others**
- **Candidate Shortages? Yes, some... but not in many areas such as...**
 - *Examples:* Project related functions, Engineering, Exploration Managers?...
- **Senior Management - Executive Positions... still very problematic, not enough available.**

There are still too many good candidates still available

- ***When there's a Boom there's a **TOTAL CORRELATION** between employment and investment markets (2007, 2011) cf. 2008, 2012 – 2016. We are certainly not there now (yet!)***

All the Best for this coming Positive Year Ahead!

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Persistence Pays...

Always

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