

“The Broken Mining Cycle Clock”

What Recruitment Trends Indicate for Supplier and Investors

McCure
CONSULTING

**Mining
Employment
Projections**



EXECUTIVE RECRUITMENT – MINING. GLOBALLY. NOW.

Topics of Discussion Today

- 1) Where are we in the **Mining Cycle**?
- 2) Latest Mining **Employment Data**
- 3) **Recruitment Clock**. Has It Changed?
- 4) **Predictions** – The Year Ahead

What Are **YOU** Expecting in the
Next 12 Months?

Worse, Same or Better?

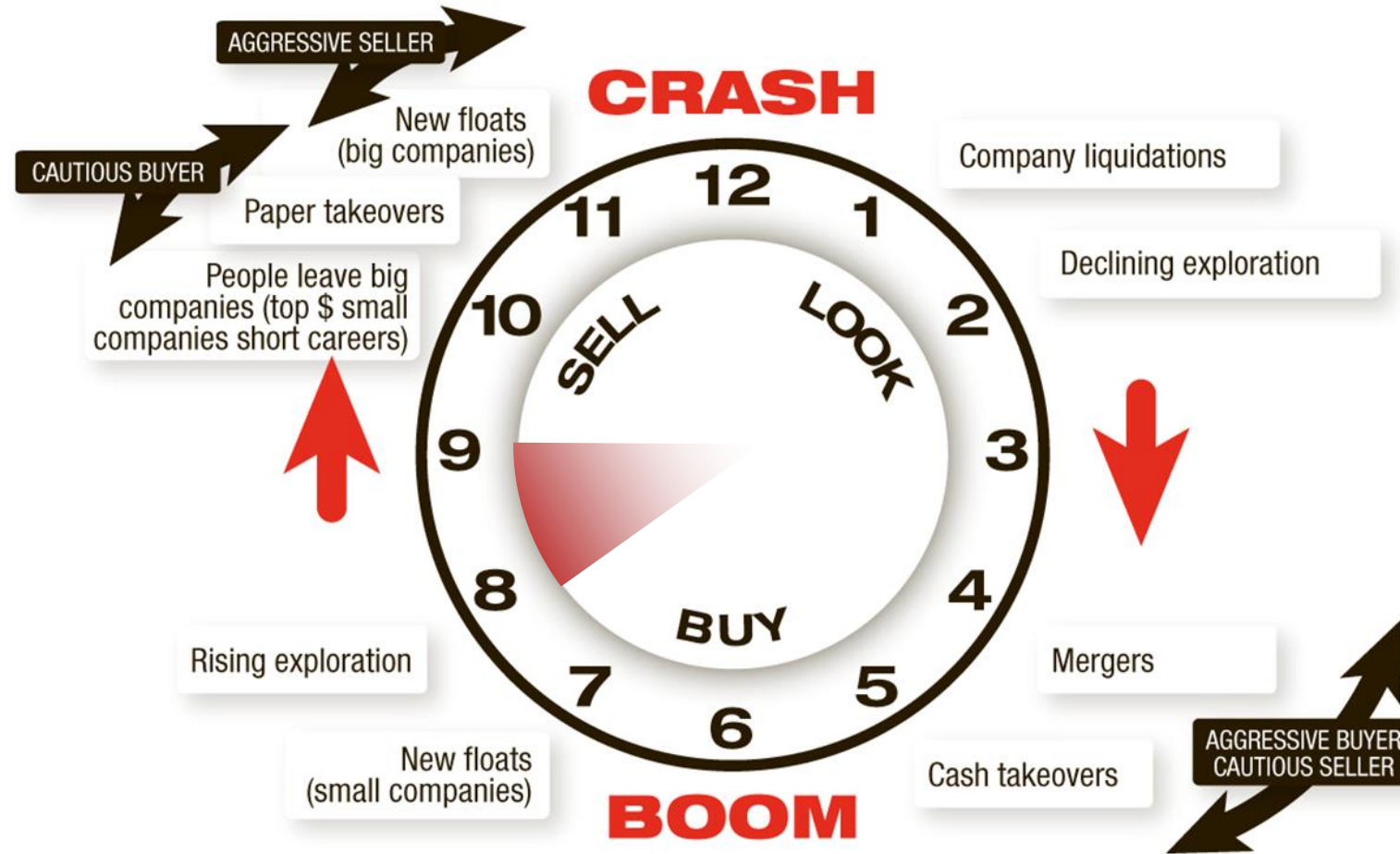
My Guess as to Your Response

WORSE	20%
SAME	40%
BETTER	40%

Post Presentation Note: ACTUAL room response was as follows:

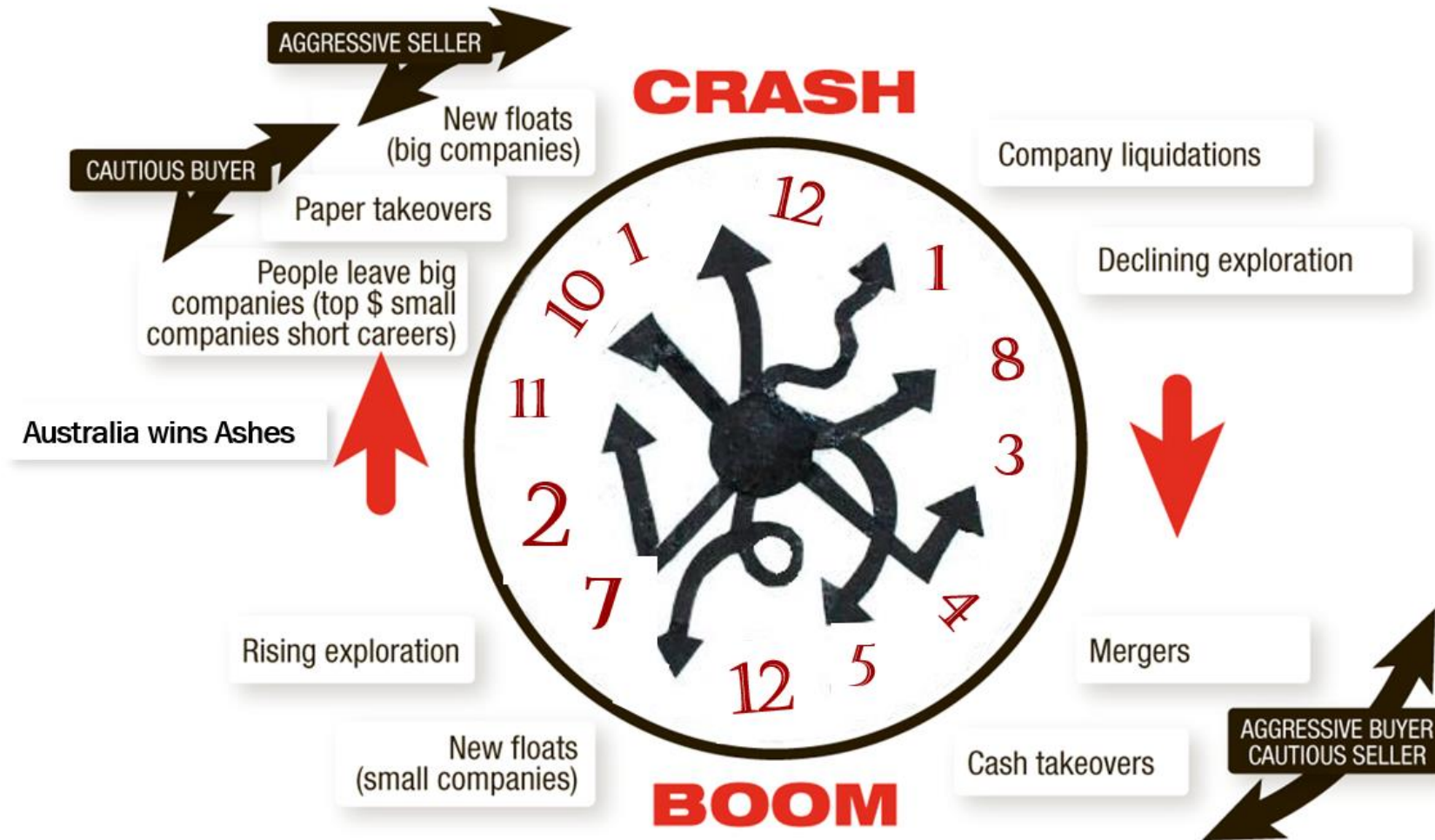
WORSE	0%
SAME	60%
BETTER	40%

Lion Mining Clock *



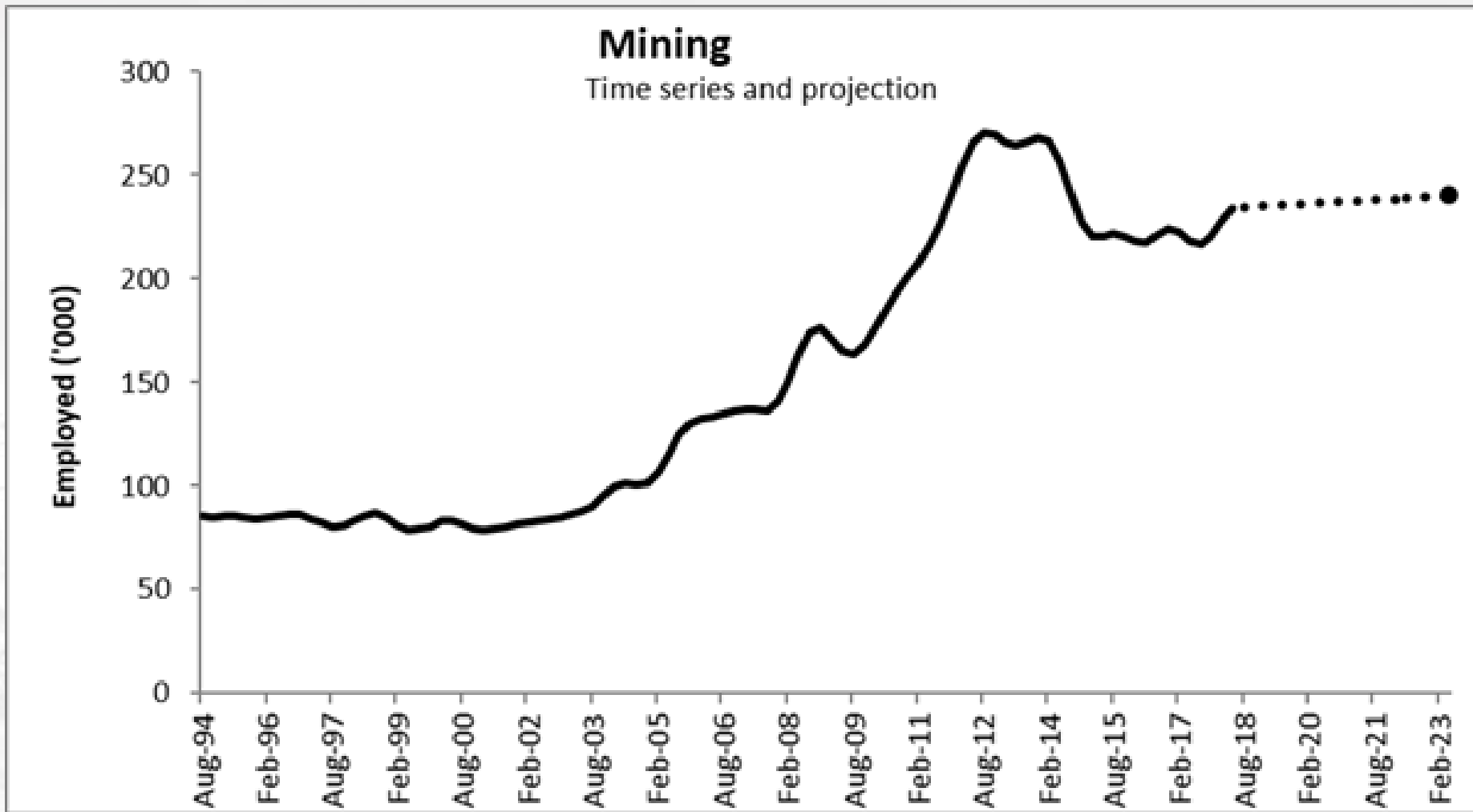
* We acknowledge **Lion Selection Group** for allowing us to use their Mining Clock

Mining Clock - McCure Consulting Version *



* Beware of poxy imitations

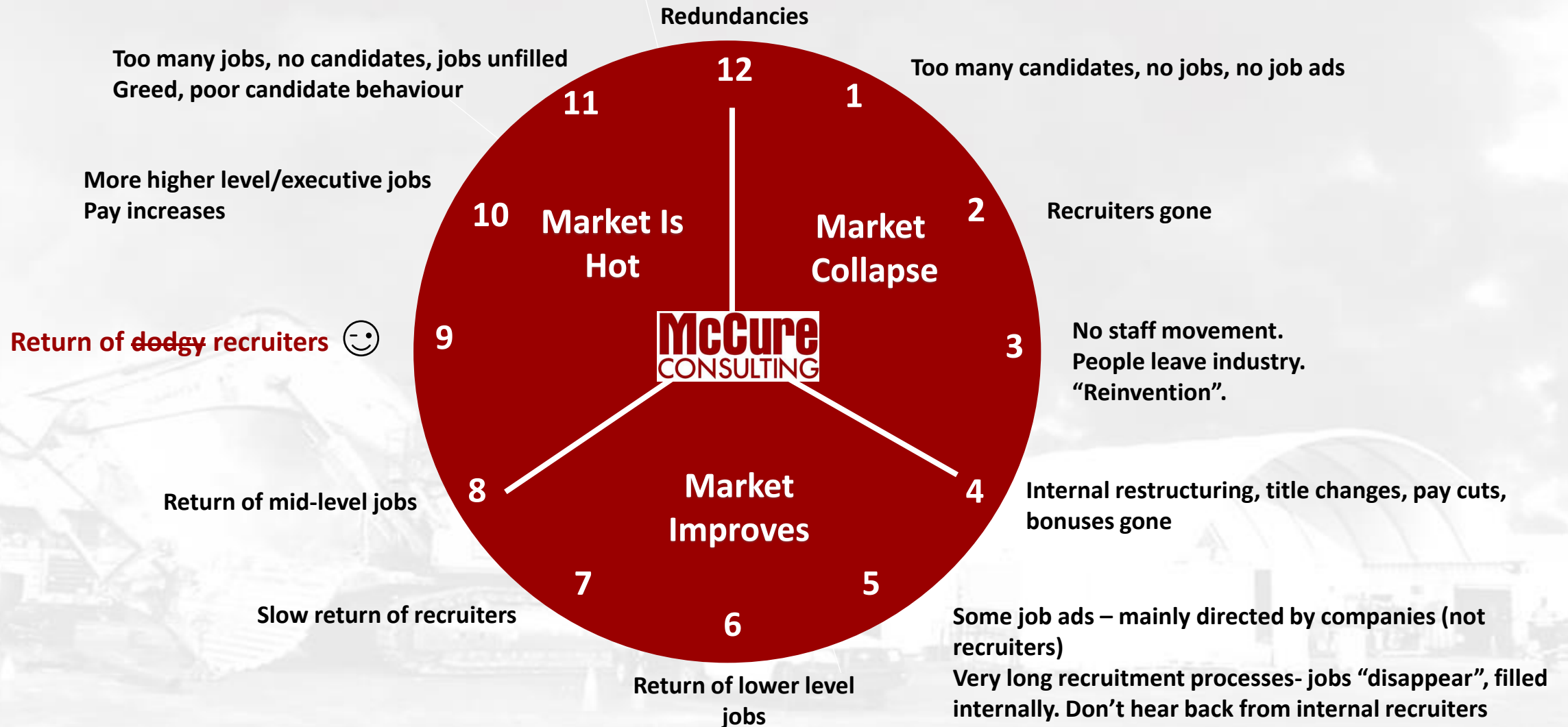
Industry Employment Projections 2018 Report



Five Year Industry Projections to May 2023

Industry	Employment level - May 2018 ('000)	('000)	(%)
Health Care and Social Assistance	1680.9	250.3	14.9
Education and Training	1013.0	113.0	11.2
Professional, Scientific and Technical Services	1050.0	106.6	10.2
Construction	1182.6	118.8	10.0
Accommodation and Food Services	897.5	81.4	9.1
Arts and Recreation Services	251.7	22.0	8.7
Administrative and Support Services	418.8	27.9	6.6
Rental, Hiring and Real Estate Services	220.2	13.1	5.9
Public Administration and Safety	755.0	37.7	5.0
Information Media and Telecommunications	227.1	10.8	4.7
Transport, Postal and Warehousing	627.6	26.9	4.3
Retail Trade	1290.6	47.6	3.7
Financial and Insurance Services	441.5	14.2	3.2
Mining	234.3	5.6	2.4
Manufacturing	940.3	8.5	0.9
Agriculture, Forestry and Fishing	325.6	-1.4	-0.4
Wholesale Trade	364.4	-9.7	-2.7

The McCure Recruitment Clock



Where Is This Market Heading?

- **Uncertainty** is the key theme currently (China v. Trump, Brexit, Hong Kong...)
- Hence not great confidence in **Commodity Prices**
- **Coal, Iron Ore, Gold** may all continue to go well.....

But for How long?

- **Conclusion: Business is buoyant** - this will probably continue but potential market shocks seem increasingly possible

✓ **More Jobs... In Almost All Parts of the Market**

➤ **In Operations especially**

✓ **More Candidate Shortages**

This will get worse still; expect yet more noise about this issue

✓ **Increased Salary Packages**

More Subdued than the last Boom but still evident