

Australia Silver Mining Market Overview and Forecast to 2020: Trends, Fiscal Regime, Major Projects, and Competitive Landscape

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1 Table of Contents

1	Table of Contents.....	2
1.1	List of Tables.....	5
1.2	List of Figures.....	5
2	Executive Summary.....	6
3	Introduction.....	7
3.1	GlobalData Report Guidance	7
4	Australia Silver Mining Industry – Drivers and Restraints	8
4.1	Australia Silver Mining Industry – Drivers	8
4.1.1	New Silver Projects and Existing Mine Life Extension	8
4.1.2	Abundant Reserves and Resources.....	8
4.2	Australia Silver Mining Industry – Restraints.....	9
4.2.1	Shortage of Skilled Labor.....	9
4.2.2	Silver Prices to Decline From 2012	9
5	Australia, Silver Mining Industry – Overview and Production	10
5.1	Silver Mining Overview.....	10
5.2	Australia Silver Mining Industry – Silver Mine Production	11
6	Australia Silver Mining Industry – Silver Reserves.....	14
7	Australia Silver Industry – Total Primary Silver Metal Consumption	16
7.1	Australia Silver Industry – Total Primary Silver Metal Consumption by End Use	18
7.1.1	Australia Silver Industry – Total Primary Silver Metal Consumption by End Use, Industrial	18
7.1.2	Australia Silver Industry – Total Primary Silver Metal Consumption by End Use, Jewelry and Silverware.....	20
7.1.3	Australia Silver Industry – Total Primary Silver Metal Consumption by End Use, Other Sectors ..	22
8	Australia Silver Mining Industry – Major Active, Planned and Exploration Projects	24

8.1	Australia Silver Mining Industry – Major Active Projects	24
8.2	Australia Silver Mining Industry – Mine Profile	26
8.2.1	Cannington Mine	26
8.2.2	Mount Isa Mines	27
8.2.3	Broken Hill Mine	27
8.3	Australia Silver Mining Industry – Major Planned and Exploration Projects	28
9	Australia Silver Mining Industry – Fiscal Regime	29
9.1	Australia, Governing Bodies	29
9.1.1	National Level	29
9.1.2	State/Territory Involvement	29
9.2	Australia Governing Laws	31
9.2.1	Offshore Legislation	31
9.2.2	Onshore Legislation	31
9.3	Australia Rights and Obligations	32
9.3.1	Rights	32
9.3.2	Obligations	32
9.4	Australia Fiscal Terms	32
9.4.1	Royalty, Annual Rates and Fees	32
9.4.2	Corporate Income Tax	33
9.4.3	Capital Gain	33
9.4.4	Depreciation	34
9.4.5	Withholding Tax	34
9.4.6	Loss Carry Forward	34
9.4.7	Goods and Services Tax	34
10	Australia Silver Mining Industry – Competitive Landscape	35
10.1	Australia Silver Mining Industry – Key Companies, BHP Billiton Limited (BHP Billiton)	35
10.1.1	BHP Billiton Limited (BHP Billiton), Overview	35
10.1.2	BHP Billiton Limited (BHP Billiton), Business Description	35
10.1.3	BHP Billiton Limited (BHP Billiton), Silver Projects	36
10.2	Australia Silver Mining Industry – Key Companies, Xstrata Plc (Xstrata)	36
10.2.1	Xstrata Plc (Xstrata), Overview	36
10.2.2	Xstrata Plc (Xstrata), Business Description	36
10.2.3	Xstrata Plc (Xstrata), Silver Projects	38

10.3 Australia Silver Mining Industry – Key Companies, Minmetals Resources Limited (MMR).....	39
10.3.1 Minmetals Resources Limited (MMR), Overview	39
10.3.2 Minmetals Resources Limited (MMR), Business Description.....	39
10.3.3 Minmetals Resources Limited (MMR), Silver Projects	41
11 Appendix	42
11.1 Abbreviations.....	42
11.2 Bibliography.....	42
11.3 GlobalData's Methodology	43
11.3.1 Coverage	43
11.3.2 Secondary research.....	44
11.3.3 Primary Research	44
11.3.4 Expert Panel Validation	44
11.4 Disclaimer	45

1.1 List of Tables

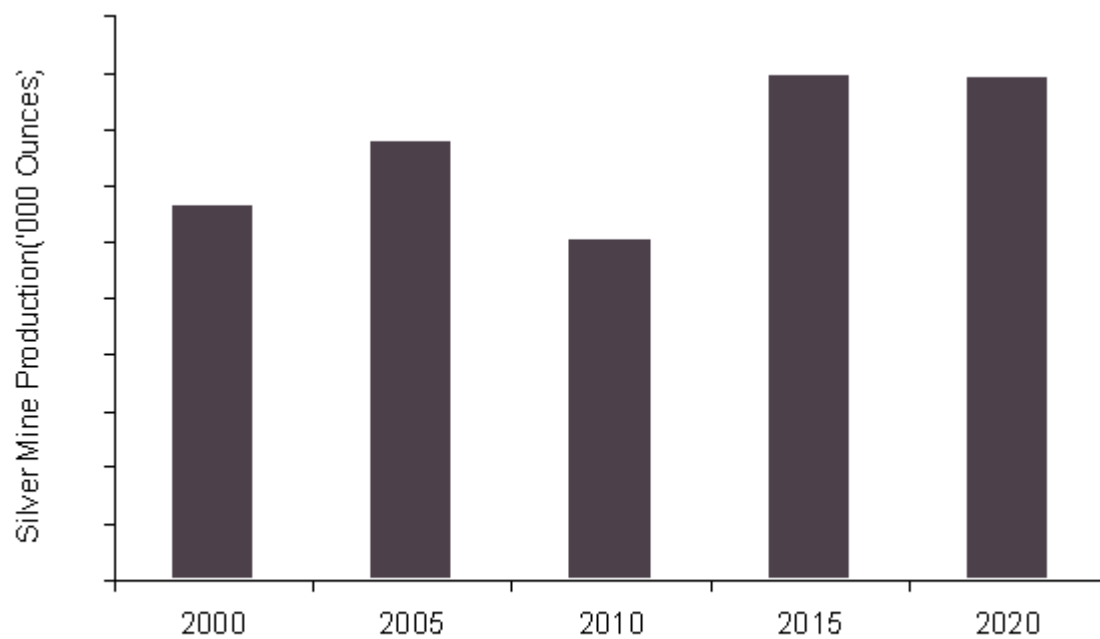
Table 1: Silver Mining Industry, Australia, Silver Mine Production ('000 Ounces), 2000–2020	12
Table 2: Silver Mining Industry, Australia, Silver Mine Production by States ('000 Ounces), 2011	13
Table 3: Silver Mining Industry, Australia, Silver Reserves (tons), 2000–2011	15
Table 4: Silver Industry, Australia, Total Primary Silver Metal Consumption ('000 Ounces), 2000–2020	17
Table 5: Silver Industry, Australia, Total Primary Silver Metal Consumption by End Use ('000 Ounces), Industrial, 2000–2020	19
Table 6: Silver Industry, Australia, Total Primary Silver Metal Consumption by End Use ('000 Ounces), Jewelry and Silverware, 2000–2020	21
Table 7: Silver Industry, Australia, Total Primary Silver Metal Consumption by End Use ('000 Ounces), Other Sectors, 2000–2020	23
Table 8: Silver Mining Industry, Australia, Major Active Projects	24
Table 9: Silver Mining Industry, Australia, Cannington Mine, Historic Production ('000 Ounces), 2002–2011	26
Table 10: Silver Mining Industry, Australia, Mount Isa Mines, Historic Production ('000 Ounces), 2002–2011	27
Table 11: Silver Mining Industry, Australia, Broken Hill Mine, Historic Production ('000 Ounces), 2004–2011	27
Table 12: Silver Mining Industry, Australia, Major Planned and Exploration Projects	28
Table 13: Silver Mining Industry, Australia, Depreciation Rates (%), 2012	34
Table 14: Silver Mining Industry, Australia, BHP Billiton Limited, Major Silver Projects	36
Table 15: Silver Mining Industry, Australia, Xstrata Plc, Major Silver Projects	38
Table 16: Silver Mining Industry, Australia, Minmetals Resources Limited, Major Silver Projects	41

1.2 List of Figures

Figure 1: Silver Mining Industry, Australia, Silver Mine Production ('000 Ounces), 2000–2020	6
Figure 2: Silver Mining Industry, Australia, Mineral Occurrences of Silver by States, 2010	10
Figure 3: Silver Mining Industry, Australia, Silver Mine Production ('000 Ounces), 2000–2020	11
Figure 4: Silver Mining Industry, Australia, Silver Production by States ('000 Ounces), 2011	13
Figure 5: Silver Mining Industry, Australia, Silver Reserves (tons), 2000–2011	14
Figure 6: Silver Mining Industry, Australia, Mineral Deposits of Silver by States, 2010	15
Figure 7: Silver Industry, Australia, Total Primary Silver Metal Consumption ('000 Ounces), 2000–2020	16
Figure 8: Silver Industry, Australia, Total Primary Silver Metal Consumption by End Use ('000 Ounces), Industrial, 2000–2020	18
Figure 9: Silver Industry, Australia, Total Primary Silver Metal Consumption by End Use ('000 Ounces), Jewelry and Silverware, 2000–2020	20
Figure 10: Silver Industry, Australia, Total Primary Silver Metal Consumption by End Use ('000 Ounces), Other Sectors, 2000–2020	22
Figure 11: Silver Mining Industry, Australia, Silver Operating Mines Location, 2010	25

2 Executive Summary

Figure 1: Silver Mining Industry, Australia, Silver Mine Production ('000 Ounces), 2000–2020



Source: GlobalData; BREE

3 Introduction

Global Data's report, "Australia Silver Mining Market Overview and Forecast to 2020", provides in-depth coverage of Australia's silver mining industry. The report covers the trends in Australia's silver mine production, reserves and silver metal consumption in detail. It also presents the key drivers and restraints for the silver mining industry in Australia and an overview of the fiscal regime, detailing the laws and regulations governing the industry.

The report includes sections that discuss the trends in production, consumption and demand and reserves. The competitive landscape covers the top players in the silver mining industry in Australia with the major active, planned and exploration projects, taking into consideration reserve volume and annual production. The report provides a comprehensive coverage of Australia's silver mining industry.

3.1 GlobalData Report Guidance

The report starts with an executive summary capturing the key elements of Australia's silver mining industry.

Chapter two consists of the executive summary, detailing key points from the report.

Chapter three provides an introduction to the report and a guide to the report's contents.

Chapter four contains the key growth factors and restraints affecting Australia's silver mining industry.

Chapter five provides an overview of Australia's silver mining industry, with detailed information about silver mine production.

Chapter six provides an overview of Australia's silver mining industry, with detailed information about silver reserves.

Chapter seven provides an overview of Australia's silver industry, with detailed information about total primary silver metal consumption and consumption by end use.

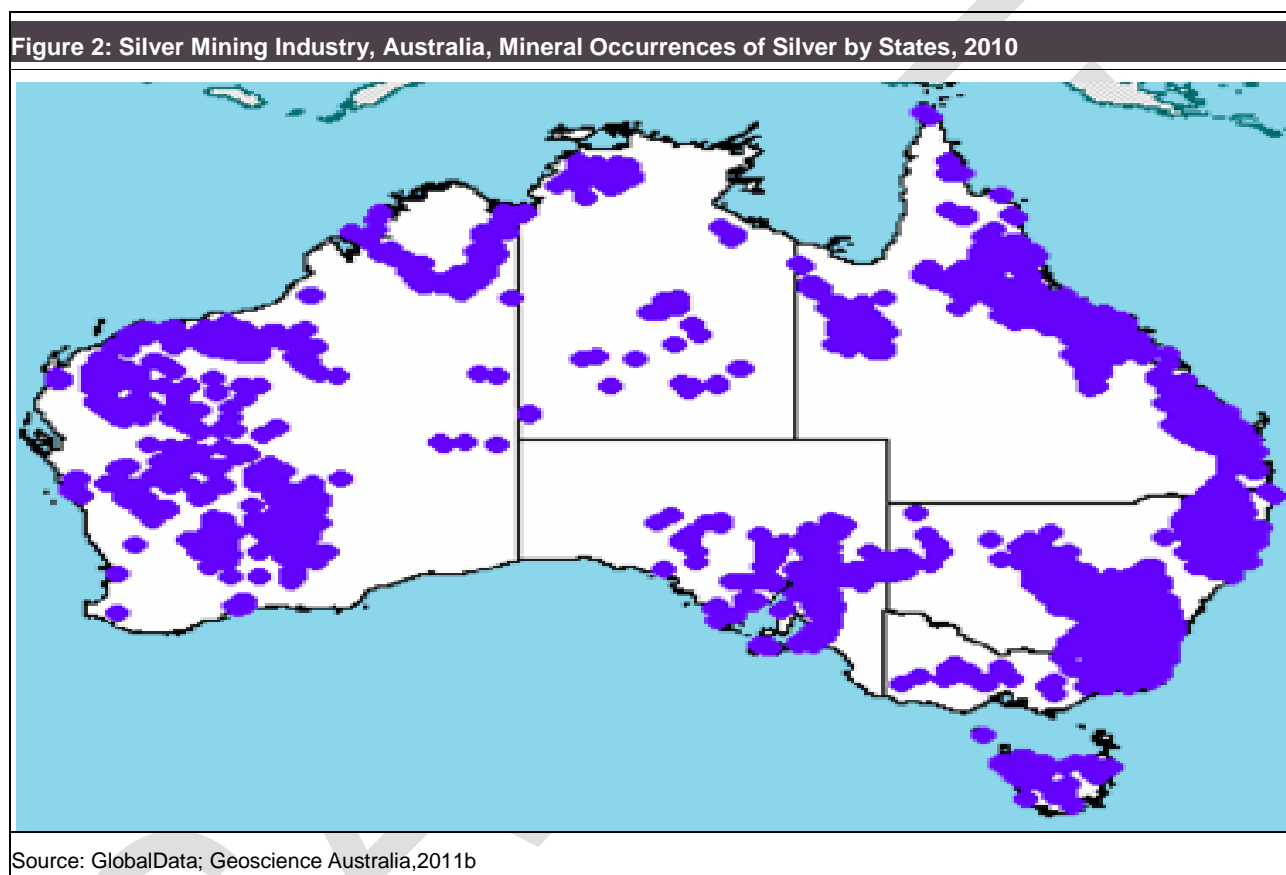
Chapter eight provides detailed information of the top active projects and the future planned and exploration projects in Australia.

Chapter nine includes Australia's fiscal regime, with a section dedicated to mining business licenses, rights and obligations of the mining companies, and lastly the fiscal terms defined in detail.

Chapter 10 provides detailed information of the competitive landscape in Australia silver mining industry. The section consists of the top producers of silver with their detailed reports.

5 Australia, Silver Mining Industry – Overview and Production

5.1 Silver Mining Overview



5.2 Australia Silver Mining Industry – Silver Mine Production

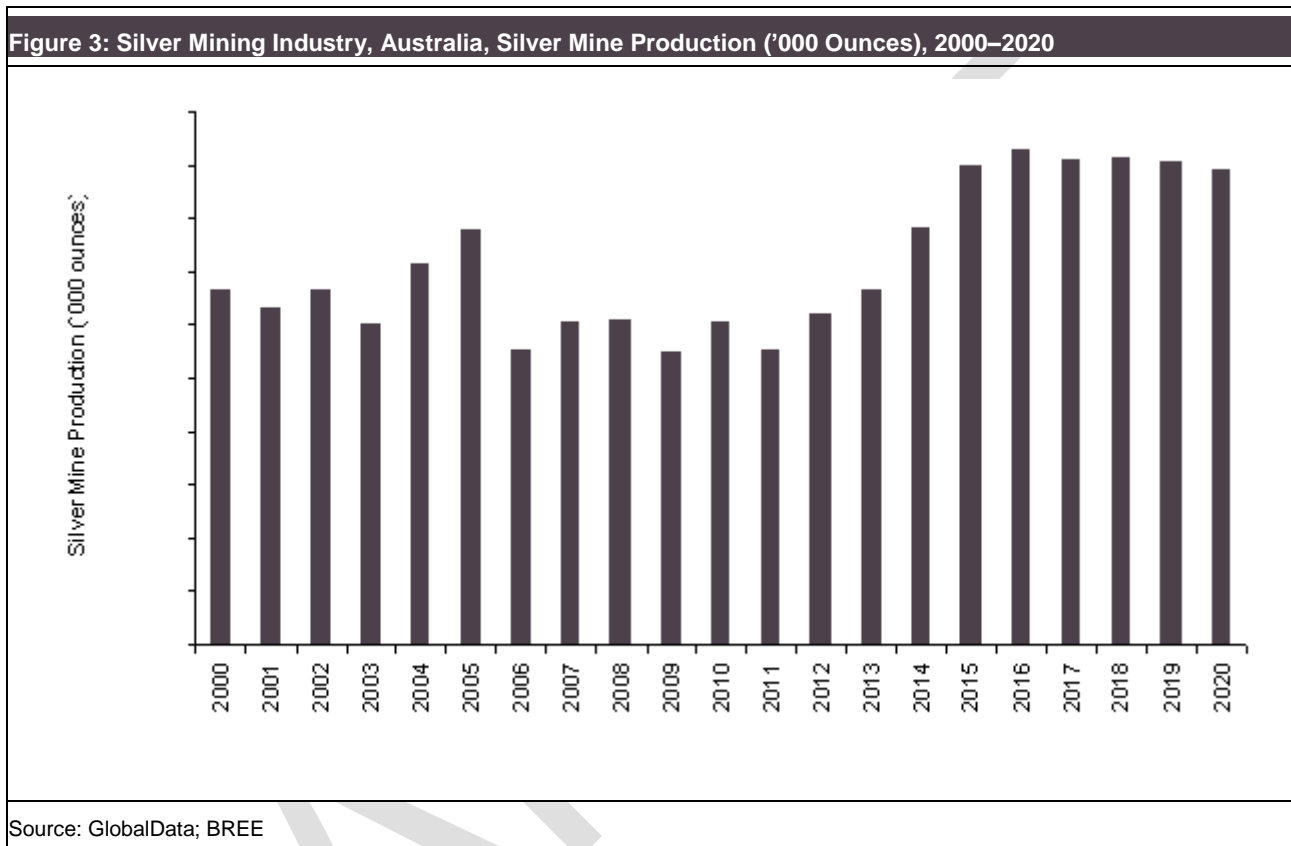
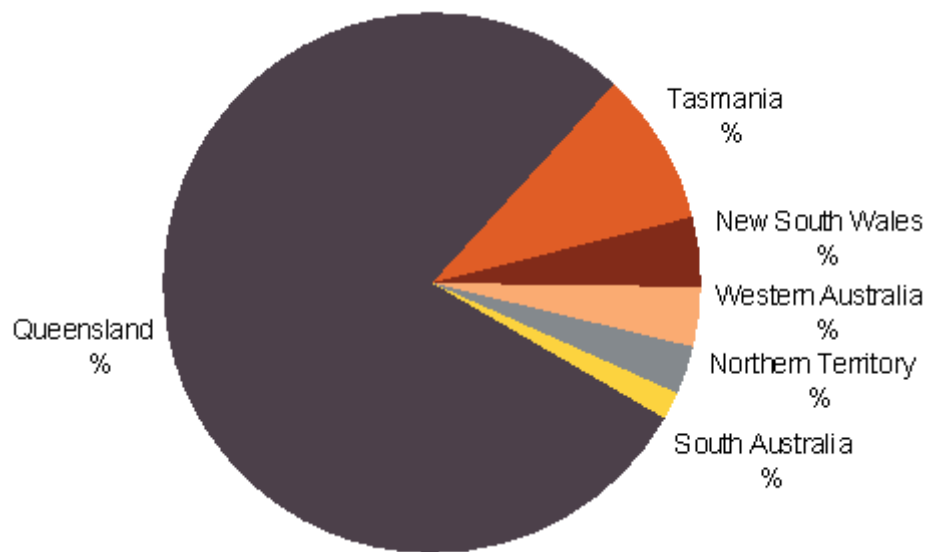


Table 1: Silver Mining Industry, Australia, Silver Mine Production ('000 Ounces), 2000–2020	
Year	Silver Mine Production ('000 Ounces)
2000	
2001	
2002	
2003	
2004	
2005	
2006	
2007	
2008	
2009	
2010	
2011	
2012	
2013	
2014	
2015	
2016	
2017	
2018	
2019	
2020	
Source: GlobalData; BREE	

The graph below details Australia's silver mine production by its various states (BREE, 2011).

Figure 4: Silver Mining Industry, Australia, Silver Production by States ('000 Ounces), 2011



Source: GlobalData; BREE

Table 2: Silver Mining Industry, Australia, Silver Mine Production by States ('000 Ounces), 2011

Year	Silver Mine Production ('000 Ounces)
Queensland	
Tasmania	
New South Wales	
Western Australia	
Northern Territory	
South Australia	

Source: GlobalData; BREE

11 Appendix

11.1 Abbreviations

- BREE: Bureau of Resources and Energy Economics
- CAGR: Compound Annual Growth Rate
- DEEDI: Department of Employment, Economic Development and Innovation
- DPI: Department of Primary Industries
- EDR: Economic Demonstrated Resources
- ERDD: Earth Resources Development Division
- GST: Goods and Services Tax
- g/t: grams per ton
- LNG: Liquefied Natural Gas
- MCA: Minerals Council of Australia
- MRG: Mineral Resources Group
- PIRSA: Primary Industries and Regions SA
- USGS: United States Geological Survey
- VAT: Value Added Tax
- WA: Western Australia
- WTH: Withhold Tax

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11.3 GlobalData's Methodology

GlobalData's dedicated research and analysis teams consist of experienced professionals with a pedigree in marketing, market research, consulting backgrounds in the silver mining industry, and advanced statistical expertise.

GlobalData adheres to the Codes of Practice of the Market Research Society (www.mrs.org.uk) and the Strategic and Competitive Intelligence Professionals (www.scip.org).

All GlobalData databases are continuously updated and revised.

11.3.1 Coverage

The objective of updating GlobalData's coverage is to ensure that it represents the most up to date vision of the industry possible.

Changes to the industry taxonomy are built on the basis of extensive research of company, association and competitor sources.

Company coverage is based on three key factors: market capitalization, revenues, and media attention/innovation/market potential.

- An exhaustive search of 56 member exchanges is conducted, and companies are prioritized on the basis of their market capitalization.
- The estimated revenues of all major companies, including private and governmental, are gathered and used to prioritize coverage.
- Companies which are making the news, or which are of particular interest due to their innovative approach, are prioritized.

GlobalData aims to cover all major news events and deals in the silver mining industry, updated on a daily basis.

11.3.2 Secondary research

The research process begins with exhaustive secondary research on internal and external sources being carried out in order to source qualitative and quantitative information relating to each market.

The secondary research sources that are typically referred to include, but are not limited to:

- Company websites, annual reports, financial reports, broker reports, investor presentations and SEC filings.
- Industry trade journals and other literature.
- Internal and external proprietary databases.
- National government documents, statistical databases and market reports.
- News articles, press releases and web-casts specific to the companies operating in the market.

11.3.3 Primary Research

GlobalData conducts hundreds of primary interviews a year with industry participants and commentators in order to validate its data and analysis. A typical research interview fulfills the following functions:

- It provides first-hand information on the market size, market trends, growth trends, competitive landscape, and future outlook.
- It helps in validating and strengthening the secondary research findings.
- It further develops the analysis team's expertise and market understanding.

Primary research involves e-mail interactions, telephone interviews, and face-to-face interviews for each market, category, segment and sub-segment across geographies.

The participants who typically take part in such a process include, but are not limited to:

- Industry participants: CEOs, VPs, business development managers, market intelligence managers and national sales managers.
- Outside experts: investment bankers, valuation experts, research analysts and key opinion leaders specializing in silver mining markets.

11.3.4 Expert Panel Validation

GlobalData uses a panel of experts to cross verify research and forecast methodologies and drive its analytical content.

The GlobalData expert panel comprises marketing managers, product specialists, international sales managers from mining companies; academics and geologists from research universities, consultants from venture capital funds, and distributors and suppliers of silver mining goods and services.

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