Copper Strategy Workshop

Paul Heithersay
Deputy Chief Executive
Chief Executive, Olympic Dam Taskforce
Department of State Development

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www.statedevelopment.sa.gov.au
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Today’s workshop

Listen to leaders in South Australia’s Copper Industry

Identify possible actions and ideas for inclusion in South Australia’s Copper Strategy
Why a Copper Strategy?

Copper will remain supply constrained and a deficit is expected at the end of this decade across world.

South Australia well placed to supply this deficit.

Source: Wood Mackenzie via BHPB
1. Production from current operating mines and committed new projects
South Australian Copper Resources

SA has 68% of Australia’s Copper
South Australia’s Copper Discovery Gap

South Australia, unlike other locations, has a huge gap between the largest and second-largest known copper deposit … which suggests there is a good opportunity to find more giant deposits there.
Developing the Strategy

Engaging with industry, community, researchers and government

1. Copper Summit – May 2015
   • 108 people
   • 90+ pages ideas

2. Directions Paper - Sept 2015
   • Target and Focus areas

   • Workshops in Copper Belt
     • Aboriginal communities - 7 Oct
     • Regional development, local government and local industry 8 Oct
Developing the Strategy

4. **Online Engagement**
   - YourSAy
   - DSD website

5. **Adelaide Workshop 21 October**
   - Actions for 6 Focus Areas

6. **Copper Strategy launched – December 2015**
   - Workgroups to progress actions for Focus Areas – 24 mths
Main messages from Regional Workshops

- Provide greater awareness of employment opportunities for all communities from copper value chain
- Develop regional approaches to respond to changes in mines as they vary in scale over time
- Build relationships with traditional owners to improve employment opportunities and understanding of cultural and heritage issues
- Ensure early engagement for projects
- Infrastructure development critical
Vision – Copper Strategy

Vision
By 2030, South Australia will be the leading contributor to Australia’s position as the world’s third largest copper producer.

Objective
Grow South Australian copper production to 1 million tonnes per annum (Mtpa) by 2030.
What it means?
300,000 tpa to 1 Mtpa in 15 years…

- Now 300 000 tpa
- Need another 700 000 tpa from
  - unlocking copper resources already identified
  - reserve replacement and brownfields discoveries
  - Exceptional new discoveries for production by 2030.
- Extra water resources
- Engagement with communities
Focus areas 1 – 3

1. Enhanced support to find and expand copper reserves – Richard Hillis
2. Improved cost competitiveness for copper production – Greg Hall
3. Shared commercial research for copper production – Jonathan Law
4. Effective engagement to gain a social license to operate – Nigel Long

5. Reducing bottlenecks in processes across the copper value chain – Matt Reed

6. Collaborative infrastructure development – Nick Flanagan
• Investment
• Exploration/information
• Developing services sector
• Research and development for mining and processing
• Leading practice regulatory and policy frameworks
Business opportunities

• The Copper Strategy will also aim to maximise opportunities across copper production chain for businesses into future.

• Business opportunities may be in:
  • Exploration
  • Assessment
  • Development and rehabilitation
  • Mining engineering and technical services
  • Personal support services

IMPTEC Super Fine Crushing Technology
Advanced Modular Solutions (AMS)

- Vision: Make South Australia a Centre of Excellence in AMS
- Concept Study – completed Oct 2015
- Competitor Analysis – Industry Hub – Innovation focus
- Collaboration opportunities: Industry, SMEs, Research and Government
- Forum will be held shortly
Developing the Copper Strategy after today

• Compile notes and ideas from today and workshops at Port Augusta

• Identify potential actions for each focus area

• Send to participants for final feedback – 30/10

• Finalise and Launch Copper Strategy – Dec 15
Thank you