



# The Pilbara

Port Hedland Industry Council Briefing | June 2023

Michael Heap | Director Regional Development | Pilbara Development Commission

*The catalyst for regional development and growth*



An aerial photograph of a wide river with a large, lush green island in the center. The water is a deep blue, and the island is covered in dense, vibrant green trees and vegetation. The sky is not visible, focusing the viewer's attention on the natural landscape.

# Acknowledgement of Country

The Pilbara Development Commission acknowledges the Traditional Owners throughout the Pilbara and their continuing connection to the land, waters and culture. We pay our respects to Elders past and present and to emerging leaders.



# Pilbara Development Commission

The Commission's role is to be the catalyst for economic development in the Pilbara, to maximise prosperity and well-being for the region, and for Western Australia.

## Strategic focus

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1. Prosperous and diverse economy

2. Regional liveability

3. Aboriginal economic participation and prosperity

4. Organisational excellence

# The Commission delivers a broad range of projects



The **Pilbara Cultural Land Management Project** is supporting Traditional Owners to implement cultural and conservation land management at scale across their native title determinations.

Partner with organisations such as the OECD and Harvard University to **develop and enact strategic recommendations**, in order to grow and diversify the region's economy



**GROWTH LAB**

Center for International Development  
*at Harvard University*



Demonstrated the commercial viability and regional benefits of **direct maritime freight** services between Asia and the Pilbara

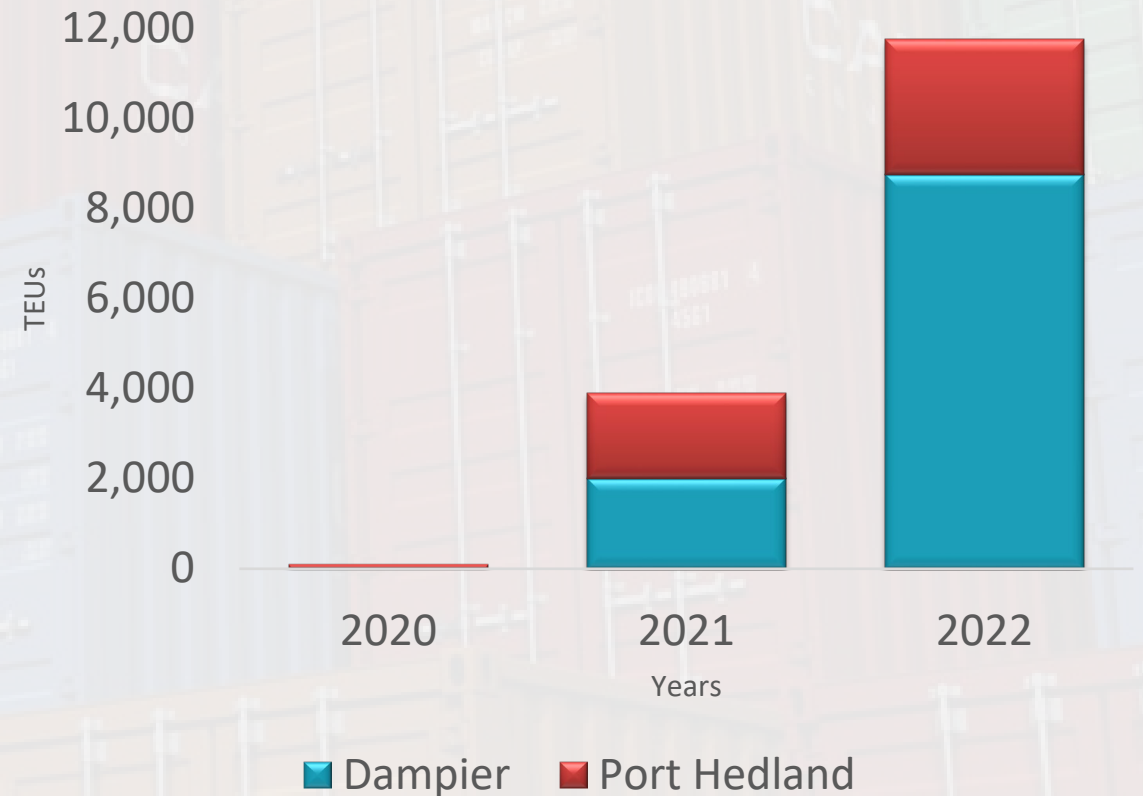
# We partner with regional stakeholders and industry to deliver transformational outcomes

The combined direct freight service is now moving close to **12,000 TEUs** (twenty foot container equivalents) each year.

And accounts for a **3% share** of the total inbound freight market.



## Pilbara Ports Container Movements



# What's the benefit?

## Based on 12,000 container movements...

### 1. Regional Benefit

CGE modelling, simulating the shock of lower import freight costs, indicates that the Direct Maritime Freight Service has resulted in a **more than \$100 million increase to the Pilbara's real GRP**.

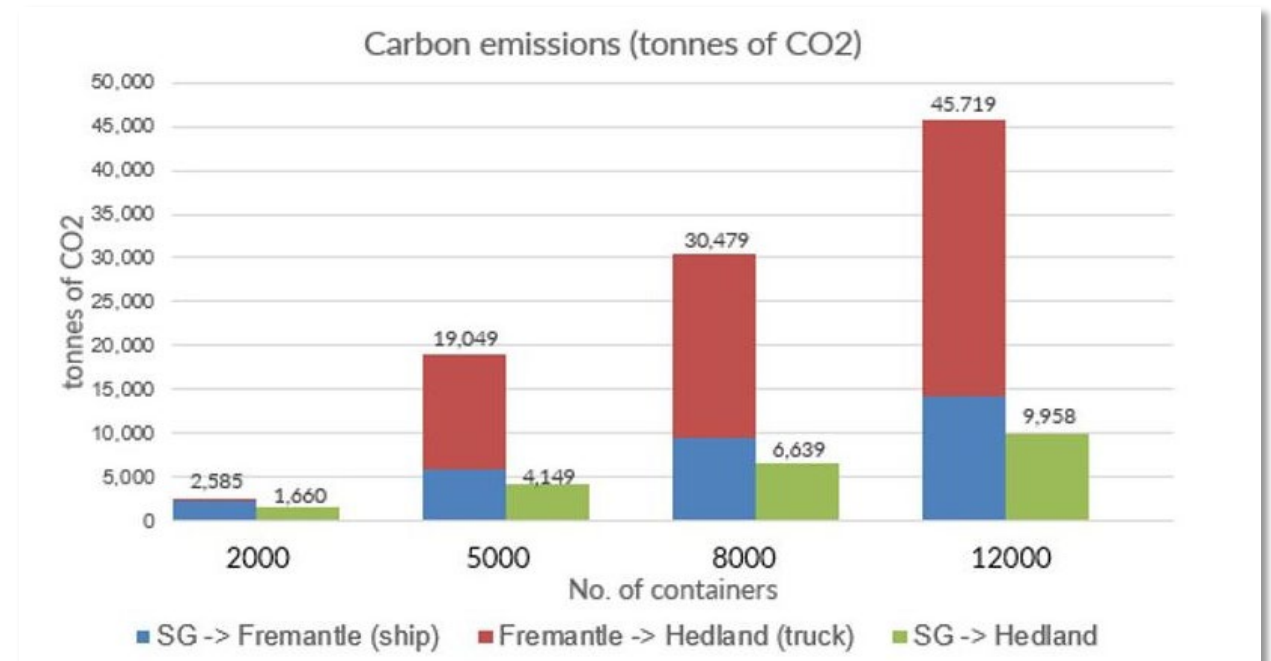
### 2. Customer Benefit



Currently **saving Pilbara businesses and their customers \$45.5 million per annum in freight costs.**

### 3. Environmental Benefit

**Reduction in CO2 emissions of approximately 35,000 tonnes per annum compared to previous supply routes**



# The Pilbara Regional Overview



*“Countries need competitive dynamic regions to achieve their economic, social and environmental objectives.”*

*The Pilbara is a globally significant resources region, with world class infrastructure, a highly skilled workforce and proximity to world markets.*

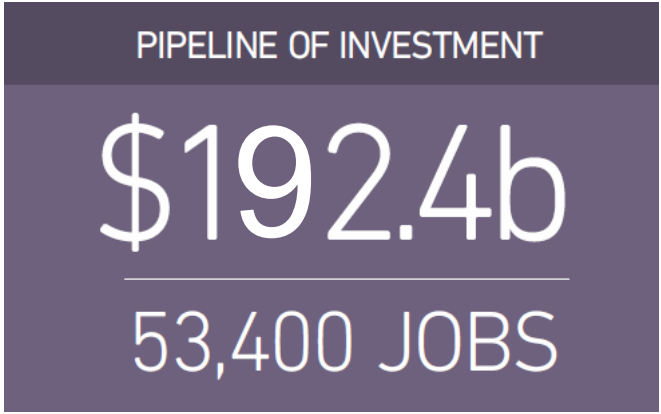




# The economic contribution of the Pilbara continues to grow...



Delivered by 4% of the State's workforce

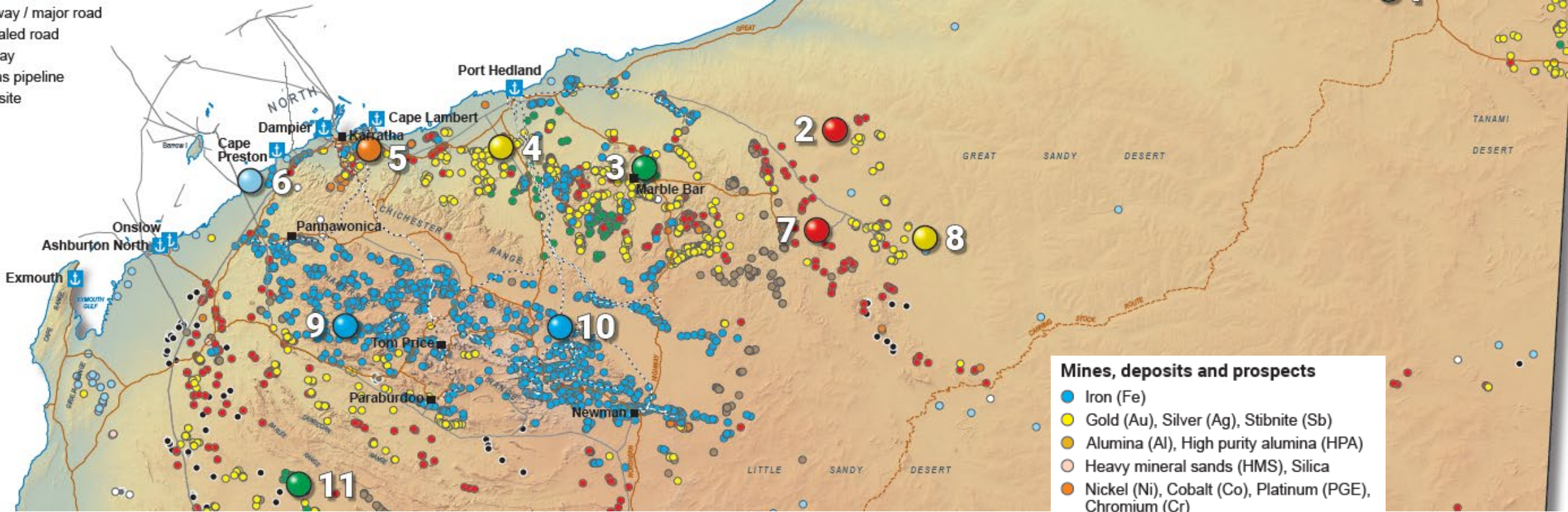


An aerial photograph of a coastal industrial port. A large cargo ship is docked at a pier in the foreground. The port area is filled with various structures, including large storage tanks and processing units. In the background, a city with residential buildings and roads is visible. The water is a deep blue-green color. The text "Outlook, Trends & Disruptors" is overlaid in white, centered on the image.

# Outlook, Trends & Disruptors

# An increasingly diversified resource sector

- Highway / major road
- Unsealed road
- Railway
- Oil/gas pipeline
- Townsite
- ⚓ Port



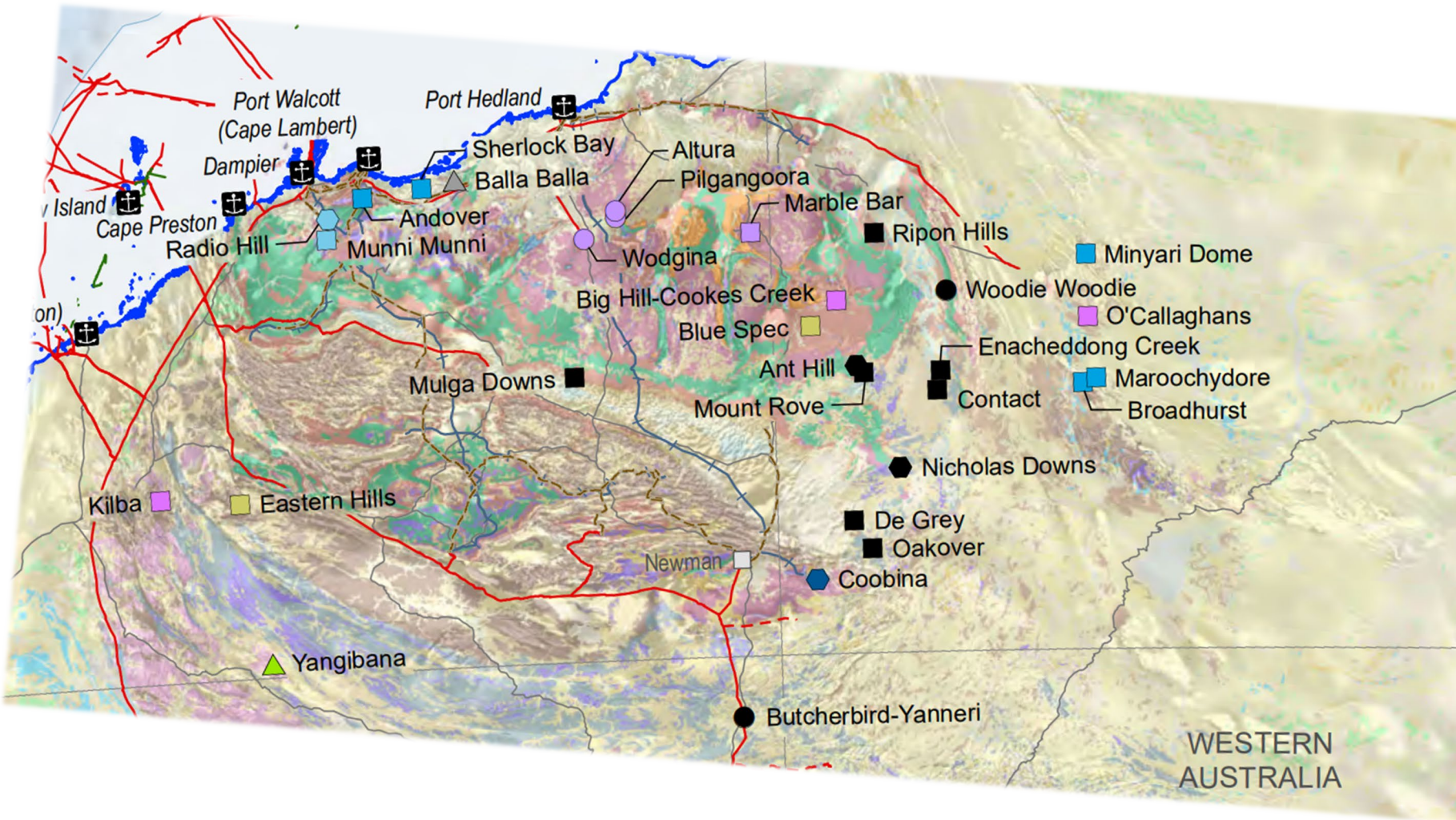
**Mines, deposits and prospects**

- Iron (Fe)
- Gold (Au), Silver (Ag), Stibnite (Sb)
- Alumina (Al), High purity alumina (HPA)
- Heavy mineral sands (HMS), Silica
- Nickel (Ni), Cobalt (Co), Platinum (PGE), Chromium (Cr)
- Copper (Cu), Lead (Pb), Zinc (Zn)
- Lithium (Li), Rare Earth Elements (REE), Tin (Sn), Tantalum (Ta)
- Vanadium (V), Manganese (Mn), Tungsten (W), Molybdenum (Mo)
- Phosphate, Potash and Salt
- Graphite
- Diamond
- Coal
- Uranium

Other industrial and construction commodities and minor mineral occurrences not shown

<b>2</b>	<b>Paterson</b> Copper + Gold Exploration	<b>4</b>	<b>Mallina</b> Gold Exploration	<b>6</b>	<b>Mardie</b> Salt + Potash DFS complete	<b>8</b>	<b>Haverion</b> Gold + Copper Exploration
<b>3</b>	<b>Marble Bar</b> Lithium New discovery	<b>5</b>	<b>Andover</b> Nickel + Copper Exploration	<b>7</b>	<b>Nifty</b> Copper Scoping study complete	<b>9</b>	<b>Eliwana</b> Iron Commenced operating
						<b>10</b>	<b>Gudai-Darri</b> Iron Under development

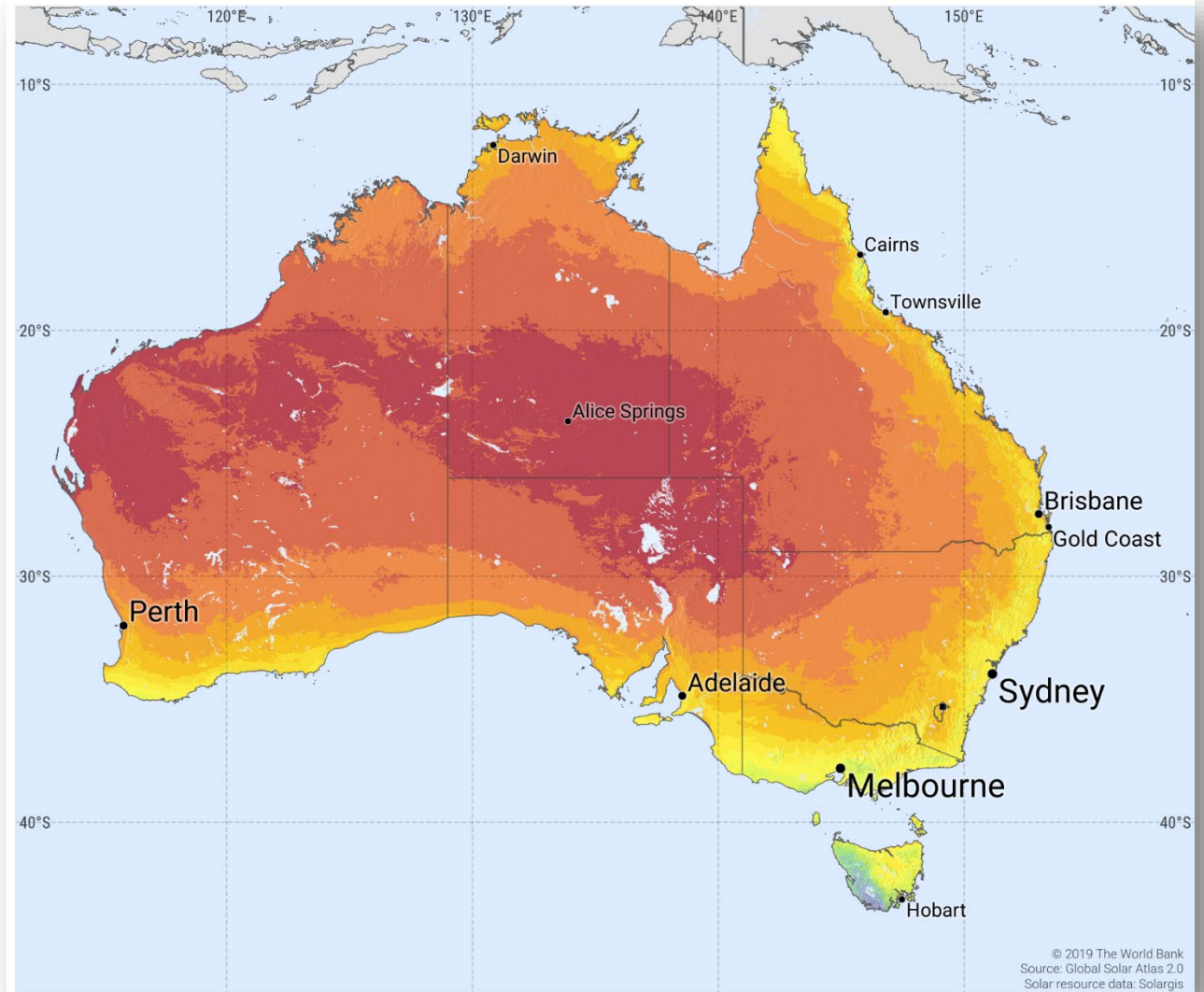
# Including critical minerals and rare earths



- MINERAL DEPOSITS <sup>1</sup>**
- Commodity Type**
- Aluminium (High-purity alumina)
  - Antimony
  - Bismuth, +/- Cobalt, +/- Indium
  - Chromium, +/- Cobalt, +/- PGE
  - Cobalt
  - Platinum Group Elements (PGE), +/- Cobalt
  - Scandium, +/- Cobalt, +/- PGE
  - Graphite
  - Helium
  - Indium
  - Lithium, +/- Tantalum, +/- Niobium
  - Magnesium
  - Manganese ore
  - Heavy mineral sands - Titanium, Zirconium
  - Heavy mineral sands - Titanium, Zirconium, REE
  - Rare Earth Elements (REE)
  - REE, Zirconium, Niobium, +/- Hafnium, Lithium, Tantalum, Gallium
  - Rhenium
  - Silicon (High-purity silica/quartz)
  - Tungsten
  - Titanium
  - Titanium, Vanadium
  - Vanadium

# Large scale renewable energy to decarbonise existing industry and export will transform the region

- Vast land mass (500,000 km<sup>2</sup>)
- Some of the highest solar irradiance in the world
- Up to 50% wind capacity factors
- Close proximity to key trading partners
- Established infrastructure and export capability
- Significant transferable skillsets within current workforce
- LNG export industry capability



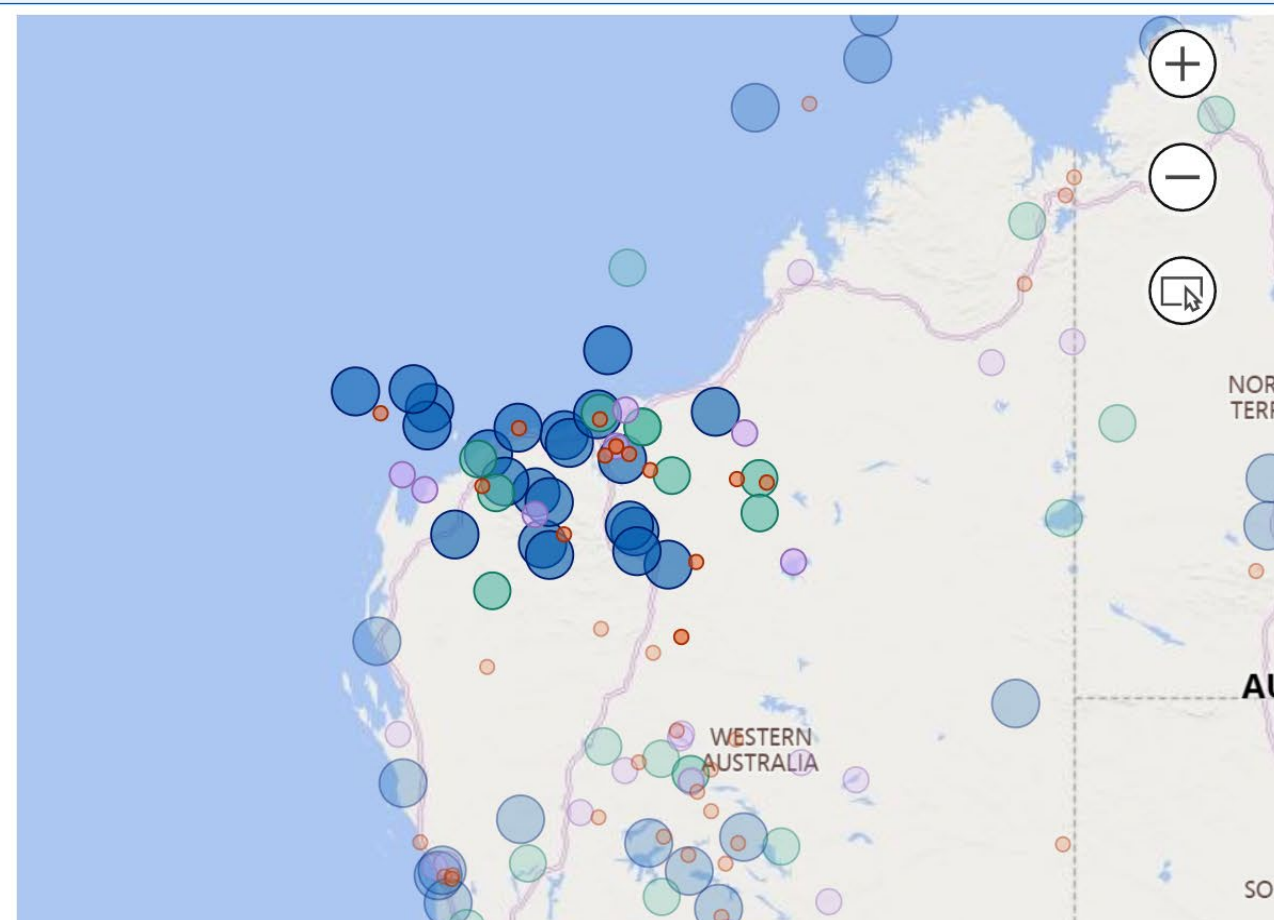
# There is more than \$190 billion of new projects under consideration or under construction

## Resources and Energy Major Projects 2022

### Including:

- Woodside Scarborough and Pluto 2
- Expansions and new mines across the Iron Ore sector
- Urea and Methanol production
- Increased activity and new mines in critical minerals (rare earths, gold, copper, cobalt, lithium...)
- Large scale Renewables (e.g. FFI Uaroo Hub and BP Australian Renewable Energy Hub)
- Multiple hydrogen and ammonia energy projects allocated land in Pilbara SIAs

### Location of Pilbara Projects



**52 projects**

**\$50-\$249m**

14  
Projects

**\$249-\$499m**

7  
Projects

**\$500-\$999m**

9  
Projects

**\$1bn+**

22  
Projects

# Pilbara Strategic Industrial Areas and Ports will be critical to Australia's energy transition ambitions

BROWSE LNG PRECINCT

BURRUP SIA

MAITLAND SIA

ASHBURTON NORTH SIA

PILBARA

BOODARIE SIA

ANKETELL SIA

Media Statements

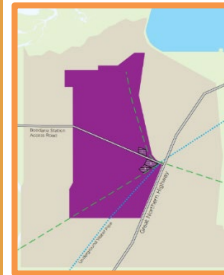
## \$117.5 million to progress two renewable hydrogen hubs

The proposed hydrogen hubs capitalise on these natural advantages in ... Karratha and Port Hedland, and port upgrades to facilitate export...

25 Nov 2021



Latest News Resources Property



## Boodarie, Ashburton land allocated for energy projects

By Nadia Budihardjo 06/01/2023 - 11:28

ENERGY

Land in the Pilbara has been allocated to seven companies, including Posco, BP, Fortescue and Te Valley Lithium, hoping to build \$70 billion of projects.

## Yara Clean Ammonia and Pilbara Ports Authority team up to assess ammonia as a shipping fuel

Yara Clean Ammonia and Pilbara Ports Authority team up to assess ammonia as a shipping fuel



Latest News Resources Property

News > Transport & Logistics

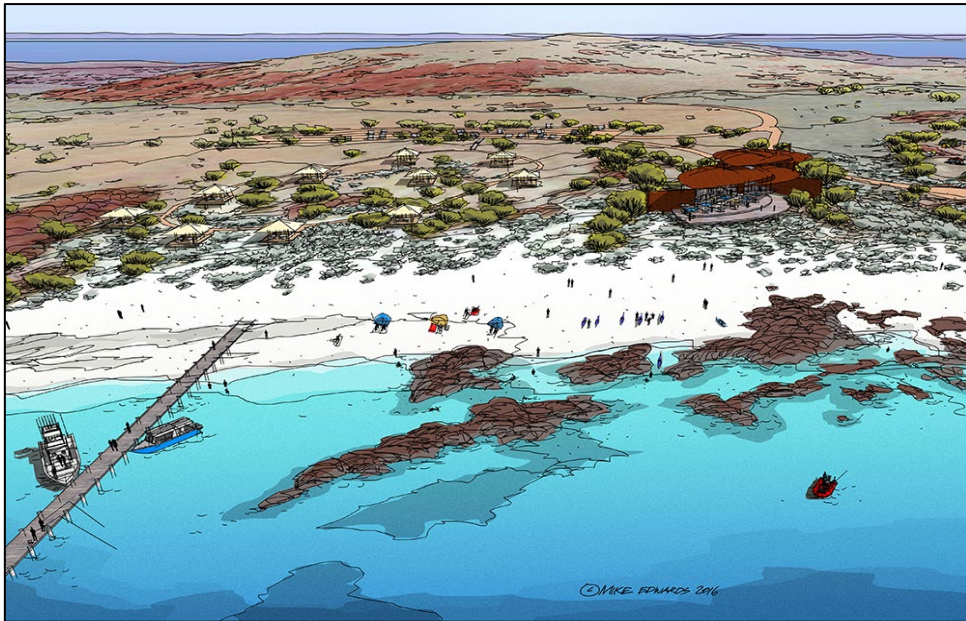


## \$565m for Pilbara ports upgrades

By Nadia Budihardjo 21/02/2023 - 11:47

Port Hedland's Lumsden Point will be one of the Pilbara-based ports slated for an upgrade as part of a \$565 million funding boost to expand export and import capacity.

# Government is investing in transformative Infrastructure



Economic Diversification – Conzinc Bay Tourism Precinct



Community Liveability - Spoilbank Marina

Regional Accessibility - Manuwarra Red Dog Highway







# Thank you

Pilbara Development Commission

[pdc.wa.gov.au](http://pdc.wa.gov.au)

