



DELPHI

ADVISORY

Signals to Strategy.

AUDIENCE
INTELLIGENCE
REPORT

ADVANCED
MANUFACTURING
RARE EARTHS
CRITICAL MINERALS

Executive Summary

Who is this document for?

- Small and medium enterprises (SMEs) across Western Australia working in or adjacent to advanced manufacturing and critical minerals/rare earths from exploration tech and process innovation to housing manufacturing, green steel, defence, robotics and additive manufacturing.

Advanced Manufacturing & Critical Minerals and Rare Earths Recap

- **Advanced manufacturing** conversations centred on sovereign capability, defence partnerships, and the green transition. Activity rose around national housing-factory initiatives and AUKUS-aligned defence production. Western Australia's share of discussion highlighted its green-steel potential, the BlueForge Alliance for defence manufacturing, and its housing-supply manufacturing facility. Together, both topics positioned WA as a bridge between resource extraction and high-value manufacturing, linking critical-minerals processing with emerging domestic production and export opportunities.
- **Critical minerals** discussions were dominated by the geopolitical context of the US–Australia \$8.5 billion partnership signed during Prime Minister Albanese's October 2025 visit to the US, it generated the largest engagement peak. Media and expert commentary focused on Australia's role in countering China's market dominance, the economic potential of rare-earth investments, and the growing importance of Western Australia as a strategic hub. Subsequent engagement came from EU delegations touring WA sites and investor activity in projects such as Arafura Rare Earths and Alcoa's gallium recovery.



Signals in Messaging

Signal 1: Policy drives attention.

- The strongest engagement spikes in Oct and Nov 2025 were triggered by government and geopolitical announcements, led by the US–Australia \$8.5B critical minerals agreement (Oct 20–21). Coverage stayed elevated for days and then rose again with EU delegations touring WA assets (Nov 2).
- For advanced manufacturing, spikes aligned to international partnerships, defence/sovereign capability, energy policy debates, and state-led housing-manufacturing initiatives.

Implication for SMEs: Time your biggest news to early week (Mon–Tue) and attach your story to the policy cycle: new approvals, funding, delegations, AUKUS/defence, housing build capacity, skills pathways.

Signal 2: WA stories land when they localise national news.

- WA peaks aligned to taking national headlines and making them local (e.g., White House deal, Housing crisis and WA factory solution). WA’s conversation is 93–94% news-driven with low social chatter, meaning traditional media and B2B channels still set the agenda.

Implication for SMEs: Lead with local impact hooks: Pilbara jobs, port and power readiness, Indigenous partnerships, WA supply-chain security, housing throughput, defence readiness.

Signal 3 : Neutral tone = wide whitespace.

- Sentiment was overwhelmingly neutral ($\approx 92\text{--}96\%$) across both topics; positive mentions were small (2–7%), and negative mentions were concentrated around processing costs, environmental impact, sovereignty/investment risk.

Implication for SMEs: You can shift sentiment with evidence-led, human stories, workers, Traditional Owner partnerships, environmental performance and circularity, community benefits, energy mix, skills training outcomes.

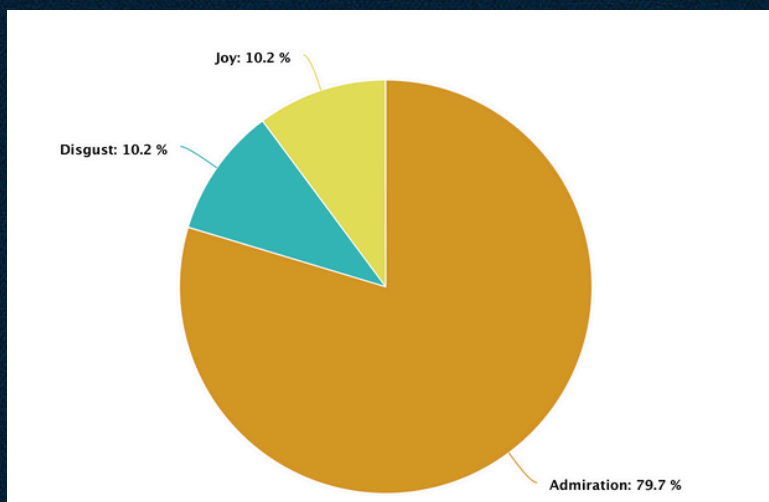


Advanced Manufacturing



Word Cloud

Emotional Sentiment
(neutral excluded)



Most used Emojis

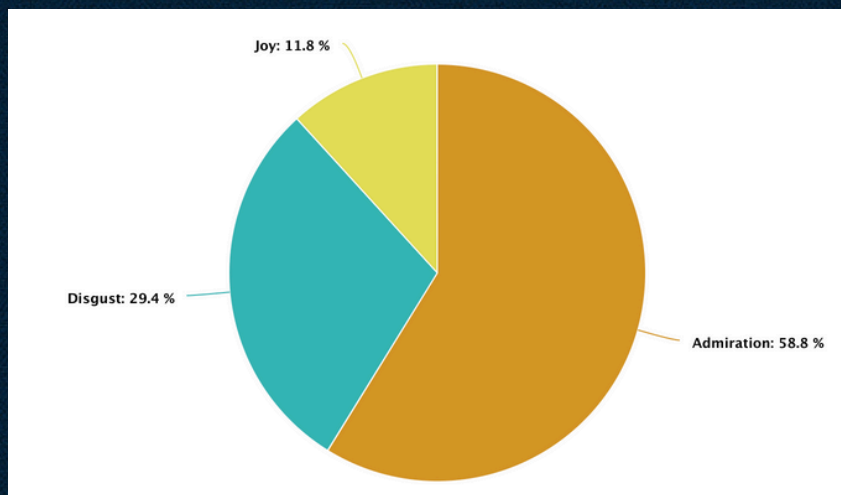


Critical Minerals



Word Cloud

Emotional Sentiment
(neutral excluded)



Most used Emojis



SME Messaging Suggestions

Messaging architecture and Narratives (use and adapt across both sectors)

- Promise: Made-in-WA capability that de-risks supply chains and accelerates build-out, reliably, responsibly, and at pace.
- Proof: Tie to policy moments, third-party visits, standards and certifications, Indigenous partnerships, energy and water plans, process efficiency, LCA/circularity, skills programs.
- Payoff: Jobs in the Pilbara, faster housing and infrastructure delivery, sovereign capability for defence and clean energy supply chains.

Critical minerals / rare earths - message pillars

- Trusted alternative to concentration risk (processing independence, allied markets).
- WA as the hinge (ore-to-oxides-to-components pathway, ports, power, workforce).
- Responsible growth (environmental performance, First Nations agreements, rehabilitation, circular recovery of by-products).
- From rocks to results (explicit end-use, EVs, magnets, defence systems; show the value chain).
- Talk to concerns: processing cost curves, permitting timeframes, environmental stewardship, "sovereignty" debates, address with audited data, timelines, and benefits-sharing detail.

Advanced manufacturing – message pillars

- Throughput at scale (housing panels/modules; defence sub-systems; green steel inputs).
- Sovereign + interoperable (AUKUS/defence standards; export-ready compliance).
- Low-carbon and circular (materials efficiency, recycled inputs, electrified heat).
- Skills engine (TAFE pipelines, migration pathways, on-the-job training tied to output).
- Talk to concerns: energy costs, supply chain resilience, skills shortage, answer with Purchase Power Achievement plans, load management, modularisation, workforce programs.

WA story angles that convert

- "Localising the macro": What the US-AU deal means in the Pilbara this quarter (show projects/jobs on a map).
- "Defence-ready SMEs": how your component/QA system aligns with AUKUS pathways; reference BlueForge and sovereign capability arcs.
- "Green steel building blocks": ore beneficiation, DR-grade inputs, renewables integration, off-take MOUs.
- "Workforce wins": TAFE, apprenticeships and safe, high-tech jobs in-region.





THANK YOU FOR YOUR TIME



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