

Bowen Basin resource industry workforce, 2023

Introduction

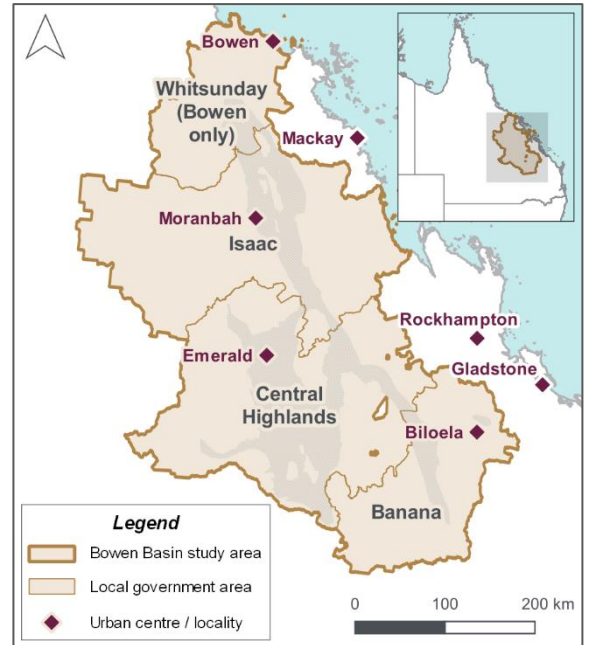
The Bowen Basin in Central Queensland (Figure 1) contains most of Australia's high quality metallurgical coal reserves, as well as significant deposits of thermal coal. Much of the coal produced in the region is transported by rail to coal terminals on the coast for export to overseas markets. In addition to coal mining, the region is home to other resource industries, including coal seam gas (CSG) and conventional gas operations, metalliferous mines, renewable energy projects and resource industry infrastructure.

The Bowen Basin's resource industry workforce includes local residents who live in the same local government area (LGA) as their place of work, and others who live elsewhere and fly-in/fly-out or drive-in/drive-out (FIFO/DIDO) to work.

This report provides information on workforce characteristics and place of residence of the Bowen Basin's resource industry workforce. It accompanies the *Bowen Basin population report, 2023*, which presents non-resident population and worker accommodation data for the region.

Data in this report were derived from the Resource Employment Survey, conducted by Queensland Government Statistician's Office (QGSO), and other sources. The survey collected information from all resource industry companies with existing operations and projects under construction in the Bowen Basin in June 2023.

Figure 1 Bowen Basin region



Source: QGSO

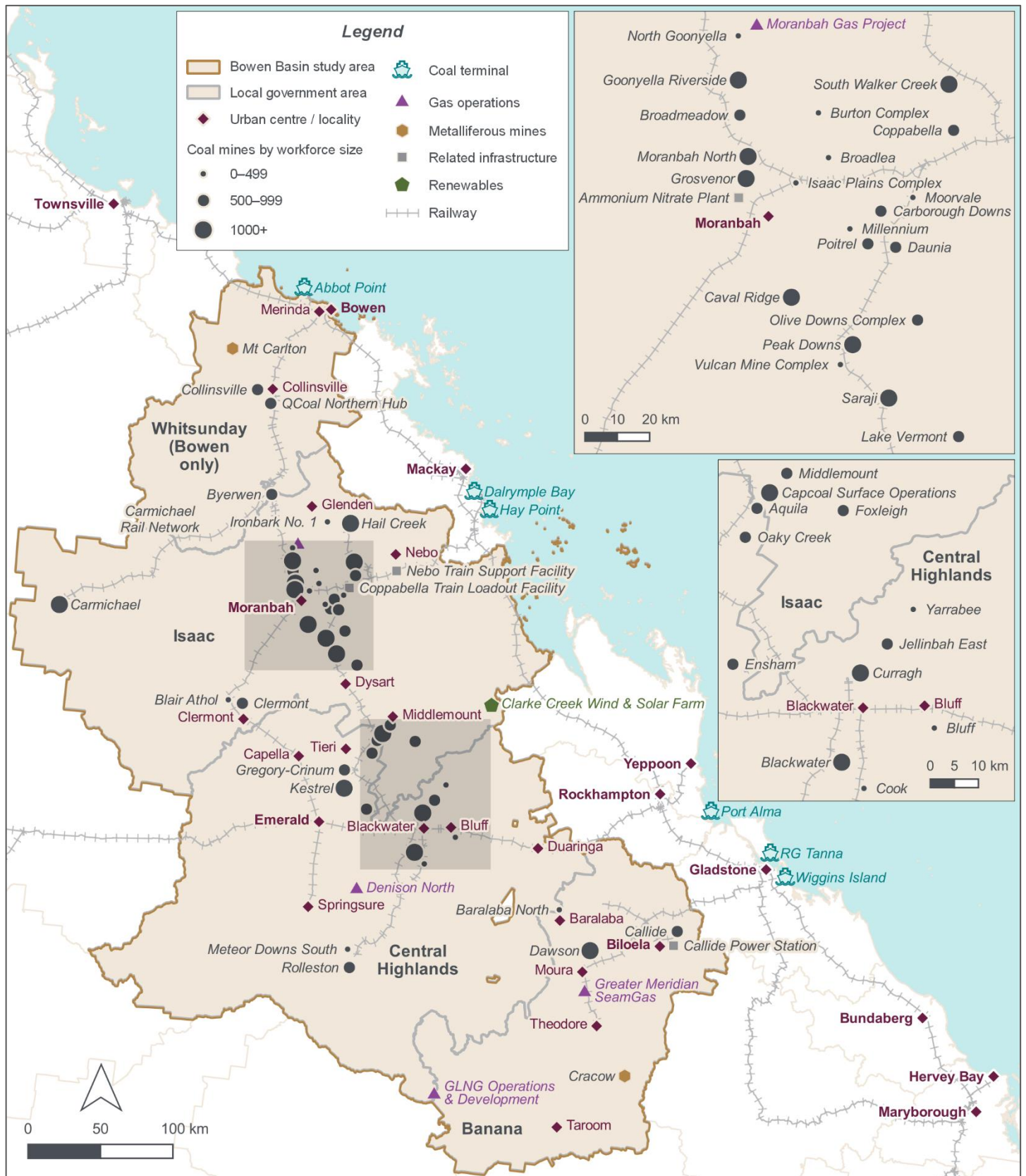
In this publication, the Bowen Basin comprises the LGAs of Banana, Central Highlands, Isaac and Whitsunday (Bowen only) (Figure 1).

Key findings

Key findings of this report include:

- In June 2023, the Bowen Basin had a resource industry workforce of around 43,965 persons.
- Most of the region's resource industry workers in June 2023 were engaged in coal mining (41,610 persons or 95%), with the balance (2,355 persons or 5%) in other resource industries.
- Just over half of the Bowen Basin's resource industry workers in June 2023 were contractors (23,435 persons or 53%) (Table 2). Slightly fewer than half were employees (20,530 persons or 47%).
- The LGA of Isaac had the largest number of workers, accounting for around two-thirds of the region's total resource industry workforce in June 2023 (28,665 persons or 65%). The remainder worked in Central Highlands (10,070 persons or 23%), Banana (3,715 persons or 8%) and Whitsunday (Bowen only) (1,515 persons or 3%).
- The Bowen Basin's resource industry workforce comprises local residents, who live in the same LGA as their place of work, and non-resident workers, who live outside the LGA where they work.
 - Place of residence was unknown for 28% (12,300 persons) of the workforce. Almost all these workers were contractors (12,070 persons).
- Of the 31,665 workers in June 2023 whose place of residence was known:
 - 25% (8,030 persons) lived and worked in same LGA
 - 75% (23,635 persons) worked in a different LGA from where they lived
 - 11,820 persons (or 37% of those with a known place of residence) came from other Bowen Basin LGAs or elsewhere in Central Queensland.

Figure 2 Existing resource operations and projects under construction^(a), Bowen Basin, June 2023



(a) Coal mines by workforce size are based on numbers in June 2023 published by Resources Safety and Health Queensland (RSHQ), rather than confidential QGSO data. Operation and project locations shown in map are indicative only. See Table 9 (pages 11–12) for a full list of existing operations and projects by LGA.

Sources: RSHQ, 2023; QGSO, 2023

Workforce characteristics

In June 2023, the Bowen Basin had a resource industry workforce of around 43,965 persons (Table 1). Isaac had the largest number of workers, accounting for around two-thirds of the region's total resource industry workforce (28,665 persons or 65%). The remainder worked in Central Highlands (10,070 persons or 23%), Banana (3,715 persons or 8%) and Whitsunday (Bowen only) (1,515 persons or 3%). The greatest concentration of resource operations and projects in the Bowen Basin is in Isaac, as shown in Figure 2 and Table 9. These include 10 of the largest coal mines in the region, each of which employed more than 1,000 workers in June 2023.

Most of the region's resource industry workers reported in June 2023 were engaged in coal mining (41,610 persons or 95%) (Table 1). The balance (2,355 persons or 5%) worked in other resource industries, including gas operations, metalliferous mining, renewable energy projects and related infrastructure operations.

In June 2023, there were 48 coal mines in operation or under construction, four gas operations, two metalliferous mines, one renewable energy project under construction and six related infrastructure operations in the Bowen Basin (Figure 2, Table 9). At the time of QGSO's survey in June 2023, most of these workers were engaged in operational activities at existing and recently opened coal mines (QGSO, 2023). Coal project construction and gas industry operations and development also made a notable contribution to the total workforce in some areas.

At the LGA level, resource industry workers in Isaac and Central Highlands in June 2023 were predominantly engaged in coal mining (98% and 97% respectively). The LGAs of Banana and Whitsunday (Bowen only) had smaller proportions of coal mining workers (71% and 64% respectively), with the balance in other resource industries.

Table 1 Resource industry workforce by sector of employment, Bowen Basin LGAs, June 2023

Place of work	Other resource industry ^(a)			Other resource industry ^(a)		
	Coal mining	— persons —	Total	Coal mining	— % —	Total
Banana	2,635	1,080	3,715	71	29	100
Central Highlands	9,785	285	10,070	97	3	100
Isaac	28,225	440	28,665	98	2	100
Whitsunday (Bowen only)	970	545	1,515	64	36	100
BOWEN BASIN TOTAL	41,610	2,355	43,965	95	5	100

(a) 'Other resource industry' includes gas operations, metalliferous mining, renewable energy projects and related infrastructure operations. Figures in tables in this report have been rounded to the nearest five; see Notes at end of report for details.

Source: QGSO estimates

Employees are workers engaged directly by resource companies at resource operations or projects to carry out production, maintenance, and operational activities.

Contractors are workers engaged by companies providing services at resource operations or projects under contractual arrangements. Contracted services range from specific project construction and maintenance events to full provision of mining operations services, and contract workforces may be temporary or ongoing.

Table 2 Resource industry workforce by employment status^(a), Bowen Basin, June 2023

	persons	%
Employees	20,530	47
Contractors	23,435	53
TOTAL WORKFORCE	43,965	100

(a) Refer to Notes at end of report for explanation of 'employment status'.

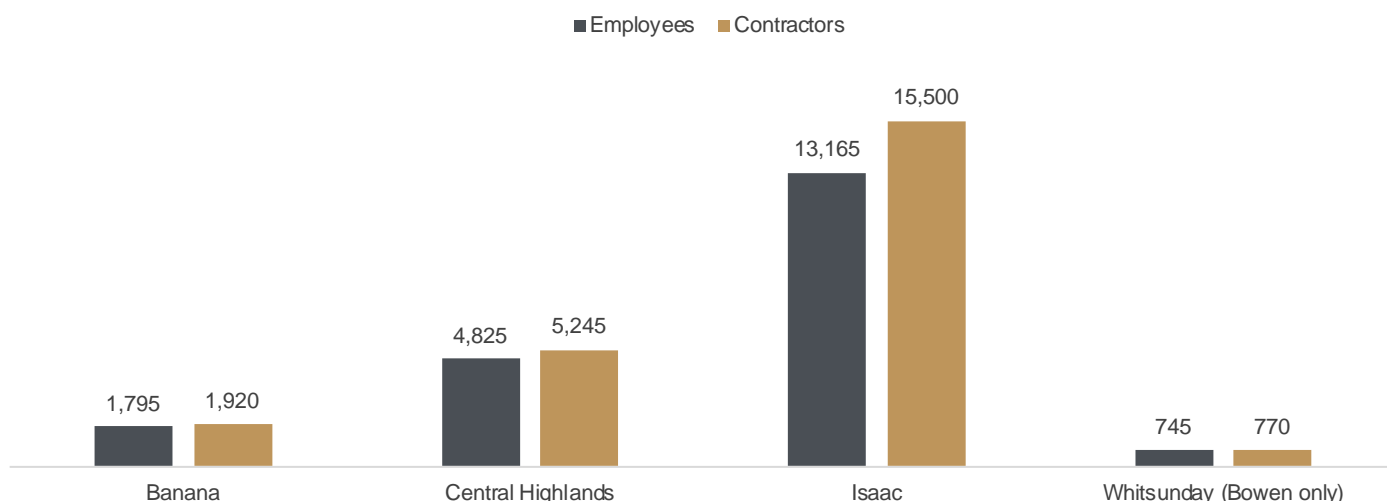
Source: QGSO estimates

According to their employment status, just over half of the Bowen Basin's resource industry workers in June 2023 were contractors (23,435 persons or 53%) (Table 2). Slightly fewer than half were employees (20,530 persons or 47%). Most employees and contractors working in the region in June 2023 were involved in production and maintenance activities at existing and recently opened operations. A smaller number of workers—predominantly contractors—were associated with project construction.

In all four Bowen Basin LGAs, contractors accounted for over half of resource industry workers in June 2023 (Figure 3). Isaac had the largest contractor workforce (15,500 persons or 54%), followed by Central Highlands (5,245 persons or 52%), Banana (1,920 persons or 52%) and Whitsunday (Bowen only) (770 persons or 51%).

As noted earlier, Isaac has the greatest concentration of coal operations and projects and the largest resource industry workforce in the region. Contractors in Isaac comprised the single largest group of resource industry workers in the Bowen Basin, accounting for more than one-third of the total workforce in June 2023 (15,500 persons, or 35% of the region's workforce). Employees in Isaac were the second-largest group, contributing around 3 in 10 of the total regional workforce (13,165 persons or 30%).

Figure 3 Resource industry workforce by employment status^(a), Bowen Basin LGAs, June 2023



(a) Refer to Notes at end of report for explanation of 'employment status'.

Source: QGSO estimates

The Bowen Basin's resource industry workforce includes local residents, who live in the same LGA as their place of work, and non-resident workers, who live outside the LGA where they work. These non-resident or FIFO/DIDO workers stay close to their place of work while rostered on and return to their place of residence elsewhere when rostered off. Non-resident workers typically stay in worker accommodation villages or other commercial accommodation, such as hotels, motels and caravan parks, while rostered on.

The use of FIFO/DIDO labour is a common practice for resource operations and projects in the region. Temporary construction workforces for resource projects tend to be predominantly non-resident, while ongoing operational workforces are more likely to include local residents.

According to their residential status in June 2023, around 8,030 persons (or 18% of the region's resource industry workforce) were local residents who lived and worked in the same Bowen Basin LGA (Table 3). A further 23,635 persons (or 54%) were non-residents who lived outside of the LGA where they worked.

For another 12,300 persons (or 28%), place of residence was reported as unknown by survey respondents. While most resource industry companies were able to report the place of residence of their employees, they were less likely to know their contractors' place of residence.

Figure 4 illustrates these differences in reporting of residential status for employees and contractors in the Bowen Basin in June 2023. For employees, around 6,115 persons (or 30%) were reported to be local residents, while 14,185 persons (or 69%) were non-residents. Just 230 persons, or 1% of employees, were recorded as having an unknown place of residence. In contrast, place of residence was unknown for 12,070 persons or 52% of contractors. The under-reporting of place of residence of contractors means that the residential status of this group cannot be determined with the same degree of certainty as for employees.

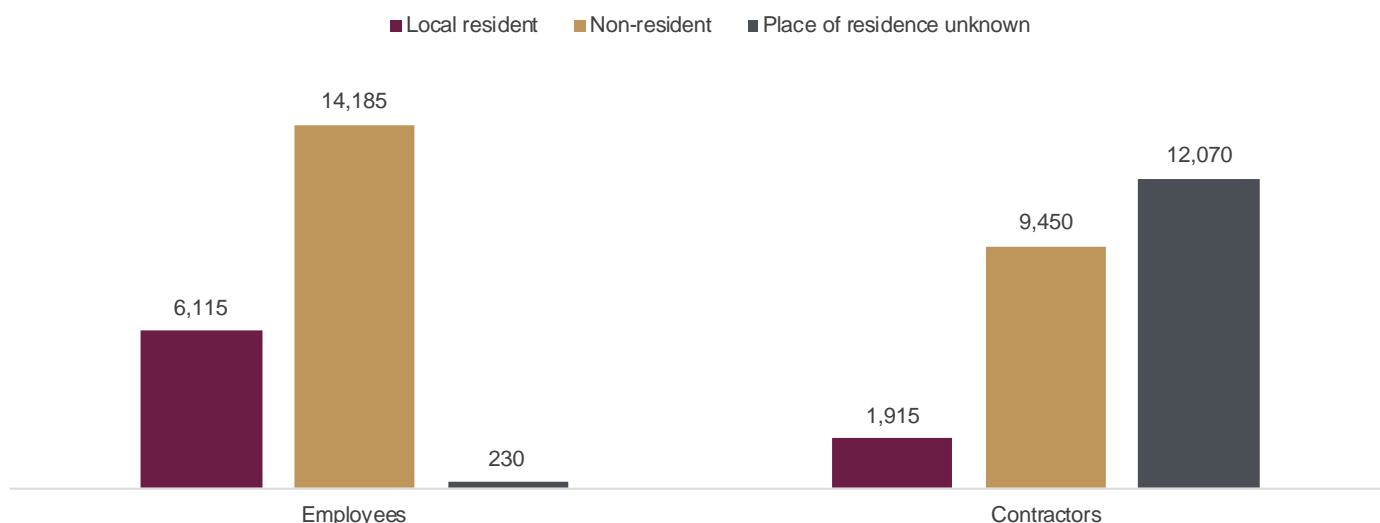
Table 3 Resource industry workforce by residential status^(a), Bowen Basin, June 2023

	persons	%
Local resident	8,030	18
Non-resident	23,635	54
Place of residence unknown	12,300	28
TOTAL WORKFORCE	43,965	100

(a) Refer to Notes at end of report for explanation of 'residential status'.

Source: QGSO estimates

Figure 4 Resource industry workforce by employment status^(a) and residential status^(b), Bowen Basin, June 2023



(a) Refer to Notes at end of report for explanation of 'employment status'.

(b) Refer to Notes at end of report for explanation of 'residential status'.

Source: QGSO estimates

Place of residence

Detailed place of residence data in this section provide further information on where the Bowen Basin's resource industry workers live when not at work.

As noted above, the Bowen Basin's resource industry workforce includes a sizeable number of non-resident workers (Table 3) who live outside the LGA where they work.

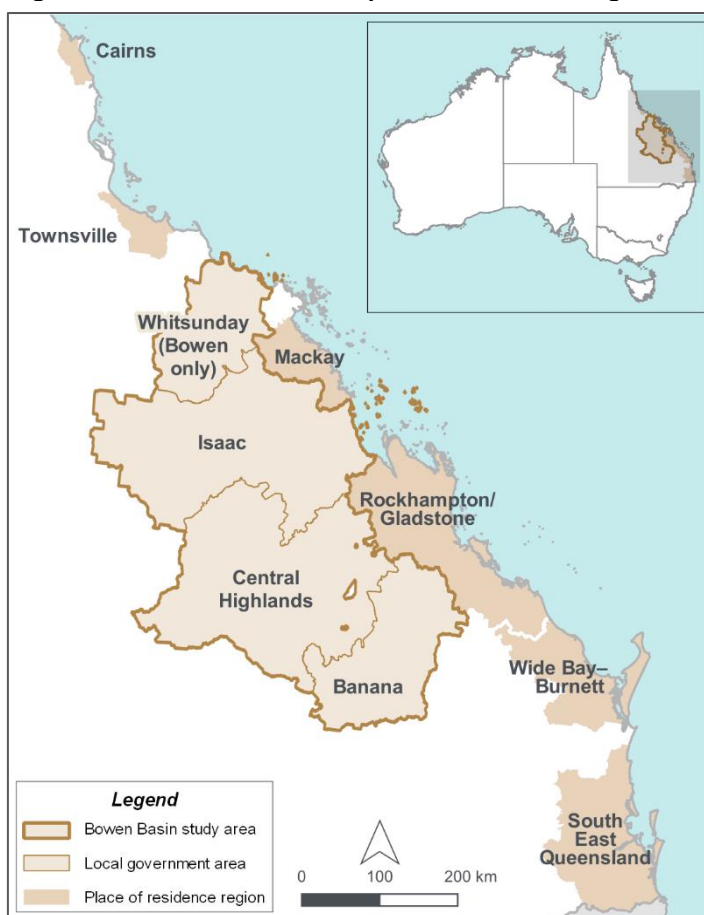
Many workers drive-in/drive-out to the region from the adjoining Central Queensland coastal areas of Mackay and Rockhampton/Gladstone (Figure 5). Others travel from other parts of regional Queensland such as Cairns, Townsville and Wide Bay–Burnett or fly-in/fly-out from South East Queensland and further afield.

As mentioned earlier, place of residence was unknown for 12,300 persons or 28% of resource industry workers in the Bowen Basin in June 2023, most of whom were contractors.

Of the 31,665 workers where place of residence was known, around 8,030 lived and worked in the same Bowen Basin LGA in June 2023 (Table 4, Figure 6). This equates to 25% of those with a known place of residence.

In June 2023, a further 11,820 persons (or 37% of those with a known place of residence) came from other Bowen Basin LGAs or elsewhere in Central Queensland. This includes 1,545 persons (or 5%) from another Bowen Basin LGA, 7,340 persons (or 23%) from the Mackay region and 2,935 persons (or 9%) from the Rockhampton/Gladstone region.

Figure 5 Bowen Basin and place of residence regions^(a)



(a) Refer to footnotes on page 6 for explanation of 'place of residence'.

Source: QGSO, 2023

In June 2023, around 1,815 persons or 6% of Bowen Basin resource industry workers with a known place of residence came from the Cairns/Townsville region. A further 750 persons or 2% came from the Wide Bay–Burnett region.

South East Queensland, the state's major population region, was a key source of resource industry workers in the Bowen Basin in June 2023, contributing 5,210 persons or 16% of those with a known place of residence.

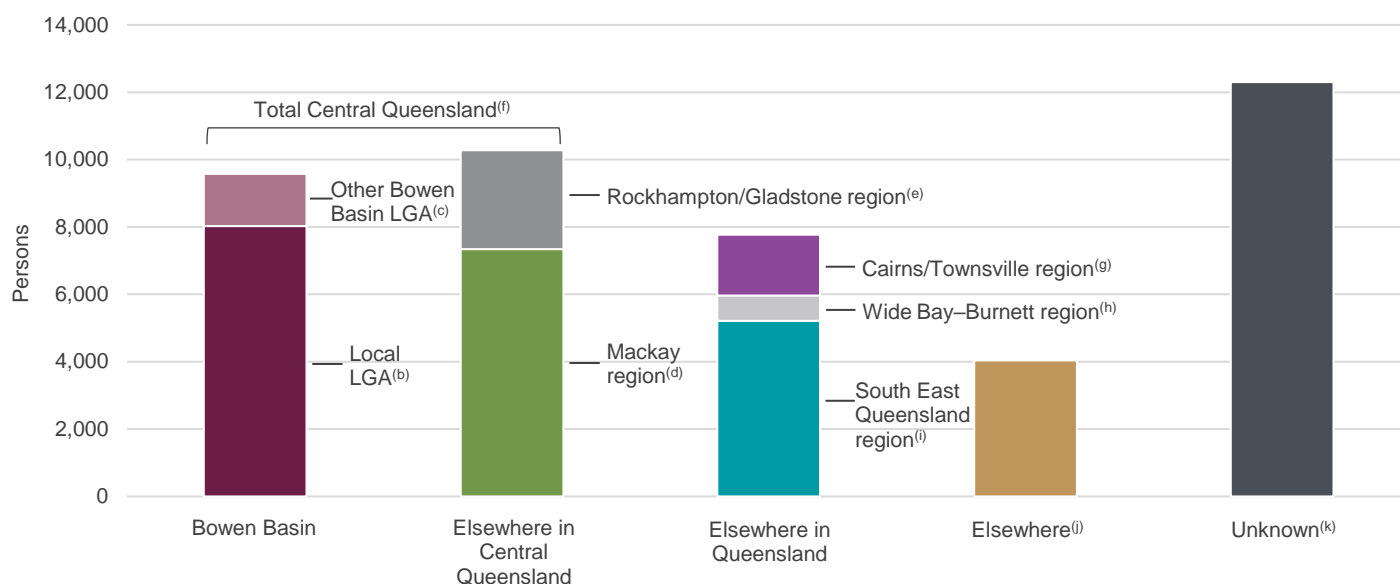
A further 4,035 persons or 13% of Bowen Basin resource industry workers in June 2023 lived 'Elsewhere'. This refers to all other locations in Queensland, interstate or overseas. Some of these workers may have come from nearby regions that were not specifically identified in place of residence categories used in this report.

Table 4 Resource industry workforce by place of residence, Bowen Basin, June 2023

Place of residence ^(a)	Place of work – Bowen Basin
	persons
Local LGA	8,030
Other Bowen Basin LGA	1,545
Mackay region	7,340
Rockhampton/Gladstone region	2,935
Total Central Queensland	19,850
Cairns/Townsville region	1,815
Wide Bay–Burnett region	750
South East Queensland region	5,210
Elsewhere	4,035
Total with place of residence known	31,665
Unknown	12,300
TOTAL WORKFORCE	43,965

(a) Refer to footnotes below Figure 6 for explanation of 'place of residence'.

Figure 6 Resource industry workforce by place of residence^(a), Bowen Basin, June 2023



- (a) Refer to Notes at end of report for explanation of 'geographies'.
- (b) Local LGA refers to the Bowen Basin LGA in which the resource operation or project is located.
- (c) Other Bowen Basin LGA refers to the three Bowen Basin LGAs other than the LGA in which the resource operation or project is located. The four LGAs in the Bowen Basin are Banana, Central Highlands, Isaac and Whitsunday (Bowen only).
- (d) Rockhampton/Gladstone region includes the urban centres of Rockhampton, Yeppoon and Gladstone.
- (e) Mackay region includes the urban centre of Mackay.
- (f) Central Queensland comprises the Bowen Basin region, Rockhampton/Gladstone region and Mackay region.
- (g) Cairns/Townsville region includes the urban centres of Cairns and Townsville.
- (h) Wide Bay–Burnett region includes the urban centres of Bundaberg, Hervey Bay and Maryborough.
- (i) South East Queensland region includes the major population centres of Brisbane, Gold Coast and Sunshine Coast.
- (j) 'Elsewhere' refers to all other locations not specifically identified in Queensland, interstate or overseas.
- (k) 'Unknown' refers to employees and contractors whose place of residence was reported as unknown in QGSO's 2023 Resource Employment Survey.

Source: QGSO estimates

Banana

Banana was home to three coal mines, two gas operations, a metalliferous mine and a coal-fired power station in June 2023 (Figure 2, Table 9). Dawson mine, the largest coal mine in the LGA, engaged more than 1,000 workers (RSHQ, 2023).

In June 2023, the LGA of Banana had a resource industry workforce of 3,715 persons, representing 8% of the regional total. Around 7 in 10 resource industry workers in the LGA were in coal mining (71%), with the rest in other resource industries.

Place of residence was known for 2,550 resource industry workers in Banana in June 2023 (Table 5). Of these, almost half lived locally in towns such as Moura and Biloela (1,190 persons or 47%).

The top source region for non-resident workers in Banana in June 2023 was the adjoining region of Rockhampton/Gladstone (505 persons or 20% of those with a known place of residence) (Figure 7). This region is connected to Banana via major roads and highways.

'Elsewhere' (335 persons or 13%) and South East Queensland (315 persons or 12%) were the second and third-largest source regions respectively for resource industry workers in Banana in June 2023.

Banana at a glance

- Banana accounted for 8% of the Bowen Basin's resource industry workforce in June 2023.
- Around 7 in 10 workers (71%) in the resource industry were in coal mining.
- Just over half the workforce (52%) were contractors; just under half (48%) were employees.
- Place of residence was known for 69% of the workforce. Of these:
 - 47% lived in the local LGA
 - 24% lived elsewhere in Central Queensland.
- Place of residence was unknown for 31% of the workforce.

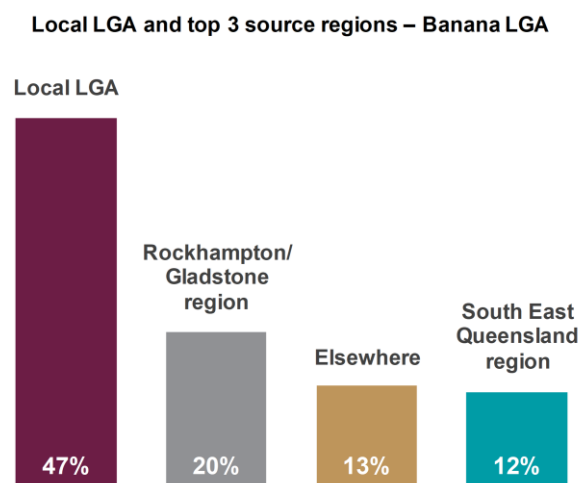
Table 5 Resource industry workforce by place of residence, Banana, June 2023

Place of residence ^(a)	Place of work – Banana persons
Local LGA	1,190
Other Bowen Basin LGA	110
Mackay region	5
Rockhampton/Gladstone region	505
Total Central Queensland	1,810
Cairns/Townsville region	10
Wide Bay–Burnett region	85
South East Queensland region	315
Elsewhere	335
Total with place of residence known	2,550
Unknown	1,165
TOTAL WORKFORCE	3,715

(a) Refer to footnotes on page 6 for explanation of 'place of residence'.

Source: QGSO estimates

Figure 7 Resource industry workforce by place of residence^(a), Banana, June 2023



(a) Percentages in graph are based on those with a known place of residence.

Central Highlands

There were 12 coal mines and two gas operations in Central Highlands in June 2023 (Figure 2, Table 9). The three largest coal mines in the LGA—Blackwater, Curragh and Kestrel—each accounted for more than 1,000 workers (RSHQ, 2023).

Central Highlands LGA had a resource industry workforce of 10,070 persons in June 2023, representing 23% of the regional total (Table 6). Almost all (97%) of these workers were in coal mining.

In June 2023, place of residence was known for 6,340 of Central Highlands' resource industry workers, or 63% of the LGA's total workforce. Of these, more than one-third (2,285 persons or 36%) lived locally in towns such as Emerald and Blackwater.

The top source region for non-resident workers in Central Highlands in June 2023 was the nearby Rockhampton/Gladstone region (1,190 persons or 19% of those with a known place of residence) (Figure 8). Central Highlands has strong links with the Rockhampton/Gladstone region, with much of the coal produced in the LGA exported via the Blackwater coal rail system through coal terminals near Gladstone. Many non-resident workers in Central Highlands live in coastal towns such as Gladstone and Yeppoon, and drive-in/drive-out for work.

'Elsewhere' (1,160 persons or 18%) and South East Queensland (855 persons or 13%) were the second and third-largest source regions respectively for resource industry workers in Central Highlands in June 2023.

Central Highlands at a glance

- Central Highlands accounted for 23% of the Bowen Basin's resource industry workforce in June 2023.
- Almost all (97%) workers in the resource industry were in coal mining.
- Almost half (48%) were employees; just over half (52%) were contractors.
- Place of residence was known for 63% of the workforce. Of these:
 - 36% lived in the local LGA
 - 27% lived elsewhere in Central Queensland.
- Place of residence was unknown for 37% of the workforce.

Table 6 Resource industry workforce by place of residence, Central Highlands, June 2023

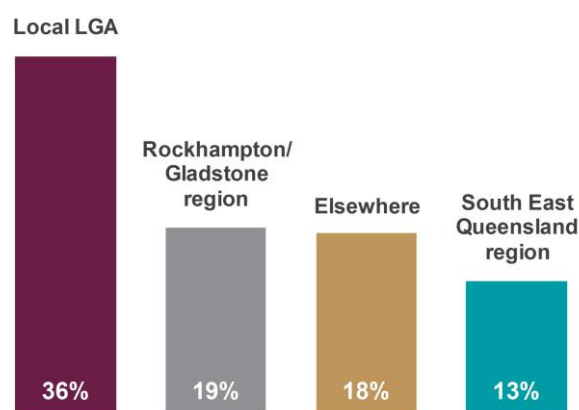
Place of residence ^(a)	Place of work – Central Highlands
	persons
Local LGA	2,285
Other Bowen Basin LGA	250
Mackay region	270
Rockhampton/Gladstone region	1,190
Total Central Queensland	3,990
Cairns/Townsville region	65
Wide Bay–Burnett region	275
South East Queensland region	855
Elsewhere	1,160
Total with place of residence known	6,340
Unknown	3,735
TOTAL WORKFORCE	10,070

(a) Refer to footnotes on page 6 for explanation of 'place of residence'.

Source: QGSO estimates

Figure 8 Resource industry workforce by place of residence^(a), Central Highlands, June 2023

Local LGA and top 3 source regions – Central Highlands LGA



(a) Percentages in graph are based on those with a known place of residence.

Isaac

In June 2023, there were 31 coal mines, four related infrastructure operations and one gas operation in Isaac (Figure 2, Table 9). The 10 largest coal mines in the LGA all engaged more than 1,000 workers (RSHQ, 2023).

Two projects—Olive Downs Complex and Clarke Creek Wind and Solar Farm—were under construction in June 2023, and rehabilitation work was underway at Newlands and Grasstree mines.

There were 28,665 resource industry workers in the LGA of Isaac in June 2023, representing around two-thirds or 65% of the regional total (Table 7). Almost all (98%) of these workers were in coal mining.

In June 2023, place of residence was known for around 75% of Isaac's resource industry workforce. Of these 21,360 workers, 3,805 (or 18%) lived locally in towns such as Moranbah, Dysart and Middlemount.

The adjoining coastal region of Mackay was the top source region for non-resident workers in Isaac in June 2023 (6,955 persons or 33% of those with a known place of residence) (Figure 9). Isaac was the only LGA in the Bowen Basin where the top source region contributed more workers than the local LGA. The urban centre of Mackay is an important mining services hub for the region and a popular place of residence for resource industry workers, who drive-in/drive-out for work via the Peak Downs Highway between Isaac and Mackay.

South East Queensland (3,995 persons or 19%) and 'Elsewhere' (2,525 persons or 12%), the second and third-largest source regions, also contributed sizeable numbers of resource workers to Isaac in June 2023. Isaac is serviced by regular commercial and charter flights from South East Queensland and other parts of the state.

Isaac at a glance

- Isaac accounted for 65% of the Bowen Basin's resource industry workforce in June 2023.
- Almost all (98%) workers in the resource industry were in coal mining.
- Almost half (46%) were employees; just over half (54%) were contractors.
- Place of residence was known for 75% of the workforce. Of these:
 - 18% lived in the local LGA
 - 44% lived elsewhere in Central Queensland.
- Place of residence was unknown for 25% of the workforce.

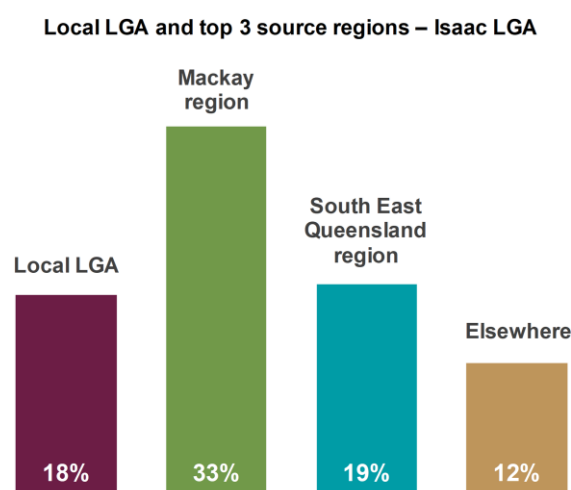
Table 7 Resource industry workforce by place of residence, Isaac, June 2023

Place of residence ^(a)	Place of work – Isaac persons
Local LGA	3,805
Other Bowen Basin LGA	1,145
Mackay region	6,955
Rockhampton/Gladstone region	1,220
Total Central Queensland	13,125
Cairns/Townsville region	1,330
Wide Bay–Burnett region	385
South East Queensland region	3,995
Elsewhere	2,525
Total with place of residence known	21,360
Unknown	7,305
TOTAL WORKFORCE	28,665

(a) Refer to footnotes on page 6 for explanation of 'place of residence'.

Source: QGSO estimates

Figure 9 Resource industry workforce by place of residence^(a), Isaac, June 2023



(a) Percentages in graph are based on those with a known place of residence.

Whitsunday (Bowen only)

In June 2023, there were two coal mines and one metalliferous mine in Whitsunday (Bowen only), as well as Carmichael Rail Network and the port of Abbot Point, which exports coal produced from mines in the northern Bowen Basin (Figure 2, Table 9). Both coal mines in the LGA employed between 500 to 999 persons (RSHQ, 2023).

In June 2023, there were 1,515 resource industry workers in the LGA of Whitsunday (Bowen only), representing 3% of the regional total (Table 8). About 6 in 10 workers (64%) in the resource industry were in coal mining, with the balance of the workforce engaged in other resource industries including metalliferous mining and related infrastructure operations.

Place of residence was known for around 1,415 of the Whitsunday (Bowen only) LGA resource industry workforce in June 2023. Of these, an estimated 750 workers (or 53%) lived locally in towns such as Bowen and Collinsville. Of all Bowen Basin LGAs, Whitsunday (Bowen only) had the highest proportion of local residents who lived and worked in the same LGA.

The top source region for non-resident workers in Whitsunday (Bowen only) in June 2023 was the Cairns/Townsville region (415 persons or 29% of those with a known place of residence) (Figure 10). Resource operations in Whitsunday (Bowen only) are linked by road to the major regional city of Townsville just to the north of the LGA.

The Mackay region accounted for 110 persons or 8% of those with a known place of residence in June 2023. South East Queensland was the third largest place of residence region, contributing 50 workers or 4%.

Whitsunday (Bowen only) at a glance

- Whitsunday (Bowen only) accounted for 3% of the Bowen Basin's resource industry workforce in June 2023.
- About 6 in 10 workers (64%) in the resource industry were in coal mining.
- Almost half (49%) were employees; just over half (51%) were contractors.
- Place of residence was known for 94% of the workforce. Of these:
 - 53% lived in the local LGA
 - 12% lived elsewhere in Central Queensland.
- Place of residence was unknown for 6% of the workforce.

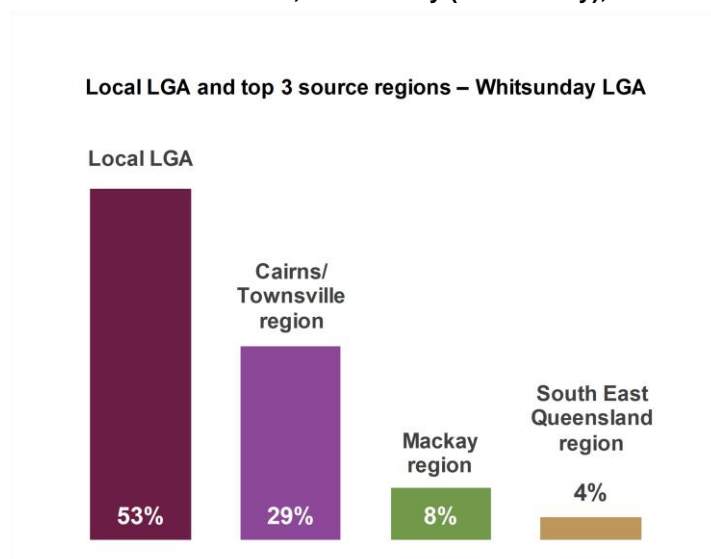
Table 8 Resource industry workforce by place of residence, Whitsunday (Bowen only), June 2023

Place of residence ^(a)	Place of work – Whitsunday (Bowen only) persons
Local LGA	750
Other Bowen Basin LGA	45
Mackay region	110
Rockhampton/Gladstone region	20
Total Central Queensland	930
Cairns/Townsville region	415
Wide Bay–Burnett region	0
South East Queensland region	50
Elsewhere	20
Total with place of residence known	1,415
Unknown	100
TOTAL WORKFORCE	1,515

(a) Refer to footnotes on page 6 for explanation of 'place of residence'.

Source: QGSO estimates

Figure 10 Resource industry workforce by place of residence^(a), Whitsunday (Bowen only), June 2023



(a) Percentages in graph are based on those with a known place of residence.



Queensland Government Statistician's Office

Table 9 Existing resource operations and projects under construction^(a), Bowen Basin LGAs, June 2023

Category	Operation / project name	Company name
Banana		
CM	Baralaba North	Baralaba Coal Company
CM	Callide	Batchfire Resources
RI	Callide Power Station	CS Energy
MM	Cracow Gold Mine	Aeris Resources
CM	Dawson	Anglo American
CSG	GLNG Operations and Development	GLNG ^(b)
CSG	Greater Meridian SeamGas	WestSide Corporation
Central Highlands		
CM	Blackwater	BHP
CM	Bluff	Bowen Coking Coal
CM	Cook	Constellation Mining
CM	Curragh	Coronado Coal
CSG	Denison North (Rolleston)	Denison Gas
CM	Ensham	Ensham Resources
CSG	GLNG Operations and Development	GLNG ^(b)
CM	Gregory–Crinum	Sojitz Blue
CM	Jellinbah East	Jellinbah Group
CM	Kestrel	Kestrel Coal Resources
CM	Meteor Downs South	Sojitz Blue
CM	Oaky Creek	Glencore Coal
CM	Rolleston	Glencore Coal
CM	Yarrabee	Yancoal Australia
Isaac		
CM	Aquila	Anglo American
CM	Blair Athol	TerraCom
CM	Broadlea	Fitzroy Mining Operations
CM	Broadmeadow	BHP
CM	Burton Complex	Bowen Coking Coal
CM	Byerwen	QCoal Group
CM	Capcoal Surface Operations	Anglo American
CM	Carborough Downs	Fitzroy Mining Operations
CM	Carmichael	Bravus Mining and Resources
RI	Carmichael Rail Network	Bowen Rail Company
CM	Caval Ridge	BHP
RE	Clarke Creek Wind and Solar Farm	Squadron Energy
CM	Clermont	Glencore Coal
CM	Coppabella	Peabody Energy
RI	Coppabella Train Loadout Facility	Pacific National
CM	Daunia	BHP
CM	Foxleigh	Middlemount South
CM	Goonyella Riverside	BHP
CM	Grosvenor	Anglo American
CM	Hail Creek	Glencore Coal
CM	Ironbark No. 1	Fitzroy Mining Operations
CM	Isaac Plains Complex	Stanmore Resources
CM	Lake Vermont	Jellinbah Group
CM	Middlemount	Middlemount Coal
CM	Millennium	MetRes



Queensland Government Statistician's Office

CM	Moorvale	Peabody Energy
RI	Moranbah Ammonium Nitrate Plant	Incitec Pivot
CSG	Moranbah Gas Project	Arrow Energy
CM	Moranbah North	Anglo American
RI	Nebo Train Support Facility	Pacific National
CM	North Goonyella	Peabody Energy
CM	Olive Downs Complex	Pembroke Resources
CM	Peak Downs	BHP
CM	Poitrel	Stanmore Resources
CM	Saraji	BHP
CM	South Walker Creek	Stanmore Resources
CM	Vulcan Mine Complex	Vitrinite

Whitsunday (Bowen only)

RI	Abbot Point Operations	Abbot Point Bulkcoal
RI	Carmichael Rail Network	Bowen Rail Company
CM	Collinsville	Glencore Coal
MM	Mt Carlton gold mine ^(c)	Navarre Minerals
CM	QCoal Northern Hub	QCoal Group

CM = coal mine CSG = coal seam / conventional gas MM = metalliferous mine RE = renewable energy RI = related infrastructure

(a) Includes coal mines, gas operations, metalliferous mines, renewable energy projects under construction, and resource industry-related infrastructure as at June 2023. Operations that have ceased production or were in care and maintenance, including Grasstree and Newlands in Isaac LGA, are not included in this list. Some mining operations extend beyond the boundary of one LGA. In these cases, the LGA refers to the primary location of worker accommodation for the mine.

(b) Santos Gladstone LNG (GLNG) is a joint venture between Santos, PETRONAS, Total and KOGAS.

(c) At the end of June 2023, Navarre Minerals had gone into voluntary administration, but Mt Carlton mine had not yet been placed into care and maintenance.

Source: QGSO, 2023

Notes

LGA – local government area

Geographies

In this publication, the Bowen Basin region comprises the LGAs of Banana, Central Highlands, Isaac and Whitsunday (Bowen only). Whitsunday (Bowen only) comprises the statistical areas level 2 (SA2s) of Bowen and Collinsville, which cover the area of former Bowen Shire.

Other regions cited in this report reflect places of residence as reported by survey respondents, which may not be based on defined statistical geographies.

Data coverage

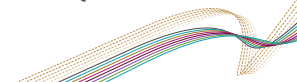
Data in this report are derived from annual surveys conducted by QGSO in 2023 and other sources. The Resource Employment Survey collected workforce information from all resource industry companies with existing operations and projects under construction in the Bowen Basin as at June 2023. Mining and gas companies, related infrastructure operations and renewable energy projects under construction reported the characteristics and place of residence of their workforce. Reported data include all workers at resource operations, as well as workers engaged in project construction or outsourced maintenance activities such as major plant shutdowns.

A full list of operations and projects is available in Table 9 of this report.

Workforce estimates

Workforce estimates in this report represent the total resource industry workforce of the Bowen Basin. In contrast, the non-resident population measure presented in the *Bowen Basin population report, 2023* reflects the number of workers staying in the LGA of their workplace at a given point in time. Workers who are absent from work due to their shift arrangements are not included in the non-resident population even though they are part of the region's resource industry workforce.

Workforce estimates are based on the best available data and advice at the time of preparation. Worker numbers may vary over time in response to a range of factors, including changing production demands, seasonal influences, adverse weather events and industrial action.



Employment status

The workforce of the resource industry in Queensland comprises employees, contractors and associated sub-contractors who work together at resource operations and projects and are engaged by different employers, either the owner/manager of the resource operation or a specialist contracting company. Employees are workers engaged directly by resource companies to carry out on-site production, maintenance and operations. Contractors are workers engaged by companies providing services at resource operations or projects under contractual arrangements. Contracted services range from specific project construction and scheduled maintenance events to full provision of mining operations services, and contract workforces may be temporary or ongoing.

Residential status

In this report, 'local residents' are defined as workers who live in the same LGA as their place of work. 'Non-residents' are workers who live outside the LGA where they work. 'Place of residence known' refers to workers whose place of residence was reported by survey respondents. 'Place of residence unknown' refers to workers whose place of residence was reported as unknown by survey respondents.

In QGSO's Resource Employment Survey, most respondents are able to report the place of residence of their employees. Fewer can report this information for their contractors, as resource industry companies who engage contractors may not have oversight of their place of residence. In the 2023 survey, place of residence was reported as unknown for 1% of employees and 52% of contractors. Users should consider the limitations of the data in interpreting these results.

Data confidentiality and rounding

Survey information reported by resource industry companies is confidential and not available for distribution. Data in this report have been aggregated to ensure that confidentiality of individual responses is preserved.

Figures in tables have been rounded to the nearest five. As a result of rounding, discrepancies may occur between sums of the component items and totals. Percentages and other calculations are made prior to rounding of figures and discrepancies might therefore exist between these calculations and those derived from the rounded figures.

References

Queensland Government Statistician's Office (QGSO) (2023) *Bowen Basin population report, 2023*

<https://www.qgso.qld.gov.au/statistics/theme/population/non-resident-population-queensland-resource-regions/bowen-galilee-basins#current-release-bowen-basin-population-report>

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<https://www.data.qld.gov.au/dataset/quarterly-mines-and-quarries-safety-statistics-data/resource/9722bfd4-9618-4b52-95de-e7c8f03cfd6b>