

Bowen Basin resource industry workforce, 2025

Introduction

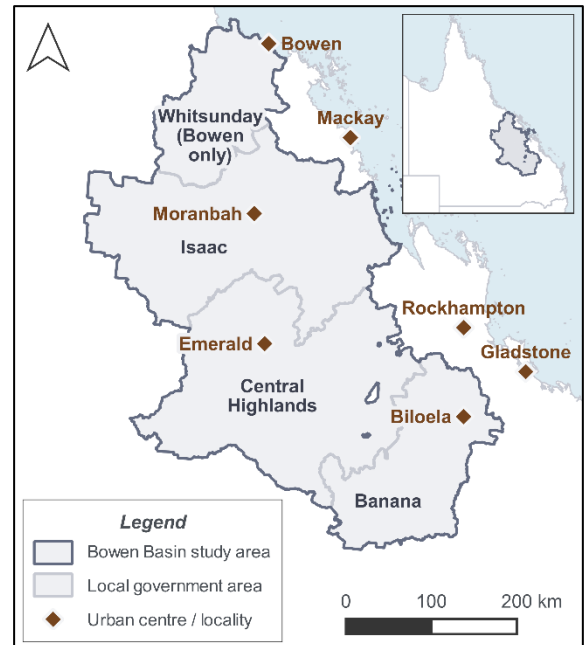
The Bowen Basin in Central Queensland (Figure 1) contains most of Australia's high quality metallurgical coal reserves, as well as significant deposits of thermal coal. Much of the coal produced in the region is transported by rail to coal terminals on the coast for export to overseas markets. In addition 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, 2025*, 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 scope covered all resource industry companies with existing operations and projects under construction in the Bowen Basin in June 2025.

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 2025, the Bowen Basin had a resource industry workforce of around 47,530 persons.
- There were 47 operating coal mines in the region, as well as other resource operations, in June 2025. Isaac had eight of the region's 13 largest coal mines, each of which employed more than 1,000 workers.
- Most of the region's resource industry workers in June 2025 were engaged in coal mining (44,580 persons or 94%), with the balance (2,950 persons or 6%) in other resource industries.
- By employment status, almost 6 in 10 of the Bowen Basin's resource industry workers in June 2025 were contractors (27,460 persons or 58%). Around 4 in 10 were employees (20,070 persons or 42%).
- 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 2025 (30,835 persons or 65%). The remainder worked in Central Highlands (11,010 persons or 23%), Banana (4,150 persons or 9%) and Whitsunday (Bowen only) (1,535 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 25% (11,865 persons) of the region's workforce. Almost all these workers were contractors (11,510 persons). *continued*

- Of the 35,665 resource industry workers in the Bowen Basin in June 2025 whose place of residence was known:
 - 9,335 persons (or 26%) lived and worked in the same LGA
 - 26,330 persons (or 74%) worked in a different LGA from where they lived
 - 13,090 persons (or 37% of those with a known place of residence) came from other Bowen Basin LGAs or elsewhere in Central Queensland
 - 13,240 persons (or 37% of those with a known place of residence) lived elsewhere in Queensland, or interstate or overseas.

Workforce characteristics

In June 2025, the Bowen Basin had a resource industry workforce of around 47,530 persons (Table 1). Isaac accounted for around two-thirds of the region's total resource industry workforce (30,835 persons or 65%). The remainder worked in Central Highlands (11,010 persons or 23%), Banana (4,150 persons or 9%) and Whitsunday (Bowen only) (1,535 persons or 3%).

There were 47 operating coal mines in the region, as well as other resource operations in June 2025. Isaac had eight of the region's 13 largest coal mines, each of which employed more than 1,000 workers (Figure 2).

At the time of QGSO's survey in June 2025, most of the region's resource industry workers were engaged in coal mining (44,580 persons or 94%) (Table 1). Most coal mining workers in the region were engaged in production activities, while project construction and maintenance activities at some mines also contributed to the total (QGSO, 2025). The balance of the workforce (2,950 persons or 6%) worked in other resource industries.

At the LGA level, resource industry workers in Isaac and Central Highlands in June 2025 were engaged predominantly in coal mining (96% and 99% respectively). The LGAs of Banana and Whitsunday (Bowen only) had smaller proportions of coal mining workers (70% and 72% respectively), with the balance employed in other resource industries.

Table 1 Resource industry workforce by sector of employment, Bowen Basin LGAs, June 2025

Place of work	Coal mining	Other resource industry ^(a)	Total	Coal mining	Other resource industry ^(a)	Total
	— persons —			— % —		
Banana	2,910	1,240	4,150	70	30	100
Central Highlands	10,910	100	11,010	99	1	100
Isaac	29,660	1,175	30,835	96	4	100
Whitsunday (Bowen only)	1,100	435	1,535	72	28	100
Bowen Basin total	44,580	2,950	47,530	94	6	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

Figure 2 Existing resource operations and projects under construction^(a), Bowen Basin, June 2025

(a) Coal mines by workforce size are based on numbers at June 2025 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 12–13) for a full list of existing operations and projects by LGA.

Sources: RSHQ, 2025; QGSO, 2025

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 2025

	persons	%
Employees	20,070	42
Contractors	27,460	58
Total workforce	47,530	100

(a)

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

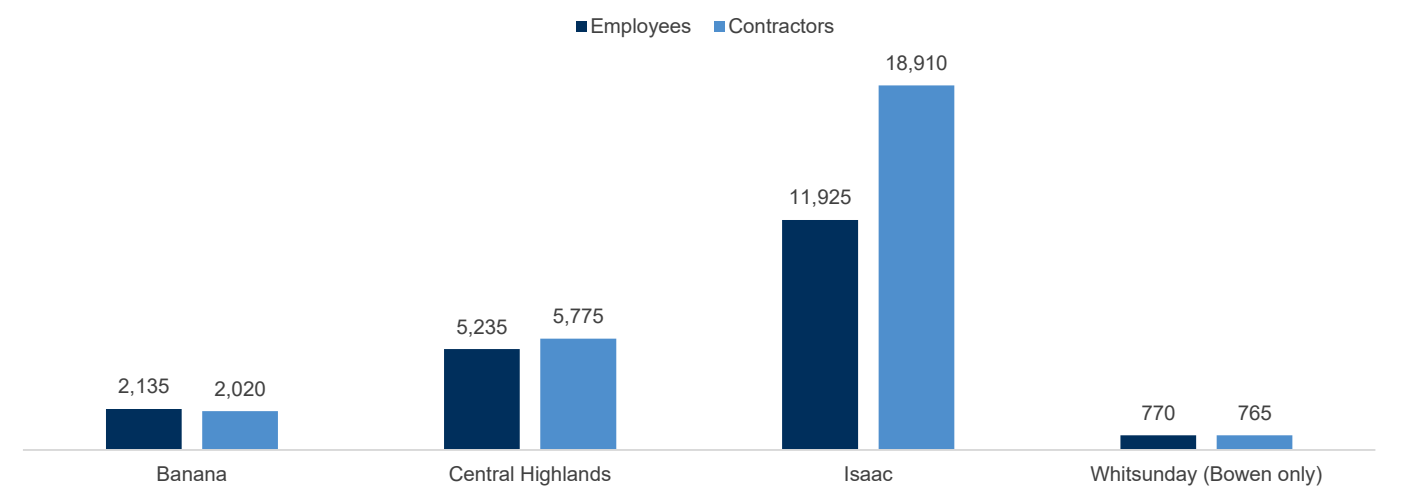
Source: QGSO estimates

According to their employment status, almost 6 in 10 of the Bowen Basin’s resource industry workers in June 2025 were contractors (27,460 persons or 58%) (Table 2). Around 4 in 10 were employees (20,070 persons or 42%).

At the LGA level, Isaac had the largest contractor workforce, both in magnitude (18,910 persons) and proportionally (61% of Isaac’s workforce). Similar to the pattern in the overall workforce, Central Highlands (5,775 persons or 52%) had the second largest contractor workforce, followed by Banana (2,020 persons or 49%), and Whitsunday (Bowen only) (765 persons or 50%) (Figure 3).

Isaac had the greatest concentration of coal operations and projects (Table 9) and the largest resource industry workforce in the region in June 2025. Contractors in Isaac comprised the single largest group of resource industry workers in the Bowen Basin, accounting for 40% of the region’s workforce in June 2025. Employees in Isaac were the second-largest group, contributing one-quarter of the total regional workforce (11,925 persons or 25%).

Figure 3 Resource industry workforce by employment status^(a), Bowen Basin LGAs, June 2025



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

The Bowen Basin’s resource industry workforce includes 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 2025, around 9,335 persons (or 20% of the region's resource industry workforce) were residents who lived and worked in the same Bowen Basin LGA (Table 3). A further 26,330 persons (or 55%) were non-residents who lived outside of the LGA where they worked.

Place of residence was reported as unknown for the remaining 11,865 persons (or 25%). 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.

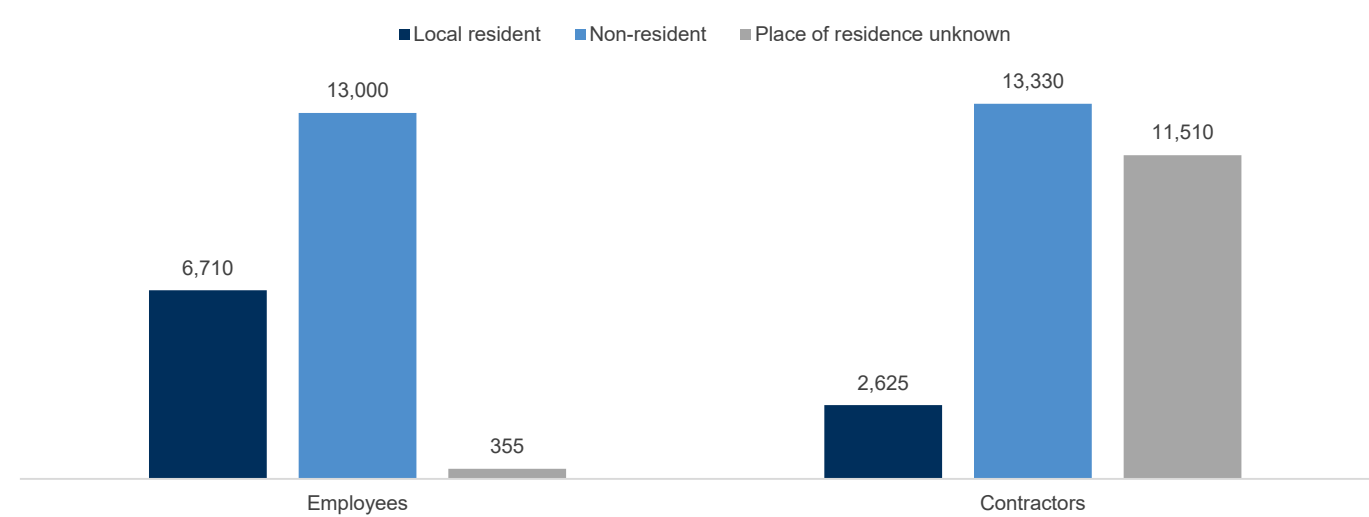
Table 3 Resource industry workforce by residential status^(a), Bowen Basin, June 2025

	persons	%
Local resident	9,335	20
Non-resident	26,330	55
Place of residence unknown	11,865	25
Total workforce	47,530	100

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

Figure 4 illustrates these differences in reporting of residential status for employees and contractors in the Bowen Basin in June 2025. For employees, around 6,710 persons (or 33%) were reported to be residents, while 13,000 persons (or 65%) were non-residents. Just 2% of employees, or 355 persons, were recorded by respondents as having an unknown place of residence. In contrast, place of residence was unknown for 42% of contractors (or 11,510 persons). Given the under reporting of place of residence of contractors, the residential status of this group cannot be determined with the same degree of certainty as for employees.

Figure 4 Resource industry workforce by employment status^(a) and residential status^(b), Bowen Basin, June 2025



(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 provides 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 or fly in/fly out from South East Queensland and further afield.

As mentioned earlier, place of residence was unknown for 11,865 persons or 25% of resource industry workers in the Bowen Basin in June 2025, most of whom were contractors.

Of the 35,665 persons where place of residence was known, around 9,335 lived and worked in the same Bowen Basin LGA (Table 4, Figure 6). This equates to 26% of those with a known place of residence.

A further 13,090 persons (or 37% of those with a known place of residence) came from other Bowen Basin LGAs or elsewhere in Central Queensland. This included 1,450 persons (or 4%) from other Bowen Basin LGAs, 7,785 persons (or 22%) from the Mackay region and 3,855 persons (or 11%) from the Rockhampton/Gladstone region.

In June 2025, 13,240 workers (or 37% of those with a known place of residence) came from elsewhere in Queensland, or interstate or overseas.

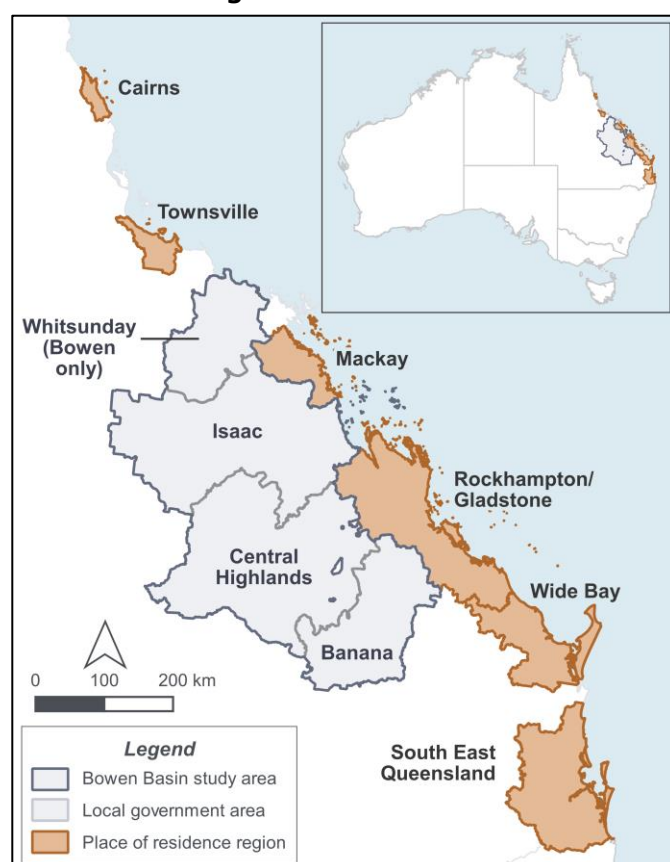
Table 4 Resource industry workforce by place of residence, Bowen Basin, June 2025

Place of residence ^(a)	Place of work – Bowen Basin — persons —
Local LGA	9,335
Other Bowen Basin LGA	1,450
Mackay region	7,785
Rockhampton/Gladstone region	3,855
Central Queensland	22,425
Cairns region	665
Townsville region	1,625
Wide Bay region	1,025
South East Queensland region	7,065
Other Queensland regions	2,225
Interstate or overseas	635
Total with place of residence known	35,665
Unknown	11,865
Total workforce	47,530

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

Source: QGSO estimates

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



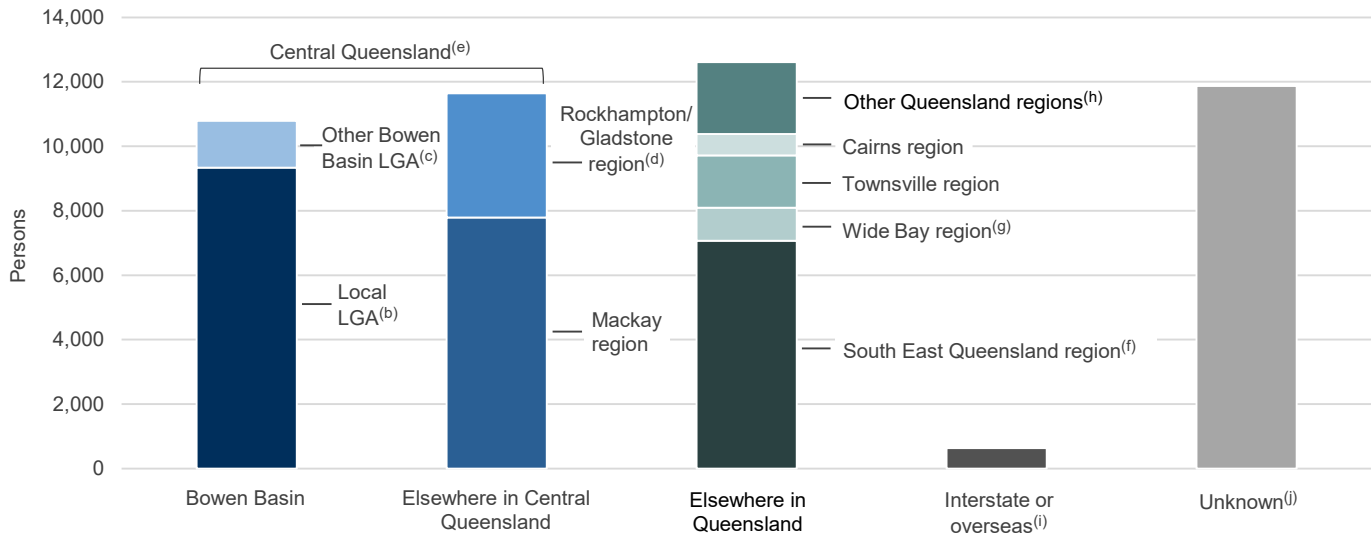
(a) Refer to footnotes below Figure 6 for explanation of 'place of residence'.

Source: QGSO

South East Queensland was a key source of resource industry workers in the Bowen Basin in June 2025, contributing around 7,065 persons, or 20% of Bowen Basin resource industry workers with a known place of residence. Around 1,625 persons (or 5%) were reported as being residents of the Townsville region. A further 1,025 persons (or 3%) came from the Wide Bay region, and 665 persons (or 2%) came from the Cairns region.

In June 2025, around 2,225 persons or 6% of Bowen Basin resource industry workers with a known place of residence lived in other Queensland regions not specifically identified in place of residence categories used in this report. Finally, 635 persons or 2% lived interstate or overseas.

Figure 6 Resource industry workforce by place of residence^(a), Bowen Basin, June 2025



(a) Refer to Notes at end of report for further information on place of residence.

(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) Central Queensland comprises the Bowen Basin region, Rockhampton/Gladstone region and Mackay region.

(f) South East Queensland region includes the major population centres of Brisbane, Gold Coast and Sunshine Coast.

(g) Wide Bay region includes the urban centres of Bundaberg, Hervey Bay and Maryborough.

(h) 'Other Queensland regions' refers to all other locations not specifically identified in Queensland.

(i) 'Interstate or overseas' refers to all other locations outside of Queensland.

(j) 'Unknown' refers to workers whose place of residence was reported as unknown in QGSO's 2025 Resource Employment Survey.

Source: QGSO estimates

Banana

Banana was home to three coal mines, two gas operations, one renewable energy project under construction, a metalliferous mine, and a coal-fired power station in June 2025 (Figure 2, Table 9). Dawson mine, the largest coal mine in the LGA, engaged more than 1,000 workers (RSHQ, 2025).

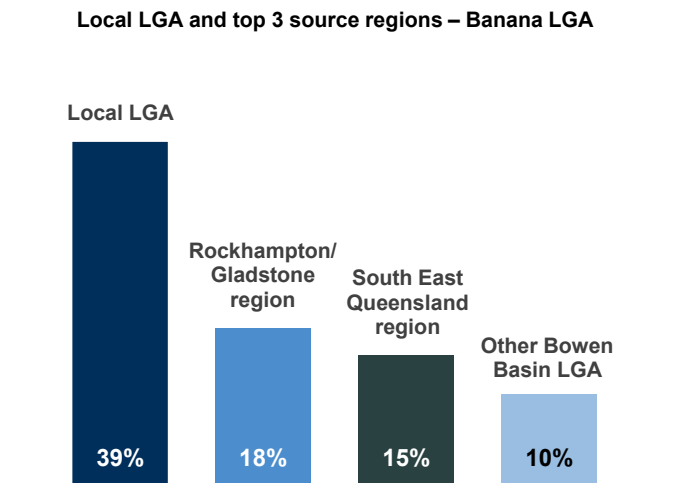
In June 2025, Banana LGA had a resource industry workforce of 4,150 persons, representing 9% of the regional total (Table 5).

Place of residence was known for 3,265 persons in Banana in June 2025, or 79% of the LGA's total resource industry workforce. Of these, more than one-third lived locally in towns such as Moura and Biloela (1,265 persons or 39%).

For non-resident workers in Banana in June 2025, the top source region was Rockhampton/Gladstone (575 persons or 18% of those with a known place of residence) (Figure 7). This region is connected to Banana via major roads and highways.

South East Queensland (475 persons or 15%) was the second-largest source region for non-resident resource industry workers in Banana in June 2025.

Figure 7 Resource industry workforce by place of residence^(a), Banana, June 2025



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

Banana at a glance

- Banana accounted for 9% of the Bowen Basin's resource industry workforce in June 2025.
- Around 7 in 10 workers (70%) in the resource industry were in coal mining.
- Just over half (51%) of the workforce were employees, while the remaining 49% were contractors.
- Place of residence was known for 79% of the workforce. Place of residence was unknown for 21% of the workforce.
- Of those with a known place of residence:
 - 39% lived in the local LGA
 - 31% lived in other Bowen Basin LGAs or elsewhere in Central Queensland
 - 30% lived elsewhere in Queensland, or interstate or overseas.

Table 5 Resource industry workforce by place of residence, Banana, June 2025

Place of residence ^(a)	Place of work – Banana
	— persons —
Local LGA	1,265
Other Bowen Basin LGA	330
Mackay region	100
Rockhampton/Gladstone region	575
Central Queensland	2,275
Cairns region	15
Townsville region	15
Wide Bay region	290
South East Queensland region	475
Other Queensland regions	175
Interstate or overseas	15
Total with place of residence known	3,265
Unknown	885
Total workforce	4,150

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

Central Highlands

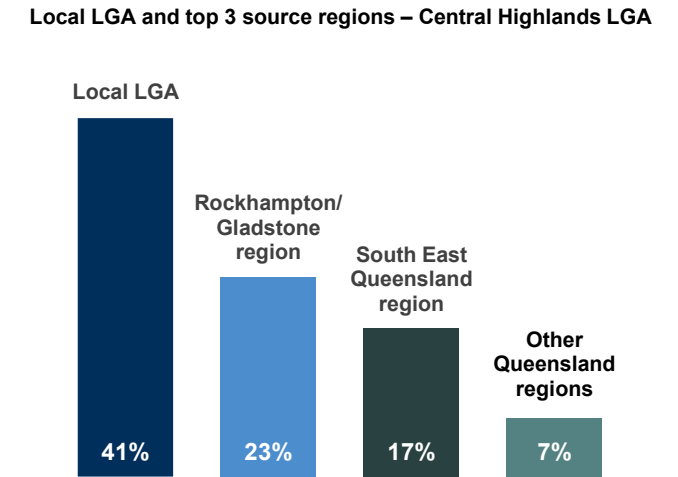
There were 12 coal mines and three gas operations in Central Highlands in June 2025 (Figure 2, Table 9). The four largest coal mines in the LGA—Curragh, Blackwater, Rolleston and Oaky Creek—each accounted for more than 1,000 workers (RSHQ, 2025).

Central Highlands LGA had a resource industry workforce of 11,010 persons in June 2025, representing 23% of the regional total (Table 6).

Place of residence was known for 7,815 persons, or 71% of Central Highland’s resource industry workforce in June 2025. Of these, more than 2 in 5 (3,180 persons or 41%) lived locally in towns such as Emerald and Blackwater.

For non-resident workers in Central Highlands in June 2025, the top source region was Rockhampton/Gladstone (1,770 persons or 23% of those with a known place of residence), followed by South East Queensland (1,320 persons or 17%) (Figure 8). Central Highlands has strong links with the nearby Rockhampton/Gladstone region, with much of the coal produced in the LGA exported via the Blackwater 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.

Figure 8 Resource industry workforce by place of residence^(a), Central Highlands, June 2025



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

Central Highlands at a glance

- Central Highlands accounted for 23% of the Bowen Basin’s resource industry workforce in June 2025.
- Almost all workers (99%) in the resource industry were in coal mining.
- Almost half (48%) of the workforce were employees. Just over half (52%) were contractors.
- Place of residence was known for 71% of the workforce. Place of residence was unknown for 29% of the workforce.
- Of those with a known place of residence:
 - 41% lived in the local LGA
 - 29% lived in other Bowen Basin LGAs or elsewhere in Central Queensland
 - 30% lived elsewhere in Queensland, or interstate or overseas.

Table 6 Resource industry workforce by place of residence, Central Highlands, June 2025

Place of residence ^(a)	Place of work – Central Highlands
	— persons —
Local LGA	3,180
Other Bowen Basin LGA	95
Mackay region	405
Rockhampton/Gladstone region	1,770
Central Queensland	5,445
Cairns region	20
Townsville region	40
Wide Bay region	310
South East Queensland region	1,320
Other Queensland regions	520
Interstate or overseas	160
Total with place of residence known	7,815
Unknown	3,200
Total workforce	11,010

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

Isaac

In June 2025, there were 30 operating coal mines, three renewable energy projects under construction, three related infrastructure operations, and one gas operation in Isaac (Figure 2, Table 9). Each of the eight largest coal mines in the LGA engaged more than 1,000 workers (RSHQ, 2025).

There were 30,835 resource industry workers in Isaac LGA in June 2025, representing almost two-thirds or 65% of the regional total (Table 7).

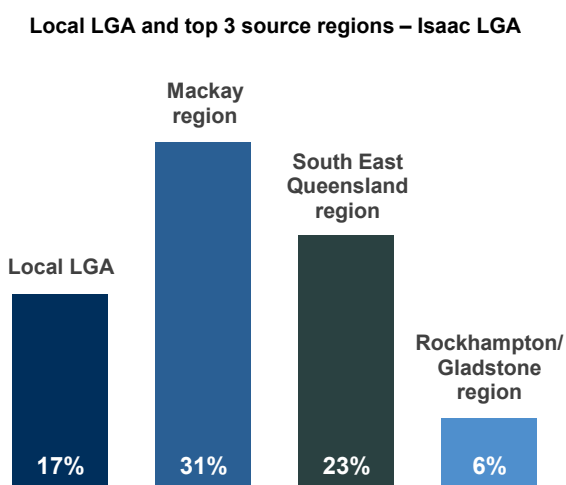
In June 2025, place of residence was known for around 23,055 persons or 75% of Isaac's resource industry workforce. Of these, 4,015 persons (or 17%) lived locally in towns such as Moranbah, Dysart and Middlesmount.

Isaac was the only LGA in the Bowen Basin where the top two source regions each contributed more workers than the local LGA. The adjoining coastal region of Mackay was the top source region for non-resident workers in Isaac in June 2025

(7,130 persons or 31% of those with a known place of residence) (Figure 9). 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.

Isaac's second-largest source region was South East Queensland, contributing 5,230 non-resident resource industry workers (or 23%) in June 2025. Isaac is serviced by regular commercial and charter flights from South East Queensland.

Figure 9 Resource industry workforce by place of residence^(a), Isaac, June 2025



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

Source: QGSO estimates

Isaac at a glance

- Isaac accounted for 65% of the Bowen Basin's resource industry workforce in June 2025.
- Almost all workers (96%) in the resource industry were in coal mining.
- 39% of the workforce were employees, while the remaining 61% were contractors.
- Place of residence was known for 75% of the workforce. Place of residence was unknown for 25% of the workforce.
- Of those with a known place of residence:
 - 17% lived in the local LGA
 - 42% lived in other Bowen Basin LGAs or elsewhere in Central Queensland
 - 41% lived elsewhere in Queensland, or interstate or overseas.

Table 7 Resource industry workforce by place of residence, Isaac, June 2025

Place of residence ^(a)	Place of work – Isaac
	— persons —
Local LGA	4,015
Other Bowen Basin LGA	1,000
Mackay region	7,130
Rockhampton/Gladstone region	1,485
Central Queensland	13,635
Cairns region	610
Townsville region	1,255
Wide Bay region	425
South East Queensland region	5,230
Other Queensland regions	1,455
Interstate or overseas	440
Total with place of residence known	23,055
Unknown	7,780
Total workforce	30,835

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

Whitsunday (Bowen only)

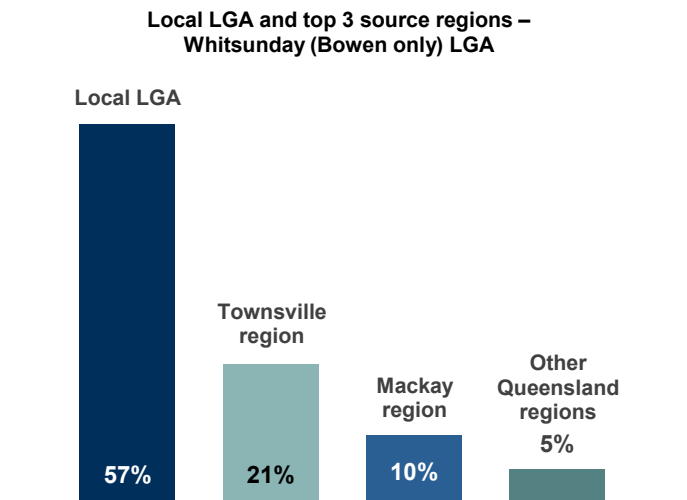
In June 2025, there were two coal mines in Whitsunday (Bowen only), both of which employed fewer than 1,000 persons (RSHQ, 2025). Related infrastructure in the LGA included Carmichael Rail Network and the port of Abbot Point, which exports coal from mines in the northern Bowen Basin (Figure 2, Table 9).

There were 1,535 resource industry workers in the LGA of Whitsunday (Bowen only) in June 2025, representing 3% of the regional total (Table 8). Around 7 in 10 resource industry workers were in coal mining, with the balance of the workforce engaged in other resource industries.

Place of residence was known for almost all resource industry workers in Whitsunday (Bowen only) in June 2025. An estimated 870 persons (or 57%) 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.

For non-resident workers in Whitsunday (Bowen only) in June 2025, the top source region was the Townsville region (315 persons or 21%) (Figure 10). Resource operations in Whitsunday (Bowen only) are linked by road to the major regional city of Townsville to the north of the LGA.

Figure 10 Resource industry workforce by place of residence^(a), Whitsunday (Bowen only), June 2025



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

Whitsunday (Bowen only) at a glance

- Whitsunday (Bowen only) accounted for 3% of the Bowen Basin’s resource industry workforce in June 2025.
- 72% of workers in the resource industry were in coal mining.
- Half (50%) of the workforce were employees and half were contractors.
- Place of residence was known for all 1,535 workers of the workforce.
- Of those with a known place of residence:
 - 57% lived in the local LGA
 - 13% lived in other Bowen Basin LGAs or elsewhere in Central Queensland
 - 30% lived elsewhere in Queensland, or interstate or overseas.

Table 8 Resource industry workforce by place of residence, Whitsunday (Bowen only), June 2025

Place of residence ^(a)	Place of work – Whitsunday (Bowen only)
	— persons —
Local LGA	870
Other Bowen Basin LGA	25
Mackay region	150
Rockhampton/Gladstone region	25
Central Queensland	1,070
Cairns region	15
Townsville region	315
Wide Bay region	0
South East Queensland region	45
Other Queensland regions	70
Interstate or overseas	15
Total with place of residence known	1,535
Unknown	0
Total workforce	1,535

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

Table 9 Existing resource operations and projects under construction^(a), Bowen Basin LGAs, June 2025

Category	Operation / project name	Company name
Banana		
CM	Baralaba North	Baralaba Coal Company
RE	Boulder Creek Wind Farm ^(b)	Aula Energy
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 ^(c)
CSG	Greater Meridian	WestSide Corporation
Central Highlands		
CM	Blackwater	Whitehaven Coal
CM	Cook Colliery	Constellation Mining
CM	Curragh	Coronado Coal
CSG	Denison North (Rolleston)	Denison Gas
CM	Ensham	Ensham Resources
CSG	GLNG Operations and Development	GLNG ^(c)
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
CSG	Reid's Dome/Rolleston West	State Gas
CM	Rolleston	Glencore Coal
CM	Wilton-Fairhill	Futura Resources
CM	Yarrabee	Yancoal Australia
Isaac		
CM	Aquila	Anglo American
CM	Blair Athol	TerraCom
CM	Broadlea	Fitzroy Mining Operations
CM	Broadmeadow	BHP
RE	Broadsound Solar Farm	Iberdrola Australia
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
CM	Caval Ridge	BHP
CM	Centurion	Peabody Energy

Category	Operation / project name	Company name
RE	Clarke Creek Wind Farm	Squadron Energy
CM	Clermont	Glencore Coal
CM	Coppabella	Peabody Energy
RI	Coppabella Train Loadout Facility	Pacific National
CM	Daunia	Whitehaven Coal
CM	Foxleigh	Middlemount South
CM	Goonyella Riverside	BHP
CM	Grosvenor ^(d)	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
RE	Lotus Creek Wind Farm	CS Energy
CM	Middlemount	Middlemount Coal
CM	Moorvale	Peabody Energy
RI	Moranbah Ammonium Nitrate Plant	Dyno Nobel
CSG	Moranbah Gas Project	QPM Energy
CM	Moranbah North	Anglo American
RI	Nebo Train Support Facility	Pacific National
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
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 mining operations, metalliferous mines, gas operations, resource industry related infrastructure, and projects under construction as at June 2025. Operations that have ceased production or were in care and maintenance, including Bluff in Central Highlands, Millennium and Newlands in Isaac, and Mt Carlton in Whitsunday (Bowen only) are not included in this list.

(b) Boulder Creek Wind Farm is predominantly located in Rockhampton LGA, which is out of scope.

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

(d) Mining operations at Grosvenor remained suspended in June 2025 following an underground fire in June 2024 (Anglo American, 2025).

Source: QGSO 2025

Notes

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 the former Bowen Shire.

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

Survey scope

Data in this report are derived from annual surveys conducted by QGSO in 2025 and other sources. The scope of the Resource Employment Survey covered all resource industry companies with existing operations and projects under construction in the Bowen Basin as at June 2025. Operations that had ceased production or were in care and maintenance in June 2025 are included in workforce estimates if worker numbers were supplied to QGSO in the Resource Employment Survey.

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

Data coverage

In the 2025 Resource Employment Survey, reported data included numbers and place-of-residence characteristics of employees and contractors at resource operations, as well as those of workers engaged in project construction or outsourced maintenance activities such as major plant shutdowns.

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, 2025* 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 were able to report the place of residence of their employees. Fewer could report this information for their contractors, as resource industry companies who engage contractors may not have oversight of their place of residence. In the 2025 survey, place of residence was reported as unknown for 2% of employees and 42% 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.

Sources

Anglo American (2025) *Production Report for the second quarter ended 30 June 2025*, 24 July 2025

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