

Bowen Basin population report, 2024

Introduction

The resource sector in regional Queensland utilises fly-in/fly-out and drive-in/drive-out (FIFO/DIDO) workers as a source of labour supply. These non-resident workers live in regional areas while on-shift. The Australian Bureau of Statistics' (ABS) resident population estimates for these areas do not include non-resident workers.

The non-resident population represents the number of FIFO/DIDO workers who are on-shift in the region at a given point in time. This group includes those employed in construction, production and maintenance at mining and gas industry operations, related infrastructure operations and renewable energy projects.

This report provides non-resident population estimates for the Bowen Basin during the last week of June 2024. It also includes full-time equivalent (FTE) population estimates, which aggregate the resident and non-resident populations to provide a more complete indicator of demand for certain services.

Estimates within this report are derived primarily from the annual Survey of Accommodation Providers conducted by the Queensland Government Statistician's Office (QGSO). The survey includes worker accommodation villages (WAVs), hotels, motels, and caravan parks.

Key findings

Key findings of this report include:

- The Bowen Basin's non-resident population in June 2024 (23,825 persons) was the highest recorded since the peak of the resource construction boom in June 2012 (25,035 persons).
- The region's non-resident population grew by 1,600 persons (or +7%) between June 2023 and June 2024.
- Most non-resident workers on-shift in the region in June 2024 were engaged in production at existing coal mines. Maintenance and project construction at some coal mines also contributed to the region's non-resident population. Wind farm construction and power station works boosted the non-resident population in some areas.
- At the LGA level, Isaac had the largest non-resident population in the Bowen Basin in June 2024 (15,810 persons or 66% of the region's total). The remaining non-resident population was in Central Highlands (5,555 persons or 23%), Banana (1,945 persons or 8%) and Whitsunday (Bowen only) (515 persons or 2%).
- Three of the four LGAs in the Bowen Basin recorded non-resident population growth in the year to June 2024—Isaac (+1,315 persons, +9%), Central Highlands (+420 persons, +8%) and Banana (+95 persons, +5%). In contrast, the non-resident population of Whitsunday (Bowen only) declined over this period (−230 persons, −31%).
- The Bowen Basin had an estimated FTE population of 106,590 persons in June 2024, comprising 82,765 residents and 23,825 non-resident workers on-shift.
- WAVs housed the majority of non-resident workers on-shift in the region in June 2024 (20,500 persons or 86% of the region's non-resident population). The remaining non-resident workers (3,325 persons or 14%) stayed in other accommodation such as hotels/motels and caravan parks.
- The Bowen Basin's WAV bed capacity totalled 29,875 beds in June 2024, an increase of 30 beds over the year.
- The proportion of vacant and available hotel/motel rooms in the region fell to 20% in June 2024, from 21% a year earlier.

Figure 1 Bowen Basin region



The Bowen Basin – at a glance

The Bowen Basin (Figure 1) is Queensland's most important source of coking coal. The region comprises the local government areas (LGAs) of Banana, Central Highlands, Isaac and Whitsunday (Bowen only).

Estimated population at June 2024:

Non-resident population.....	23,825
Resident population.....	82,765
Full-time equivalent population.....	106,590

Bowen Basin update, 2023–24

The Bowen Basin in Central Queensland (Figure 3) contains most of Australia's high quality metallurgical coal reserves, as well as significant deposits of thermal coal. As at June 2024, there were 48 coal mines and one metalliferous mine in operation in the region, along with coal seam gas (CSG) and conventional gas operations, and related infrastructure operations (Table 6).

Saleable coal production from Bowen Basin coal mines in 2023–24 was 209.0 Mt, compared with a total of 209.7 Mt in 2022–23 (Queensland Government, 2024; QGSO, 2023). Although annual production fell slightly, some Bowen Basin coal producers reported strong production in June quarter 2024 (Anglo American, 2024b; Bowen Coking Coal, 2024a; Coronado, 2024; Stanmore Resources, 2024b; Whitehaven Coal, 2024).

In contrast to the small reduction in saleable coal production, coal industry employment increased over the year to June 2024. The Bowen Basin's coal industry workforce was approximately 44,200 persons in June 2024, an annual increase of about 1,300 persons or 3.1% (RSHQ, 2024). Most of these workers were engaged in mining production, while maintenance and project construction activities at some mines also contributed to the increase in worker numbers.

Changes at Bowen Basin mines during 2023–24 included the following:

- **Mt Carlton** gold mine in Whitsunday (Bowen only) was placed on care and maintenance in July 2023 (McGrath Nicol, 2023). **Bluff** coal mine transitioned to care and maintenance in the March quarter 2024 (Bowen Coking Coal, 2024b).
- Production at **Grosvenor** mine was suspended following an underground coal gas ignition incident on 29 June 2024 (Anglo American, 2024a). Operations at **Millennium** complex ceased on 28 June 2024 (Stanmore Resources, 2024a).
- **Olive Downs Complex** produced and shipped its first coal in January 2024 (Pembroke Resources, 2024). The first pit at **Wilton–Fairhill** mine started in December 2023, with first coal railed and sold in March 2024 (Futura Resources, 2024).
- Redevelopment continued at Peabody Energy's **Centurion** mine (formerly North Goonyella), with first development coal produced in June 2024 (Peabody Energy, 2024).
- Mine rehabilitation works at **Newlands** mine near Glenden advanced during the year (Glencore, 2024). Newlands came to the end of its mine life in February 2023.

Construction work on stage one of the 450 MW **Clarke Creek Wind Farm** in Isaac progressed in 2023–24. At the end of June 2024, 25 of a total of 100 wind turbines had been installed and additional civil work was continuing, with about 350–400 workers onsite daily (Squadron Energy, 2024).

Work on CS Energy's **Callide Power Station** near Biloela continued during the year to June 2024. Callide Unit C4 returned to service in August 2024 following the rebuild of the generating unit and cooling tower (CS Energy, 2024).

Operations and development works at **Santos GLNG's** Arcadia and Fairview gas fields in the southern Bowen Basin were ongoing in 2023–24 (Santos, 2024). Other companies also maintained their gas operations in the region (Denison Gas, 2024; QPM, 2024; WestSide Corporation, 2024).

Overall, coal mining continued to account for most resource industry employment in the Bowen Basin in the year to June 2024. While most non-resident workers on-shift were engaged in production at existing mines, maintenance and project construction activities also contributed to the region's non-resident population. Renewable energy construction and power station works boosted the non-resident population in some areas.

Non-resident population

At the end of June 2024, the Bowen Basin's non-resident population was estimated at 23,825 persons, an increase of 1,600 persons (or +7%) from June 2023 (Table 1).

Two-thirds (66%) of non-resident workers on-shift in the region in June 2024 were counted in Isaac (15,810 persons), with the remainder recorded in Central Highlands (5,555 persons or 23%), Banana (1,945 persons or 8%) and Whitsunday (Bowen only) (515 persons or 2%).

Three of the four LGAs in the Bowen Basin recorded non-resident population growth in the year to June 2024. The largest growth occurred in Isaac, where increased activity at some mines and wind farm construction contributed to an increase of 1,315 persons (or +9%). Central Highlands recorded a gain of 420 persons (or +8%) due to expanded activity at existing coal mines and gas operations. Banana grew by 95 persons (or +5%), driven mainly by workers engaged in the Callide Power Station rebuild. In contrast, the non-resident population of

Non-resident population

The non-resident population is the number of fly-in/fly-out or drive-in/drive-out (FIFO/DIDO) workers who are living in the area of their workplace temporarily, and who have their usual place of residence elsewhere.

Due to shift arrangements, not all members of the non-resident workforce are present in the local area at one time. For that reason, the non-resident population refers to the number of non-resident workers on-shift at a given point in time, rather than the total non-resident workforce.

Whitsunday (Bowen only) fell by 230 persons (or –31%) between June 2023 and June 2024, reflecting reduced numbers of workers at Mt Carlton Gold Mine and other mine, rail and port operations.

Table 1 Non-resident population, Bowen Basin LGAs, as at June

LGA	2023	2024	Change, 2023 to 2024	
	— persons —		persons	%
Banana	1,845	1,945	95	5
Central Highlands	5,140	5,555	420	8
Isaac	14,495	15,810	1,315	9
Whitsunday (Bowen only)	745	515	–230	–31
BOWEN BASIN TOTAL	22,225	23,825	1,600	7

Figures in tables in this report have been rounded to the nearest five; see Notes at end of report for details.

Source: QGSO estimates

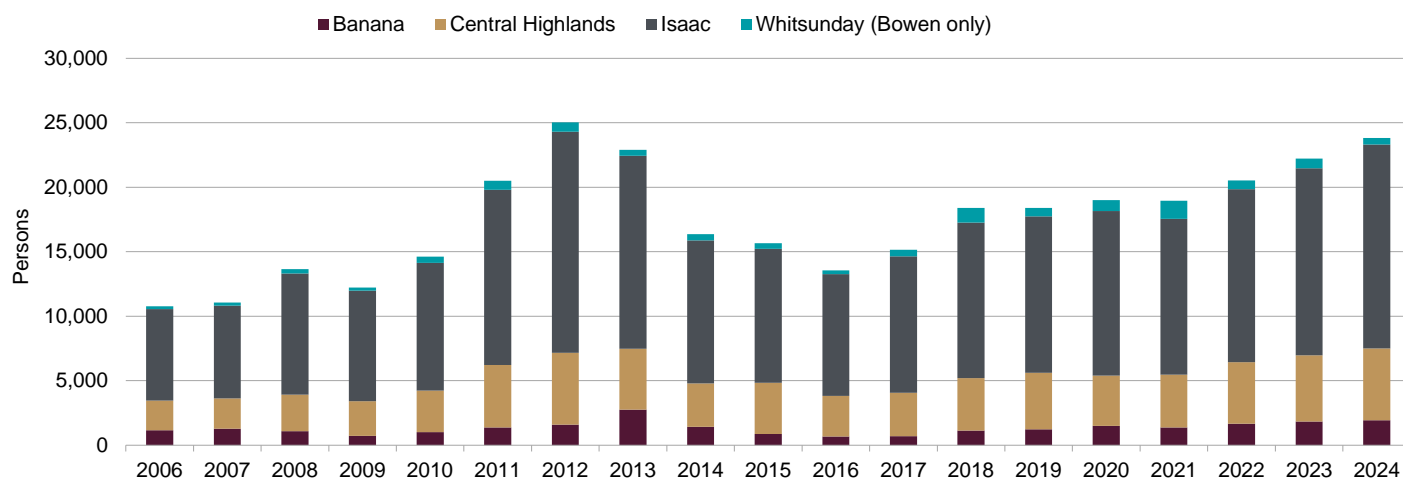
As Figure 2 shows, the Bowen Basin's non-resident population increased from 10,765 persons in 2006 to a peak of 25,035 persons in 2012. This growth was driven by the construction of major resource projects, including new coal mines, mine expansions, and infrastructure associated with major gas developments. The subsequent decline to 13,560 persons in 2016 reflects the transition to the production phase as large, temporary construction workforces were replaced by smaller operational workforces.

Increases in the region's non-resident population between 2016 and 2018 were associated with expanded coal production and projects to sustain ongoing operations rather than major project construction, as mining companies responded to high metallurgical and thermal coal prices. From 2018 to 2021, the Bowen Basin's non-resident population remained relatively stable (between 18,410 persons and 19,005 persons), with ongoing coal production being the main influence on numbers. A variety of other factors—including mine, rail and renewable energy project construction, gas development, and maintenance events—also contributed to the non-resident population in different years and in different LGAs.

Since 2021, the Bowen Basin's non-resident population has grown each year to reach levels not seen since the construction boom in the resources industry from 2011 to 2013. Increased numbers of workers at existing coal operations have driven growth in the non-resident population over the past three years, with most workers engaged in production rather than major project construction.

The Bowen Basin's non-resident population in June 2024 (23,825 persons) was the highest recorded since the peak of the resource industry construction boom in June 2012 (25,035 persons). The increase in the number of non-resident workers on-shift in 2023–24 was due mainly to expanded activities at some existing coal operations, including project construction and maintenance activities at a number of mines. Additional construction workers associated with the Clarke Creek Wind Farm and Callide Power Station rebuild also contributed to the change.

Figure 2 Non-resident population, Bowen Basin LGAs, as at June



Source: QGSO estimates

Figure 3 Existing resource operations and projects under construction^(a), Bowen Basin, June 2024



(a) Coal mines by workforce size are based on numbers at June 2024 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 6 (pages 9–10) for a full list of existing operations and projects by LGA.

Sources: RSHQ, 2024; QGSO, 2024

Full-time equivalent (FTE) population

In June 2024, the Bowen Basin had an estimated FTE population of 106,590 persons, comprising 82,765 residents and 23,825 non-resident workers on-shift (Table 2). Non-resident workers on-shift made up 22% of the region's total FTE population.

Isaac had the region's largest FTE population in June 2024 (39,140 persons), with 15,810 non-resident workers on-shift accounting for 40% of its FTE. The FTE population of Central Highlands was 34,870 persons, with a smaller number and proportion of non-resident workers on-shift (5,555 persons or 16% of its FTE) than in Isaac.

Full-time equivalent population

The FTE population measure is the sum of the resident population (people who live in the area permanently) and the non-resident population (i.e. the number of non-resident workers on-shift).

The FTE population measure provides a more complete estimate of total demand for certain services and infrastructure in regions with a high incidence of FIFO/DIDO workers.

Table 2 FTE population estimates, Bowen Basin LGAs and selected UCLs, June 2024

			Resident population ^(b)	Non-resident population	FTE population
LGA	Location ^(a)	UCL	— persons —		
Banana	In town	Baralaba	265	185	450
		Biloela	5,820	490	6,310
		Moura	2,070	460	2,530
		Taroom	580	20	600
		Other towns ^(c)	710	20	730
	Rural areas		5,600	770	6,370
	Banana total		15,050	1,945	16,995
Central Highlands	In town	Blackwater	4,840	2,040	6,875
		Bluff	245	215	460
		Capella	995	65	1,065
		Emerald	15,195	635	15,830
		Springsure	690	60	750
		Tieri	825	620	1,445
	Other towns ^(c)	1,330	20	1,350	
Rural areas		5,190	1,905	7,095	
Central Highlands total		29,310	5,555	34,870	
Isaac	In town	Clermont	2,170	120	2,290
		Dysart	2,895	2,135	5,030
		Glenden	475	340	815
		Middlemount	1,890	1,390	3,275
		Moranbah	9,495	3,085	12,580
		Nebo	715	400	1,115
	Rural areas		5,690	8,340	14,030
Isaac total		23,325	15,810	39,140	
Whitsunday (Bowen only)	In town	Bowen	10,760	50	10,810
		Collinsville	1,365	435	1,805
		Other towns ^(c)	520	0	520
	Rural areas		2,425	25	2,455
Whitsunday (Bowen only) total		15,075	515	15,590	
BOWEN BASIN TOTAL			82,765	23,825	106,590

(a) Refer to Notes at end of report for explanation of 'in town' and 'rural areas'.

(b) QGSO unpublished data – provisional and subject to revision.

(c) UCLs with only one accommodation provider or fewer than 20 non-resident workers are aggregated in 'Other towns'.

Source: QGSO estimates

Non-resident population distribution

In June 2024, more than half of the Bowen Basin's non-resident population was counted in town (12,785 persons or 54%), with the balance in rural areas (11,040 persons or 46%) (Table 3). Four urban centres and localities (UCLs) had non-resident populations of 1,000 persons or more—Moranbah (3,085 persons), Dysart (2,135 persons), Blackwater (2,040 persons) and Middlesbrough (1,390 persons) (Table 2, page 5).

Growth in the Bowen Basin's non-resident population in the year to June 2024 was led by an increase of 955 persons in rural areas. The number of non-resident workers on-shift counted in town also grew, by 645 persons.

Rural areas in Isaac had the largest non-resident population increase in 2023–24 (+895 persons), driven by coal mining activity and wind farm construction. The non-resident population in town in Isaac also grew (+420 persons), as a result of increased numbers of coal mine workers. Central Highlands experienced growth in both rural areas (245 persons) and in town (170 persons), due to increased activity at existing coal mines and gas operations.

In 2023–24, non-resident population growth in town in Banana (+175 persons) was due mainly to greater numbers of FIFO/DIDO workers engaged in the Callide Power Station rebuild. This increase more than made up for a decline in rural areas of Banana (–80 persons), which was driven by reduced gas activity. In Whitsunday (Bowen only), the non-resident population declined both in town (–125 persons) and in rural areas (–105 persons) due to fewer mine, port and rail workers in town, and the transition of Mt Carlton Gold Mine into care and maintenance.

Table 3 Non-resident population distribution^(a), Bowen Basin LGAs, as at June

LGA	In town	Rural areas	Total	In town	Rural areas	Total
	2024			Change, 2023–24		
	— persons —					
Banana	1,175	770	1,945	175	–80	95
Central Highlands	3,655	1,905	5,555	170	245	420
Isaac	7,470	8,340	15,810	420	895	1,315
Whitsunday (Bowen only)	490	25	515	–125	–105	–230
BOWEN BASIN TOTAL	12,785	11,040	23,825	645	955	1,600

(a) Refer to Notes at end of report for explanation of 'in town' and 'rural areas'.

Source: QGSO estimates

Non-resident worker accommodation

Most non-resident workers on-shift in the Bowen Basin stayed in worker accommodation villages (WAVs), which housed 20,500 persons or 86% of the total in June 2024 (Table 4). Other types of accommodation, including hotels/motels and caravan parks, accounted for the remainder (3,325 persons or 14%). Across the region, WAVs are located both in rural areas and in town, while other establishments (hotels/motels and caravans) are mostly located in town.

Worker accommodation villages (WAVs)

WAVs are commonly used to house non-resident workers on-shift. WAVs typically consist of demountable dwellings arranged in a village, with common dining, laundry and recreational facilities.

The number of non-resident workers on-shift in the Bowen Basin accommodated in WAVs increased by 1,170 persons in the year to June 2024. The number of workers staying in other accommodation also grew (+430 persons) over this period.

At the LGA level, Isaac recorded the largest change in accommodation usage in 2023–24, with 1,215 more non-resident workers on-shift counted in WAVs and 100 more in other accommodation. Wind farm construction and increased activity at some coal mines led to greater demand for WAV accommodation in the LGA. In Central Highlands, the non-resident population in WAVs grew (+245 persons), with increased activity at existing resource operations. Numbers in other accommodation in Central Highlands were also up (+175 persons) due to strong demand from coal mining contractors in some areas. Increased use of other accommodation in Banana (+255 persons) was largely driven by workers engaged in the Callide Power Station rebuild. In Whitsunday (Bowen only), fewer non-resident workers on-shift saw reduced usage of both WAVs and other accommodation.

Table 4 Non-resident population by accommodation type, Bowen Basin LGAs, as at June

LGA	WAVs	Other ^(a)	Total	WAVs	Other ^(a)	Total
	2024			Change, 2023–24		
	— persons —					
Banana	1,175	765	1,945	–160	255	95
Central Highlands	4,630	925	5,555	245	175	420
Isaac	14,300	1,515	15,810	1,215	100	1,315
Whitsunday (Bowen only)	395	120	515	–135	–95	–230
BOWEN BASIN TOTAL	20,500	3,325	23,825	1,170	430	1,600

(a) 'Other' includes hotels/motels, caravan parks and other accommodation. Refer to Notes at end of report for additional information.

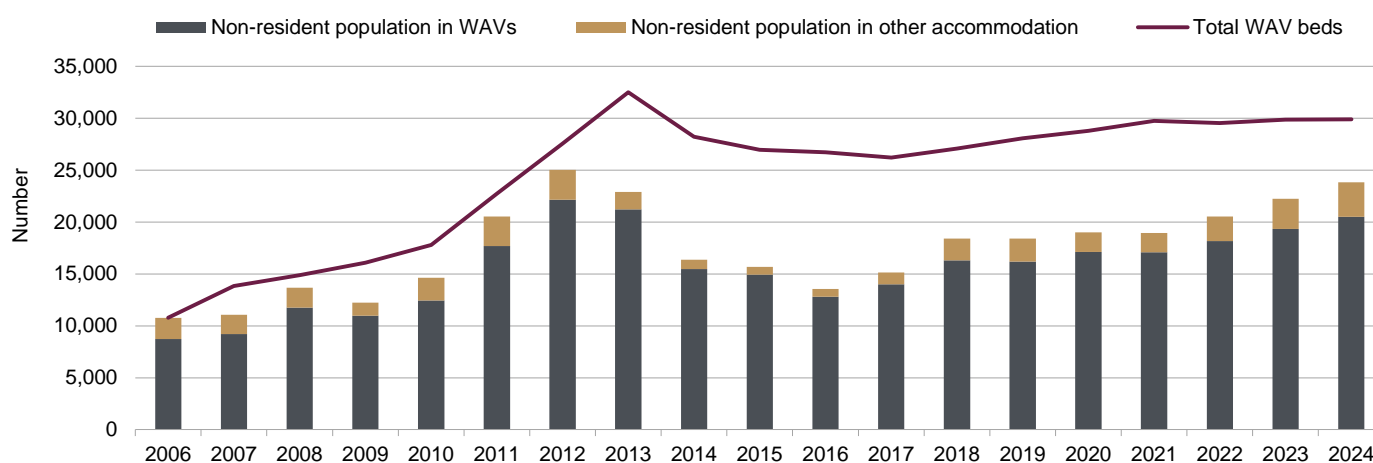
Source: QGSO estimates

WAVs have several advantages over other types of accommodation for housing non-resident workers, including economies of scale for large workforces, the flexibility to expand or contract capacity with changing workforce demand, and the ability to house workers on or near work sites in rural areas. The number of WAV beds across the region varies from year to year as camps open, close (either temporarily or permanently), and change in size in response to demand from industry and the needs of specific projects.

As Figure 4 shows, the number of WAV beds in the region increased along with non-resident population growth over the period leading up to June 2012, and continued to increase in the year to June 2013 despite the decrease in the non-resident population. Rapid growth leading to the peak in 2013 was driven by new camps catering for the large, temporary construction workforces of major gas pipeline and coal projects.

Since 2013, the number of WAV beds in the region has declined overall but remained at a comparatively high level due to ongoing demand for WAV accommodation from operational workforces. The noticeable difference between the number of WAV beds and number of non-resident workers on-shift for much of this period does not necessarily indicate surplus bed availability, as many establishments reserve rooms for workers when they are rostered off.

WAV bed capacity in the Bowen Basin totalled 29,875 beds in June 2024, an increase of 30 beds over the year. This small net gain was largely due to minor changes in capacity at existing WAVs, with additional beds at some WAVs making up for a reduction in capacity at others.

Figure 4 Non-resident population by accommodation type^(a) and WAV bed capacity, Bowen Basin, as at June

(a) 'Other' includes hotels/motels, caravan parks and other accommodation. Refer to Notes at end of report for additional information.

(b) Refer to Notes at end of report for explanation of 'in town' and 'rural areas'.

Source: QGSO estimates

WAVs have been the predominant type of non-resident worker accommodation used in the Bowen Basin since monitoring began in 2006, with much smaller numbers in other accommodation (Figure 4, page 7). Other accommodation types including hotels, motels and caravan parks often cater for additional workers requiring accommodation in periods of high demand from the resources sector.

Since 2021, WAV bed capacity in the region has remained relatively stable even though the non-resident population has increased. This growth has seen more non-resident workers on-shift in both WAVs and other accommodation. The proportion of the non-resident population in other accommodation increased steadily over this period. In June 2024, 14% of non-resident workers on-shift stayed in other accommodation, the highest proportion since 2011 (14%), at the beginning of the resources boom.

With other accommodation, around 20% of hotel/motel rooms in the Bowen Basin were vacant and available in June 2024, down from the proportions in June 2023 (21%) and June 2022 (29%) (Table 5).

At the LGA level, the proportion of vacant and available hotel/motel rooms in Banana declined from 21% in June 2023 to 10% in June 2024, driven by increased demand for accommodation from workers engaged in the Callide Power Station rebuild. In contrast, in Whitsunday (Bowen only) the proportion of vacant and available hotel/motel rooms increased from 23% in June 2023 to 29% in June 2024, due partly to reduced numbers of non-resident workers on-shift.

The vacant and available rate in Isaac was 19% in June 2024, almost unchanged from 20% a year earlier, with continued demand from resource industry workers. There was no change in the proportion of vacant and available hotel/motel rooms in Central Highlands (20%) between June 2023 and June 2024.

Table 5 Vacant and available hotel/motel rooms, Bowen Basin LGAs, as at June

LGA	Occupied by non-resident workers	Vacant and available ^(a)	Balance ^(a)	Total hotel/motel rooms ^(a)	Vacant and available hotel/motel rooms		
					2022	2023	2024
					— % —		
					— rooms —		
Banana	315	50	170	540	29	21	10
Central Highlands	780	280	360	1,420	30	20	20
Isaac	635	160	45	840	36	20	19
Whitsunday (Bowen only)	120	170	290	580	15	23	29
BOWEN BASIN TOTAL	1,850	660	865	3,375	29	21	20

(a) Refer to Notes at end of report for explanation of 'vacant and available' and 'balance'.

Source: QGSO estimates

Table 6 Existing resource operations and projects under construction^(a), Bowen Basin, June 2024

Category	Operation / project name	Company name	LGA
RI	Abbot Point Operations	Abbot Point Bulkcoal	Whitsunday (Bowen only)
CM	Aquila	Anglo American	Isaac
CM	Baralaba North	Baralaba Coal Company	Banana
CM	Blackwater	Whitehaven Coal	Central Highlands
CM	Blair Athol	TerraCom	Isaac
CM	Broadlea	Fitzroy Mining Operations	Isaac
CM	Broadmeadow	BHP	Isaac
CM	Burton Complex	Bowen Coking Coal	Isaac
CM	Byerwen	QCoal Group	Isaac
CM	Callide	Batchfire Resources	Banana
RI	Callide Power Station	CS Energy	Banana
CM	Capcoal Surface Operations	Anglo American	Isaac
CM	Carborough Downs	Fitzroy Mining Operations	Isaac
CM	Carmichael	Bravus Mining and Resources	Isaac
RI	Carmichael Rail Network	Bowen Rail Company	Whitsunday (Bowen only)
CM	Caval Ridge	BHP	Isaac
CM	Centurion	Peabody Energy	Isaac
RE	Clarke Creek Wind Farm	Squadron Energy	Isaac
CM	Clermont	Glencore Coal	Isaac
CM	Collinsville	Glencore Coal	Whitsunday (Bowen only)
CM	Cook Colliery	Constellation Mining	Central Highlands
CM	Coppabella	Peabody Energy	Isaac
RI	Coppabella Train Loadout Facility	Pacific National	Isaac
MM	Cracow Gold Mine	Aeris Resources	Banana
CM	Curragh	Coronado Coal	Central Highlands
CM	Daunia	Whitehaven Coal	Isaac
CM	Dawson	Anglo American	Banana
CSG	Denison North (Rolleston)	Denison Gas	Central Highlands
CM	Ensham	Ensham Resources	Central Highlands
CM	Foxleigh	Middlemount South	Isaac
CSG	GLNG Operations and Development	GLNG ^(b)	Banana, Central Highlands
CM	Goonyella Riverside	BHP	Isaac
CSG	Greater Meridian	WestSide Corporation	Banana
CM	Gregory–Crinum	Sojitz Blue	Central Highlands
CM	Grosvenor ^(c)	Anglo American	Isaac
CM	Hail Creek	Glencore Coal	Isaac
CM	Ironbark No. 1	Fitzroy Mining Operations	Isaac
CM	Isaac Plains Complex	Stanmore Resources	Isaac
CM	Jellinbah East	Jellinbah Group	Central Highlands
CM	Kestrel	Kestrel Coal Resources	Central Highlands
CM	Lake Vermont	Jellinbah Group	Isaac
CM	Meteor Downs South	Sojitz Blue	Central Highlands
CM	Middlemount	Middlemount Coal	Isaac
CM	Millennium ^(d)	Stanmore Resources	Isaac
CM	Moorvale	Peabody Energy	Isaac
RI	Moranbah Ammonium Nitrate Plant	Incitec Pivot	Isaac
CSG	Moranbah Gas Project	Queensland Pacific Metals	Isaac
CM	Moranbah North	Anglo American	Isaac
RI	Nebo Train Support Facility	Pacific National	Isaac
CM	Oaky Creek	Glencore Coal	Central Highlands

Category	Operation / project name	Company name	LGA
CM	Olive Downs Complex	Pembroke Resources	Isaac
CM	Peak Downs	BHP	Isaac
CM	Poitrel	Stanmore Resources	Isaac
CM	QCoal Northern Hub	QCoal Group	Whitsunday (Bowen only)
CSG	Reid's Dome/Rolleston West	State Gas	Central Highlands
CM	Rolleston	Glencore Coal	Central Highlands
CM	Saraji	BHP	Isaac
CM	South Walker Creek	Stanmore Resources	Isaac
CM	Vulcan Mine Complex	Vitrinite	Isaac
CM	Wilton-Fairhill	Futura Resources	Central Highlands
CM	Yarrabee	Yancoal Australia	Central Highlands

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 2024. Operations that have ceased production or were in care and maintenance, including Bluff in Central Highlands, Newlands in Isaac and Mt Carlton in Whitsunday (Bowen only) 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) Anglo American suspended production at Grosvenor mine following an underground coal gas ignition incident on 29 June 2024 (Anglo American, 2024a).
- (d) Operations at Millennium complex ceased on 28 June 2024, with the focus on demobilising all contractors and equipment by the end of the September quarter 2024 (Stanmore Resources, 2024a).

Source: QGSO 2024

Notes

LGA – local government area UCL – urban centre and locality

Place names refer to local government areas unless otherwise specified.

Whitsunday (Bowen only) comprises the statistical areas level 2 (SA2s) of Bowen and Collinsville, which cover the area of former Bowen Shire.

Data in this report are derived from surveys conducted by QGSO in 2024 and other sources. The Survey of Accommodation Providers counted non-resident workers staying in worker accommodation villages (WAVs), hotels, motels, caravan parks and other commercial accommodation during the last week of June 2024. Short-term and overnight visitors are not regarded as non-resident workers. The Resource Employment Survey collected workforce information from all resource companies with existing operations and projects in the Bowen Basin as at June 2024.

Non-resident workers are people who fly-in/fly-out or drive-in/drive-out (FIFO/DIDO) to work and live in the area temporarily while rostered on, and who have their usual place of residence elsewhere. This group includes employees, contractors and associated sub-contractors, employed in construction, production, and maintenance at mining and gas industry operations and projects, renewable energy projects and resource-related infrastructure. Figures in this report refer to the number of non-resident workers on-shift, or present in the area at a given point in time, and should not be confused with total non-resident workforce numbers.

Non-resident population data presented in this report are a point-in-time measure, based on the best information available at the time of the surveys. Non-resident worker numbers may vary in response to changing production demands, prevailing weather and industrial disputes. At the time of the 2024 surveys, the number of non-resident workers on-shift in the Bowen Basin was unaffected by widespread adverse weather events or industrial action.

Resident population estimates for 2024 are unpublished QGSO estimates, which are provisional and subject to revision.

'In town' includes populations counted in defined urban centres and localities (UCLs), as well as non-resident workers housed within 5km of town. 'Rural areas' include populations outside of defined UCLs, including non-resident workers more than 5km from town.

'Other' accommodation includes hotels, motels, caravan parks and other private rental accommodation.

'Vacant and available' refers to hotel/motel rooms that were not occupied by non-resident workers or other guests and were vacant and available on the night of the survey. 'Balance' includes hotel/motel rooms occupied by other guests, rooms that were not occupied but held for non-resident workers under permanent booking arrangements, or rooms unavailable for other reasons.

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 that could be derived from the rounded figures.



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