
Queensland Coal Sector Economic Contribution Study 2024/25

November 2025

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Introduction

Lawrence Consulting was commissioned by the Queensland Resources Council (QRC) to determine the economic benefit of the coal sector to the Queensland economy based on expenditure data provided by its full-member companies and selected key service members. This report provides a detailed summary of the level of direct expenditure into the state economy by the coal sector in 2024/25 and the multiplier and consumption-induced effects that are generated by that initial stimulus.

The focus of this report is to identify the geographical spread of impacts (direct, indirect and consumption-induced) from the coal sector across Queensland at a number of different geographic scales:

- State (the whole area of Queensland);
- Regional (represented by 13 Statistical Divisions in Queensland);
- Local (represented by 78 Local Government Areas in Queensland);
- State electoral divisions (represented by 93 SEDs in Queensland);
and
- Commonwealth electoral divisions (represented by 30 CEDs in Queensland).

This report concentrates more on the state and regional profiles, whilst data tables for LGA, SED and CED areas are contained in the Appendices.

Company Survey

The process was initiated in July 2025 when the QRC surveyed its full member companies, including 34 of the Queensland coal sector's largest producers. Companies were asked to disclose expenditure and other information by postcode in 2024/25 or equivalent reporting years in the following categories:

- Employee salaries and wages (by place of residence) for full-time direct employees and contract workers as well as the number of FTE employees by place of operation;
- Goods and services expenditure by individual supplier, including separate identification of both operational expenditure (opex) data for current projects and capital expenditure (capex) data from projects currently under development;
- Voluntary community contributions by individual organisation;
- Local government payments, including council rates and infrastructure charges; and
- State government payments, including royalties, stamp duty, payroll tax and land tax.

The data was supplied by Australian postcodes where the salary was paid (residence of the direct employee) and where the community contributions and business expenditures were made. The companies that provided expenditure data as part of the study are shown in Table 1.

The postcode spend data were then aggregated using geographical concordance files from the Australian Bureau of Statistics and the economic impacts (direct, indirect and consumption impacts) of the coal sector were analysed at five geographic levels:

- State (the whole area of Queensland);
- Regional (represented by 13 former Statistical Divisions in Queensland);
- Local (represented by 78 Local Government Areas in Queensland);
- State electoral divisions (represented by 93 SEDs in Queensland); and
- Commonwealth electoral divisions (represented by 30 CEDs in Queensland).

Table 1: Queensland Coal Companies Supplying Expenditure Data

| | |
|---|----------------------------------|
| Anglo American Metallurgical Coal Pty Ltd | Kestrel |
| Austchina Holdings Ltd | Marubeni |
| Baralaba Coal | Mastermyne |
| Batchfire | MDP |
| Bengal Energy | Mitsui |
| BHP | New Hope Group |
| Bravus Mining | Peabody Energy Australia Pty Ltd |
| BUMA Australia | Pembroke Resources |
| Coronado Curragh | QCoal Pty Ltd |
| Fitzroy Australia Resources | QMetco |
| Glencore Coal | Sojitz Coal Mining |
| Golding | Stanmore |
| GVK | Terracom |
| HSE | Thiess Pty Ltd |
| Idemitsu | UD Mining (Coal) |
| ITOCHU | Whitehaven |
| Jellinbah Resources Pty Ltd | Yancoal Australia Ltd |

The current analysis of the economic contribution of the coal sector in 2024/25 adopted a similar approach to the application of the base expenditure data provided as utilized during previous studies, specifically:

- Identification and allocation of purchases by region to industry categories based on commodity groupings as used in the input-output modelling, which was done to alleviate any possible supply constraint issues. Similarly, household (or consumption) spending was allocated based on different industry expenditure coefficients for each region;
- Substitution of resource-related expenditure data from major supply chain companies to provide a more accurate assessment of how the sector's transport purchases and contractor activity impact upon the Queensland economy;
- Reallocation of contractor expenditure identified for Brisbane to other regions based on consultation with major providers and distribution patterns for both salary and goods and services expenditure; and
- Removal, where applicable, of direct expenditure related to imports in order to correctly estimate the level of overseas purchases, either capital or operating.

The analysis also contains a number of important differences and improvements from the approach adopted during previous studies, specifically participation by a small number of new respondents who have not previously completed returns, which has had the impact of further improving the accuracy of allocation of spending to regions where activity occurred in 2024/25.

Disclaimer

Lawrence Consulting does not warrant the accuracy of this information and accepts no liability for any loss or damage that you may suffer as a result of your reliance on this information, whether or not there has been any error, omission or negligence on the part of Lawrence Consulting or its employees.

Economic Benefits

Direct Impact

Direct Spending

Expenditure data indicated that the **coal sector contributed \$35.7 billion** in direct spending to the Queensland economy in 2024/25, comprising:

- **\$5.2 billion in wages and salaries** to approximately **31,605 direct fulltime resident employees**, representing an **average salary** level across the sector of **\$164,959** per annum. In addition, there were **16,630 fulltime equivalent contract workers** employed in the coal sector in Queensland in 2024/25;
- **\$24.2 billion in purchases of goods and services from over 7,660 local businesses** (including contract payments), community contributions and payments to local government (including rates, developer contributions and other payments); and
- **\$6.3 billion** in state government payments (including royalties, stamp duty, payroll tax and land tax), although this is considered a conservative figure as not all companies disclosed royalty payments.

Coal mining was the largest contributor to the total direct expenditure of the resources sector in Queensland in 2023/24 with approximately 66.5% of total spending, followed by petroleum & gas (\$9.9 billion, or 18.4%), metals (\$6.3 billion, or 11.8%) and other (\$1.8 billion, or 3.3%).

*The coal sector contributed **\$35.7 billion** in direct spending to the Queensland economy in 2024/25.*

The direct economic stimulus provided by the Queensland coal sector in 2024/25 also extended to other states, with an additional \$12.2 billion in direct spending, which combined with the impact in Queensland for a **total direct impact of \$47.9 billion for the whole of Australia**, comprised of:

- \$5.4 billion in wages and salaries to approximately 32,830 full-time residing employees; and
- \$41.9 billion in purchases of goods and services from local businesses, government (federal, state and local) and community contributions.

When overseas and other unallocated spending of \$1.6 billion was also included, the total direct expenditure relating to the Queensland coal sector was approximately \$48.9 billion in 2024/25.

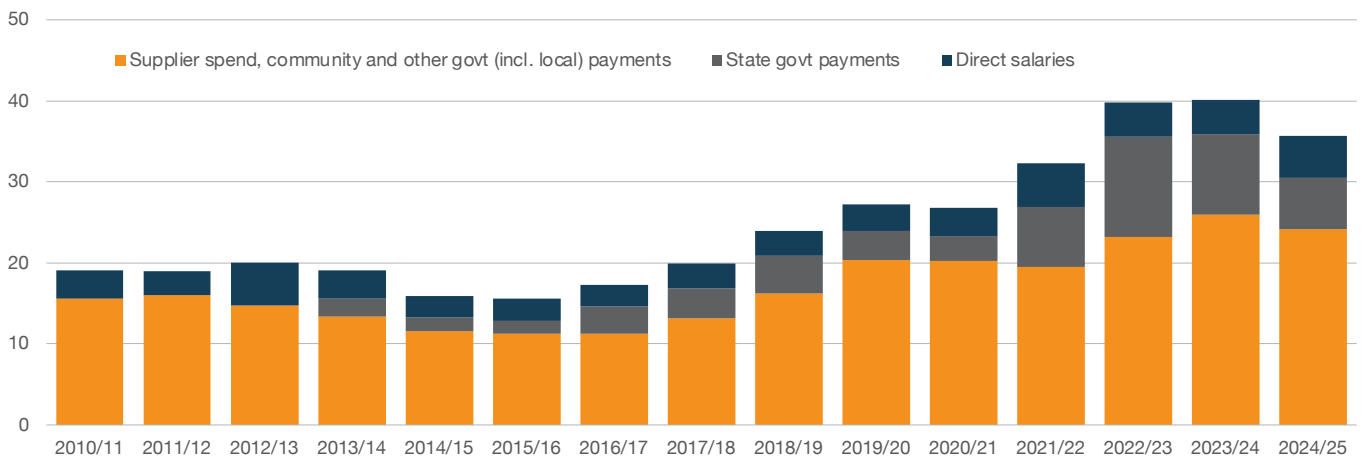
Since 2010/11, the Queensland coal sector has generated **\$371.4 billion in direct spending** – comprised of \$55.4 billion in total wages and salaries and \$316.0 billion in business purchases, community contributions and government payments – and has supported an **average direct workforce of 25,249 jobs per annum**.

Table 2: Direct Impact of Queensland Coal Sector by Commodity Type, 2024/25

| Commodity type | Direct employees (FTEs) | Associated salaries (\$M) | Contract workers (FTEs) | Business purchases, community and govt payments (\$M) | Total direct spending (\$M) | % of total spend | Annual % change |
|-------------------------|-------------------------|---------------------------|-------------------------|---|-----------------------------|------------------|-----------------|
| Coal | 31,605 | 5,213.5 | 16,630 | 30,454.8 | 35,668.3 | 66.5% | -11.2% |
| Petroleum & gas | 4,691 | 954.0 | 1,545 | 8,939.5 | 9,893.5 | 18.4% | 26.1% |
| Metals | 9,928 | 1,422.3 | 1,667 | 4,893.4 | 6,315.8 | 11.8% | 0.3% |
| Other | 3,184 | 469.2 | 1,111 | 1,311.9 | 1,781.1 | 3.3% | -11.4% |
| Total Queensland | 49,408 | 8,059.1 | 20,954 | 45,599.5 | 53,658.6 | 100.0% | -4.7% |

Direct Expenditure of Coal Sector

Queensland (\$ billion, real)



Note: State government payments data only collected from 2013/14 onwards; included in 'Supplier spend, community and other government (including local govt) payments' in years prior to this.

Local Suppliers

Approximately 7,660 local businesses in Queensland received payments for goods and services supplied during 2024/25 to coal mining companies. The highest number of businesses was recorded in the Brisbane region (3,028, followed by Mackay (1,865), Fitzroy (1,417), Darling Downs (325) and Northern (303).

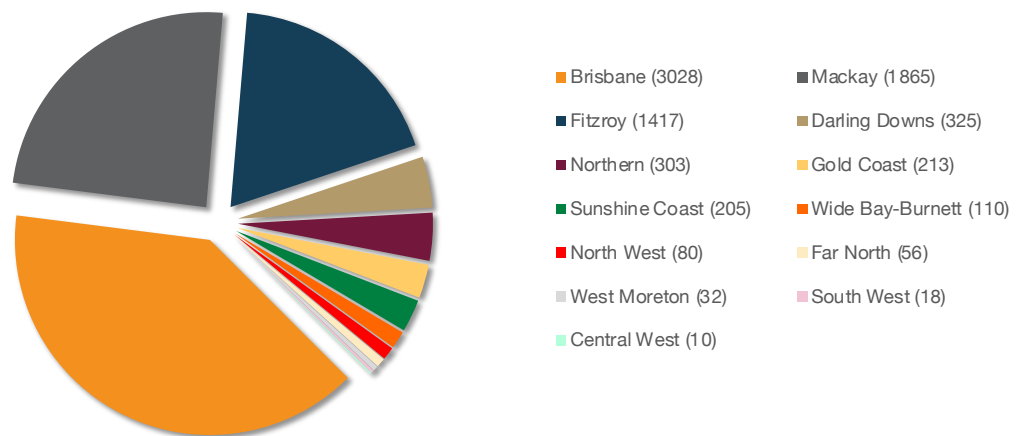
Table 3: Number of Businesses Supported by Region, 2024/25

| Region | Total | % of total |
|-------------------------|--------------|---------------|
| Brisbane | 3,028 | 39.5% |
| Mackay | 1,865 | 24.3% |
| Fitzroy | 1,417 | 18.5% |
| Darling Downs | 325 | 4.2% |
| Northern | 303 | 4.0% |
| Gold Coast | 213 | 2.8% |
| Sunshine Coast | 205 | 2.7% |
| Wide Bay-Burnett | 110 | 1.4% |
| North West | 80 | 1.0% |
| Far North | 56 | 0.7% |
| West Moreton | 32 | 0.4% |
| South West | 18 | 0.2% |
| Central West | 10 | 0.1% |
| Total Queensland | 7,663 | 100.0% |

Note: Only for those companies that provided supplier details. n.p. not publishable data. Duplicates were removed to the best extent practicable to ensure an accurate estimation of the number of businesses supported at both state and regional level.

Local Businesses Supported by Qld Coal Sector by Region

Queensland, 2024/25



Community Support

During 2024/25, the Queensland coal sector directly contributed to 810 separate community groups in a wide range of areas including health, education, environment and the arts. The Mackay region recorded the highest number of community organisations supported (395), followed by Fitzroy (240), Darling Downs (70) and Brisbane (67).

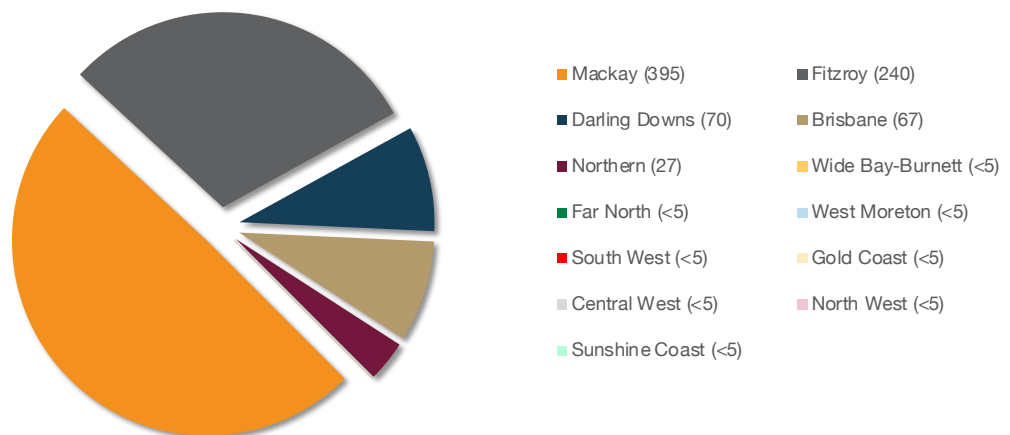
Table 4: Number of Community Organisations Supported by Region, 2024/25

| Region | Total | % of total |
|-------------------------|------------|---------------|
| Mackay | 395 | 48.7% |
| Fitzroy | 240 | 29.7% |
| Darling Downs | 70 | 8.6% |
| Brisbane | 67 | 8.3% |
| Northern | 27 | 3.3% |
| Wide Bay-Burnett | <5 | n.p. |
| Far North | <5 | n.p. |
| West Moreton | <5 | n.p. |
| South West | <5 | n.p. |
| Gold Coast | <5 | n.p. |
| Central West | <5 | n.p. |
| North West | <5 | n.p. |
| Sunshine Coast | <5 | n.p. |
| Total Queensland | 810 | 100.0% |

Note: Only for those companies that provided details. n.p. not publishable data. Duplicates were removed to the best extent practicable to ensure an accurate estimation of the number of individual community organisations supported at both state and regional level.

Community Organisations Supported by Qld Coal Sector by Region

Queensland, 2024/25



Indirect Impact

The input-output (I-O) modelling conducted for this project has estimated the indirect (Type I) and consumption-induced (Type II) effects flowing from the business expenditure, community and government contributions of \$30.5 billion and the employment expenditure of \$5.2 billion. These impacts have been modelled separately and then aggregated to identify the level of impacts on output, incomes, employment and industry value added in Queensland. In 2024/25, the \$35.7 billion in direct spending by the coal sector in Queensland supported additional supply chain and consumption-induced effects of 325,314 fulltime jobs and \$78.9 billion in aggregate spending (\$29.0 billion in wages and salaries and \$49.9 billion in purchases of goods and services).

In 2024/25, the Queensland coal sector supported an additional 325,314 fulltime jobs and \$78.9 billion in aggregate spending (\$29.0 billion in wages and salaries and \$49.9 billion in purchases of goods and services).

Total Impact

The results of the economic modelling allow forecasts to be made about the total size of impacts from the Queensland coal sector on the economy. For each key measure, the total impact on the economy is the sum of the direct effects from industry, the indirect effects through the business chain, and the final consumption-induced effects. The total economic impact (i.e. direct, indirect and induced, or Type II impact) from the coal sector to the Queensland economy in 2024/25 amounted to:

- **\$85.6 billion in output/turnover** (or purchases from supplying businesses);
- **\$75.7 billion in gross value added** (contribution to gross state product);
- **\$34.6 billion in income** (wages and salaries); and
- **360,745 full-time equivalent jobs.**

Estimates of the contribution to Gross State Product (GSP) require an estimate of the initial contribution of the industry in terms of direct value added – defined as compensation of employees plus gross operating surplus plus other taxes less subsidies on production – plus the value added effects generated through the business chain and consumption effects. A precise measure of direct value added for the coal sector is not available from the data; an estimated value added of \$35.7 billion – equivalent to the sum of input and labour costs, or total direct spending – has instead been adopted.

When business supply and employment effects are considered, the Queensland coal sector generated approximately **\$75.7 billion in gross value added** (\$35.7 billion in direct effects, and \$40.1 billion in supply chain and consumption effects) in 2024/25 and was responsible for supporting approximately **360,745 jobs** (31,605 in direct employment and 325,314 in additional employment). This means that the coal sector contributed an estimated **14.8% of Gross State Product** (based on the figure of \$510.7 billion in 2023/24) and **12.3% of total employment** (2,943,964 persons) in Queensland in 2024/25.

*The total economic impact of the Queensland coal sector was estimated at **\$75.7 billion in gross value added and 360,745 jobs supported in 2024/25.***

Under the more conservative Type I scenario (i.e. excluding consumption-induced effects), direct spending by the companies surveyed and flow-on impacts contributed 12.1% to GSP and 7.5% of total state employment.

Since 2010/11, the Queensland coal sector has generated approximately \$786.5 billion in value added and has supported an average workforce of 267,766 jobs per annum.

*Since 2010/11, the Queensland coal sector has generated **\$786.5 billion in value added and has supported an average workforce of 267,766 jobs per annum.***

Table 5: Economic Impact of Queensland Coal Sector, 2024/25

| | Total |
|---|----------------|
| Gross Value Added (\$M) | |
| Direct | 35,668 |
| % of Gross State Product (GSP) | 7.0% |
| Indirect | 25,974 |
| Total GVA (Type I) | 61,642 |
| % of GSP | 12.1% |
| Consumption-induced | 14,078 |
| Total GVA (Type II) | 75,720 |
| % of GSP | 14.8% |
| Employment (FTEs) | |
| Direct | 35,431 |
| % of total state employment | 1.2% |
| Indirect | 185,188 |
| Total employment (Type I) | 220,619 |
| % of total state employment | 7.5% |
| Consumption-induced | 140,126 |
| Total employment (Type II) | 360,745 |
| % of total state employment | 12.3% |
| Business spend (incl. community contributions and govt payments) (\$M) | |
| Direct | 30,094 |
| Indirect | 18,983 |
| Total business spend (Type I) | 49,078 |
| Consumption-induced | 30,954 |
| Total business spend (Type II) | 80,032 |
| Wages & salaries (\$M) | |
| Direct | 5,574 |
| Indirect | 17,798 |
| Total wages & salaries (Type I) | 23,372 |
| Consumption-induced | 11,198 |
| Total wages & salaries (Type II) | 34,569 |

Note: Consumption-induced impacts, i.e. the increase in economic activity generated to service the additional employment generated or sustained through the direct and indirect effects, are included in Type II impacts, but are excluded from Type I impacts. Total figures may not appear as the sum of individual commodities due to rounding errors.

Regional Impact

Direct Spending

The postcode expenditure data provided by companies was aggregated using geographical concordances at the regional (or SD) and local (LGA) levels. Queensland coal sector expenditures, split across salary and supplier and community contribution expenditure, varied considerably across regional areas.

The primary data identified that a significant amount of direct coal sector spending occurs in Brisbane. The I-O model has also allowed for spending leakages to imports in both the first and subsequent rounds of economic activity.

The level of employment, and direct expenditure on employees and business purchases in 2024/25, along with the annual percentage change from 2023/24, is summarised for the 13 major regions in Queensland in Table 6. The data illustrates that the largest proportion of direct expenditure from the coal sector in Queensland in 2024/25 was in the Brisbane (\$15.3 billion), followed by the Mackay (\$7.1 billion), Fitzroy (\$3.9 billion), Sunshine Coast (\$988.2 million) and Gold Coast (\$473.9 million) regions.

Brisbane recorded the largest share of direct expenditure by the coal sector by region in 2024/25 (\$15.3 billion), followed by Mackay (\$7.1 billion) and Fitzroy (\$3.9 billion).

Compared to 2023/24, the West Moreton region recorded the highest annual growth in direct expenditure, increasing considerably by 48.0%, followed by the Wide Bay-Burnett (up 31.5%), Far North (up 25.3%), South West (up 22.1%) and Gold Coast (up 16.9%) regions.

With regard to employment, the largest share of direct full-time resident employees across Queensland was recorded in the Mackay region (10,593 FTEs, or 33.5%), followed by the Fitzroy (7,717 FTEs, or 24.4%) and Brisbane (6,554 FTEs, or 20.7%) regions.

The average salary for coal sector workers in Queensland was approximately \$164,959 in 2024/25.

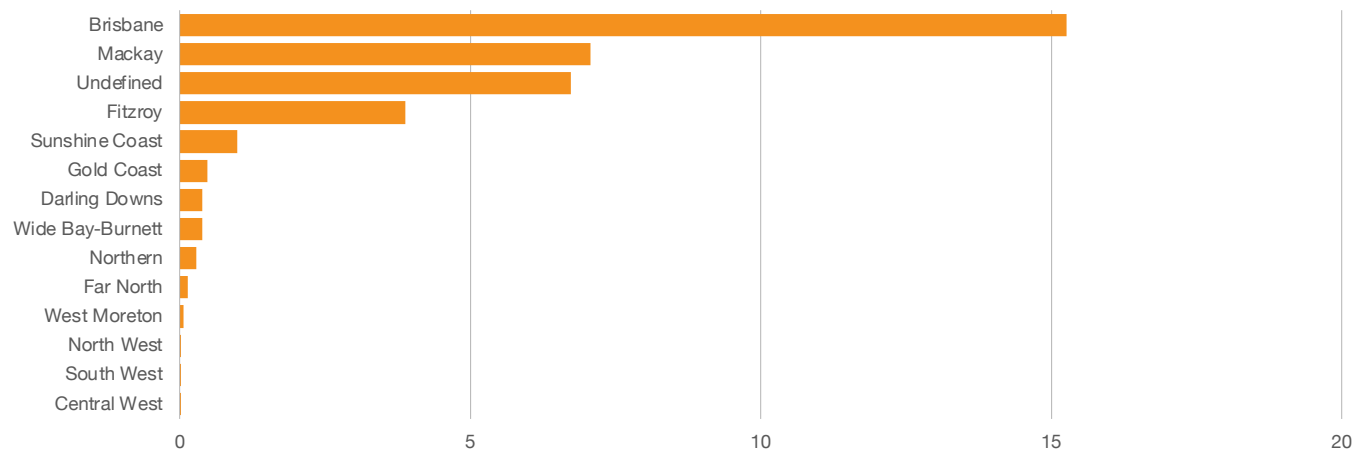
Table 6: Direct Impact of Queensland Coal Sector by Region, 2024/25

| Region | Residing employees (FTEs) | Associated salaries (\$M) | Business purchases, community and govt payments (\$M) | Total direct spending (\$M) | Annual % change in direct spending |
|-------------------------|---------------------------|---------------------------|---|-----------------------------|------------------------------------|
| Brisbane | 6,554 | 1,204.5 | 14,056.1 | 15,260.5 | 6.2% |
| Mackay | 10,593 | 1,729.1 | 5,341.7 | 7,070.7 | -18.2% |
| Fitzroy | 7,717 | 1,238.9 | 2,633.2 | 3,872.1 | -19.5% |
| Sunshine Coast | 1,540 | 253.6 | 734.6 | 988.2 | 12.1% |
| Gold Coast | 958 | 153.7 | 320.3 | 473.9 | 16.9% |
| Darling Downs | 813 | 112.3 | 275.8 | 388.0 | 14.8% |
| Wide Bay-Burnett | 1,344 | 207.9 | 175.3 | 383.2 | 31.5% |
| Northern | 1,197 | 177.2 | 104.9 | 282.1 | 15.1% |
| Far North | 534 | 82.5 | 52.8 | 135.2 | 25.3% |
| West Moreton | 266 | 41.7 | 22.6 | 64.3 | 48.0% |
| North West | 22 | 3.2 | 5.2 | 8.4 | -4.5% |
| South West | 31 | 4.1 | 4.3 | 8.4 | 22.1% |
| Central West | 37 | 5.1 | 3.3 | 8.3 | -80.0% |
| Undefined | 0 | 0.0 | 6,724.7 | 6,724.7 | -32.4% |
| Total Queensland | 31,605 | 5,213.5 | 30,454.8 | 35,668.3 | -11.2% |

Note: (a) Includes Mackay, Isaac and Whitsunday LGAs

Queensland Coal Sector Direct Spend by Region

Queensland, 2024/25 (\$ billion)



Indirect Impact

The economic modelling conducted for this project has estimated the indirect and consumption-induced effects flowing from the two key direct impacts on the economy, i.e. those generated by business supply chain expenditure in each region and those generated by consumption-induced spending in each region. These impacts have been modelled separately and then aggregated to identify the level of impacts on output, incomes, employment and industry value added for each region.

Table 7: Flow-on Impacts of Coal Sector by Region, 2024/25 (Type II)

| Region | Indirect full-time employees (FTEs) | Associated salaries (\$M) | Supply of goods and services (\$M) | Total indirect value added (\$M) |
|-------------------------|-------------------------------------|---------------------------|------------------------------------|----------------------------------|
| Brisbane | 165,742 | 13,637.8 | 24,068.8 | 19,741.8 |
| Mackay | 49,923 | 6,394.6 | 8,858.1 | 5,434.9 |
| Fitzroy | 34,848 | 3,047.6 | 5,029.3 | 4,220.0 |
| Sunshine Coast | 9,409 | 767.8 | 1,357.3 | 1,115.1 |
| Gold Coast | 4,480 | 362.9 | 652.3 | 534.1 |
| Wide Bay-Burnett | 3,326 | 263.3 | 484.6 | 396.2 |
| Darling Downs | 3,328 | 220.3 | 381.2 | 367.4 |
| Northern | 2,644 | 153.7 | 272.3 | 267.4 |
| Far North | 1,270 | 74.4 | 128.3 | 126.6 |
| West Moreton | 510 | 40.1 | 73.9 | 60.5 |
| Central West | 73 | 4.5 | 8.3 | 7.3 |
| South West | 66 | 4.3 | 7.4 | 7.1 |
| North West | 66 | 4.1 | 6.1 | 6.1 |
| Undefined | 49,629 | 4,020.0 | 8,609.3 | 7,767.6 |
| Total Queensland | 325,314 | 28,995.3 | 49,937.4 | 40,052.1 |

Total Impact

Table 8 shows that the coal sector has the highest overall impact in the Brisbane region, with total gross value added of \$35.0 billion, meaning the sector contributed 13.8% to gross regional product (\$253.7 billion), based on GRP estimates for 2023/24. The impact in Brisbane was significantly higher than that of other resource-based regional economies, namely the Mackay region (\$12.5 billion in value added) and Fitzroy (\$8.1 billion in value added). The Mackay region had the highest proportion of GRP contributed by the coal sector (48.6%), followed by the Fitzroy (32.8%) and Brisbane (13.8%) regions.

*The **Mackay** region had the highest proportion of GRP contributed by the coal sector (48.6%), followed by Fitzroy (32.8%) and Brisbane (13.8%).*

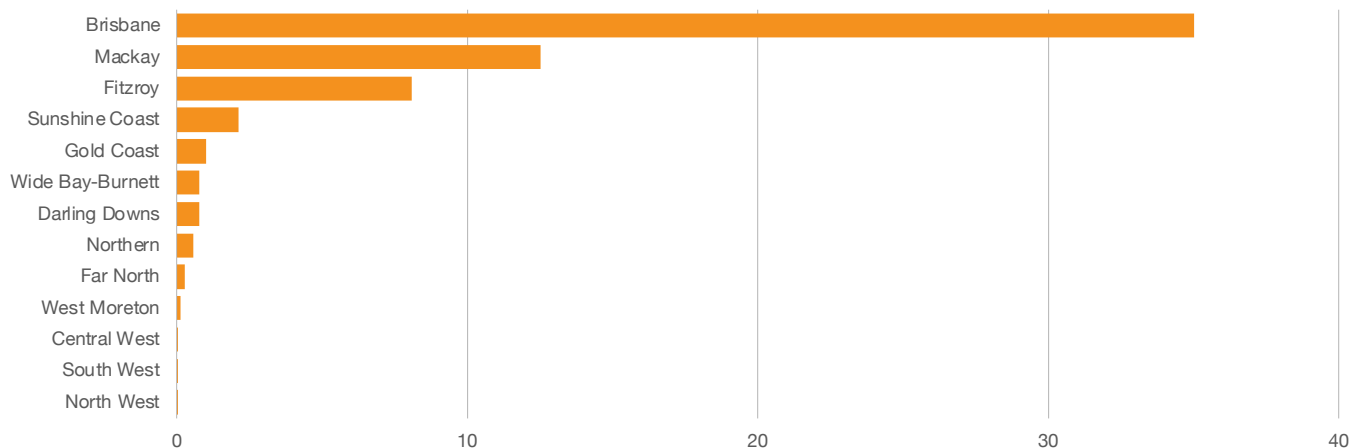
With regard to employment, the coal sector again had the greatest impact on jobs in the Brisbane region, supporting 172,647 FTEs comprising 11.8% of the total regional workforce. The Mackay (62,364 FTEs) and Fitzroy (43,345 FTEs) regions recorded the next highest employment levels, whilst the Mackay region had the highest proportion of total regional employment made up by the coal sector (59.9%), followed by Fitzroy (33.3%).

Table 8: Total Economic Impact of Coal Sector by Region, 2024/25

| Region | Total GVA (\$M) | Total value added as % of GRP | Total jobs supported (FTEs) | % of regional employment |
|-------------------------|-----------------|-------------------------------|-----------------------------|--------------------------|
| Brisbane | 35,002.4 | 13.8% | 172,647 | 11.8% |
| Mackay | 12,505.7 | 48.6% | 62,364 | 59.9% |
| Fitzroy | 8,092.1 | 32.8% | 43,345 | 33.3% |
| Sunshine Coast | 2,103.3 | 7.0% | 11,138 | 5.0% |
| Gold Coast | 1,008.0 | 2.0% | 5,542 | 1.5% |
| Wide Bay-Burnett | 779.4 | 3.9% | 4,964 | 3.5% |
| Darling Downs | 755.5 | 3.3% | 4,204 | 3.1% |
| Northern | 549.6 | 2.7% | 3,960 | 3.3% |
| Far North | 261.8 | 0.6% | 1,842 | 1.2% |
| West Moreton | 124.8 | 1.8% | 805 | 1.4% |
| Central West | 15.6 | 1.2% | 116 | 1.8% |
| South West | 15.5 | 0.6% | 102 | 0.7% |
| North West | 14.6 | 0.2% | 88 | 0.5% |
| Total Queensland | 75,720.4 | 14.8% | 360,745 | 12.3% |

Queensland Coal Sector Total Value Added by Region

Queensland, 2024/25 (\$ billion)



Local Government Area Impact

Direct Spending

The spending and employment data provided by companies was aggregated using geographical concordances at the local government area (LGA) level. As expected, Queensland coal sector expenditures, split across salary and supplier and voluntary community contribution expenditure, varied considerably across LGAs. The level of employment and direct expenditure on employees and business supply chain purchases is summarised for the 78 LGAs in Queensland in Appendix B (where significant activity occurs in an LGA).

Table 9 shows the distribution of total direct spending (i.e. salaries, business purchases and community contributions) from coal mining companies across Queensland to the top 20 LGAs by expenditure. Brisbane LGA recorded the largest share of direct expenditure in 2024/25 (\$14.5 billion), followed by Mackay (\$4.8 billion), Isaac (\$1.8 billion), Central Highlands (\$1.4 billion) and Sunshine Coast (\$948.6 million).

Brisbane recorded the largest share of direct expenditure by local government area in 2024/25 (\$14.5 billion), followed by Mackay (\$4.8 billion).

Direct resident employment and associated salary expenditures were greatest in the Mackay LGA (\$919.2 million and 5,688 FTEs), followed by the Brisbane (\$800.7 million and 4,506 FTEs), Isaac (\$605.5 million and 3,554 FTEs), Central Highlands (\$481.2 million and 3,103 FTEs) and Rockhampton (\$346.9 million and 2,143 FTEs) LGAs.

Queensland Coal Sector Direct Employment by LGA

Queensland (FTEs), 2024/25

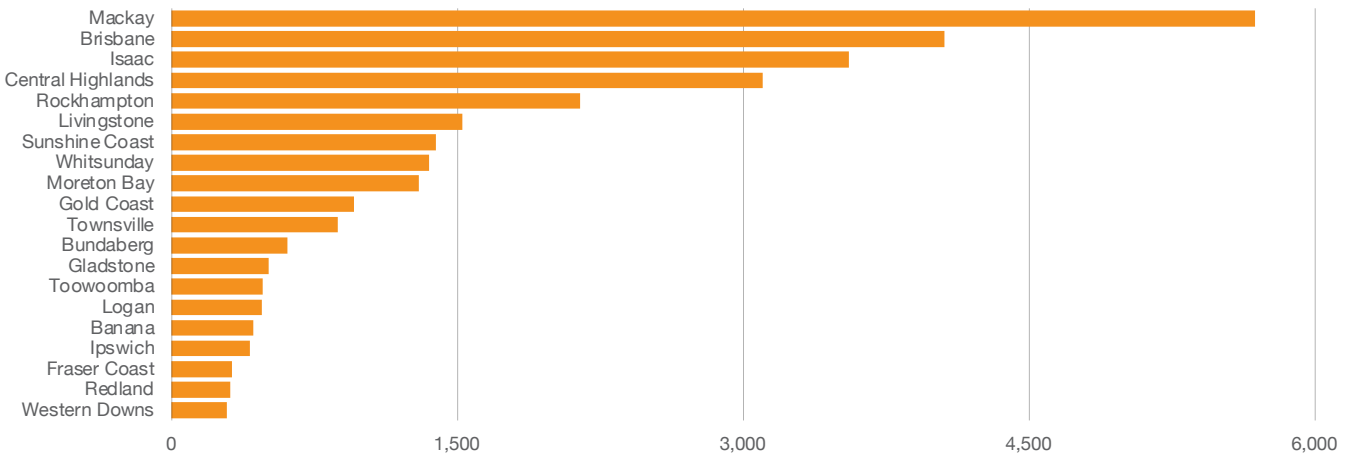


Table 9: Direct Impact of Coal Sector, Highest LGAs by Expenditure, 2024/25

| Region | Residing employees (FTEs) | Associated salaries (\$M) | Business purchases, community and govt payments (\$M) | Total direct spending (\$M) | Local suppliers (no.) |
|-------------------|---------------------------|---------------------------|---|-----------------------------|-----------------------|
| Brisbane | 4,056 | 800.7 | 13,657.1 | 14,457.8 | 2,499 |
| Mackay | 5,688 | 919.2 | 3,834.1 | 4,753.2 | 1,118 |
| Isaac | 3,554 | 605.5 | 1,196.7 | 1,802.2 | 413 |
| Central Highlands | 3,103 | 481.2 | 959.5 | 1,440.7 | 655 |
| Sunshine Coast | 1,386 | 228.6 | 720.0 | 948.6 | 186 |
| Rockhampton | 2,143 | 346.9 | 558.6 | 905.5 | 378 |
| Gladstone | 509 | 79.1 | 655.8 | 734.9 | 101 |
| Whitsunday | 1,351 | 204.4 | 310.9 | 515.3 | 334 |
| Gold Coast | 958 | 153.7 | 320.3 | 473.9 | 213 |
| Livingstone | 1,525 | 261.0 | 190.9 | 451.9 | 147 |
| Banana | 428 | 69.7 | 268.5 | 338.2 | 136 |
| Moreton Bay | 1,299 | 212.4 | 98.5 | 310.9 | 207 |
| Toowoomba | 480 | 63.7 | 237.1 | 300.9 | 206 |
| Logan | 475 | 71.0 | 178.2 | 249.2 | 164 |
| Townsville | 874 | 128.1 | 82.4 | 210.5 | 261 |
| Ipswich | 412 | 66.7 | 107.2 | 173.9 | 87 |
| Bundaberg | 609 | 94.3 | 59.1 | 153.4 | 39 |
| Gympie | 244 | 38.5 | 71.4 | 109.9 | 22 |
| Cairns | 288 | 44.9 | 49.3 | 94.2 | 34 |
| Fraser Coast | 320 | 49.7 | 31.5 | 81.3 | 29 |

Indirect & Total Impact

The economic (I-O) modelling estimated the indirect and consumption effects flowing from business supply chain expenditure and consumption spending in each LGA. These impacts have been modelled separately and then aggregated to identify the level of impacts on output, incomes, employment and industry value added for each region. The I-O model allowed for spending leakages to imports in both the first and subsequent rounds of economic activity, based on the assumption that some reported expenditure in the Brisbane LGA flows directly to imports.

Modelling consumption impacts is problematic for smaller shires with limited economic structures because only a subset of goods and services are available. Smaller and specialised mining LGAs tend to have larger expenditure leakages, typically to the nearest large regional centre. To incorporate this into the modelling, a further correction factor has been applied for LGAs, as shown in Table 10. The rates were further reduced for a number of coal mining focused LGAs to account for the tendency of residents of those communities to travel to major centres for consumption spending and to alleviate any constrained consumption capacity.

The total economic impact (i.e. Type II model scenario) of direct coal sector spending for each LGA across Queensland in 2024/25 are contained in Appendix C (where significant activity occurs in an LGA), with a summary of the top 20 LGAs by value added provided in Table 11. The largest contributions made by the coal sector to gross regional product (i.e. total estimated value added) occurred in the Brisbane LGA (\$32.3 billion, or 17.6% of GRP), followed by Mackay (\$5.6 billion), Isaac (\$2.7 billion), Central Highlands (\$2.5 billion) and Sunshine Coast (\$2.0 billion).

With regard to employment, the resources sector again had the greatest impact on jobs in the Brisbane region, with 154,030 total FTEs supported, comprising 19.5% of the total workforce. Mackay (30,010 FTEs, or 44.3%) and Central Highlands (11,684 FTEs, or 65.6%) LGAs recorded the next highest employment impacts.

Table 10: Rates of Adjustment for Local Consumption Expenditure by LGA Population Size

| Population of LGA | Rate of consumption expenditure in LGA |
|-------------------|--|
| 0 – 2,000 | 40% |
| 2,000 – 5,000 | 46.7% |
| 5,000 – 10,000 | 53.3% |
| 10,000 – 30,000 | 73.3% |
| 30,000 – 50,000 | 80% |
| 50,000 – 100,000 | 86.7% |
| Over 100,000 | 100% |

Table 11: Total Economic Impact of Coal Sector, Highest LGAs by Gross Value Added, 2024/25 (Type II)

| Region | Total GVA (\$M) | Total value added as % of GRP | Total jobs supported (FTEs) | % of regional employment |
|-------------------|-----------------|-------------------------------|-----------------------------|--------------------------|
| Brisbane | 32,317.5 | 17.6% | 154,030 | 19.5% |
| Mackay | 5,591.9 | 53.8% | 30,010 | 44.3% |
| Isaac | 2,698.1 | 22.5% | 8,871 | 61.3% |
| Central Highlands | 2,474.4 | 50.1% | 11,684 | 65.6% |
| Sunshine Coast | 2,024.3 | 7.8% | 10,633 | 5.4% |
| Rockhampton | 1,928.9 | 22.6% | 10,900 | 24.3% |
| Gladstone | 1,180.1 | 18.1% | 4,259 | 12.0% |
| Gold Coast | 1,008.0 | 2.0% | 5,542 | 1.5% |
| Whitsunday | 985.0 | 29.7% | 6,108 | 28.0% |
| Livingstone | 950.5 | 43.1% | 5,902 | 26.3% |
| Banana | 712.8 | 30.2% | 3,613 | 40.4% |
| Moreton Bay | 610.7 | 2.5% | 3,941 | 1.5% |
| Toowoomba | 585.9 | 4.0% | 3,093 | 3.2% |
| Logan | 533.4 | 2.5% | 2,903 | 1.5% |
| Townsville | 410.7 | 2.4% | 2,935 | 2.9% |
| Ipswich | 362.5 | 2.2% | 2,031 | 1.6% |
| Bundaberg | 296.3 | 4.3% | 1,961 | 4.1% |
| Gympie | 227.3 | 6.3% | 1,266 | 5.0% |
| Cairns | 182.2 | 1.2% | 1,207 | 1.2% |
| Fraser Coast | 165.2 | 2.6% | 1,085 | 2.3% |

Conclusion

This report contains the outcomes of two key pieces of analysis. The first is the collection of primary data by the Queensland Resources Council (QRC) that identifies the direct impact of the coal sector by local and regional areas in Queensland. The second is the conduct of economic modelling that identifies the flow-on effects through the economy at a State, Statistical Division, Local Government Authority, State Electoral Division and Commonwealth Electoral Division level.

The analysis identifies that the Queensland coal sector contributed approximately \$35.7 billion in direct spending to the state economy in 2024/25, comprised of:

- \$5.2 billion in wages and salaries to approximately 31,605 direct fulltime resident employees. In addition, there were 16,630 fulltime equivalent contract workers employed in the coal sector in Queensland in 2024/25;
- \$24.2 billion in purchases of goods and services from over 7,660 local businesses (including contract payments), community contributions and payments to local government (including rates, developer contributions and other payments); and
- \$6.3 billion in state government payments (including royalties, stamp duty, payroll tax and land tax), although this is considered a conservative figure as not all companies disclosed royalty payments.

*The coal sector contributed **\$35.7 billion** in direct spending to the Queensland economy in 2024/25.*

Coal production was the largest contributor to the resources sector in Queensland in 2024/25, although significant spending was also recorded by other industry contributors such as CSG/LNG (\$9.9 billion), Metals (\$6.3 billion) and Other (\$1.8 billion).

The total impact of the \$35.7 billion in direct spending by the coal sector, measured through supply chain and consumption-induced spending effects, amounted to an estimated 14.8% of Gross State Product and 12.3% of employment in Queensland.

*The total economic impact of the Queensland coal sector was estimated at **\$75.7 billion** in gross value added and **360,745 jobs** supported in 2024/25.*

Since 2010/11, the Queensland coal sector has generated approximately \$786.5 million in value added, including \$371.4 billion in direct spending – comprised of \$55.4 billion in total wages and salaries and \$316.0 billion in business purchases, community contributions and government payments – and has supported an average workforce of 267,766 jobs per annum.

*Since 2010/11, the Queensland coal sector has generated **\$786.5 million in value added** and has supported an average workforce of **267,766 jobs per annum**.*

Appendix A: Modelling Approach

Input-Output Modelling

For this study, input-output (I-O) modelling has been used to estimate the sum of direct, indirect and consumption-induced effects of the companies surveyed on different regions of Queensland. I-O techniques provide a solid approach for taking account of the inter-relationships between the various sectors of the economy in the short-term and hence are an appropriate tool for determining the direct, indirect and induced economic impact of economic stimuli.

I-O models can be used to capture only the indirect impacts that occur through other industry sectors (Type I models), or the indirect plus the consumption-induced effects (Type II models), which have been adopted for the current study. Further, the I-O models used in this study were based on the ABS model of the Australian economy generated from general equilibrium models. Note: Type II models involve assumptions about fixed relationships between income and consumption patterns. These factors mean that the results of I-O models should generally be treated as the upper bound of estimates, and that care has to be taken in interpreting the results of very large changes in demand or production.

A concept underlying I-O modelling is that an initial economic shock or stimulus can have multiplier effects through a series of successive spending rounds. The size of the economic multiplier in a local or regional area can be summarised in the following way:

- The extent to which project operators purchase inputs from the local or regional economy. Examples of inputs include wages for labour supplied from the local or regional area, and purchases of goods and services. The more that a project operator sources from the local or regional economy, the more money that is directly injected into the economy; and
- The extent to which money spent in a local or regional economy is retained within that economy. If there is not much opportunity for people receiving income to spend it on goods and services in their local or regional area, then not as much money will be kept in the local or regional area. Larger and more diverse regional economies tend to be better at keeping expenditures in their economy and not 'losing' it to other regions.

Key advantages of using input-output models are the fineness of detail available at a disaggregated industry level, the relative ease of application, particularly for sub-regional levels, and the ability to model effects in a timely manner.

To generate predictions, the economic contribution of an industry is applied to the relevant industry sectors of the input-output model of a regional economy. The stimulus from economic activity can be traced through the economy in several different ways:

- The first-round effect, or direct effect, are those from the activities expenditure in purchasing goods from other industries;
- The second-round effects are those from the supplying industries increasing their purchases to meet the additional demand. The second and subsequent rounds of purchasing are termed the indirect effects; and
- The consumption-induced effects, which recognise that the level of local production is important in determining regional levels of household consumption, that this in turn will be spent locally to a large extent and therefore influence the level of regional consumption and the level of output of each sector.

These effects can be represented in terms of multipliers and changes in four key variables:

Output

The output impact measures the increase in gross sales throughout the whole economy by summing all the individual transactions resulting, directly and indirectly, from the economic stimulus.

Income

The income impact measures the additional amount of wages and salaries paid to employees of the industry under consideration and to other industries benefiting from the stimulus to the economy.

Employment

The employment impact measures the combined number of existing jobs sustained and new jobs generated by the stimulus, both directly and indirectly, although allocation between these forms of employment is not separately identified.

Value Added

The value added or Gross Regional Product (GRP) impact measures only the net activity at each stage of production. GRP is defined as the addition of consumption, investment and government expenditure, plus exports of goods and services, minus imports of goods and services for a region. The GRP impacts are the preferred measure for the assessment and contribution of a stimulus to the economy.

Key advantages of using input-output models are the fineness of detail available at a disaggregated industry level, the relative ease of application, particularly for sub-regional levels, and the ability to model effects in a timely manner. However, care has to be taken in its application and interpretation of results. Key assumptions that underpin the application of I-O models are:

- The inputs purchased by each industry are a function of the level of output of that industry. The input function is generally assumed linear and homogenous of degree one (which implies constant returns to scale and no substitution between inputs);
- Each commodity (or group of commodities) is supplied by a single industry or sector of production. This implies that there is only one method used to produce each commodity and that each sector has only a single primary output;
- The total effect of carrying on several types of production is the sum of the separate effects. This rules out external economies and diseconomies and is known simply as the additivity assumption;
- The system is in equilibrium at given prices. This would not be the case in an economic system subject to external influences;
- In the static input-output model, there are no capacity constraints so that the supply of each good is perfectly elastic. Each industry can supply whatever quantity is demanded of it and there are no capital restrictions. This assumption would come into play depending upon the magnitude of the changes in quantities demanded, brought about through changes in taxation levels; and
- The input-output model is an optimisation model that allocates resources between sectors to their most efficient use.

Type II models involve additional assumptions about fixed relationships between income and consumption patterns. These factors mean that the results of I-O models should generally be treated as the upper bound of estimates, and that care has to be taken in interpreting the results of very large changes in demand or production.

Construction of Regional I-O Models

For the derivation of the regional I-O tables, a variable interference non-survey technique was applied, involving a formalised non-survey method compilation. This allowed data on direct effects of the companies surveyed to be inserted at any stage of the compilation procedure. This approach is based primarily on the Generation of Regional Input-Output Tables (GRIT) technique, a widely used method of constructing local and regional input-output tables in Australia, America and Europe. The procedure utilises cross-industry location quotients as well as superior data (including expenditure patterns of within the primary company data) for the regionalisation of the national direct requirements matrix (DRM) or at the elements of other final payments and demand, which are at the core of any I-O table.

In summary, the construction of the local and regional I-O models employed the following steps:

- Adjustment to the latest available national I-O table;
- Computation of the regional direct requirement matrix;
- Aggregation of regional sectors (if necessary); and
- Computation of the complete regional I-O table.

All the necessary data for the regionalisation procedure were collected from the Australian Bureau of Statistics as well as other reliable sources for secondary data such as regional household expenditure patterns, income and productivity measures. The latest available national I-O tables were 2021-22, which consisted of 114 sectors of economic activity, at the 4-digit level, compiled following the industry-technology assumption, product-by-product, with total flows and valued at basic values in current prices.

For estimating the regional I-O tables, and especially in the interpretation of results, relevant limitations of the I-O approach (static, linear production function, no substitution or scale economy effects, infinite elasticity of supply) were taken into consideration. Once the I-O models were generated, predictions of impact were estimated for each regional area using the available data on salary and business expenditure.

The predictions of the I-O models for regional area were estimated in two separate groups. The first group involved the economic impacts of expenditure on business goods and services (business suppliers), while the second involved economic expenditure of the labour force. Each stimulus group was modelled using expenditure coefficients and household consumption patterns applicable for each region, also taking into account the type of commodity (e.g. coal, gas, metals, etc.) and the nature of the expenditure (i.e. operating or capital expenditure).

The outputs of the models can be classified into First Round and Indirect Effects, representing industry impacts through the business chain, and Final Consumption-Induced effects, which represent the economic activity needed to support the increased workforce from Direct, First Round and Indirect Effects.

The data collection and the methodology applied in this study are notable in three key aspects:

- First, the data collected on actual spending by the coal sector allowed an assessment of impacts by spending in the economy in comparison to the more traditional approach of predicting economic impacts from total revenue changes;
- Second, the collection of primary data by local area allowed a much more accurate assessment of the direct impacts by geographic area than had previously been available; and
- Third, the application of the I-O modelling framework down to the LGA, SED and CED levels, when combined with the accuracy of the primary data, meant that relatively accurate models of local impacts from the Queensland resources sector could be generated.

The outcomes of the data collection and modelling approach meant that the assessment of direct, indirect and consumption effects could be expected to be more detailed and accurate at the LGA, SED and CED levels than could be achieved with standard applications of general equilibrium models.

Appendix B: Direct Impact by Local Government Area

Table B1: Direct Impacts of Queensland Coal Sector by LGA, 2024/25

| Local government area | Residing employees (FTEs) | Associated salaries (\$M) | Business purchases, community and local govt payments (\$M) | Total direct spending (\$M) | Local suppliers (no.) |
|-----------------------|---------------------------|---------------------------|---|-----------------------------|-----------------------|
| Brisbane | 4,056 | 800.7 | 13,657.1 | 14,457.8 | 2,499 |
| Mackay | 5,688 | 919.2 | 3,834.1 | 4,753.2 | 1,118 |
| Isaac | 3,554 | 605.5 | 1,196.7 | 1,802.2 | 413 |
| Central Highlands | 3,103 | 481.2 | 959.5 | 1,440.7 | 655 |
| Sunshine Coast | 1,386 | 228.6 | 720.0 | 948.6 | 186 |
| Rockhampton | 2,143 | 346.9 | 558.6 | 905.5 | 378 |
| Gladstone | 509 | 79.1 | 655.8 | 734.9 | 101 |
| Whitsunday | 1,351 | 204.4 | 310.9 | 515.3 | 334 |
| Gold Coast | 958 | 153.7 | 320.3 | 473.9 | 213 |
| Livingstone | 1,525 | 261.0 | 190.9 | 451.9 | 147 |
| Banana | 428 | 69.7 | 268.5 | 338.2 | 136 |
| Moreton Bay | 1,299 | 212.4 | 98.5 | 310.9 | 207 |
| Toowoomba | 480 | 63.7 | 237.1 | 300.9 | 206 |
| Logan | 475 | 71.0 | 178.2 | 249.2 | 164 |
| Townsville | 874 | 128.1 | 82.4 | 210.5 | 261 |
| Ipswich | 412 | 66.7 | 107.2 | 173.9 | 87 |
| Bundaberg | 609 | 94.3 | 59.1 | 153.4 | 39 |
| Gympie | 244 | 38.5 | 71.4 | 109.9 | 22 |
| Cairns | 288 | 44.9 | 49.3 | 94.2 | 34 |
| Fraser Coast | 320 | 49.7 | 31.5 | 81.3 | 29 |
| Western Downs | 289 | 41.7 | 37.0 | 78.8 | 108 |
| Redland | 311 | 53.7 | 15.1 | 68.8 | 71 |
| Noosa | 153 | 25.0 | 14.6 | 39.6 | 19 |
| Burdekin | 156 | 22.2 | 10.3 | 32.5 | 16 |
| Charters Towers | 133 | 21.9 | 10.2 | 32.1 | 21 |
| Scenic Rim | 93 | 15.6 | 14.4 | 30.0 | 16 |

Table B1: Direct Impacts of Queensland Coal Sector by LGA, 2024/25

| Local government area | Residing employees (FTEs) | Associated salaries (\$M) | Business purchases, community and local govt payments (\$M) | Total direct spending (\$M) | Local suppliers (no.) |
|-----------------------|---------------------------|---------------------------|---|-----------------------------|-----------------------|
| South Burnett | 96 | 14.0 | 11.9 | 25.9 | 17 |
| Lockyer Valley | 105 | 15.0 | 3.9 | 18.9 | 11 |
| Tablelands | 94 | 15.8 | 1.4 | 17.2 | 7 |
| Somerset | 69 | 11.1 | 4.3 | 15.4 | <5 |
| North Burnett | 73 | 11.0 | 1.3 | 12.3 | <5 |
| Cassowary Coast | 71 | 10.5 | 1.3 | 11.8 | 9 |
| Mareeba | 55 | 7.8 | 0.2 | 8.0 | 6 |
| Mount Isa | 16 | 2.3 | 4.6 | 6.9 | 47 |
| Southern Downs | 37 | 5.8 | 0.9 | 6.7 | 7 |
| Maranoa | 21 | 2.8 | 3.8 | 6.7 | 12 |
| Hinchinbrook | 24 | 3.4 | 1.2 | 4.5 | <5 |
| Longreach | 6 | 1.0 | 2.3 | 3.3 | <5 |
| Palm Island | 11 | 1.7 | 0.8 | 2.5 | <5 |
| Blackall Tambo | 13 | 1.9 | 0.3 | 2.2 | <5 |
| Barcaldine | 13 | 1.5 | 0.2 | 1.8 | <5 |
| Goondiwindi | 7 | 1.0 | 0.7 | 1.7 | <5 |
| Woorabinda | 8 | 1.0 | 0.0 | 1.0 | <5 |
| Douglas | 8 | 0.8 | 0.2 | 1.0 | <5 |

Note: Excludes LGAs with total direct spend of less than \$1 million.

Appendix C: Total Impact by Local Government Area

Table C1: Estimated Total Economic Impact of Queensland Coal Sector by LGA, 2024/25 (Type I)

| Local government area | Total GVA (\$M) | Total value added as % of GRP | Total jobs supported (FTEs) | % of regional employment |
|-----------------------|-----------------|-------------------------------|-----------------------------|--------------------------|
| Brisbane | 25,518.5 | 13.9% | 85,244 | 10.8% |
| Mackay | 5,259.5 | 50.6% | 18,994 | 28.0% |
| Isaac | 2,337.4 | 19.5% | 6,917 | 47.8% |
| Central Highlands | 2,058.9 | 41.6% | 8,751 | 49.1% |
| Sunshine Coast | 1,609.2 | 6.2% | 6,519 | 3.3% |
| Rockhampton | 1,512.3 | 17.7% | 7,850 | 17.5% |
| Gladstone | 1,002.2 | 15.4% | 3,050 | 8.6% |
| Gold Coast | 800.0 | 1.6% | 3,528 | 1.0% |
| Whitsunday | 796.4 | 24.0% | 3,996 | 18.3% |
| Livingstone | 744.7 | 33.8% | 4,312 | 19.2% |
| Banana | 562.8 | 23.9% | 2,583 | 28.9% |
| Toowoomba | 497.4 | 3.4% | 2,182 | 2.3% |
| Moreton Bay | 489.8 | 2.0% | 2,840 | 1.1% |
| Logan | 423.2 | 2.0% | 1,827 | 0.9% |
| Townsville | 349.4 | 2.1% | 2,330 | 2.3% |
| Ipswich | 288.8 | 1.8% | 1,319 | 1.0% |
| Bundaberg | 239.0 | 3.5% | 1,434 | 3.0% |
| Gympie | 181.6 | 5.0% | 823 | 3.3% |
| Cairns | 155.6 | 1.1% | 939 | 1.0% |
| Fraser Coast | 131.5 | 2.1% | 782 | 1.6% |
| Western Downs | 125.7 | 2.7% | 719 | 4.0% |
| Redland | 106.8 | 1.3% | 644 | 0.7% |
| Noosa | 63.1 | 1.6% | 360 | 1.2% |
| Burdekin | 50.4 | 3.4% | 344 | 4.2% |
| Charters Towers | 49.3 | 5.3% | 331 | 6.2% |
| Scenic Rim | 47.8 | 1.8% | 240 | 1.1% |
| South Burnett | 40.7 | 1.7% | 226 | 1.5% |
| Lockyer Valley | 27.9 | 1.0% | 189 | 0.9% |
| Tablelands | 26.7 | 1.4% | 191 | 1.5% |
| Somerset | 22.9 | 1.4% | 136 | 1.1% |
| Cassowary Coast | 18.0 | 0.7% | 138 | 1.0% |

Table C1: Estimated Total Economic Impact of Queensland Coal Sector by LGA, 2024/25 (Type I)

| Local government area | Total GVA (\$M) | Total value added as % of GRP | Total jobs supported (FTEs) | % of regional employment |
|-----------------------|-----------------|-------------------------------|-----------------------------|--------------------------|
| North Burnett | 17.3 | 1.7% | 139 | 2.6% |
| Mareeba | 12.1 | 0.3% | 95 | 0.9% |
| Southern Downs | 10.3 | 0.4% | 74 | 0.4% |
| Maranoa | 9.9 | 0.8% | 54 | 0.7% |
| Mount Isa | 8.9 | 0.3% | 38 | 0.4% |
| Hinchinbrook | 7.0 | 0.8% | 52 | 1.0% |
| Longreach | 5.2 | 1.3% | 27 | 1.2% |
| Palm Island | 3.6 | 9.7% | 23 | 18.9% |
| Blackall Tambo | 2.9 | 1.5% | 23 | 2.1% |
| Goondiwindi | 2.6 | 0.3% | 17 | 0.3% |
| Barcaldine | 2.3 | 0.7% | 20 | 1.2% |
| Douglas | 1.7 | 0.2% | 18 | 0.3% |
| Woorabinda | 1.3 | 1.0% | 11 | 1.8% |
| Winton | 1.2 | 0.7% | 8 | 1.0% |
| Cloncurry | 1.1 | 0.1% | 6 | 0.3% |
| Yarrabah | 1.0 | 1.1% | 7 | 1.9% |

Note: Excludes LGAs with total GVA of less than \$1 million.

Table C2: Estimated Total Economic Impact of Queensland Coal sector by LGA, 2024/25 (Type II)

| Local government area | Total GVA (\$M) | Total value added as % of GRP | Total jobs supported (FTEs) | % of regional employment |
|-----------------------|-----------------|-------------------------------|-----------------------------|--------------------------|
| Brisbane | 32,317.5 | 17.6% | 154,030 | 19.5% |
| Mackay | 5,591.9 | 53.8% | 30,010 | 44.3% |
| Isaac | 2,698.1 | 22.5% | 8,871 | 61.3% |
| Central Highlands | 2,474.4 | 50.1% | 11,684 | 65.6% |
| Sunshine Coast | 2,024.3 | 7.8% | 10,633 | 5.4% |
| Rockhampton | 1,928.9 | 22.6% | 10,900 | 24.3% |
| Gladstone | 1,180.1 | 18.1% | 4,259 | 12.0% |
| Gold Coast | 1,008.0 | 2.0% | 5,542 | 1.5% |
| Whitsunday | 985.0 | 29.7% | 6,108 | 28.0% |
| Livingstone | 950.5 | 43.1% | 5,902 | 26.3% |
| Banana | 712.8 | 30.2% | 3,613 | 40.4% |
| Moreton Bay | 610.7 | 2.5% | 3,941 | 1.5% |
| Toowoomba | 585.9 | 4.0% | 3,093 | 3.2% |
| Logan | 533.4 | 2.5% | 2,903 | 1.5% |
| Townsville | 410.7 | 2.4% | 2,935 | 2.9% |
| Ipswich | 362.5 | 2.2% | 2,031 | 1.6% |
| Bundaberg | 296.3 | 4.3% | 1,961 | 4.1% |
| Gympie | 227.3 | 6.3% | 1,266 | 5.0% |
| Cairns | 182.2 | 1.2% | 1,207 | 1.2% |
| Fraser Coast | 165.2 | 2.6% | 1,085 | 2.3% |
| Western Downs | 147.8 | 3.2% | 937 | 5.2% |
| Redland | 133.1 | 1.6% | 877 | 1.0% |
| Noosa | 79.0 | 2.0% | 505 | 1.7% |
| Scenic Rim | 59.4 | 2.2% | 350 | 1.6% |
| Burdekin | 58.4 | 3.9% | 422 | 5.1% |
| Charters Towers | 57.0 | 6.1% | 406 | 7.6% |
| South Burnett | 50.4 | 2.1% | 318 | 2.2% |
| Lockyer Valley | 34.2 | 1.3% | 245 | 1.1% |
| Tablelands | 31.1 | 1.7% | 233 | 1.8% |
| Somerset | 27.9 | 1.7% | 182 | 1.5% |
| North Burnett | 20.8 | 2.0% | 169 | 3.2% |
| Cassowary Coast | 20.8 | 0.9% | 165 | 1.1% |
| Mareeba | 14.0 | 0.4% | 113 | 1.0% |

Table C2: Estimated Total Economic Impact of Queensland Coal sector by LGA, 2024/25 (Type II)

| Local government area | Total GVA (\$M) | Total value added as % of GRP | Total jobs supported (FTEs) | % of regional employment |
|-----------------------|-----------------|-------------------------------|-----------------------------|--------------------------|
| Southern Downs | 12.1 | 0.4% | 91 | 0.5% |
| Maranoa | 11.4 | 0.9% | 69 | 0.9% |
| Mount Isa | 9.8 | 0.3% | 47 | 0.4% |
| Hinchinbrook | 8.1 | 1.0% | 62 | 1.3% |
| Longreach | 6.3 | 1.5% | 38 | 1.7% |
| Palm Island | 4.0 | 11.0% | 27 | 22.8% |
| Blackall Tambo | 3.3 | 1.7% | 27 | 2.5% |
| Goondiwindi | 3.0 | 0.3% | 21 | 0.4% |
| Barcaldine | 2.6 | 0.8% | 23 | 1.4% |
| Douglas | 2.0 | 0.2% | 21 | 0.3% |
| Woorabinda | 1.5 | 1.2% | 12 | 2.0% |
| Winton | 1.4 | 0.8% | 10 | 1.3% |
| Cloncurry | 1.3 | 0.1% | 8 | 0.3% |
| Yarrabah | 1.1 | 1.3% | 8 | 2.2% |

Note: Excludes LGAs with total GVA of less than \$1 million.

Appendix D: Impact by State Electoral Division

Table D1: Estimated Total Economic Impacts of Queensland Coal Sector by SED, 2024/25

| State electoral division | Direct impact | | | Type I impact | | Type II impact | | Total impact |
|--------------------------|---------------------------|-----------------------------|-----------------------|-------------------------|------------------|-------------------------|------------------|--------------|
| | Residing employees (FTEs) | Total direct spending (\$M) | Local suppliers (no.) | Gross value added (\$M) | Total jobs (\$M) | Gross value added (\$M) | Total jobs (\$M) | |
| | Algerier | 103 | 171.5 | 77 | 306.6 | 1,087 | 390.3 | |
| Aspley | 172 | 51.0 | 33 | 81.6 | 411 | 101.8 | 600 | |
| Bancroft | 170 | 29.9 | 14 | 44.7 | 292 | 55.0 | 383 | |
| Barron River | 96 | 24.6 | 10 | 40.0 | 253 | 46.7 | 320 | |
| Bonney | 63 | 103.5 | 25 | 180.4 | 629 | 227.8 | 1,109 | |
| Broadwater | 84 | 20.6 | 14 | 35.2 | 194 | 45.1 | 279 | |
| Buderim | 241 | 57.0 | 31 | 88.8 | 493 | 110.1 | 689 | |
| Bulimba | 298 | 688.3 | 137 | 1,210.5 | 4,126 | 1,532.6 | 7,366 | |
| Bundaberg | 379 | 81.8 | 21 | 128.3 | 747 | 159.3 | 1,034 | |
| Bundamba | 113 | 50.8 | 26 | 84.7 | 369 | 106.2 | 580 | |
| Burdekin | 5,355 | 1,950.5 | 537 | 3,113.3 | 13,601 | 3,608.7 | 17,251 | |
| Burleigh | 94 | 20.8 | 25 | 32.6 | 188 | 40.6 | 260 | |
| Burnett | 433 | 81.9 | 23 | 126.7 | 792 | 157.0 | 1,067 | |
| Cairns | 89 | 47.3 | 18 | 77.7 | 414 | 90.4 | 546 | |
| Callide | 955 | 481.4 | 231 | 816.3 | 3,450 | 1,027.1 | 5,517 | |
| Caloundra | 285 | 52.8 | 23 | 80.1 | 507 | 98.8 | 674 | |
| Capalaba | 108 | 19.8 | 22 | 30.1 | 192 | 37.3 | 254 | |
| Chatsworth | 164 | 57.6 | 33 | 93.4 | 441 | 117.1 | 660 | |
| Clayfield | 272 | 758.5 | 190 | 1,350.7 | 4,591 | 1,717.1 | 8,239 | |
| Condamine | 228 | 77.4 | 93 | 126.4 | 652 | 148.9 | 880 | |
| Cook | 60 | 7.6 | 4 | 12.2 | 103 | 14.3 | 123 | |
| Coomera | 179 | 53.6 | 30 | 87.1 | 437 | 108.9 | 644 | |
| Cooper | 223 | 806.8 | 132 | 1,445.6 | 4,869 | 1,840.8 | 8,796 | |

Table D1: Estimated Total Economic Impacts of Queensland Coal Sector by SED, 2024/25

| State electoral division | Direct impact | | | | Total impact | | |
|--------------------------|---------------------------|-----------------------------|-----------------------|-------------------------|------------------|-------------------------|------------------|
| | Residing employees (FTEs) | Total direct spending (\$M) | Local suppliers (no.) | Type I impact | | Type II impact | |
| | | | | Gross value added (\$M) | Total jobs (\$M) | Gross value added (\$M) | Total jobs (\$M) |
| Currumbin | 113 | 22.5 | 18 | 34.4 | 208 | 42.5 | 281 |
| Everton | 182 | 62.3 | 34 | 100.2 | 477 | 125.0 | 711 |
| Ferny Grove | 192 | 48.7 | 29 | 75.0 | 404 | 92.9 | 566 |
| Gaven | 79 | 44.3 | 14 | 74.5 | 307 | 93.5 | 495 |
| Gladstone | 458 | 635.2 | 82 | 1,080.0 | 4,544 | 1,374.7 | 6,512 |
| Glass House | 244 | 58.6 | 23 | 93.0 | 514 | 115.9 | 725 |
| Greenslopes | 211 | 60.9 | 41 | 95.1 | 483 | 118.0 | 694 |
| Gregory | 3,284 | 1,450.6 | 666 | 2,309.9 | 11,332 | 2,767.3 | 13,734 |
| Gympie | 279 | 113.2 | 22 | 189.3 | 854 | 237.8 | 1,324 |
| Hervey Bay | 204 | 29.7 | 13 | 43.9 | 323 | 54.0 | 410 |
| Hill | 171 | 27.7 | 14 | 44.4 | 331 | 52.1 | 404 |
| Hinchinbrook | 303 | 59.1 | 57 | 97.3 | 667 | 114.4 | 833 |
| Inala | 68 | 79.7 | 54 | 137.9 | 499 | 173.9 | 862 |
| Ipswich | 90 | 23.5 | 18 | 37.2 | 197 | 46.3 | 282 |
| Ipswich West | 117 | 28.1 | 19 | 43.9 | 242 | 54.4 | 339 |
| Jordan | 156 | 77.9 | 28 | 130.3 | 552 | 163.5 | 877 |
| Kawana | 225 | 45.7 | 33 | 70.0 | 422 | 86.6 | 571 |
| Keppel | 1,944 | 563.3 | 192 | 918.9 | 5,133 | 1,166.4 | 7,001 |
| Kurwongbah | 172 | 40.1 | 35 | 62.7 | 351 | 77.7 | 490 |
| Lockyer | 149 | 24.8 | 14 | 37.3 | 252 | 46.1 | 329 |
| Logan | 143 | 60.8 | 27 | 101.6 | 452 | 127.5 | 704 |
| Lytton | 176 | 177.7 | 58 | 306.1 | 1,129 | 386.3 | 1,926 |
| Macalister | 122 | 105.1 | 42 | 181.2 | 686 | 228.5 | 1,159 |
| Mackay | 2,805 | 2,647.0 | 575 | 4,465.2 | 11,036 | 5,643.1 | 18,110 |
| Maiwar | 233 | 118.2 | 82 | 195.4 | 821 | 245.2 | 1,296 |

Table D1: Estimated Total Economic Impacts of Queensland Coal Sector by SED, 2024/25

| State electoral division | Direct impact | | | | | Total impact | |
|--------------------------|---------------------------|-----------------------------|-----------------------|-------------------------|------------------|-------------------------|------------------|
| | Residing employees (FTEs) | Total direct spending (\$M) | Local suppliers (no.) | Type I impact | | Type II impact | |
| | | | | Gross value added (\$M) | Total jobs (\$M) | Gross value added (\$M) | Total jobs (\$M) |
| Mansfield | 127 | 35.6 | 31 | 56.3 | 290 | 70.0 | 417 |
| Maroochydore | 249 | 529.5 | 34 | 921.9 | 3,136 | 1,162.4 | 5,591 |
| Maryborough | 172 | 44.9 | 15 | 76.3 | 409 | 97.0 | 597 |
| McConnel | 522 | 7,318.1 | 987 | 12,917.3 | 17,735 | 16,334.9 | 32,382 |
| Mermaid Beach | 94 | 20.0 | 18 | 30.9 | 181 | 38.3 | 248 |
| Miller | 129 | 38.5 | 45 | 60.1 | 301 | 74.7 | 434 |
| Mirani | 2,434 | 1,100.3 | 304 | 1,821.7 | 8,880 | 2,299.9 | 14,381 |
| Moggill | 163 | 47.4 | 37 | 73.4 | 371 | 91.1 | 530 |
| Morayfield | 169 | 30.7 | 13 | 47.0 | 301 | 58.2 | 401 |
| Mount Ommaney | 122 | 199.7 | 112 | 347.1 | 1,209 | 438.2 | 2,127 |
| Mudgeeraba | 108 | 22.2 | 15 | 34.0 | 203 | 42.1 | 276 |
| Mulgrave | 132 | 24.4 | 8 | 39.2 | 277 | 46.0 | 342 |
| Mundingburra | 178 | 41.1 | 76 | 66.8 | 439 | 78.1 | 551 |
| Murrumba | 173 | 27.9 | 12 | 41.4 | 286 | 50.9 | 369 |
| Nanango | 188 | 41.2 | 25 | 66.4 | 413 | 78.5 | 532 |
| Nicklin | 230 | 122.0 | 25 | 205.1 | 856 | 257.5 | 1,372 |
| Ninderry | 214 | 109.2 | 30 | 182.7 | 769 | 229.2 | 1,227 |
| Noosa | 137 | 30.1 | 15 | 45.9 | 263 | 56.5 | 360 |
| Nudgee | 268 | 104.0 | 75 | 173.3 | 795 | 218.4 | 1,218 |
| Oodgeroo | 102 | 26.9 | 28 | 41.4 | 217 | 51.1 | 307 |
| Pine Rivers | 161 | 60.9 | 71 | 99.1 | 454 | 123.7 | 691 |
| Pumicestone | 152 | 36.9 | 13 | 58.6 | 322 | 72.8 | 456 |
| Redcliffe | 145 | 25.6 | 16 | 38.0 | 249 | 46.8 | 325 |
| Redlands | 107 | 18.9 | 17 | 28.0 | 183 | 34.4 | 239 |
| Rockhampton | 1,715 | 664.8 | 282 | 1,099.1 | 5,620 | 1,396.7 | 7,791 |

Table D1: Estimated Total Economic Impacts of Queensland Coal Sector by SED, 2024/25

| State electoral division | Direct impact | | | | Total impact | | |
|--------------------------|---------------------------|-----------------------------|-----------------------|-------------------------|------------------|-------------------------|------------------|
| | Residing employees (FTEs) | Total direct spending (\$M) | Local suppliers (no.) | Type I impact | | Type II impact | |
| | | | | Gross value added (\$M) | Total jobs (\$M) | Gross value added (\$M) | Total jobs (\$M) |
| Sandgate | 124 | 29.1 | 14 | 45.4 | 254 | 56.4 | 354 |
| Scenic Rim | 130 | 39.4 | 18 | 63.7 | 318 | 79.5 | 468 |
| South Brisbane | 275 | 2,282.1 | 121 | 4,024.4 | 13,010 | 5,088.0 | 23,890 |
| Southern Downs | 56 | 18.8 | 12 | 30.7 | 162 | 36.2 | 218 |
| Southport | 58 | 115.6 | 27 | 201.7 | 691 | 254.7 | 1,229 |
| Springwood | 73 | 16.6 | 23 | 25.7 | 146 | 31.9 | 202 |
| Stafford | 212 | 71.1 | 44 | 114.1 | 547 | 142.3 | 812 |
| Stretton | 69 | 40.0 | 22 | 67.3 | 274 | 84.4 | 444 |
| Surfers Paradise | 73 | 18.7 | 15 | 29.4 | 157 | 36.4 | 223 |
| Theodore | 118 | 32.3 | 13 | 53.4 | 279 | 67.4 | 406 |
| Thuringowa | 265 | 50.2 | 24 | 80.8 | 567 | 94.6 | 701 |
| Toohy | 84 | 1,261.6 | 142 | 2,263.2 | 7,355 | 2,877.7 | 13,548 |
| Toowoomba North | 151 | 96.3 | 52 | 158.3 | 674 | 186.0 | 960 |
| Toowoomba South | 116 | 114.7 | 55 | 189.2 | 740 | 222.3 | 1,084 |
| Townsville | 239 | 64.8 | 107 | 105.9 | 659 | 123.6 | 838 |
| Traeger | 186 | 40.8 | 101 | 64.6 | 423 | 75.1 | 527 |
| Warrego | 140 | 45.7 | 48 | 74.0 | 379 | 87.0 | 510 |
| Waterford | 64 | 25.8 | 43 | 44.6 | 204 | 56.6 | 318 |
| Whitsunday | 2,467 | 1,539.6 | 521 | 2,576.0 | 11,697 | 3,253.6 | 19,715 |
| Woodridge | 52 | 19.9 | 21 | 33.1 | 152 | 41.5 | 234 |

Appendix E: Impact by Commonwealth Electoral Division

Table E1: Estimated Total Economic Impacts of Queensland Coal Sector by CED, 2024/25

| Commonwealth electoral division | Direct impact | | | Type I impact | | Type II impact | | Total impact |
|---------------------------------|---------------------------|-----------------------------|-----------------------|-------------------------|------------------|-------------------------|------------------|--------------|
| | Residing employees (FTEs) | Total direct spending (\$M) | Local suppliers (no.) | Gross value added (\$M) | Total jobs (\$M) | Gross value added (\$M) | Total jobs (\$M) | |
| | Blair | 392 | 109.0 | 64 | 176.1 | 916 | 220.2 | |
| Bonner | 465 | 502.8 | 153 | 875.3 | 3,222 | 1,107.9 | 5,526 | |
| Bowman | 334 | 68.8 | 71 | 106.8 | 644 | 133.1 | 877 | |
| Brisbane | 1,032 | 8,537.7 | 1,252 | 15,109.9 | 26,555 | 19,133.1 | 48,207 | |
| Capricornia | 10,104 | 3,901.6 | 1,137 | 6,476.2 | 29,032 | 8,204.8 | 44,678 | |
| Dawson | 5,973 | 4,335.2 | 1,199 | 7,296.1 | 29,828 | 8,530.9 | 39,897 | |
| Dickson | 457 | 129.7 | 118 | 208.3 | 1,075 | 260.3 | 1,561 | |
| Fadden | 329 | 161.1 | 65 | 276.7 | 1,195 | 350.4 | 1,904 | |
| Fairfax | 714 | 475.9 | 95 | 810.0 | 3,218 | 1,019.2 | 5,300 | |
| Fisher | 839 | 472.0 | 91 | 798.1 | 3,296 | 1,003.8 | 5,325 | |
| Flynn | 5,362 | 2,798.1 | 1,004 | 4,711.6 | 18,859 | 6,005.0 | 26,340 | |
| Forde | 347 | 171.3 | 90 | 292.0 | 1,253 | 368.5 | 1,999 | |
| Griffith | 784 | 2,805.1 | 270 | 4,928.9 | 16,356 | 6,230.9 | 29,601 | |
| Groom | 471 | 285.3 | 194 | 471.5 | 2,050 | 555.3 | 2,912 | |
| Herbert | 835 | 186.0 | 230 | 309.0 | 2,055 | 363.4 | 2,590 | |
| Hinkler | 898 | 168.8 | 48 | 265.0 | 1,671 | 330.2 | 2,263 | |
| Kennedy | 573 | 106.1 | 138 | 174.6 | 1,243 | 205.5 | 1,542 | |
| Leichhardt | 250 | 82.5 | 30 | 136.5 | 811 | 159.6 | 1,045 | |
| Lilley | 595 | 573.9 | 197 | 991.0 | 3,694 | 1,251.2 | 6,283 | |
| Longman | 594 | 120.9 | 58 | 190.0 | 1,149 | 236.9 | 1,574 | |
| Maranoa | 569 | 140.9 | 170 | 231.6 | 1,367 | 274.6 | 1,791 | |
| McPherson | 328 | 63.4 | 60 | 99.5 | 618 | 124.2 | 839 | |
| Moncrieff | 238 | 202.8 | 66 | 348.2 | 1,321 | 438.8 | 2,227 | |

Table E1: Estimated Total Economic Impacts of Queensland Coal Sector by CED, 2024/25

| Commonwealth electoral division | Direct impact | | | Total impact | | | |
|---------------------------------|---------------------------|-----------------------------|-----------------------|-------------------------|------------------|-------------------------|------------------|
| | Residing employees (FTEs) | Total direct spending (\$M) | Local suppliers (no.) | Type I impact | | Type II impact | |
| | | | | Gross value added (\$M) | Total jobs (\$M) | Gross value added (\$M) | Total jobs (\$M) |
| Moreton | 312 | 1,477.0 | 256 | 2,639.3 | 8,773 | 3,354.7 | 15,956 |
| Oxley | 328 | 372.4 | 211 | 647.1 | 2,360 | 817.5 | 4,067 |
| Petrie | 504 | 96.9 | 54 | 149.9 | 937 | 186.5 | 1,261 |
| Rankin | 191 | 56.7 | 70 | 92.8 | 471 | 116.2 | 694 |
| Ryan | 602 | 221.5 | 157 | 359.8 | 1,681 | 451.1 | 2,531 |
| Wide Bay | 582 | 192.3 | 55 | 322.6 | 1,575 | 407.2 | 2,373 |
| Wright | 429 | 127.7 | 60 | 208.9 | 1,058 | 261.8 | 1,559 |

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