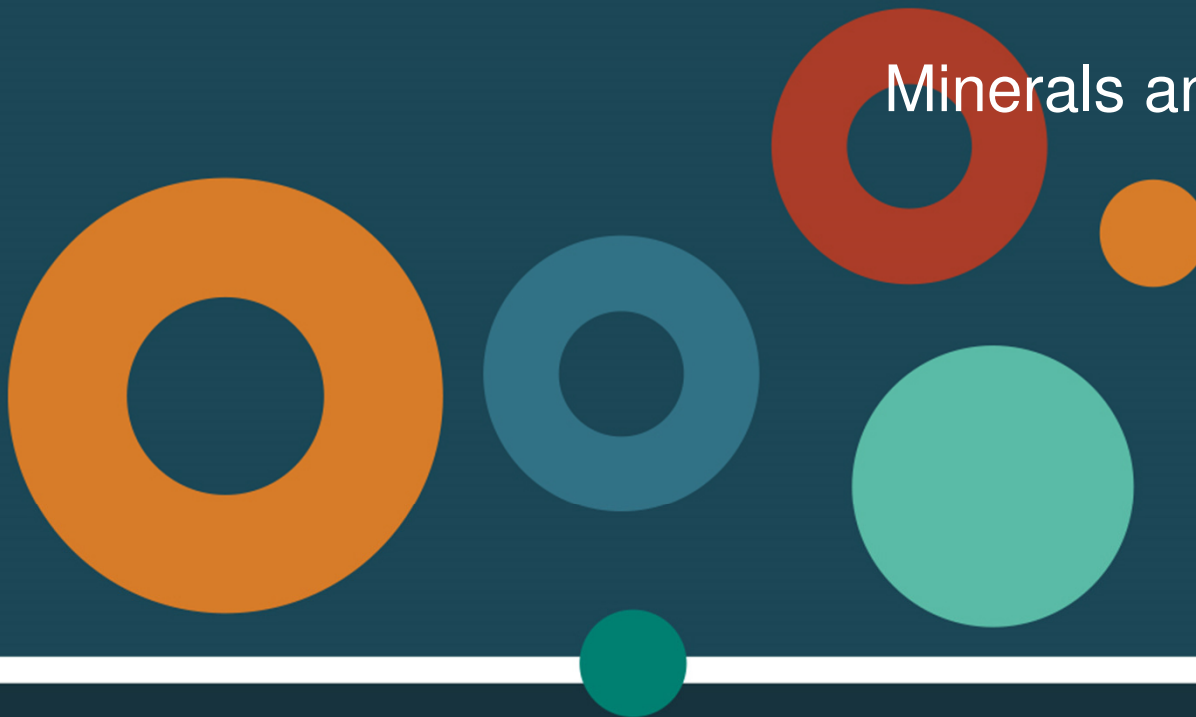


Queensland Coal

Presented by Peter Donaghy

Director of Coal

Minerals and Energy Resources



Know Your Coal

Queensland's Coal

- There are approximately 57 Coal mines in Qld
- 37 of them are metallurgical (met) coal mines in the Bowen Basin, i.e. 74%
- >70% of Qld's coal exports are met coal (~ 163 Mt in 2015-16)
- Queensland has some of the highest quality met coal in the world and supplies >50% of global exports



Value to Queensland

Direct benefits in 2016-17:

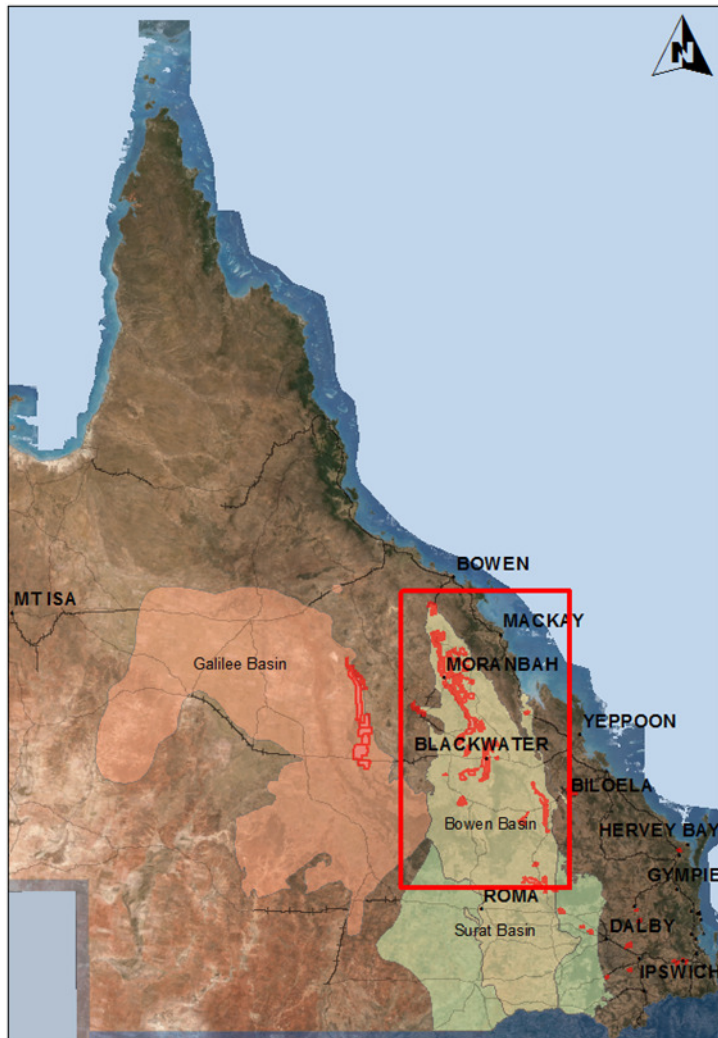
- \$2.7 billion paid in wages
- >21,000 full time employees
- \$3.4 billion paid in royalties

Indirect benefits:

- supports over 168,000 indirect full time jobs
- contributes \$37.8 billion to gross regional product
- underwrites Queensland's port and rail networks



Queensland Coal Mining Industry



We describe our mining industry by province or basin.

- There are 3 main coal basins in Queensland:
 - Bowen Basin
 - Surat Basin
 - Galilee Basin
- There are **~30 advanced** coal projects in Queensland
 - 20 Greenfields or new projects
 - 10 Brownfields extensions, expansions or 2nd stages
 - Of these most are in the Bowen Basin 25

Mining Lease Approvals

Granted

Clermont

Glencore Coal

Open cut

Thermal

Continued
Employment of 629

Production: 3.3 Mtpa
ROM

Grevillea (Saraji) (Extension)

BHP Coal

Open cut

Metallurgical

Continued employment
of approximately 500

Production:
Continuation of: 55
Mtpa ROM (Whole of
Project)

Isaac Plains (Extension)

Stanmore Coal

Open cut

Pulverized Coal
Injection (PCI)

Capital Expenditure
~\$100 m

Employment:
construction <100;
operational 118

Production: 1.4 Mtpa
ROM; 1.2 Mtpa
Saleable

Dysart

Bengal Coal

Underground

Coking

Proposed 1st Coal
2019

Employment:
Construction 200
Operational 180

Production: 2.0 Mtpa
ROM

Boundary Hill South (Extension)

Batchfire Resources

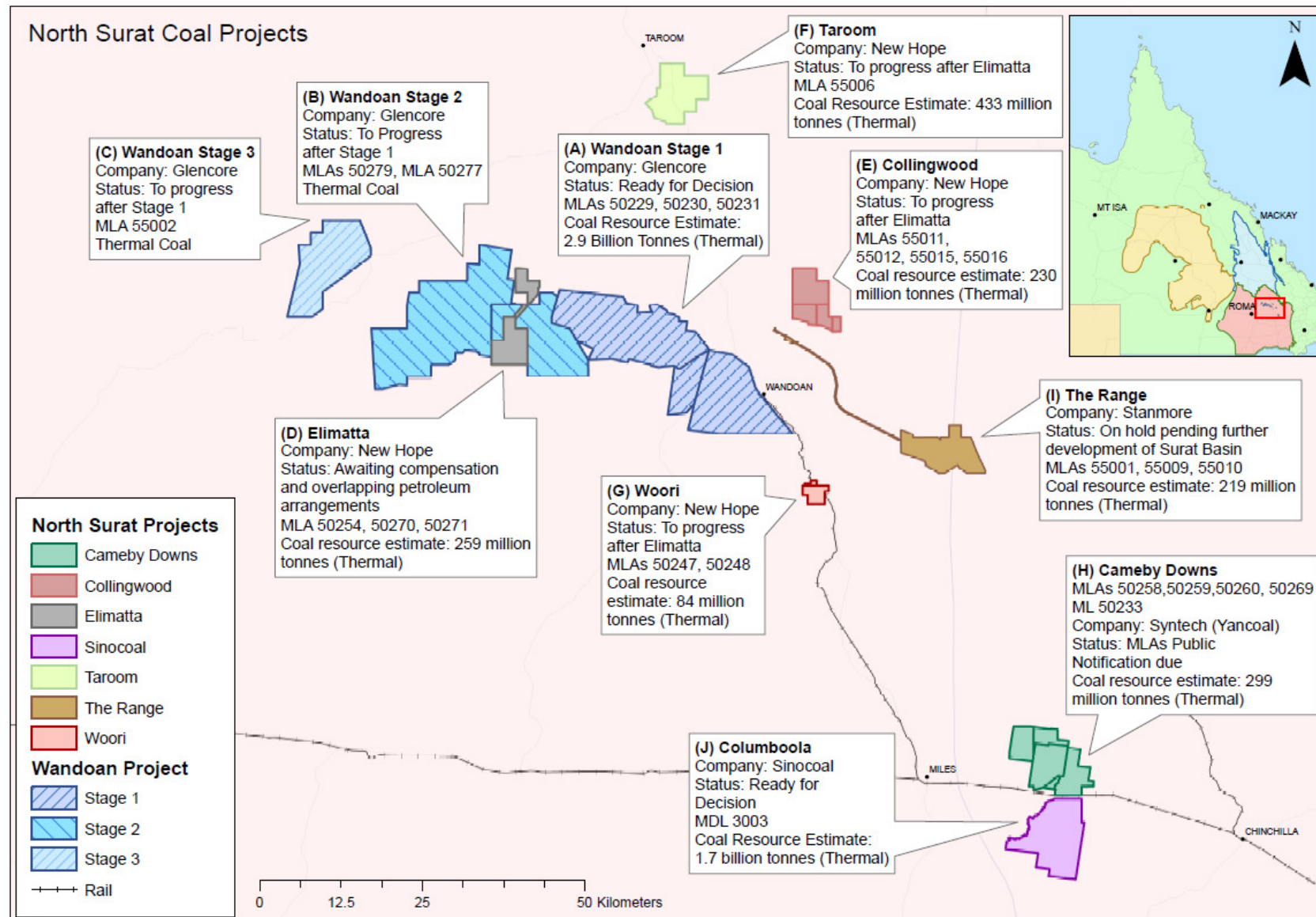
Open Cut

Thermal

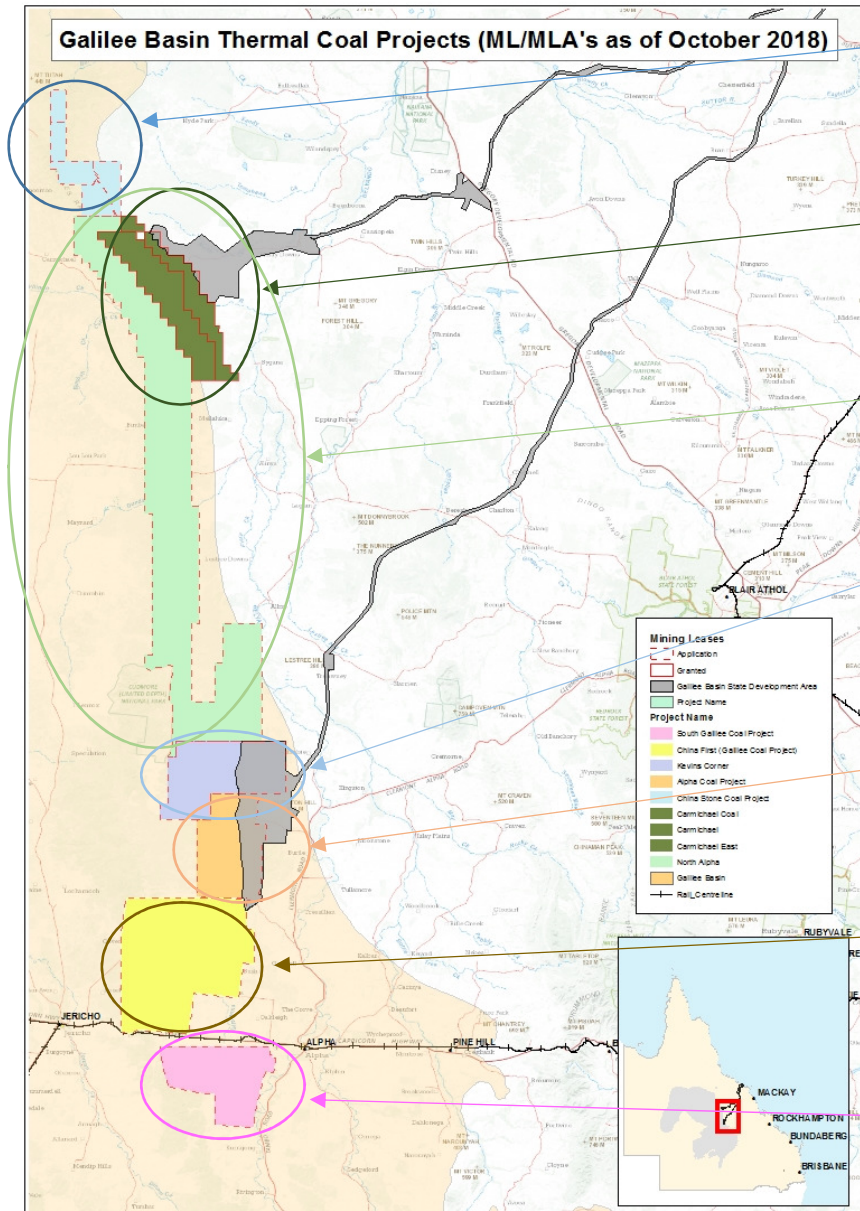
Continued
employment of
approximately 450

7.5 mtpa saleable
(whole of Callide
Mine)

Surat Basin



Galilee Basin



Project: China Stone Coal Project
Type: OC and UG
Company: MacMines Austasia Pty Ltd
Status: CG Report Pending
Proposed Commencement of Construction: tbc
Proposed First Coal: tbc

Project: Carmichael Coal
Type: OC and UG
Company: Adani Mining Ltd
Status: EA and ML issued
Proposed Commencement of Construction: Q1 2019
Proposed First Coal: 2019/2020

Project: North Alpha
Type: OC and UG
Company: Waratah Coal Pty Ltd
Status: ML in application
Proposed commencement of construction: tbc
Proposed First Coal: tbc

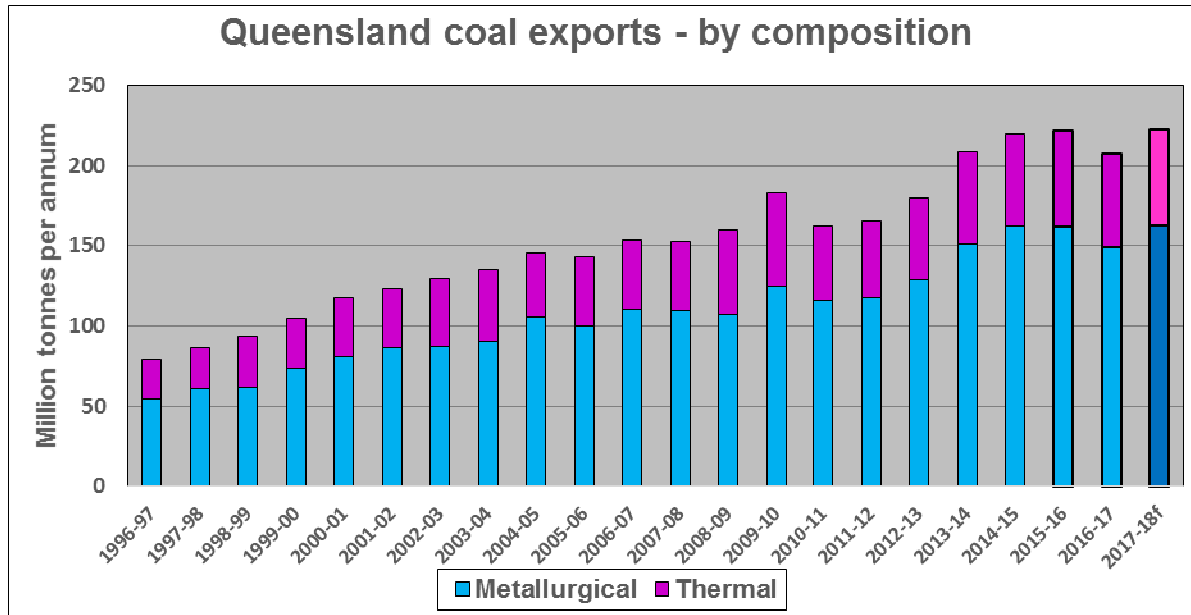
Project: Kevins Corner
Type: OC and UG
Company: Hancock Galilee Pty Ltd (GVK)
Status: EA issued
Proposed commencement of construction: tbc
Proposed First Coal: tbc

Project: Alpha Coal Project
Type: OC
Company: Hancock Coal Pty Ltd (GVK)
Status: EA issued
Proposed commencement of construction: tbc
Proposed First Coal: tbc

Project: China First (Galilee Coal Project)
Type: OC and UG
Company: Waratah Coal Pty Ltd
Status: EA in application
Proposed commencement of construction: 2020
Proposed First Coal: 2023

Project: South Galilee (Stage 1 - Epsilon)
Type: OC and UG
Company: AMCI
Status: EA in application (EIS complete) ML in application
Proposed commencement of construction: 2021 (Epsilon); 2023 (Stages 1-3)
Proposed First Coal: 2022 (Epsilon); 2025 (Stages 1-3)

Coal Recovery



In 2017-18 Queensland coal exports (by terminal) comprise:

Abbot Point: 28.14Mt, a 10.9% increase on 2016-17.

- DBCT: 70.57Mt, an 11.8% increase on 2016-17.
- HPSCT: 49.72Mt, a 14.3% increase on 2016-17.
- RGTCT: 57.11Mt, a 4.3% decrease on 2016-17.
- WICET: 9.63Mt, a 4.8% increase on 2016-17.
- Brisbane: 7.31Mt, a 10.1% increase on 2016-17.

- TMR's forecast for 2018-19 Queensland coal exports is 228Mt, a 2.5% increase on 2017-18.

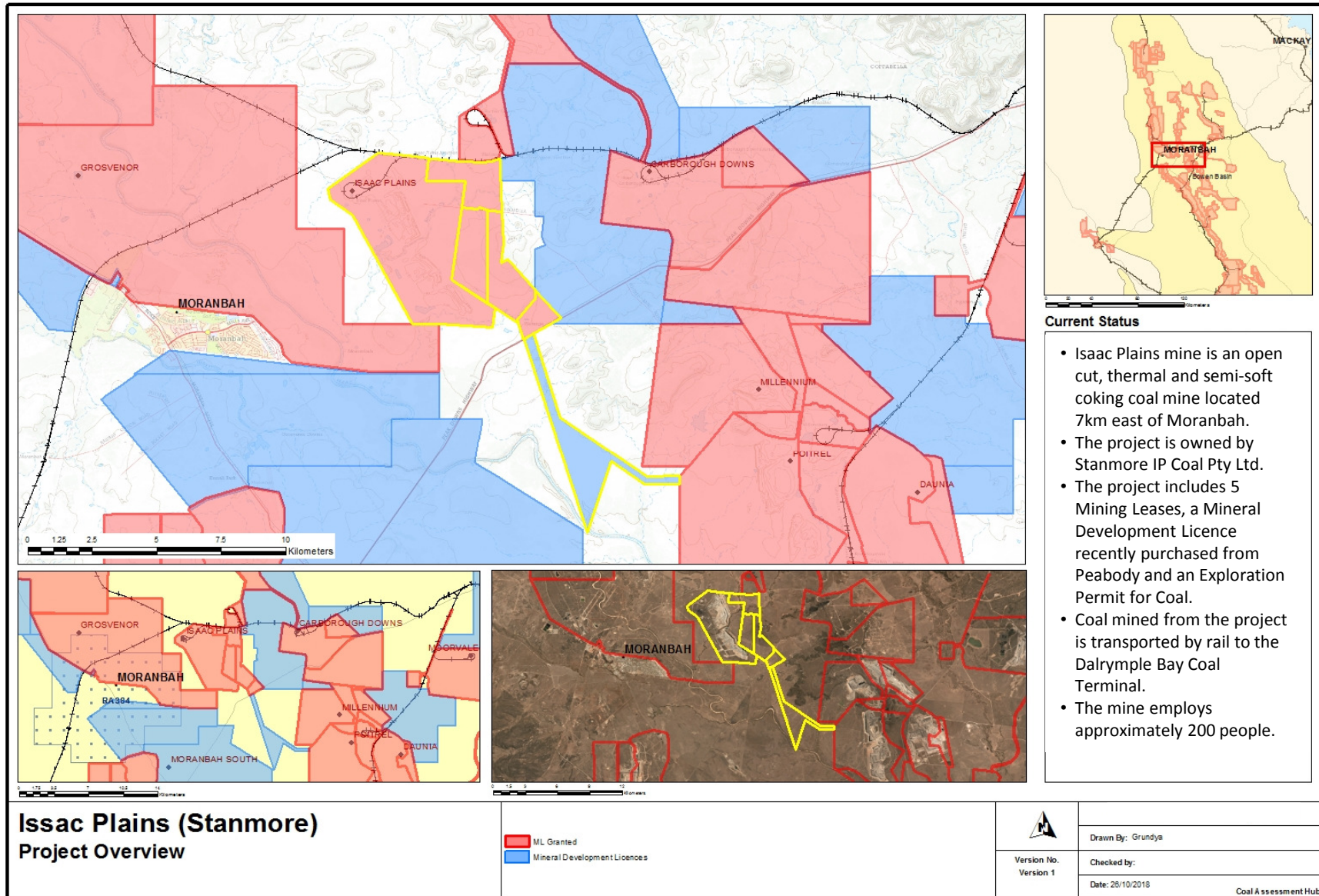
Granted: Coal Mining Leases

2015	2016	2017	2018 (@ 30 Oct)
10	13	18	9

Applications Lodged for: Coal Mining Leases

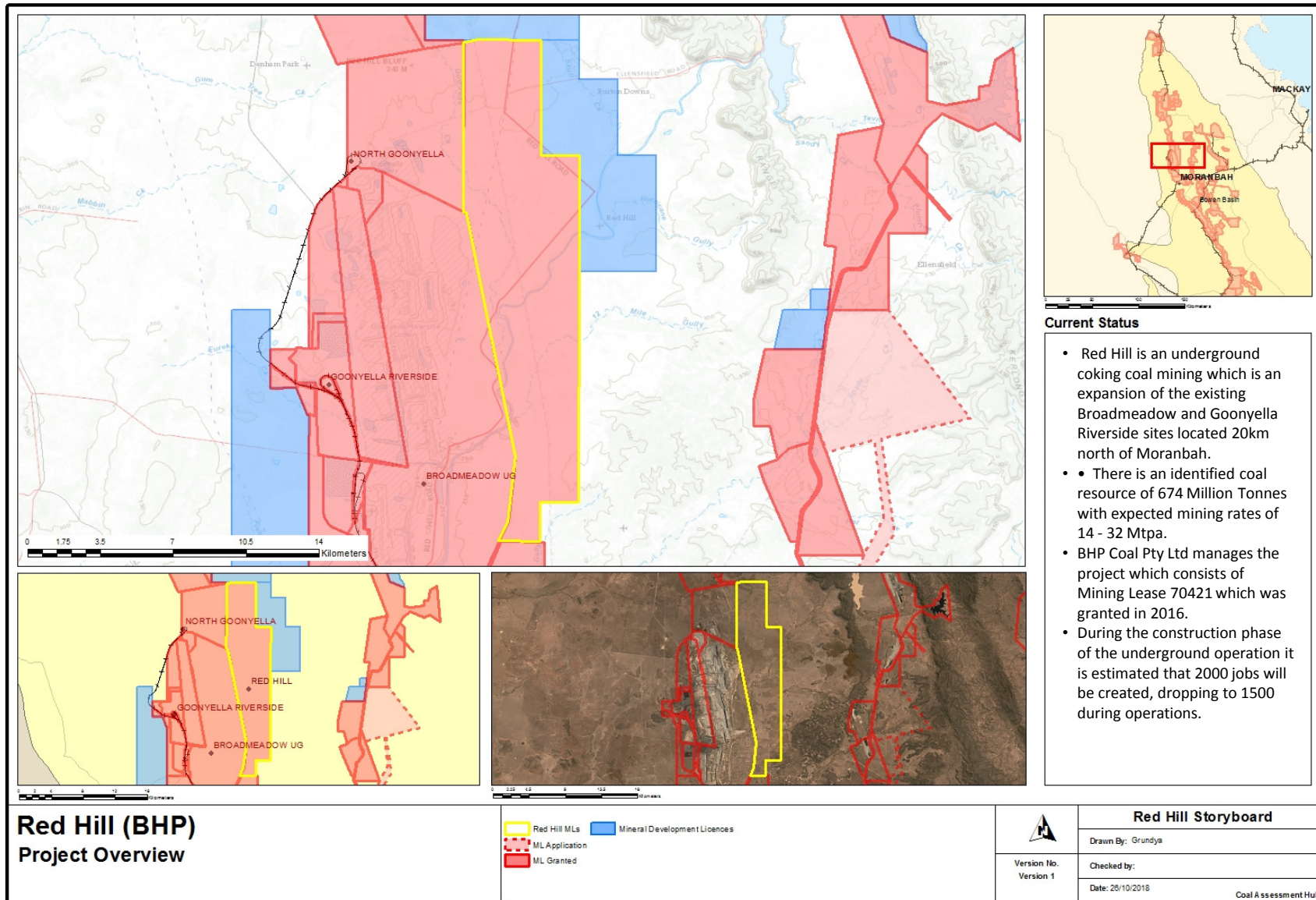
2015	2016	2017	2018 (@ 30 Oct)
9	7	4	15

Isaac Plains

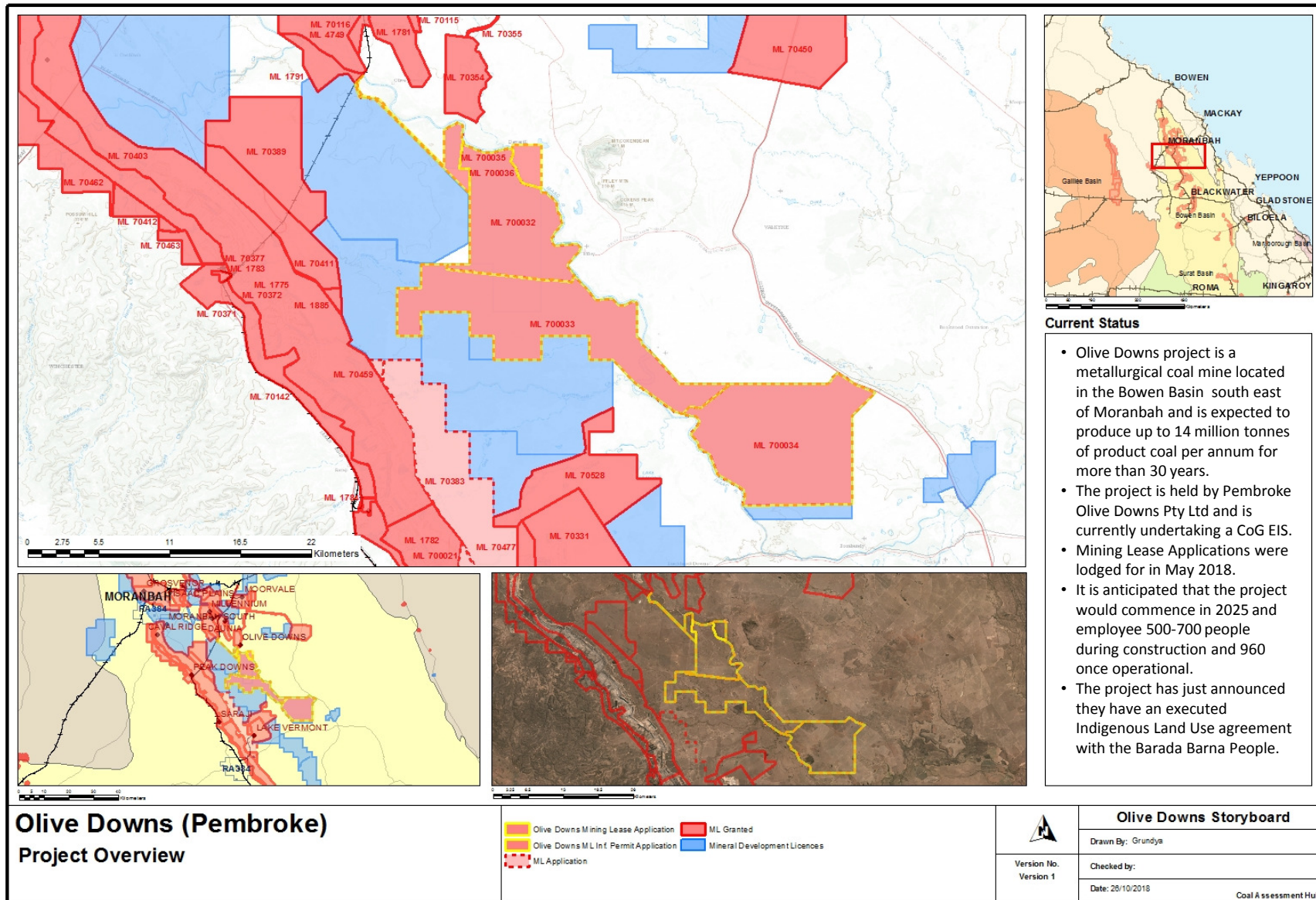


Isaac Plains (Stanmore) Project Overview

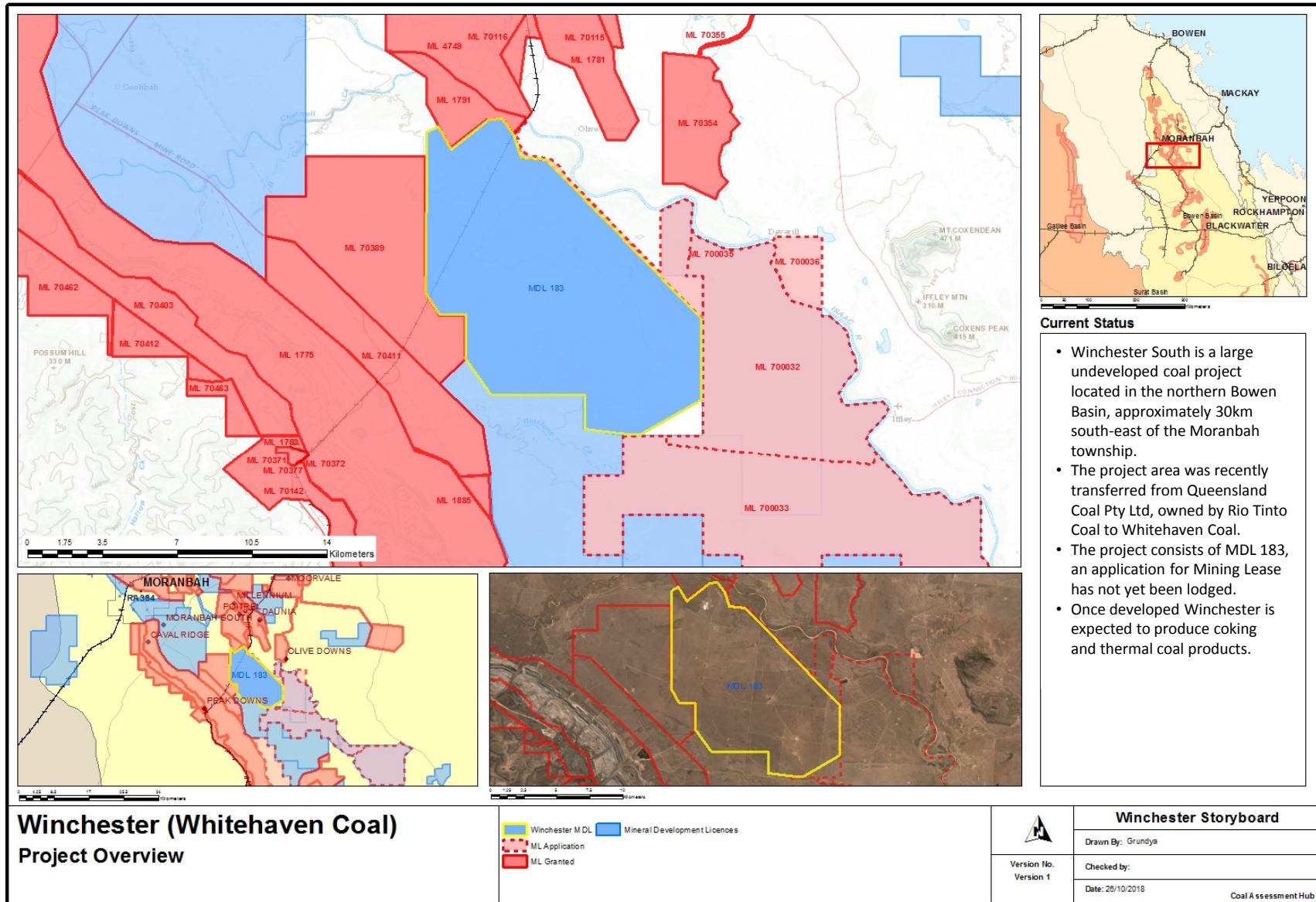
Red Hill



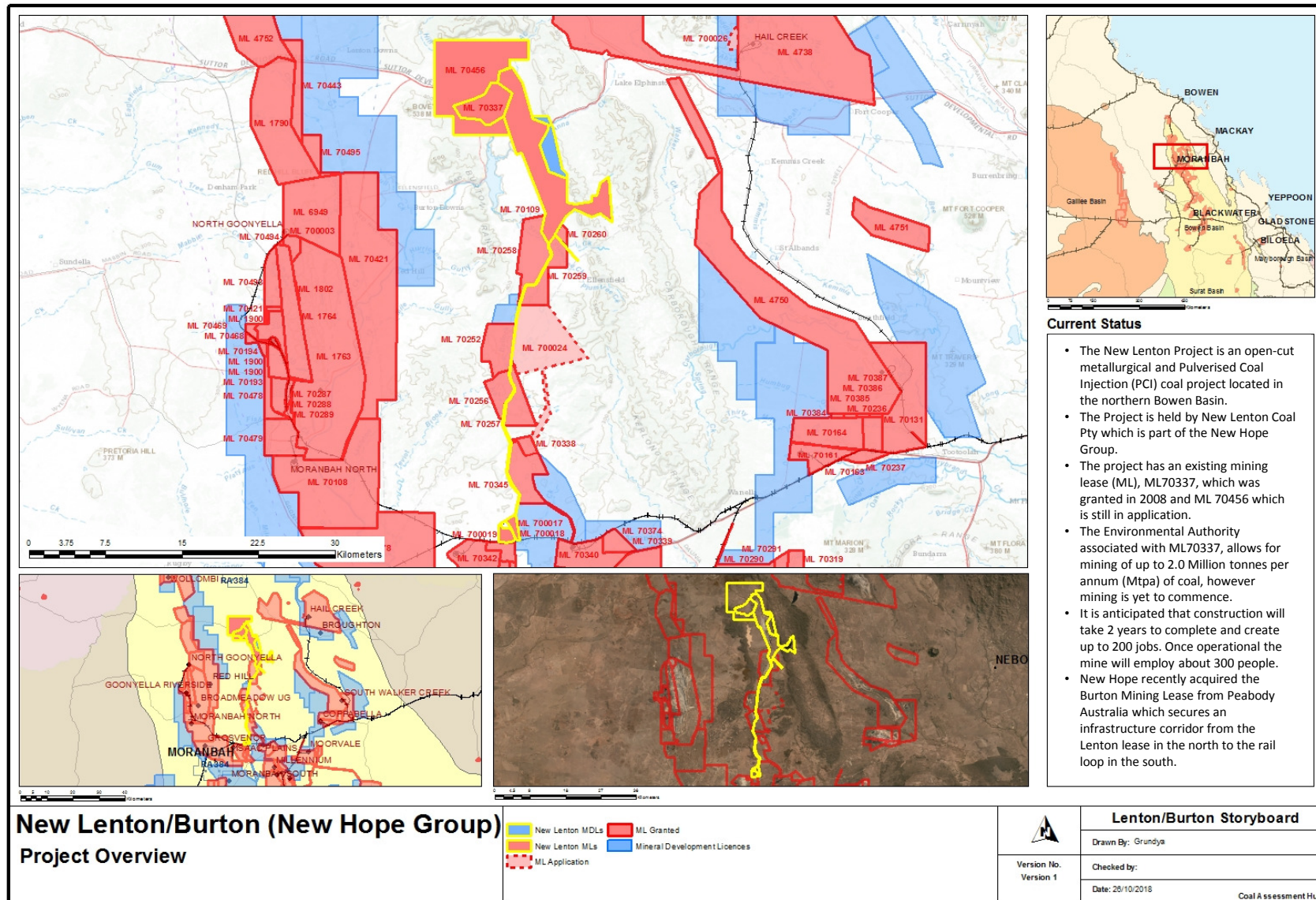
Olive Downs



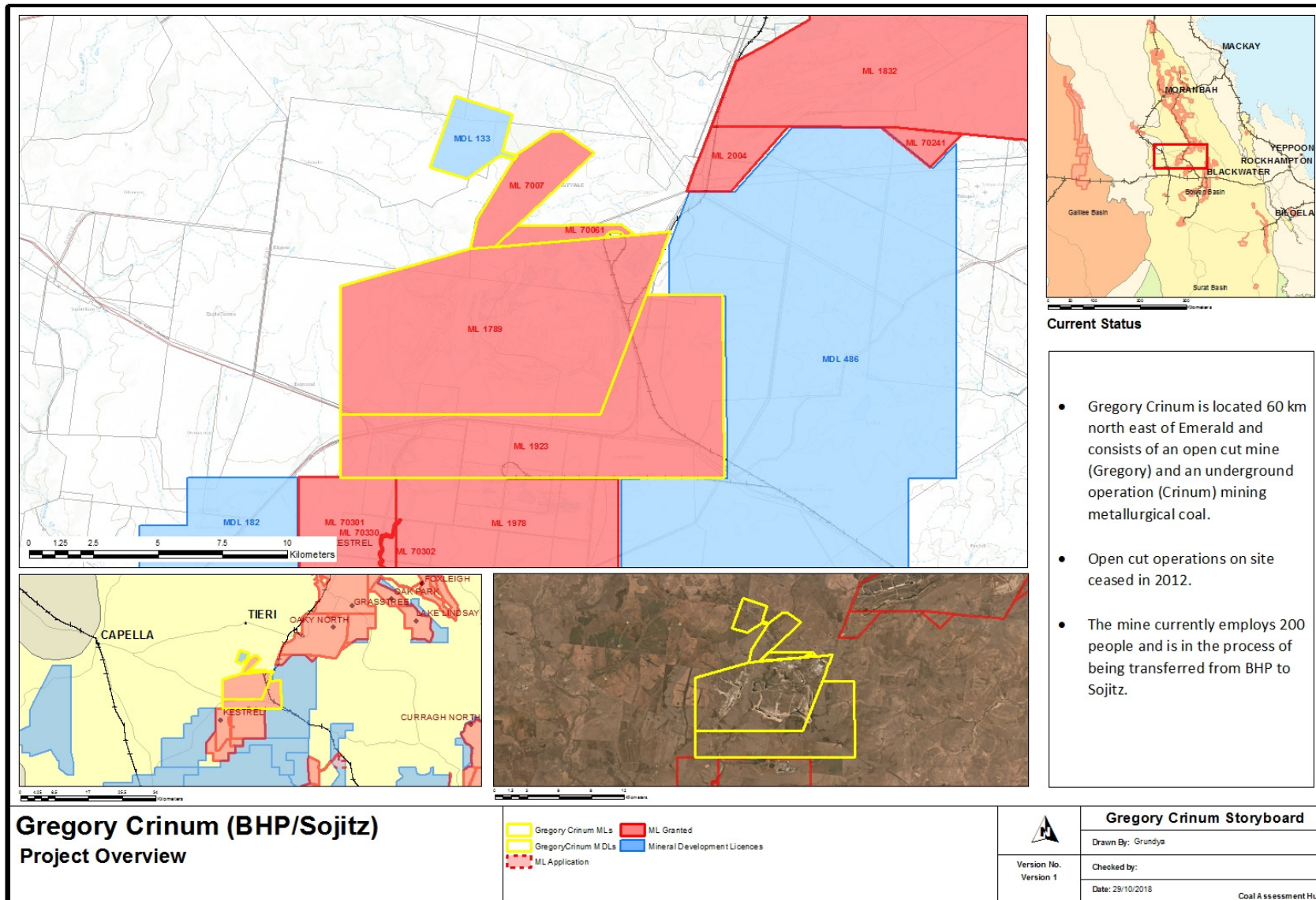
Winchester



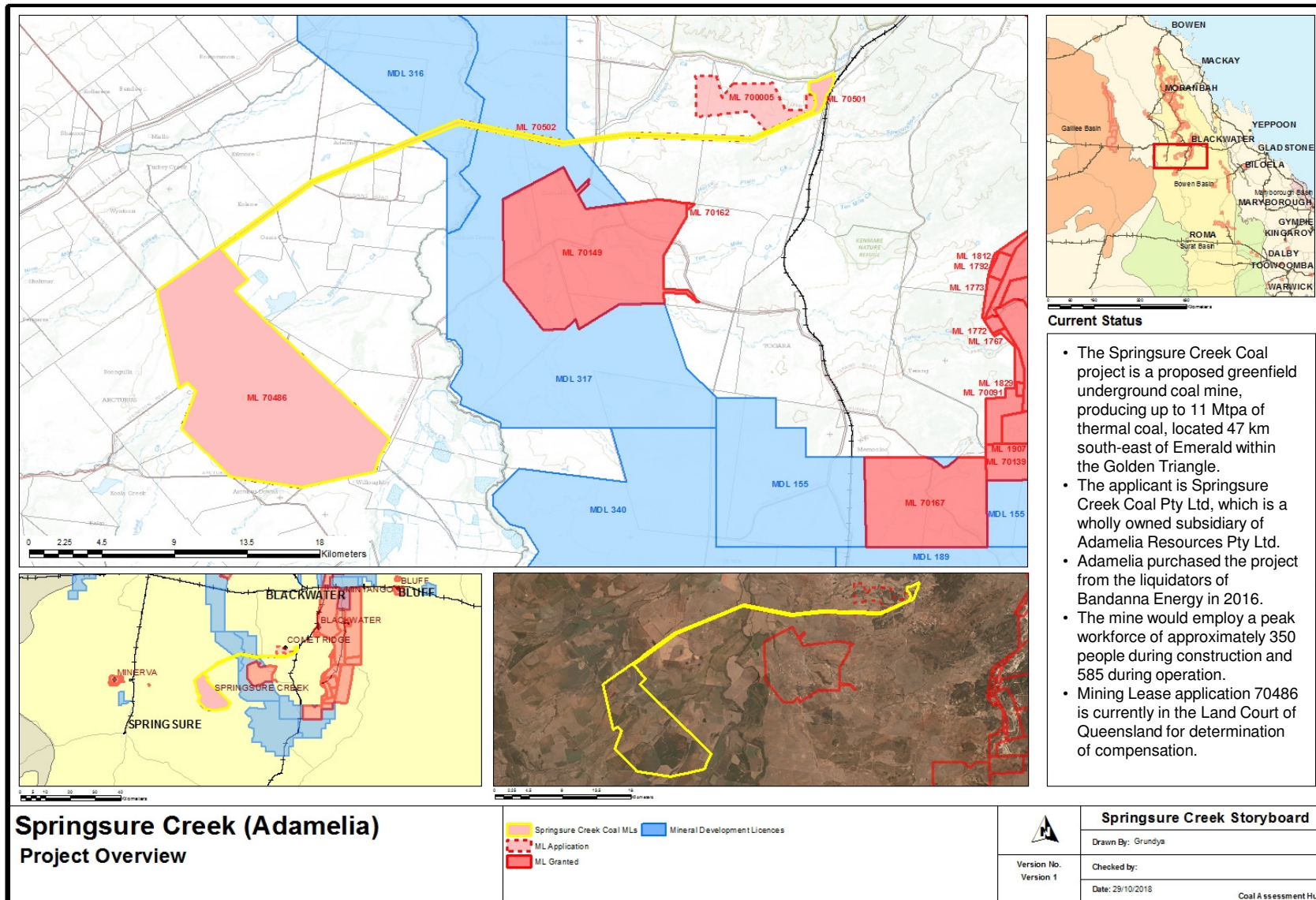
New Lenton



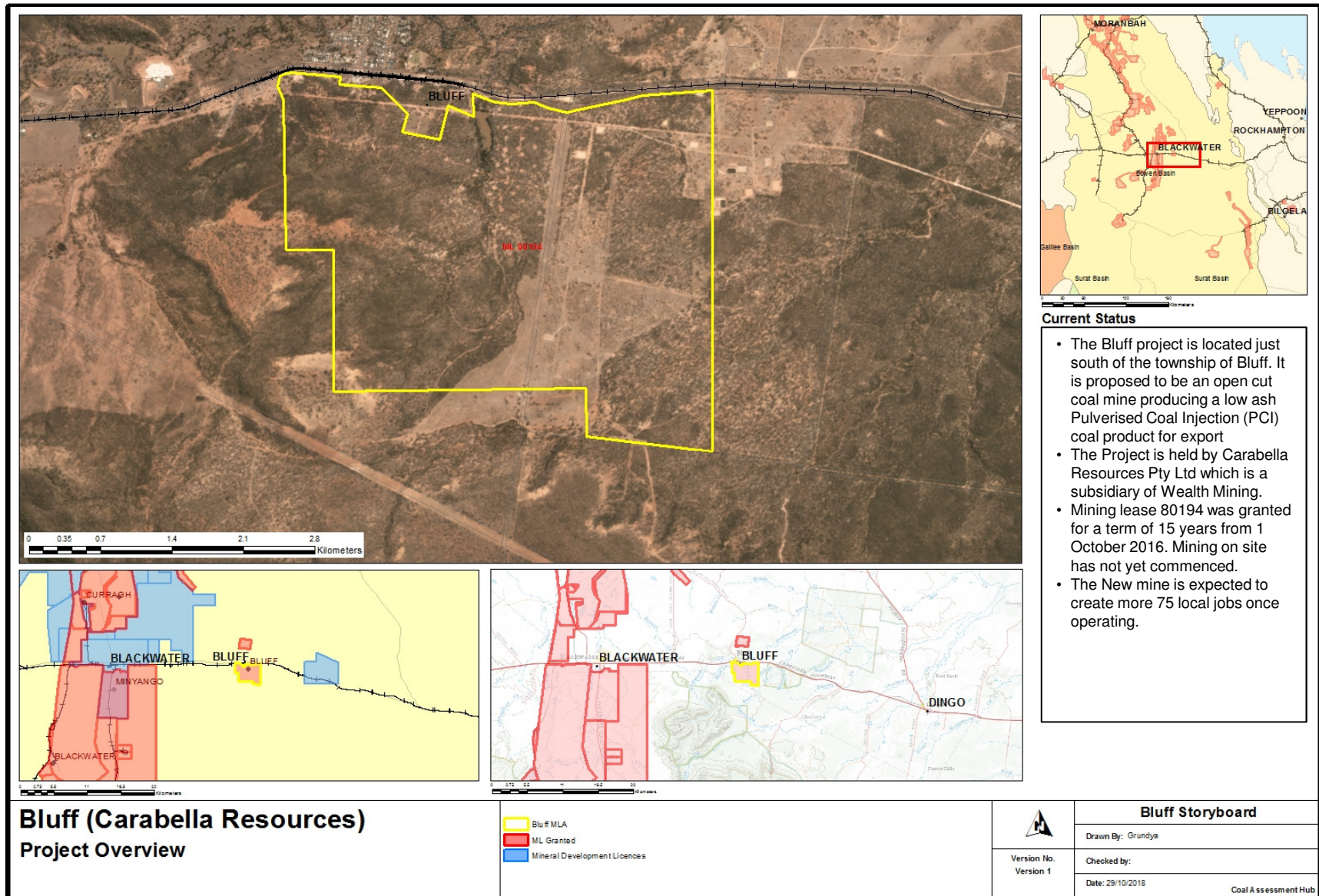
Gregory Crinum



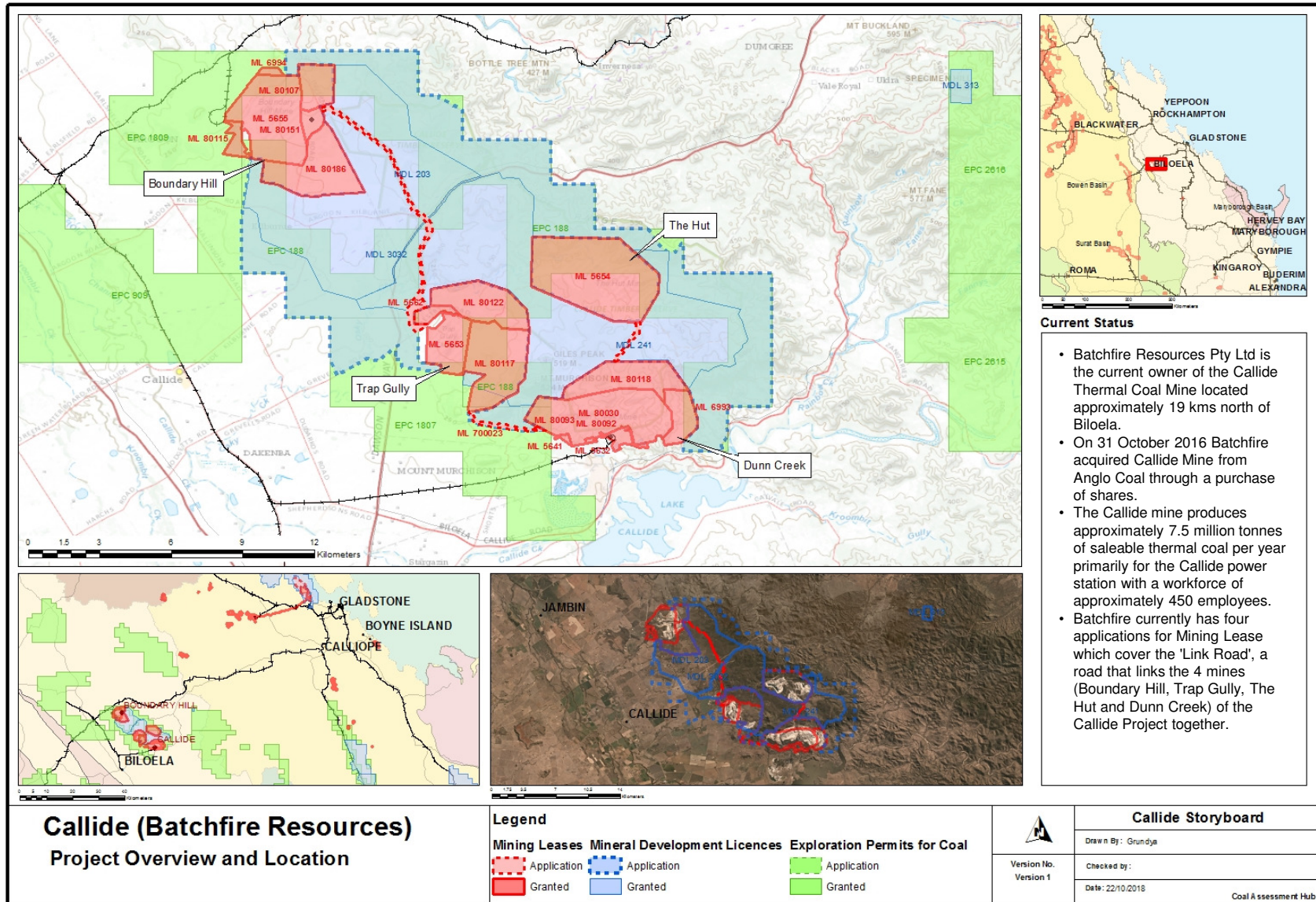
Springsure Creek



Bluff



Callide



Useful online information

Queensland Coal Projects Table

- Email: Coal Hub CoalHub@dnrme.qld.gov.au

Search for resource authorities

- <https://www.business.qld.gov.au/industries/mining-energy-water/resources/online-services/searches>

Coal industry statistical tables

- <https://data.qld.gov.au/dataset/coal-industry-review-statistical-tables>

Mine worker numbers

- <https://www.business.qld.gov.au/industries/mining-energy-water/resources/safety-health/mining/accidents-incidents/safety-performance>

Coal resources

- <https://www.business.qld.gov.au/industries/invest/mining/resources-potential/mineral-resources/coal-resources>

Spatial data

- <http://qldspatial.information.qld.gov.au/catalogue/custom/index.page>

MMOL maps

- <https://minesonlinemaps.business.qld.gov.au/SilverlightViewer/Viewer.html?Viewer=momapspublic>

Queensland globe

- http://qldspatial.information.qld.gov.au/catalogue/custom/search.page?q=%22Queensland+Globe%22&fq%5B%5D=id.table_s:table.docindex

