

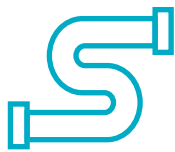
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INTRODUCTION AND OVERVIEW



1900

Gas is first discovered by chance in Roma from a well being drilled for water



1968

Gas is piped to Brisbane via the Wallumbilla to Brisbane gas pipeline



1996

Commercial production of coal seam gas (CSG) commences in the Bowen Basin



2015

Liquefied natural gas (LNG) is exported from Gladstone

WHAT DOES 'SHARED LANDSCAPES' REPRESENT?

The concept of the Shared Landscapes report was born in part from the Commission's [statutory function](#) to obtain and publish information that can assist landholders and regional communities to increase their knowledge and understanding of Queensland's onshore gas industry.

The agricultural and resources sectors are two of the many contributors to the prosperity of Queensland's rural and regional communities and the State as a whole. This report acknowledges that while there are many different factors that relate to the prosperity of regional communities, the focus is the interrelationship between the agricultural and resources sectors.

Maintaining the social licence of Queensland's onshore gas industry and achieving sustainable coexistence with rural landholders and regional communities is essential for the industry's continued growth and prosperity. As Queensland's onshore gas industry continues to expand, it is important that trust, transparency, respectful communication and information sharing is facilitated between all stakeholders.

This Shared Landscapes report is the third comprehensive report that the Commission has produced since 2019. This iteration of Shared Landscapes encapsulates the current state of Queensland's petroleum and gas industry for the Financial Year ending in June 2021 (FY21). The purpose of the report is to define the current state of the petroleum and gas industry, including development areas, groundwater management processes, compliance and the economic contributions made to regional communities and the State. In FY21, Queensland's petroleum and gas industry spent over \$3.5 billion with Queensland based suppliers of goods and services, communities, and government payments, which also supported over 4,000 directly employed jobs.

This report also includes the compilation of data that demonstrates the joint economic contribution that both the agriculture sector and the gas industry deliver to the Queensland economy. The purpose of this additional information is not as a comparison, rather to

demonstrate how important the agriculture sector and the gas industry is to the entire Queensland economy. The ability for this economic contribution to be realised relies in part on the successful coexistence of the gas industry and the agricultural sector operating on the same land at the same time. This symbiotic relationship between rural landholders, regional communities and the onshore gas industry has developed over the past few decades and will continue for years to come. That is why coexistence between these two sectors is critical.

This report will describe the benefits and contributions that the petroleum industry provides to Queensland. It will explore further how the petroleum industry and agriculture sector can operate side by side and deliver benefits to landholders, regional communities, and all Queenslanders. The report is underpinned by facts and data obtained from government agencies, the petroleum and gas industry and industry representative bodies to provide accurate and meaningful information to stakeholders in regional communities, rural landholders and other interested groups.

QUEENSLAND'S ONSHORE GAS INDUSTRY

The onshore gas industry has been a part of Queensland's landscape since the first natural gas field was discovered by accident in Roma in 1900, with natural gas rising from a well that was being drilled for water. Queensland's first commercial petroleum and gas operations were developed in the 1960s in the Cooper Basin and Moonie oil fields.

The [conventional gas](#) industry has matured since the 1960s, with productive oil and gas fields in the Cooper Basin and around Moonie in the Surat. During the 1990's, as those gas reserves were depleting, the discovery of coal seam gas (CSG) reserves in the Surat Basin led to the growth of a new gas industry in Queensland.

Until the 2000s, gas had traditionally been developed in Queensland for use in the domestic East Coast Market. The discovery of significant CSG reserves and resources in the Surat Basin and the Bowen Basin led to the viability of exporting gas overseas to high value energy markets in Asia.

To achieve this vision required a significant undertaking and resulted in the development of a world first to convert CSG to liquid natural gas (LNG) for export.

The concept of converting CSG to LNG was realised in 2014 with the first export cargo from the Curtis Island LNG facilities. This shipment marked a world first of converting CSG into LNG, launching Queensland gas resources into global export markets.

The ability to convert CSG to LNG underpinned the commercial investments required to develop the CSG resources in Queensland. To continue to supply the export and domestic markets for decades to come, there is a need to discover and develop new gas reserves.

Gas exploration continues to be undertaken in new and emerging areas as well as targets in traditional fields like the Cooper Basin, the Surat Basin and Bowen Basin. These traditional areas are being explored for deeper and harder to reach targets such as basin-centred and tight gas in sandstones. As well as new targets in traditional areas, gas exploration is occurring in areas that have not yet seen significant gas activity such as the Galilee Basin and Adavale Basin.

In addition, frontier basins such as South Nicholson Basin and the Millungera Basin are in the early stages of potential exploration activities.

The ability to discover and liberate these emerging gas resources may require the deployment of new technology, new practices, new techniques and utilising innovative approaches. Some of these techniques include practices already used in Queensland such as deviated and directional drilling, hydraulic fracturing and artificial intelligence learning to reprocess existing data.

In the early days of the CSG to LNG sector in Queensland, the agricultural producers in the Surat Basin and Bowen Basin held serious concerns regarding the gas industry's surface impacts on established farming operations.

This included potential impacts to groundwater aquifers, as well as social and economic challenges.

Today, a large portion of landholder and community concerns center around CSG activities in high-value agricultural areas which are predominantly crop farming operations.

By improving management of surface impact, the gas industry has undoubtedly delivered benefits to the communities that host gas activity as well as the State of Queensland as a whole. These benefits include the opportunity for economic diversity in Local Government Areas (LGAs), direct contributions from gas companies to local sporting and community groups, procurement of goods and services in regional areas and the payment of royalties to the Queensland Government.

Gas is a critical contributor and creator of direct jobs, not only boosting Queensland's economy, but the positive flow-on effects are evident in the indirect jobs it enables downstream in the energy and manufacturing sectors.

Australia's manufacturing sector needs gas to operate and that's why it's so important there is a guarantee that they have a ready gas supply.

Similarly, gas is also needed as a vital energy source for power generation as well as for household use, primarily in cooking and heating (particularly in the colder southern states).

Gas production—both domestically and for export—will continue to be an essential part of Queensland's economy for the foreseeable future, and sound coexistence practices with rural and regional communities will be key to its delivery.

GASFIELDS COMMISSION QUEENSLAND

The GasFields Commission Queensland (the Commission) is an independent statutory body established by the Queensland Government in 2012 to manage and improve the sustainable coexistence of landholders, regional communities, and Queensland's onshore gas industry.

The Commission provides a range of support to landholders and regional communities, primarily through education and engagement activities.

It plays a key role in delivering information to landholders to help them understand their rights as they relate to gas development, along with advising government and other key stakeholders on issues of concern and opportunities.

The Commission also works to provide transparency and independent assurances that the onshore gas industry is being appropriately regulated and held to account when needed.

