

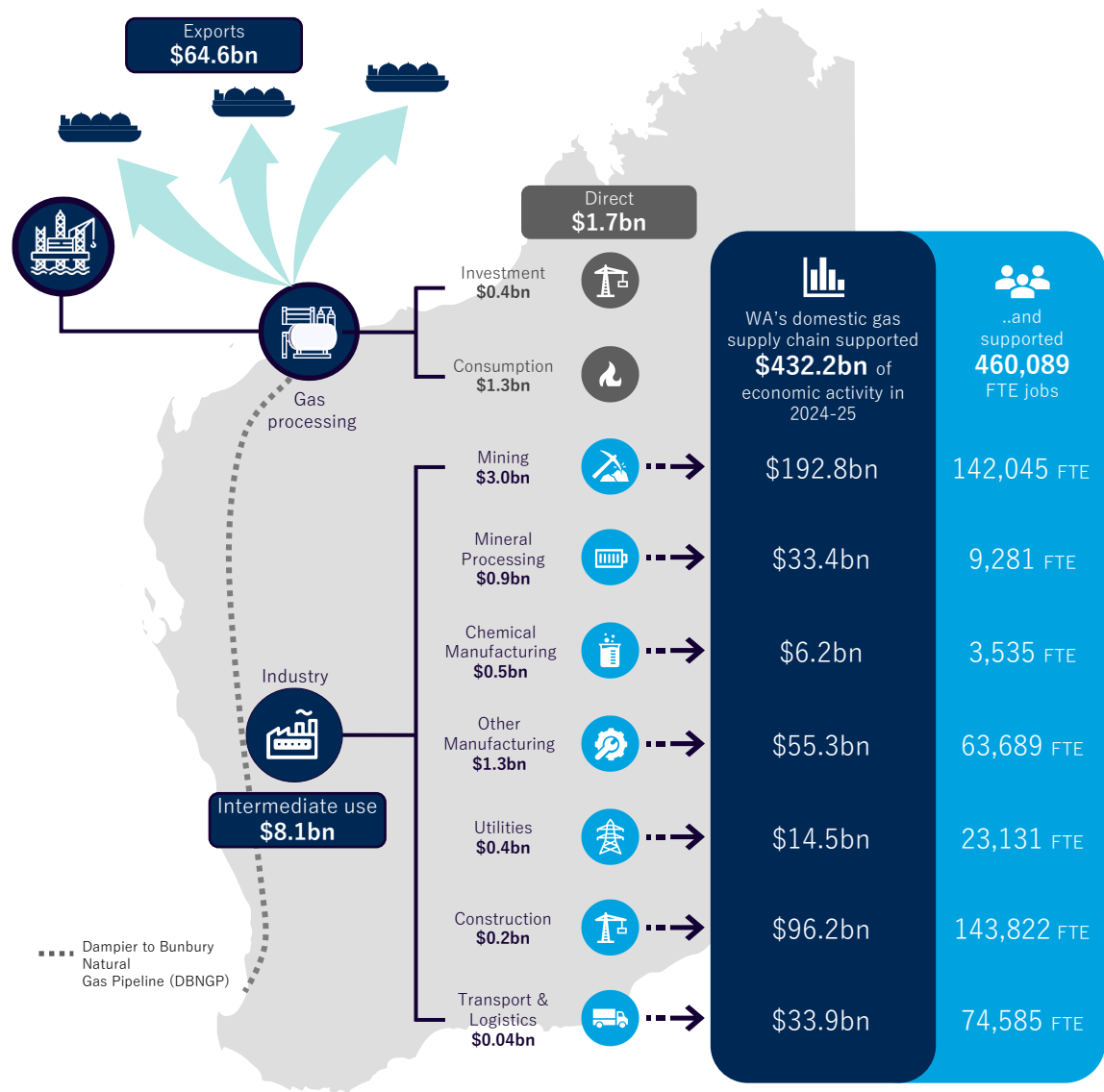
Economic Importance of Domestic Gas to Western Australia, 2024-25

The gas industry is a significant driver of Western Australia's economic growth and development. ACIL Allen estimates that in 2024-25, gas exports alone contributed \$64.6 billion to the State's export income. While these direct impacts are significant and visible, the gas industry plays an equally important role in enabling the growth of other industries and the broader domestic economy.

The industry supplies gas to a number of important sectors across the State, which together purchased some \$8.1 billion of gas as a critical input into their operations. The largest consumer of domestic gas in 2024-25 was the mining sector (\$3.0 billion in purchases), the manufacturing sector (\$1.8 billion) which includes chemical manufacturing (\$0.5 billion) and other manufacturing (\$1.3 billion), and the mineral processing sector (\$0.9 billion). Other significant consumers included the utilities (\$0.4 billion), construction (\$0.2 billion) and transport and logistics (\$0.04 billion) sectors. Sectors for which gas represents only a minor input have been excluded from this analysis on account that gas is only a minor input into activity.

Together, these industries supported \$432.2 billion of economic activity (accounting for 52.1% of total economic activity in Western Australia in 2024-25) and 460,089 full time equivalent jobs.

Compared to the same analysis conducted by ACIL Allen for the DomGas Alliance for the 2021-22 year, the value of export income has increased by \$16.4 billion (+34.1%), while the value of purchases across the same group of sectors has increased by \$3.8 billion (+88.7%) in nominal terms. The increase in purchases has largely been driven by the mining sector (+\$2.4 billion), with notable increases also observed in purchases from other manufacturing (+\$0.74 billion) and mineral processing (+\$0.53 billion) sectors.



About ACIL Allen

ACIL Allen is a leading independent economics, policy and strategy advisory firm, dedicated to helping clients solve complex issues.

Our purpose is to help clients make informed decisions about complex economic and public policy issues.

Our vision is to be Australia's most trusted economics, policy and strategy advisory firm. We are committed and passionate about providing rigorous independent advice that contributes to a better world.

Report to: Domestic Gas Alliance

RELIANCE AND DISCLAIMER

The professional analysis and advice in this report has been prepared by ACIL Allen for the exclusive use of the party or parties to whom it is addressed (the addressee) and for the purposes specified in it. This report is supplied in good faith and reflects the knowledge, expertise and experience of the consultants involved. The report must not be published, quoted or disseminated to any other party without ACIL Allen's prior written consent. ACIL Allen accepts no responsibility whatsoever for any loss occasioned by any person acting or refraining from action as a result of reliance on the report, other than the addressee.

In conducting the analysis in this report ACIL Allen has endeavoured to use what it considers is the best information available at the date of publication, including information supplied by the addressee. ACIL Allen has relied upon the information provided by the addressee and has not sought to verify the accuracy of the information supplied. Unless stated otherwise, ACIL Allen does not warrant the accuracy of any forecast or projection in the report. Although ACIL Allen exercises reasonable care when making forecasts or projections, factors in the process, such as future market behaviour, are inherently uncertain and cannot be forecast or projected reliably.

ACIL Allen shall not be liable in respect of any claim arising out of the failure of a client investment to perform to the advantage of the client or to the advantage of the client to the degree suggested or assumed in any advice or forecast given by ACIL Allen.