2019 From Paddock to Plate Tour

Mackay Qld

3 July 2019
Greater Whitsunday Alliance formed in January 2017 and is collaboratively funded by three regional councils.

GW3 is working on a range of projects including:

- Infrastructure funding and advocacy;
- Investment attraction
- Jobs of the future
- Agrifood
- Innovation and more . . .

Agriculture output has increased from $1.1B to $1.4B

Tourism visitor numbers to Mackay has increased 12.2% from March 2017 to March 2018

169,693 Residents projected to grow to 249,898 by 2036

85,165 Jobs – 16,600 in mining – next highest retail 7,610
Greater Whitsunday region spans 90,354 km²
WAS IT REALLY A BUST?

The region’s GRP fell from $18.5B to $14.9B

SOURCE: REMPLAN
March 2014
The unemployment rate is 4.2%

March 2015
The unemployment rate is 9.6%

June 2018
The unemployment rate is 2.9%

Qld Unemployment rate 6.1%
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<tbody>
<tr>
<td></td>
<td>$M</td>
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<tr>
<td>Mining</td>
<td>$13,901.879</td>
<td>40.2%</td>
<td>$11,131.591</td>
<td>79.3%</td>
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<tr>
<td>Manufacturing</td>
<td>$3,728.806</td>
<td>10.8%</td>
<td>$610.564</td>
<td>4.3%</td>
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<td>Construction</td>
<td>$2,874.918</td>
<td>8.3%</td>
<td>$423.253</td>
<td>3.0%</td>
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<tr>
<td>Rental, Hiring &amp; Real Estate Services</td>
<td>$2,339.667</td>
<td>6.8%</td>
<td>$372.961</td>
<td>2.7%</td>
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<tr>
<td>Transport, Postal &amp; Warehousing</td>
<td>$1,851.161</td>
<td>5.3%</td>
<td>$194.221</td>
<td>1.4%</td>
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<tr>
<td>Agriculture, Forestry &amp; Fishing</td>
<td>$1,403.287</td>
<td>4.1%</td>
<td>$308.653</td>
<td>2.2%</td>
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<tr>
<td>Accommodation &amp; Food Services</td>
<td>$1,103.819</td>
<td>3.2%</td>
<td>$149.688</td>
<td>1.1%</td>
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<td>Health Care &amp; Social Assistance</td>
<td>$878.705</td>
<td>2.5%</td>
<td>$57.289</td>
<td>0.4%</td>
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<tr>
<td>Wholesale Trade</td>
<td>$878.227</td>
<td>2.5%</td>
<td>$69.538</td>
<td>0.5%</td>
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<tr>
<td>Retail Trade</td>
<td>$809.190</td>
<td>2.3%</td>
<td>$57.100</td>
<td>0.4%</td>
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<td>Administrative &amp; Support Services</td>
<td>$783.377</td>
<td>2.3%</td>
<td>$190.946</td>
<td>1.4%</td>
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<tr>
<td>Professional, Scientific &amp; Technical Services</td>
<td>$721.336</td>
<td>2.1%</td>
<td>$59.618</td>
<td>0.4%</td>
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<td>Education &amp; Training</td>
<td>$688.187</td>
<td>2.0%</td>
<td>$99.015</td>
<td>0.7%</td>
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<td>Public Administration &amp; Safety</td>
<td>$666.550</td>
<td>1.9%</td>
<td>$94.641</td>
<td>0.7%</td>
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<tr>
<td>Financial &amp; Insurance Services</td>
<td>$567.450</td>
<td>1.6%</td>
<td>$27.024</td>
<td>0.2%</td>
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<tr>
<td>Electricity, Gas, Water &amp; Waste Services</td>
<td>$545.355</td>
<td>1.6%</td>
<td>$97.910</td>
<td>0.7%</td>
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<td>Other Services</td>
<td>$531.781</td>
<td>1.5%</td>
<td>$64.713</td>
<td>0.5%</td>
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<td>Information Services &amp; Telecommunications</td>
<td>$224.064</td>
<td>0.6%</td>
<td>$22.199</td>
<td>0.2%</td>
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<tr>
<td>Arts &amp; Recreation Services</td>
<td>$117.288</td>
<td>0.3%</td>
<td>$10.285</td>
<td>0.1%</td>
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<tr>
<td><strong>Total</strong></td>
<td><strong>$34,615.045</strong></td>
<td><strong>$14,041.210</strong></td>
<td><strong>$15,487.072</strong></td>
<td><strong>$5,112.942</strong></td>
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Total value of projects listed is in excess of $40 billion.

Mackay has more than $600 million in infrastructure projects.

Isaac has more than $30 billion in mining projects planned over the next 20 years.

Whitsunday has more than $4 billion in infrastructure projects planned including significant port upgrades.

265 projects in total listed.

45 commenced (16.9%)

34 firm (12.8%)

116 possible (43.7%)

54 early (20.3%)

16 has no further information available (6%)
The MIW region is the fourth ranked region in Queensland in relation to gross value of agriculture production.

$1,393B
Gross value of Agricultural Product

9.9%
Queensland's Gross Value

2.3%
Australia's Gross Value

5.1%
Beef Cattle & Calves - $613m
of Australia’s beef cattle and calves

28.4%
Sugar Cane - $461m
of Australia’s sugar cane

5.6%
Sorghum - $13m
of Australia’s sorghum

24.1%
Tomatoes - $109m
of Australia’s fresh market tomatoes

26.2%
Capsicum - $32m
of Australia’s capsicum

7.6%
Beans - $14m
of Australia’s beans

3.6%
Mangoes - $5m
of Australia’s mangoes

6.1%
Sweet Corn - $9m
of Australia’s sweet corn

5.1%
Pumpkins - $3.9m
of Australia’s pumpkins

$615,188,990 - 44%
Livestock - Total

$564,274,806 - 41%
Broadacre crops - Total

$193,360,918 - 14%
Vegetables for human consumption - Total

$5,183,331 - 0.4%
Fruit and nuts (excluding grapes) - Total

$4,127,505 - 0.3%
Livestock products - Total

$9,297,376 - 0.7%
Nurseries, cut flowers or cultivated turf - Total

$1,394,701 - 0.1%
Hay and silage - Total

2019 Paddock to Plate Tour
COLLABORATE

KEY PRIORITY AREA

Agriculture, Aquaculture and Bio Futures

Drive the region as a peak primary producing economy

- Stage 2
  “Cultivating Opportunity”

Close collaboration with CHDC
Why GGWA - Stage 1?

- Stakeholders recognised the need for greater diversity following slowing of resource sector
- Stakeholders (GGWA Steering Committee) saw opportunity to grow Agricultural sector from $1.119 billion gross value and need to value add
- Stakeholders identified that MIW agri sector was flying under the radar and missing opportunities
- RDA proactively dealt with Canberra and developed the Mackay-Isaac-Whitsunday Agricultural Overview (2016) - raising awareness of sector and burgeoning opportunities
Outcomes of GGWA - Stage 1

- DAF used MIW Agricultural Overview as part of business case to secure funding for a Project Coordinator to engage with over 250 industry and other stakeholders and identify opportunities

- GGWA - Report Stage 1 - ‘Planting the Seed’ produced after 7 months of engagement

- 3 Stages identified - under 3 themes: Planning, Infrastructure & Marketing:
Priorities Identified and Prioritised:

Industry sectors:
1. Aquaculture
2. Beef/Livestock
3. Biofutures
4. Cropping - Broadacre
5. Horticulture
6. Sugar

Growth Enablers:
1. Agri-Tourism
2. Branding – Regional & products
3. Exports
4. Investment attraction
5. Planning
6. Sustainability
7. Technology & innovation
8. Transport & logistics
9. Water security
10. Workforce
$194K Joint Submission – GW3 / NQBP / BGGA / GGWA

Identify the capacity and capability of the region’s agriculture production (including products from agri-food waste streams – current and future), infrastructure and export sectors to meet existing and future international market demands.

• Examine how supply chains, both domestic and international, will need to be developed to get export produce and products from agri-food waste to market and overcome market access barriers.

• Ultimately emphasise how agricultural development and export market development can be a catalyst for generating future growth in the region

• Map the current capacity and export supply chains of the MIW agriculture sector to develop a plan to optimise the region’s capacity to supply to international markets.

• MIW Agribusiness configuration and capacity assessment including a full literature review, desktop analysis of available data sources and validation of the data through producer and stakeholder interviews and engagement

• Complete a detailed analysis that identifies opportunities to enhance export opportunities and efficiencies across MIW agricultural export supply chain.
SUPPLY CHAIN IN MIW REGION

Export demand (Australia):
- Beef: grow by an average of 4%
- Sugar: stabilise
- Fruit & Veg: little growth by an average of 1%

National economic growth of major partners:
Decline by an average of 2%

As well as income and price of food, population growth is a key indicator of future demand. Australia and Queensland’s population is projected to grow by over 4 million and 800,000 people, respectively by 2030.

Projected population growth

Preliminary findings: 30 May 2019
The North Queensland Agricultural Supply Chain Alliance
Investing in Biofutures projects in the Mackay Isaac Whitsunday Region

Queensland Government’s biofutures vision

The Queensland Government is increasing its support to accelerate the biofutures industry as part of its vision for the diversification of the Queensland economy.

Queensland has strong competitive advantages such as a subtropical and tropical climate, and world-class agricultural and research sectors. The vision is supported by the strategies and actions we are implementing as Queensland becomes renowned both nationally and internationally as a place to invest, research and commercialise biofutures projects.

What is driving investment in biofutures?
Biofutures is seen internationally as the next wave of economic development, providing major opportunities for innovation, jobs and growth. The Queensland Government’s sustainable biofuels mandates set minimum requirements for the sale of bio-based petrol and bio-based diesel. Biofuels production is expected to increase due to mandates and a growth in the global demand for biofuels specifically for the aviation and marine sector.

The Queensland Government is developing a comprehensive new Waste Management and Resource Recovery Strategy, underpinned by a waste disposal levy to attract investment, develop new jobs and industries and reduce waste. There are opportunities for co-located waste to energy plants.

The Mackay Isaac Whitsunday region

Located just north of the Tropic of Capricorn, the Mackay, Isaac and Whitsunday (MW) region is positioned in the heart of the magnificent Whitsunday Islands and the Great Barrier Reef.

Mackay Isaac Whitsunday’s economic drivers

- a strong manufacturing base focused in the Mackay area
- the strong agricultural sector with 28% of Australia’s sugar cane, one of the largest winter produce growing regions in Australia and 5% of Australia’s beef
- the Bowen and Galilee basins containing the largest coal mining deposits in Australia and the majority of Queensland’s prime coking coal with 26 operating mines in the region
- tourism based around the Whitsundays and the Great Barrier Reef
OUR ROLE