Fitzroy and Central West Inc.

# An Overview of Food and Fibre Industries in Central Queensland

April 2018

The updating of statistics in this 2018 report was carried out by Indigo Gold Pty Ltd.

# Contents

## Executive summary

Census material and statistics from the Australian Bureau of Statistics (ABS) signify Central Queensland as a prominent and important area of Australia for the production of food and fibre.

Rockhampton is called the 'Beef Capital of Australia' and the city is situated in Central Queensland, which in 2015-2016 was home to 1.9 million head of cattle and calves or 28% of the state's total number.

There are three abattoirs located in Central Queensland. JBS Australia in Rockhampton which has a daily processing capacity of 696 head of beef[1] and Teys Australia which has a daily slaughtering capacity of 1,731 head of beef. Located in Biloela is also Teys Australia which has a daily capacity of 703 head of beef.[2]

The Central Queensland region had a total of 2,802 agricultural businesses as at the 30th June 2016, of which beef cattle farming accounted for 2,471 businesses or 88.2% of the total number of agricultural businesses in the region.

In the Central West region 465,858 head of sheep or 19% of Queensland's total sheep numbers were located.

The Queensland Government has outlined an Agricultural Strategy, which aims to double the value of Queensland's food production by 2040. However, meeting this target will only occur if the level of productivity within the sector increases across the supply chain.

# Introduction

In 2013, Regional Development Australian Fitzroy and Central West undertook a study to identify exactly what was produced in Central Queensland in relation to food and fibre and what happened to the produce after it left the "farm".

The purpose of this initiative was to help raise awareness of Central Queensland as a resource region – to ensure that 'resource' is not simply synonymous with 'coal production' but also to agriculture supply.

The original document has been updated to reflect changes over the last five years.

The document explores the areas of food and fibre production in the Central Queensland region with emphasis on the following areas:

» Location of supply
» Number of producers
» Production by volume
» Gross value, land holdings and weight of commodities
» Seasonality
» Supply chain and networks
» Sales destinations (including exports)

This report is a synopsis of published and unpublished data relating to food and fibre industries with the Central Queensland region and its related food chain routes.

In this document, the Central West region data for Agricultural Commodities includes the Statistical Area Level 2s of Barcaldine – Blackall, Far Central West and Longreach. The Far Central West SA2 includes the local government areas of Barcoo, Boulia, Diamantina and Winton. Boulia (S) is not part of Regional Development Australia Fitzroy and Central West but is part of the Far Central West SA2, the smallest area for which Agricultural Commodities data are reported by the ABS.

## Background of study

Australia has a strong, safe and stable food system with a high level of food security. Australia produces far more food than it consumes and has the capacity to increase food production in response to population needs, and to take advantage of growing markets in Asia. To make the most of the emerging opportunities and to plan for the future Australia needs a more integrated approach to government food policy along the supply chain.

On 17 July 2012, Minister Ludwig released the National Food Plan green paper – the next step in developing the National Food Plan. Its aim was for the Australian Government to put forward an overarching framework for its role in the food system. Australia's food system relies on collaboration between the food industry, the Australian Government, state and territory governments, and the community. The Australian Government at the time sought discussion on the development of the National Food Plan white paper.[3]

The Queensland Government in 2013 released the Queensland's Agriculture Strategy: A 2040 vision to double agricultural production. The 2040 vision is for agriculture, fisheries and forestry to be an efficient, innovative, resilient and profitable sector. In order to double Queensland's agricultural production, productivity growth must lift above the 30 year long term average. The key to productivity growth is in the development and adoption of innovation across the supply chain. The framework for growth is based on four key pathways:

1. Securing and increasing resource availability
2. Driving productivity growth across the supply chain
3. Securing and increasing market access
4. Minimising the costs of production[4]

## Queensland's agricultural industry

Geographically, Queensland is Australia's second-largest state, covering more than 173 million hectares. In 2013 almost 144 million hectares (83 percent) of the land in Queensland was used for agriculture. Queensland has the largest area of agricultural land of any Australian state and the highest proportion of land area dedicated to agriculture.[5]

Queensland's agriculture commodities have a forecast estimate value of $19.87 billion (gross value of production) for 2017-18.[7] Queensland's overseas agricultural exports (food and live animals) in 2013-14 was worth $4.2 billion, comprising 22.3% of the state's total gross value of exports.[8]

In 2015-16, Queensland produced around 45 percent of Australia's total cattle and calves, which is worth well over $6 billion per annum. Queensland also produced over 63 percent of Australia's sorghum. Queensland is Australia's hub for tropical knowledge and expertise, producing approximately 94 percent of Australia's sugar cane, 98 percent of bananas, 85 percent of limes, 68 percent of mangoes, 57 percent of macadamia nuts and almost all of the country's pineapples.[9]

For the February quarter 2018 an estimated 66,400 employed persons in Queensland worked in the Agriculture, Forestry and Fishing Industry. In other words, 2.7% of employed persons in Queensland worked in the Agriculture, Forestry and Fishing industry.[10]

## Foreign ownership of agricultural businesses

In late 2010 the Foreign Acquisitions Amendment (Agricultural Land) Bill was introduced, which sought to amend the Foreign Acquisitions and Takeovers Act 1975 to enable greater scrutiny of potential foreign investment of agricultural land in Australia.

Results from the Australian Bureau of Statistics (ABS) 2015-16 Agricultural Land and Water Ownership Survey showed that 87.6% of Australian agricultural land was 100% Australian-owned and 99.5% of Australian agricultural businesses were 100% Australian-owned. The survey captured information on the foreign ownership of all leased and operated only land. This enabled the capture of the level of foreign ownership where the businesses may have leased parcels of land from owners with differing degrees of foreign ownership.

Within Australia, Queensland had the lowest level of foreign ownership of agricultural businesses, with 0.3% of its businesses reporting some level of foreign ownership. By comparison Queensland had 11.9% of its agricultural land (16,575,601 ha) reporting some level of foreign ownership.

# Central Queensland region

The vast Central Queensland region covers approximately 26% of the state (453,354 square kilometers) and incorporates the regions of Fitzroy and Central West.

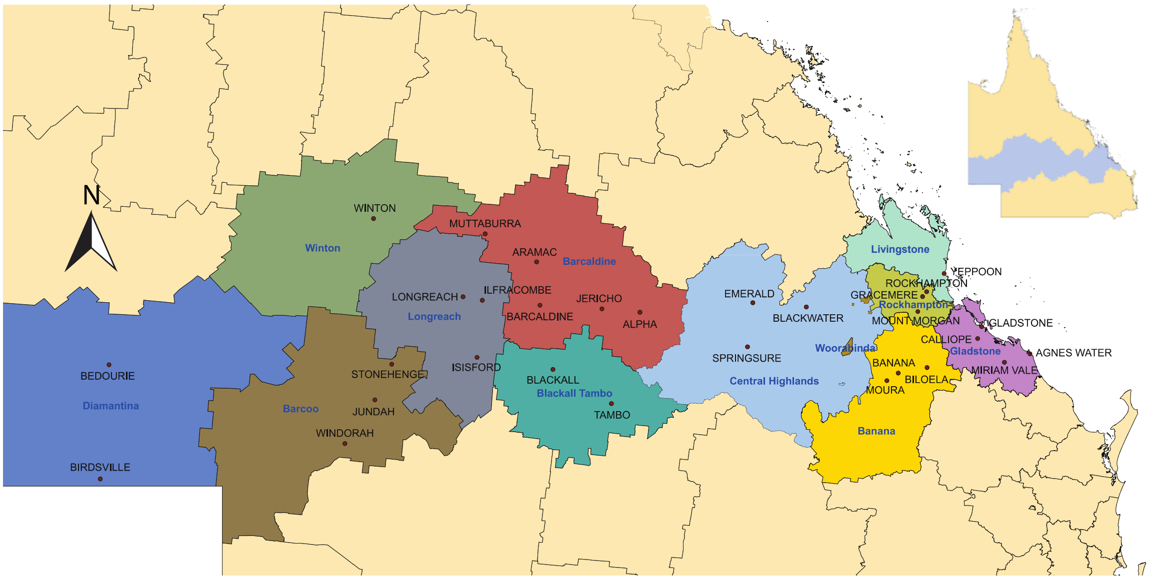
The **Fitzroy region** occupies 117,813 km$^2$ and comprises six local government authorities:

| | | |
|---|---|---|
| Banana | Gladstone | Rockhampton |
| Central Highlands | Woorabinda | Livingstone |

The **Central West region** covers 335,542 km$^2$ and includes six local government authorities:

| | | |
|---|---|---|
| Barcaldine | Blackall-Tambo | Longreach |
| Barcoo | Diamantina | Winton |

**Map 1 – The area of responsibility for Regional Development Australia Fitzroy and Central West**




As at 30 June 2017 the estimated resident population of the Central Queensland region was 236,134 persons, 4.8% of the Queensland population. Between 2012 and 2017 Central Queensland's population increased by 1.4% (3,234 persons).

The 2017 estimated resident population of the Fitzroy region was 226,090 persons, with the largest Council (Rockhampton) having 81,446 persons. The population between 2016 and 2017 saw decline across the division, largely as a result of mining industry construction contraction, with growth only in Livingstone (0.9%) and Woorabinda (0.2%).

The 2017 estimated resident population of the Central West region was 10,044 persons; 4.3% of the Fitzroy and Central West region as a whole, with the largest Council (Longreach) having 3,598 persons.[12]

Queensland Government Statistician's Office indicated that in 2017 an estimated further 3,360 non-resident workers existed in the Central Highland area, plus a further 710 in Banana.[13] There is a large non-resident population which reflects the nature of the mining workforce; shift workers operating on a fly-in, fly-out or drive-in, drive-out basis.

**Table 1 – Estimated Resident Population, local government areas – Central Queensland**

| Local government area | ERP at 30 June | | Change | |
|---|---|---|---|---|
| | 2016 | 2017 | 2016-17 | |
| | No. | No. | % | No. |
| Banana | 14,067 | 14,521 | -0.6 | -186 |
| Barcaldine | 2,909 | 2,853 | -1.9 | -56 |
| Barcoo | 272 | 272 | 0.0 | 0 |
| Blackall - Tambo | 1,1924 | 1,889 | -1.8 | -35 |
| Central Highlands | 28,783 | 28,684 | -0.3 | -99 |
| Diamantina | 297 | 288 | -3.0 | -9 |
| Gladstone | 63,288 | 63,052 | -0.4 | -236 |
| Livingstone | 37,055 | 37,393 | 0.9 | 338 |
| Longreach | 3,727 | 3,598 | -3.5 | -129 |
| Rockhampton | 81,589 | 81,446 | -0.2 | -143 |
| Winton | 1,156 | 1,144 | -1.0 | -12 |
| Woorabinda | 992 | 994 | 0.2 | 2 |
| | | | | |
| **Total Fitzroy and Central West** | **236,599** | **236,134** | **-0.2** | **-465** |
| | | | | |
| Queensland | 4,848,877 | 4,928,457 | 1.6 | 79,580 |
| *Fitzroy and Central West as % of Queensland* | *4.9* | *4.8* | .. | .. |

Note: Estimated resident population (ERP) is the official estimate of the Australian population. ERP is based on Census counts by place of usual residence (excl. short term overseas visitors in Australia), with an allowance for Census net under count, to which are added the estimated number of Australian residents temporarily overseas at the time of the Census. 2016 figures are preliminary rebased for 2017.

Source: Australian Bureau of Statistics, 3218.0, *Regional Population Growth, Australia*, various editions.

# Overview of Central Queensland's food industries

## Seasonality

**Table 2 - Seasonality of produce in Central Queensland**

| | JAN | FEB | MAR | APR | MAY | JUN | JUL | AUG | SEP | OCT | NOV | DEC |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Avocado | | | | | | | | | | | | |
| Baby corn | | | | | | | | | | | | |
| Capsicum | | | | | | | | | | | | |
| Carrots | | | | | | | | | | | | |
| Cucumber | | | | | | | | | | | | |
| Custard apple | | | | | | | | | | | | |
| Figs | | | | | | | | | | | | |
| Honeydew | | | | | | | | | | | | |
| Hydroponic/fancy lettuce | | | | | | | | | | | | |
| Lettuce | | | | | | | | | | | | |
| Lychee | | | | | | | | | | | | |
| Longans | | | | | | | | | | | | |
| Mango | | | | | | | | | | | | |
| Pawpaw | | | | | | | | | | | | |
| Pineapple | | | | | | | | | | | | |
| Potato | | | | | | | | | | | | |
| Pumpkin | | | | | | | | | | | | |
| Rockmelon | | | | | | | | | | | | |
| Silverbeet | | | | | | | | | | | | |
| Squash | | | | | | | | | | | | |
| Sweet potato | | | | | | | | | | | | |
| Table grapes | | | | | | | | | | | | |
| Tomato | | | | | | | | | | | | |
| Watermelon | | | | | | | | | | | | |
| Zucchini | | | | | | | | | | | | |
| | | | | | | | | | | | | |
| Basil & Dill | | | | | | | | | | | | |
| Coriander | | | | | | | | | | | | |
| Mint & Parsley | | | | | | | | | | | | |
| Onion chives & Watercress | | | | | | | | | | | | |
| Shallot | | | | | | | | | | | | |
| | | | | | | | | | | | | |
| Lemons | | | | | | | | | | | | |
| Limes | | | | | | | | | | | | |
| Mandarins | | | | | | | | | | | | |
| Oranges | | | | | | | | | | | | |
| | | | | | | | | | | | | |
| Banana prawns | | | | | | | | | | | | |
| Cultured plate size barra | | | | | | | | | | | | |
| King salmon | | | | | | | | | | | | |
| Mud crabs | | | | | | | | | | | | |
| Reef fish | | | | | | | | | | | | |
| Scallops | | | | | | | | | | | | |
| Wild caught barramundi | | | | | | | | | | | | |
| | | | | | | | | | | | | |
| Beef | | | | | | | | | | | | |
| Coffee | | | | | | | | | | | | |

Source: Queensland Government – Department of Agriculture and Fisheries, Crop and Food Sciences - 2017

## Businesses with agricultural activity

This section contains estimates from the Australian Bureau of Statistics 2015-16 Agricultural Census and Agricultural Commodities 2015-2016. The scope of the Census included all businesses undertaking agricultural activity recorded on the ABS Business Register above a minimum size cut-off of $40,000, a change from the previous ABS Rural Environmental and Agricultural Collections, where a scope of EVAO of $5,000 or greater was used. The measure of size was based on the ABS' Estimated Value of Agricultural Operations (EVAO). Estimated Value of Agricultural Operations is not an actual farm income but the estimated value of agricultural operations.

Tables 3 to 5 of this report categorise businesses with agricultural activity into the industry that represents the business' *main activity*, using the Australian and New Zealand Standard Industrial Classification (ANZSIC 2006 edition).

The Central Queensland region had a total of 2,802 agricultural businesses as at the 30th June 2016, of which beef cattle farming accounted for 2,471 businesses or 88% of the total number of agricultural businesses in the region. By comparison 21% of beef cattle farming businesses in Queensland are located in the Central Queensland region.

Other livestock which included horses, goats and domesticated buffaloes also made up a significant proportion, 24%, of Queensland's other livestock businesses.

Also in the Fitzroy region 17 businesses were in vegetable production; 11 in beekeeping; 192 in cotton growing; and 43 businesses grew fruit and nut crops in the 2015-2016 financial year.

**Table 3 – Top 5 businesses with agricultural activity – Central Queensland – at 30 June 2016**

| | No. | % Qld |
|---|---|---|
| **FITZROY REGION** | | |
| Other Fruit and Tree Nut Growing | 43 | 3.3 |
| Beef Cattle Farming | 1,893 | 16.3 |
| Other livestock (a) | 577 | 19.4 |
| Other Grain Growing | 373 | 6.5 |
| Horse Farming | 230 | 10.5 |
| | | |
| **Total all agricultural farms** | **2,153** | **11.9** |
| **CENTRAL WEST REGION** | | |
| Sheep Farming | 183 | 15.2 |
| Beef Cattle Farming | 578 | 5.0 |
| Hay and Silage | 10 | 0.5 |
| Goats (excluding unmanaged feral goats) | 35 | 12.8 |
| Other livestock (a) | 135 | 4.5 |
| | | |
| **Total all agricultural farms** | **649** | **3.6** |

Note: The Australian and New Zealand Standard Industry Classification has been used to categorise businesses according to their main activity.
Note: These figures include Boulia (S).
(a) E.g. Horses, goats, domesticated buffaloes, excludes beehives.

Source: Australian Bureau of Statistics, 7212.0 Agricultural Commodities, Australia, 2015-16.

## Area of holding

In 2010-2011 of the 2,114 beef cattle farms (specialised) in the Fitzroy region 20% were less than 49 hectares in land holding and 27% were between 2,500-24,999 hectares in area. Only one beef cattle farm reported an area of holding greater than 100,000 hectares.

By comparison in the Central West region, 46% of the beef cattle farms (specialised) had an area of holding between 2,500-24,999 hectares. Also 48 or 9% of the beef cattle farms had an area greater than 100,000 hectares.

Please note the Australian Bureau of Statistics has not yet released the complete range of relevant data for Table 4 to be updated.

**Table 4 – Top 5 businesses with agricultural activity – Central Queensland – at 30 June 2011**

| | AREA OF HOLDING (HA) | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | 0-49 | 50-99 | 100-499 | 500-999 | 1,000-2,499 | 2,500-24,999 | 25,000-99,999 | 100,000-199,999 | 200,000-499,999 | 500,000 plus | Total | % Qld |
| **FITZROY REGION** | | | | | | | | | | | | |
| Other Fruit and Tree Nut Growing | 45 | 9 | 10 | - | 1 | - | - | - | - | - | 65 | 5.3 |
| Beef Cattle Farming (Specialised) | 422 | 98 | 437 | 254 | 296 | 578 | 30 | 1 | - | - | 2,114 | 16.9 |
| Grain-Sheep or Grain-Beef Cattle Farming | 20 | 2 | 19 | 16 | 29 | 58 | 1 | - | - | - | 146 | 14.0 |
| Other Grain Growing | 31 | 8 | 37 | 15 | 25 | 29 | 2 | - | - | - | 146 | 12.6 |
| Horse Farming | 74 | 32 | 40 | 6 | 4 | 11 | 2 | - | - | - | 168 | 12.3 |
| | | | | | | | | | | | | |
| **Total all agricultural farms** | **692** | **177** | **601** | **311** | **374** | **721** | **36** | **1** | | | **2,913** | **11.4** |
| **CENTRAL WEST REGION** | | | | | | | | | | | | |
| Sheep Farming (Specialised) | 12 | - | - | - | - | 30 | 12 | - | - | - | 54 | 20.4 |
| Beef Cattle Farming (Specialised) | 99 | - | 6 | 11 | 14 | 239 | 102 | 16 | 19 | 13 | 520 | 4.2 |
| Beef Cattle Feedlots (Specialised) | - | - | - | - | - | 1 | 1 | - | - | 1 | 3 | 1.6 |
| Sheep-Beef Cattle Farming | 17 | - | - | 1 | - | 78 | 25 | 1 | 1 | - | 124 | 28.0 |
| Horse Farming | 6 | 3 | 2 | 1 | 3 | 7 | 2 | - | - | - | 25 | 1.8 |
| | | | | | | | | | | | | |
| **Total all agricultural farms** | **136** | **3** | **8** | **14** | **17** | **357** | **143** | **17** | **20** | **14** | **729** | **2.8** |

Note: The Australian and New Zealand Standard Industry Classification has been used to categories businesses according to their main activity.
Note: These figures include Boulia (S).
Note: New Census data will be available in July 2018

Source: Australian Bureau of Statistics: Agricultural Census 2010-11.

## Estimated value of agricultural operations (EVAO)

The ABS term estimated value of agricultural operations (EVAO) is not an actual farm income but the estimated value of agricultural production.

In 2010-2011 in the Fitzroy region 172 or 6% of all agricultural farms reported an estimated value of agricultural operations over $1 million. Subsequently in the Central West region 142 or 19% of all agricultural farms reported an estimated value of agricultural operations over $1 million.

In the Fitzroy region 3% of the beef cattle farms (specialised) had an estimated value of agricultural operations over $1 million this compared to 23% in the Central West region.

Also in the Fitzroy region 43 or 74% of cotton growing farms had an estimated value of agricultural operations over $1 million. There were also 3 grape growing farms with an EVAO over $1 million; 2 citrus growing farms with an EVAO over $1 million; and 1 poultry egg farm, 1 pig farm and 1 horse farm with and EVAO over $2 million.

Please note the Australian Bureau of Statistics has not yet released the complete range of relevant data for Table 5 to be updated.

**Table 5 – Top 5 sectors with agricultural activity – Central Queensland – at 30 June 2011**

| | ESTIMATED VALUE OF AGRICULTURAL OPERATIONS ($'000) | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Less than 22.5 | 22.5-49.9 | 50-99.9 | 100-149.9 | 150-199.9 | 200-349.9 | 350-499.9 | 500-999.9 | 1,000-1,999.9 | 2,000 plus | TOTAL | % Qld |
| **FITZROY REGION** | | | | | | | | | | | | |
| Other Fruit and Tree Nut Growing | 22 | 12 | 12 | 2 | 1 | 6 | 4 | 4 | 1 | - | 65 | 5.3 |
| Beef Cattle Farming (Specialised) | 366 | 369 | 357 | 206 | 136 | 263 | 153 | 194 | 52 | 18 | 2,114 | 16.9 |
| Grain-Sheep or Grain-Beef Cattle Farming | 5 | 9 | 17 | 11 | 11 | 29 | 18 | 34 | 9 | 4 | 146 | 14.0 |
| Other Grain Growing | 7 | 14 | 25 | 14 | 10 | 11 | 20 | 23 | 18 | 4 | 146 | 12.6 |
| Horse Farming | 76 | 34 | 27 | 19 | 5 | 5 | - | 1 | - | 1 | 168 | 12.3 |
| | | | | | | | | | | | | |
| **Total all agricultural farms** | **522** | **465** | **462** | **274** | **172** | **336** | **217** | **294** | **108** | **64** | **2,913** | **11.4** |
| **CENTRAL WEST REGION** | | | | | | | | | | | | |
| Sheep Farming (Specialised) | 3 | - | 9 | 1 | 5 | 20 | 4 | 10 | 2 | - | 54 | 20.4 |
| Beef Cattle Farming (Specialised) | 23 | 23 | 31 | 37 | 30 | 78 | 63 | 118 | 74 | 43 | 520 | 4.2 |
| Beef Cattle Feedlots (Specialised) | - | - | - | - | - | - | - | - | 1 | 2 | 3 | 1.6 |
| Sheep-Beef Cattle Farming | 1 | 1 | - | 7 | 9 | 28 | 28 | 32 | 16 | 1 | 124 | 28.0 |
| Horse Farming | 9 | 3 | 6 | 4 | - | 1 | - | 1 | 1 | - | 25 | 1.8 |
| | | | | | | | | | | | | |
| **Total all agricultural farms** | **37** | **27** | **46** | **49** | **44** | **127** | **95** | **162** | **96** | **46** | **729** | **2.8** |

Note: The Australian and New Zealand Standard Industry Classification has been used to categories businesses according to their main activity.
Note: EVAO is not an actual farm income but the estimated value of agricultural operation.
Note: These figures include Boulia (S).
Note: New Census data will be available in July 2018

Source: Australian Bureau of Statistics: Agricultural Census 2010-11.

## Land use

In 2015-16 approximately 48% of Australia's total land area was used for agriculture. On a state basis, Queensland had the highest proportion of agricultural farm land at 77%.

The total area of agricultural farms in Central Queensland in 2015-2016 was 41,593,826 hectares, which is 32.6% of Queensland's total agricultural farm area. In Central Queensland 243,514 hectares (11.6%) were used for crops and there were 2.9 million head of cattle (27.8%) in the 2015-16 financial year.

**Table 6 – Land use – Central Queensland – at 30 June 2016**

| | Fitzroy Region | Central West Region | Central Queensland | % Qld |
|---|---|---|---|---|
| **Total area of agricultural farms (a) ha.** | **9,187,118** | **32,406,708** | **41,593,826** | **32.6** |
| Land used for crops (b) ha. | 242,265 | 1,249 | 243,514 | 11.6 |
| Land used for livestock - cattle (no.) | 1,877,512 | 1,050,059 | 2,927,571 | 27.8 |

(a) Total area of agricultural businesses with an EVAO of $40,000 or more.
(b) Crops include cereals, vegetables, fruit, nuts, rice, cotton, grapevines, nurseries and land left fallow between crops.
Note: These figures include Boulia (S).

Source: Australian Bureau of Statistics, 7121.0 *Agricultural Commodities, Australia 2015-16.*

# Agricultural commodities

## Broadacre crops

In 2015-16 Queensland's sorghum production made up 65.8% of the national total of 1.8 million tonnes. Central Queensland produced 161,851 tonnes or 14% of the state's total sorghum production.

Queensland's maize production represented 56% and cotton production represented 34% of the national total production. The Fitzroy region produced 15,763 tonnes or 10% of the state's total maize production. Furthermore the Fitzroy region produced 31 million kilograms of cotton lint production covering an area of 20,359 hectares.

Central Queensland produced 38% of the State's hay production or 56,970 tonnes in 2015-16.

**Table 7 – Broadacre crops – Central Queensland – year ended 30 June 2016**

| | Fitzroy Region | | Central West Region | | Central Queensland | | % Qld | |
|---|---|---|---|---|---|---|---|---|
| | No. | No. business | No. | No. business | No. | No. business | No. | No. business |
| Hay - Total area (ha) | 11,195.8 | 230 | 2,330.7 | 10 | 13,526.5 | 240 | 12.8 | 10.9 |
| Hay - Total production (t) | 56,970.2 | 230 | 8,272.8 | 10 | 65,243.0 | 240 | 11.9 | 10.9 |
| Cereal crops for grain or seed (including rice) - Total area (ha) | 126,214.4 | 453 | 1,249.1 | 2 | 127,463.5 | 455 | 10.7 | 9.6 |
| Cereal crops for grain or seed (including rice) - Total production (t) | 278,220.6 | 453 | 3,169,7 | 2 | 281,390.3 | 455 | 9.1 | 9.6 |
| Cereal crops – Sorghum for grain – Production (t) | 161,851.4 | 173 | - | - | 161,851.4 | 173 | 13.7 | 12.1 |
| Cereal crops – Maize for grain – Production (t) | 15,763.4 | 32 | - | - | 15,763.4 | 32 | 9.6 | 7.7 |
| Cereal crops – Wheat for grain – Production (t) | 91,288.8 | 191 | - | - | 91,288.8 | 191 | 6.9 | 14.1 |
| Non-cereal crops - Cotton - Area planted (ha) | 20,358.7 | 47 | - | - | 20,358.7 | 47 | 21.7 | 17.5 |
| Non-cereal crops - Cotton - Lint production (kg) | 31,213,427.4 | 47 | - | - | 31,213,427.4 | 47 | 16.6 | 17.5 |
| Non-cereal crops - Chickpeas - Production (t) | 46,757.3 | 100 | - | - | 46,757.3 | 100 | 12.6 | 17.1 |
| Non-cereal crops - Mung beans - Production (t) | 31,690.5 | 129 | - | - | 31,690.5 | 129 | 31.1 | 20.1 |
| Non-cereal crops - Oilseeds - Production (t) | 2,281.7 | 8 | - | - | 2,281.7 | 8 | 13.3 | 3.7 |
| Non-cereal crops – Other crops fed-off, grazed or used as green manure - Production (ha) | 10,397.5 | 60 | - | - | 10,397.5 | 60 | 20.1 | 15.2 |
| Non-cereal crops – Other pulses - Production (t) | 332.5 | 4 | - | - | 332.5 | 4 | 4.3 | 7.4 |
| Non-cereal crops - Peanuts - Production (kg)(a) | 137,808.6 | 1 | - | - | 137,808.6 | 1 | 0.9 | 0.9 |

(a) Peanuts in shell.
Note: Includes businesses that may be involved in more than one agricultural activity. Therefore total number of agricultural businesses for a particular commodity may not equal the sum of its components.
Note: These figures include Boulia (S).

Source: Australian Bureau of Statistics, 7121.0 *Agricultural Commodities, Australia 2015-16.*

## Vegetables, fruit and nuts

Queensland's pineapple production represented 99.9% of the national total of 71,782 tonnes. The Fitzroy region produced 8,615 tonnes or 12% of the state's total pineapple production.

Furthermore the Fitzroy region produced 6,232 tonnes of table grapes (66% of Queensland's total production) covering an area of 984 hectares. In 2015-16 Queensland had a total of 1.1 million mandarin trees which made up 46% of the national total of 1.8 million. The Fitzroy region had a total of 78,857 mandarin trees or 6.7% of Queensland's total.

Queensland has 53% of Australia's Macadamia nut trees and 56% of production. Fitzroy has almost 10% of Queensland's production.

**Table 8 – Vegetables, fruit and nuts – Central Queensland – year ended 30 June 2016**

| | Fitzroy Region | | Central West Region | | Central Queensland | | % Qld | |
|---|---|---|---|---|---|---|---|---|
| | No. | No. business | No. | No. | No. | No. business | No. | No. business |
| Vegetables – Beans (including French & runner) - Production (kg) | 150,000 | 1 | - | - | 150,000 | 1 | 0.7 | 1.5 |
| Vegetables - Broccoli - Production (kg) | 2,359 | 1 | - | - | 2,359 | 1 | 0.0 | 1.5 |
| Vegetables – Capsicums (excluding chillies) - Production (kg) | 24,896 | 1 | - | - | 24,896 | 1 | 0.1 | 1.4 |
| Vegetables - Melons - Production (t) | 3,439 | 4 | - | - | 3,439 | 4 | 4.4 | 3.8 |
| Vegetables - Pumpkins - Production (t) | 543 | 7 | - | - | 542.9 | 7 | 1.2 | 2.9 |
| Vegetables - Sweet corn - Production (t) | 2.4 | 2 | - | - | 2.4 | 2 | 0.0 | 4.3 |
| Berry fruit - Strawberries – Area of bearing age (ha) | 0.1 | 1 | - | - | 0.1 | 1 | 0.0 | 1.2 |
| Berry fruit - Strawberries - Production (kg) | 1,180 | 1 | - | - | 1,179.50 | 1 | 0.0 | 1.2 |
| Citrus fruit - Grapefruits - Total trees (no.) | 143 | 3 | - | - | 143 | 3 | 0.8 | 9.4 |
| Citrus fruit - Grapefruits - Production (kg) | 8,017 | 3 | - | - | 8,016.80 | 3 | 0.7 | 10.6 |
| Citrus fruit - Oranges – Total trees (no.) | 1,747 | 2 | - | - | 1,747 | 2 | 2.6 | 4.2 |
| Citrus fruit - Oranges - Production (kg) | 62,494 | 2 | - | - | 62,493.70 | 2 | 2.5 | 5.3 |
| Citrus fruit - Lemons - Total trees (no.) | 6,736 | 2 | - | - | 6,736 | 2 | 2.7 | 2.1 |
| Citrus fruit - Lemons - Production (kg) | 71,801 | 2 | - | - | 71,801.10 | 2 | 0.4 | 2.4 |
| Citrus fruit - Limes - Total trees (no.) | 483 | 5 | | | 483 | 5 | 0.2 | 2.5 |
| Citrus fruit - Limes - Production (kg) | 6,459 | 4 | | | 6,459.30 | 4 | 0.1 | 2.2 |
| Citrus fruit - Mandarins - Total trees (no.) | 78,857 | 5 | - | - | 78,857 | 5 | 6.7 | 5.3 |
| Citrus fruit - Mandarins - Production (kg) | 696,497 | 5 | - | - | 696,496.90 | 5 | 0.9 | 5.5 |
| Nuts - Macadamias - Total trees (no.) | 204,325 | 4 | - | - | 204,325 | 4 | 7.1 | 2.7 |
| Nuts - Macadamias - Production (t) | 2,035,493 | 4 | - | - | 2,035,493.30 | 4 | 9.3 | 2.8 |
| Other orchard fruit - Avocados - Total trees (no.) | 2,372 | 2 | - | - | 2,372 | 2 | 0.3 | 0.9 |
| Other orchard fruit - Avocados - Production (kg) | 44,052 | 2 | - | - | 44,051.60 | 2 | 0.1 | 1.0 |
| Other orchard fruit - Mangoes -Total trees (no.) | 44,871 | 17 | - | - | 44,871 | 17 | 5.0 | 6.0 |
| Other orchard fruit - Mangoes - Production (kg) | 1,066,032 | 17 | - | - | 1,066,031.60 | 17 | 3.6 | 6.2 |
| Other fruit - Pineapples - Total area (ha) | 364 | 12 | - | - | 364.1 | 12 | 13.2 | 17.1 |
| Other fruit - Pineapples - Production (t) | 8,615 | 12 | - | - | 8,614.50 | 12 | 12.0 | 18.2 |
| Grapevines - Grapevines for wine production - Total Area (ha) | - | - | - | - | - | - | - | - |
| Grapevines - Grapevines for wine production - Production (t) | - | - | - | - | - | - | - | - |
| Grapevines for table and/or other grape production - Total Area (ha) | 984 | 6 | - | - | 984 | 6 | 67.9 | 19.4 |
| Grapevines for table and/or other grape production - Production (t) | 6,232 | 6 | - | - | 6,231.90 | 6 | 66.2 | 19.4 |

Note: Includes businesses that may be involved in more than one agricultural activity. Therefore total number of agricultural businesses for a particular commodity may not equal the sum of its components.
Note: These figures include Boulia (S).

Source: Australian Bureau of Statistics: 7121.0 *Agricultural Commodities, Australia 2015-16.*

## Livestock

In 2015-16 Queensland had 42% of Australia's total number (25.0 million) of cattle and calves. Central Queensland was home to 3.0 million head of cattle and calves owned by 2,478 businesses. In other words 28% of the state's total number of cattle and calves were located in Central Queensland.

Queensland had 39% of the other livestock, including horses that were farmed in Australia. Central Queensland was home to 17,839 of other livestock horses (15% of Queensland's total) owned by 603 businesses.

Also in the Central West region 0.5 million head of sheep or 26% of Queensland's total sheep numbers were being managed by 183 businesses.

**Table 9 – Livestock – Central Queensland – at 30 June 2016**

| | Fitzroy Region | | Central West Region | | Central Queensland | | % Qld | |
|---|---|---|---|---|---|---|---|---|
| | No. | No. business | No. | No. business | No. | No. business | No. | No. business |
| **Poultry and eggs - Total poultry (no.)** | **2,023,435** | **94** | **34** | **6** | **2,023,469** | **100** | **8.6** | **17.0** |
| Live poultry - Layers (no.)(a) | 87,850 | 44 | 20 | 3 | 87,870 | 47 | 2.0 | 13.8 |
| Live poultry - Total meat poultry (no.) | - | - | 13 | 1 | 13 | 1 | 0.0 | 1.0 |
| Hen egg production for human consumption (dozens) | 1,910,511 | 43 | 143 | 3 | 1,910,654 | 46 | 2.0 | 13.6 |
| | | | | | | | | |
| **Cattle - Total (no.)(b)** | **1,877,512** | **1,898** | **1,097,311** | **580** | **2,974,823** | **2,478** | **28.2** | **20.9** |
| Dairy cattle (no.)(c) | 5,884 | 42 | 628 | 2 | 6,512 | 44 | 4.2 | 7.1 |
| Meat cattle (no.)(d) | 1,871,628 | 1,893 | 1,096,683 | 578 | 2,968,311 | 2,471 | 28.6 | 21.3 |
| | | | | | | | | |
| Sheep (no.) | 6,274 | 48 | 465,858 | 183 | 472,132 | 231 | 26.0 | 19.1 |
| Pigs (no.)(e) | 19,583 | 20 | 37 | 4 | 19,620 | 24 | 3.5 | 7.8 |
| All other livestock (no.)(f) | 15,801 | 578 | 2,038 | 25 | 17,839 | 603 | 15.4 | 20.3 |
| Goats (no.)(g) | 1,241 | 16 | 13,463 | 12 | 14,704 | 28 | 13.4 | 10.2 |

(a) Includes hens in moult.
(b) Includes cattle and calves - dairy and meat cattle for all purposes.
(c) Includes cows in milk and dry and all other dairy cattle.
(d) Includes cows and heifers one year and over, and all other meat cattle.
(e) Includes breeding sows and all other pigs.
(f) Includes horses, goats, domesticated buffaloes, excludes beehives.
(g) Excludes unmanaged feral goats.
Note: These figures include Boulia (S).
Note: Includes businesses that may be involved in more than one agricultural activity. Therefore total number of agricultural businesses for a particular commodity may not equal the sum of its components.

Source: Source: ABS, 7121.0 *Agricultural Commodities, Australia 2015-16.*

## Value of agricultural commodities

In 2015-16 the gross value of Queensland's agricultural production was $13.2 billion, which represented 23.6% of Australia's total gross value of agricultural commodities produced. Central Queensland produced in gross value $2.0 billion in agricultural production, representing 15.4% of Queensland's total gross value.

The gross value of Queensland's livestock slaughtered was worth $6.9 billion or 33.4% of the national total. Livestock slaughtered includes sheep, lambs, cattle, calves, pigs, goats and poultry. The total gross value of livestock slaughtered in the Central Queensland region was $1,689.3 million (24.6% of Queensland total).

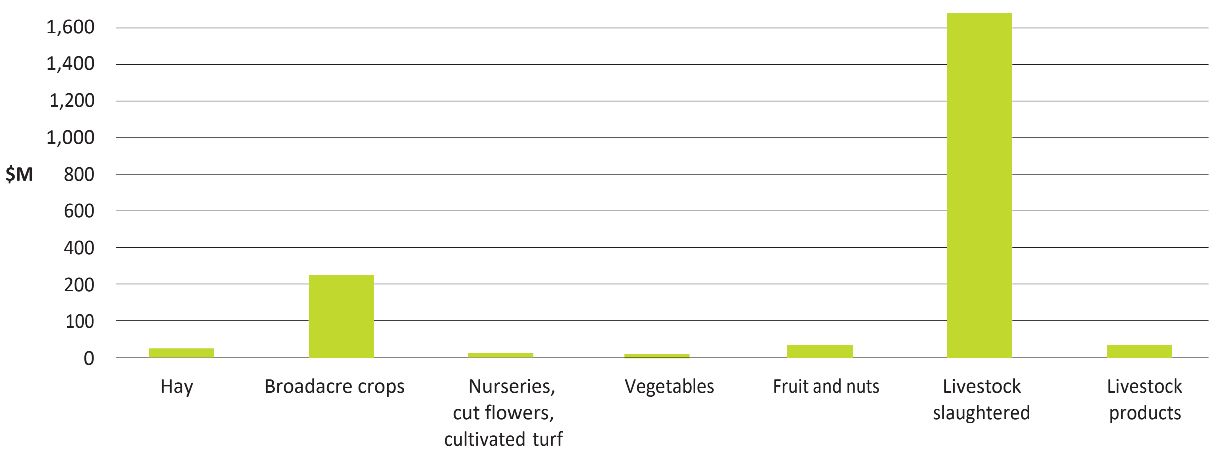
**Table 10 – Value of agricultural commodities – Central Queensland – year ended 30 June 2016**

| | Fitzroy Region | Central West Region | Central Queensland | |
|---|---|---|---|---|
| | Gross Value | Gross Value | Gross Value | |
| | $M | $M | $M | % Qld |
| **Agriculture (a)** | **1,375.8** | **653.6** | **2,029.4** | **15.4** |
| | | | | |
| **Crops (b)** | **307.9** | **2.6** | **310.5** | **5.3** |
| Hay | 14.3 | 1.7 | 16.1 | 11.5 |
| Broadacre crops (c) | 230.6 | 0.9 | 231.6 | 7.7 |
| Horticulture - Nurseries and cut flowers and cultivated turf | 7.9 | - | 7.9 | 2.9 |
| Horticulture – Vegetables for human consumption (d) | 11.0 | - | 11.0 | 1.0 |
| Horticulture – Fruit and nuts (excluding grapes) (e) | 22.1 | - | 22.1 | 1.7 |
| | | | | |
| Livestock - Livestock slaughtered and other disposals (f) | 1,056.0 | 633.3 | 1,689.3 | 24.6 |
| Livestock - Livestock products (g) | 11.9 | 17.7 | 29.6 | 5.8 |

(a) Includes crops, livestock slaughtered and livestock products.
(b) Includes broadacre crops (including hay), nurseries, cut flowers and cultivated turf, vegetables and fruit.
(c) Includes cereal crops, legumes for grain, oilseeds, other crops (excludes hay).
(d) Includes vegetables for human consumption - potatoes, asparagus, beans, broccoli, carrots, cauliflowers, herbs, mushrooms, peas (green), pumpkins, sweet corn, tomatoes, onions, capsicums, melons, lettuce and other vegetables. Also includes vegetables for seed (potatoes and other).
(e) Includes citrus fruit, pome fruit, stone fruit, other orchard fruit, berry fruit, plantation fruit, grapes and nuts.
(f) Includes sheep, lamb, cattle, calves, pigs, goats, poultry and not elsewhere classified.
(g) Includes eggs, wool and milk.
Note: These figures include Boulia (S).

Source: Australian Bureau of Statistics, 7503.0 *Value of Agricultural commodities Produced, Australia, 2015-16.*

**Gross value of agricultural commodities produced, Central Queensland – 2015-16**




Source: Australian Bureau of Statistics, 7503.0 Value of Agricultural Commodities Produced, Australia, 2015-16

## Water allocations

In 2015-16, Queensland was the second largest user of water for irrigation at 2,433.5 gigalitres in Australia. Furthermore 29.8% of all agricultural businesses in Queensland used irrigation compared to only 10% in Central Queensland.

The Fitzroy region had 2,153 businesses, of which 13.0% or 280 irrigated their pastoral lands. The Fitzroy region had 9,187,117.7 hectares, of which 55,818.6 hectares were irrigated using 212,729.9 million litres of water per annum to irrigate which equates to 3.8 mega litres per hectare, which was below the state average of 4.6 mega litres.

The Central West region had 649 agricultural businesses of which 6 irrigated their pastoral lands. These businesses used 383.4 mega litres per annum which equates to 2.5 mega litres per hectare. This was also well below the state average of 4.6 mega litres per hectare.

**Table 11 – Water use on Central Queensland farms – 2015-16**

| | Agricultural businesses (a) | Agricultural businesses irrigating (a) | Area of agricultural land | Area irrigated | Volume applied | Application rate(b) |
|---|---|---|---|---|---|---|
| | No. | No. | '000 ha | '000 ha | ML | ML/ha |
| **Central Queensland** | **2,802** | **186** | **41,593.8** | **56.0** | **213,113.3** | **3.8** |
| Fitzroy Region | 2,153 | 280 | 9,187.1 | 55.8 | 212,729.9 | 3.8 |
| Central West Region | 649 | 6 | 32,406.7 | 0.2 | 383.4 | 2.5 |

(a) Includes businesses that may be involved in more than one agricultural activity.
(b) Averaged across all pastures and crops.
Note: These figures include Boulia (S).
Note: ML = Mega litre, one million litres.

Source: Australian Bureau of Statistics: 4618.0 *Water use on Australian Farms, Australia 2015-16.*

### Rookwood Weir

Early in 2018, both the Queensland and Federal Governments announced financial commitments to the construction of the Rookwood Weir, proposed to be located approximately 66 km south west of Rockhampton on the Fitzroy River. Media statements about the Rookwood Weir on 9 February 2018 by the Queensland Premier, 4 April 2018 by the Minister for Natural Resources, Mines and Energy, and 4 April by the Prime Minister outlined that:

» The Weir is capable of supplying 76,000 ML per annum of high security water for high value agricultural production along the Fitzroy River

» It is capable of providing up to 42,000 ML of water for irrigated agriculture in the Fitzroy Basin and around 34,000 ML for industrial and urban use in the Gladstone region

» The Weir will increase water security for Rockhampton, the Gladstone region, the Stanwell-Gracemere Industrial Corridor and expand irrigation in the region. eventually provide back-up supply for Gladstone, Rockhampton and Livingstone Shire

» For the project to be economically viable, water would need to be used to boost agricultural production substantially

» The project is expected to increase agricultural production in the Fitzroy River region by up to $1 billion

» The water would be available within two years of construction starting

## Employment in the agricultural industry

Employment data for this section has been taken from the Australian Bureau of Statistics Census of Population and Housing 2016. Industry of employment has been coded to the ABS 2006 Australian and New Zealand Standard Industrial Classification (ANZSIC) and includes employed persons aged 15 years and over. It is also based on the location of the person's workplace in the week prior to the Census.

In 2016, Agriculture, Forestry and Fishing was the largest industry of employment for the Central West region, with 25.0% or 1,307 persons of 5,220 total persons. Other industries with relatively large numbers of employed persons included Public Administration and Safety (11.6%) and Health Care and Social Assistance (10.0%).

By comparison in the Fitzroy region, Health Care and Social Assistance and Retail Trade were the largest industries of employment, with 10.5% and 9.6% respectively. Other industries with high numbers of employed persons included Education and Training (9.0%) and Mining (8.7%). The Agriculture, Forestry and Fishing industry represented 5.1%.

For Central Queensland in 2016 an estimated 6,289 or 6.1% employed persons worked in the Agriculture, Forestry and Fishing Industry which was higher than the Queensland average of 2.8%.[14]

**Table 12 – Employment in the Agriculture, Forestry and Fishing Industry – Central Queensland – 2016**

| | No. | % |
|---|---|---|
| **Central Queensland** | **6,289** | **6.1** |
| Fitzroy Region | 4,982 | 5.1 |
| Central West Region | 1,307 | 25.0 |
| | | |
| **TOTAL ALL INDUSTRIES – CENTRAL QUEENSLAND** | **102,875** | **..** |

Note: Industry of employment was coded to the ABS 2006 ANZSIC.
Note: Based on the location of the person's workplace in the week prior to the Census.
Note: Employed persons aged 15 years and over.

Source: Australian Bureau of Statistics, *Census of Population and Housing 2016, General Community Profile – G51*.

## Overseas exports of agricultural commodities

Overseas export data for this section has been taken from the Australian Bureau of Statistics Foreign Trade unpublished data. Australia's foreign trade statistics are compiled from information submitted by exporters and importers or their agents to the Australian Customs and Border Protection Service. Overseas commodities exported and imported are coded to the Standard International Trade Classification (Revision 4).

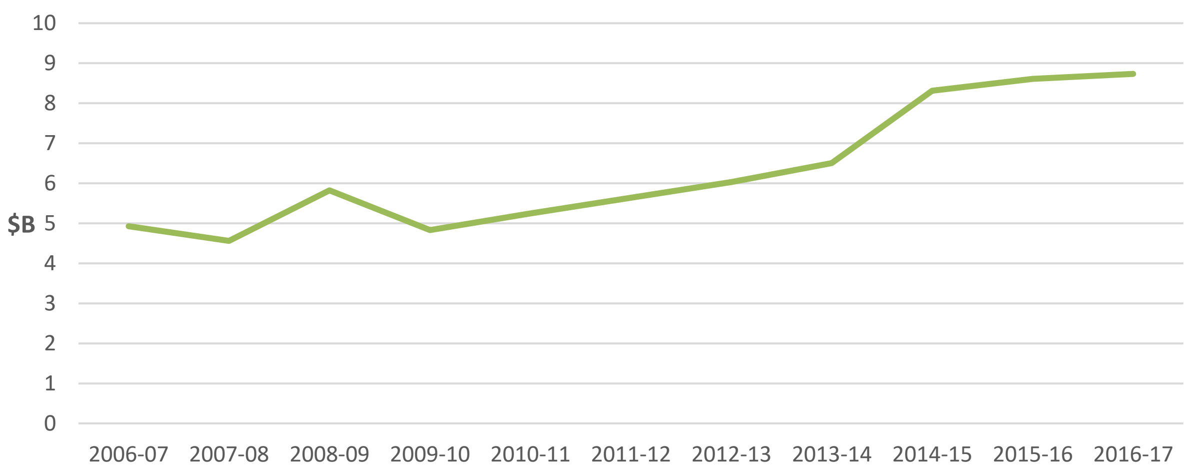
Section 0 refers to FOOD AND LIVE ANIMALS and includes:

- 00 – Live animals (other than fish, crustaceans, molluscs and aquatic invertebrates)
- 01 – Meat and meat preparations
- 02 – Dairy products and birds eggs
- 03 – Fish (not marine mammals), crustaceans, molluscs and aquatic invertebrates
- 04 – Cereals and cereal preparation
- 05 – Vegetables and fruit
- 06 – Sugars, sugar preparations and honey
- 07 – Coffee, tea, cocoa, spices
- 08 – Feeding stuff for animals (excl. unmilled cereals)
- 09 – Miscellaneous edible products

Over the past ten years the value and quantity of overseas exports of 'food and live animals' from Queensland ports has steadily been rising, peaking in 2016-17 at just over 5 million tonnes valued at $8.7 billion.

Agricultural commodities (food and live animals) comprised only 3.2% of total Queensland ports overseas export volumes in 2016-17.

**Value of overseas exports of food and live animals, Queensland ports**

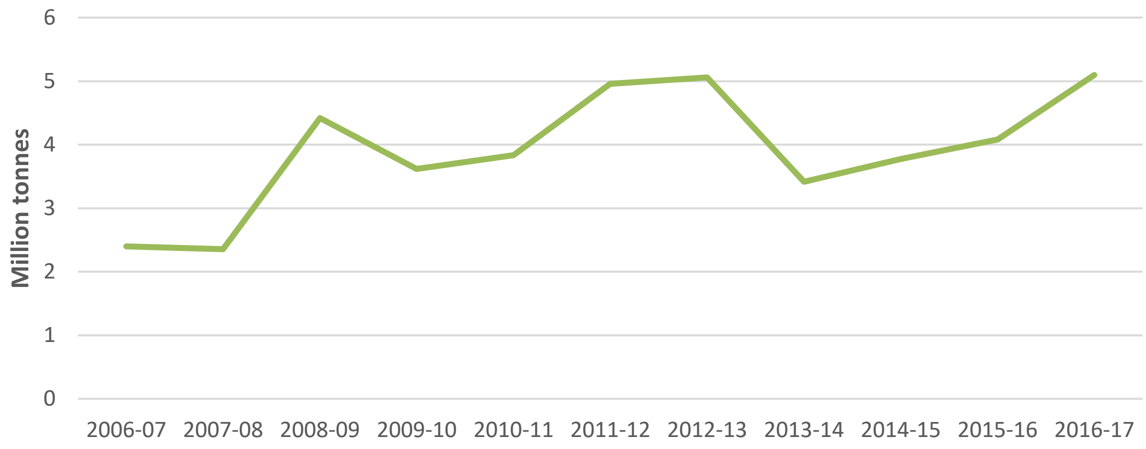



Note: Based on the Standard International Trade Classification (Revision 4).

Note: Based on port of loading.

Source: Australian Bureau of Statistics 5368.0, International merchandise exports, Australia – information consultancy subscription service, unpublished data.

**Quantity of overseas exports of food and live animals, Queensland ports**




Note: Based on the Standard International Trade Classification (Revision 4).
Note: Based on port of loading.

Source: Australian Bureau of Statistics 5368.0, International merchandise exports, Australia – information consultancy subscription service, unpublished data.

In 2016-2017 Gladstone port exported 276,697.4 tonnes of 'food and live animals' valued at $196.5 million predominately to Bangladesh, China, Egypt, India, Indonesia, Malaysia, Pakistan, Philippines, Taiwan, Thailand and Vietnam.[15]

By comparison Cairns port exported 83,738.2 tonnes; Townsville port 450,686.8 tonnes; and Mackay 420,225.0 tonnes of 'food and live animals' in 2016-2017.

Across all commodities Gladstone port exported overseas 95 million tonnes to the value of $21.5 billion in 2016-2017.

**Table 13 – Overseas exports by agricultural commodities – Gladstone port – 2016-17**

| | Gladstone Port | | Total Queensland Ports | |
|---|---|---|---|---|
| | **Tonnes** | **$M** | **Tonnes** | **$M** |
| Live animals (other than fish, crustaceans, molluscs, aquatic invertebrates) | 0 | 0 | 81,023.0 | 301.2 |
| Meat and meat preparations | 0 | 0 | 739,443.5 | 4,958.4 |
| Dairy products and birds eggs | 0 | 0 | 13,641.3 | 75.3 |
| Fish (not marine mammals), crustaceans, molluscs, aquatic invertebrates | 0 | 0 | 11,526.3 | 196.8 |
| Cereals and cereal preparation | 109,794.0 | 31.6 | 1,605,384.0 | 556.3 |
| Vegetables and fruit | 152,585.2 | 157.5 | 1,661,681.9 | 2,014.5 |
| Sugars, sugar preparations and honey | 0 | 0 | 751,267.9 | 212.4 |
| Coffee, tea, cocoa, spices | 0 | 0 | 5,596.4 | 41.2 |
| Feeding stuff for animals (excl. unmilled cereals) | 14,318.2 | 7.4 | 195,902.0 | 143.4 |
| Miscellaneous edible products | 0 | 0 | 31,287.4 | 234.7 |
| **Total food and live animals (agricultural commodities)** | **276,697.4** | **196.5** | **5,096,753.7** | **8,734.1** |
| | | | | |
| **TOTAL ALL COMMODITIES** | **95,083,579.4** | **21,582.9** | **266,360,673.7** | **68,907.1** |

Note: Based on the Standard International Trade Classification (Revision 4).
Note: Based on port of loading.

Source: Australian Bureau of Statistics 5368.0, International merchandise exports, Australia – information consultancy subscription service, unpublished data.

# Queensland interstate trade of agricultural commodities

Data for this section is from the Australian Bureau of Statistics Queensland Interstate Trade quarterly survey which collects information about the interstate movement of goods into and out of Queensland from and to other parts of Australia. This movement can be by purchase, sale or transfer. The information sought is the dollar value of goods by commodity classification of the goods. The classification used is based on the Standard International Trade Classification, revision 4 (SITC).

The value of interstate 'meat and meat preparations' imported to Queensland for 2012-2013 was $1,020.1 million and $1,291.0 million in 2013-2014. This compared to the value exported of $1,248.0 million for 2012-2013 and $1,275.0 million in 2013-2014.

'Other food and live animals' includes - live animals, fish, cereals and cereal preparation, vegetables and fruit, sugars, sugar preparations and honey, feeding stuff for animals and miscellaneous edible products.

The value of interstate 'other food and live animals' imported to Queensland for 2012-2013 was $6,333.7 million and $5,361.4 million in 2013-2014. By comparison the value exported in 2012-2013 was $5,613.0 million and $2,888.0 million in 2013-2014.

**Table 14 – Queensland interstate trade by commodity – Sept Qtr 2012 – June Qtr 2014(a)**

| | Sept Qtr 2012 | Dec Qtr 2012 | Mar Qtr 2013 | June Qtr 2013 |
|---|---|---|---|---|
| | $'000 | $'000 | $'000 | $'000 |
| **EXPORTS** | | | | |
| Meat and meat preparations | 270,900 | 369,329 | 272,568 | 335,246 |
| Dairy products | n.p. | n.p. | n.p. | n.p. |
| Coffee, tea, cocoa and spices | 7,388 | 8,668 | 7,355 | 12,059 |
| Other food and live animals | 2,132,116 | 1,455,936 | 898,725 | 1,126,279 |
| **IMPORTS** | | | | |
| Meat and meat preparations | 238,057 | 285,934 | 243,893 | 252,208 |
| Dairy products | 213,394 | 224,630 | 197,878 | 216,743 |
| Coffee, tea, cocoa and spices | 55,790 | 57,261 | 46,633 | 54,672 |
| Other food and live animals | 1,474,546 | 1,760,272 | 1,461,021 | 1,637,868 |
| | **Sept Qtr 2013** | **Dec Qtr 2013** | **Mar Qtr 2014** | **June Qtr 2014** |
| | **$'000** | **$'000** | **$'000** | **$'000** |
| **EXPORTS** | | | | |
| Meat and meat preparations | 327,915 | 313,765 | 284,559 | 348,753 |
| Dairy products | n.p. | n.p. | n.p. | n.p. |
| Coffee, tea, cocoa and spices | 12,009 | 12,442 | 12,121 | 12,696 |
| Other food and live animals | 782,255 | 835,817 | 649,235 | 620,669 |
| **IMPORTS** | | | | |
| Meat and meat preparations | 276,556 | 361,588 | 326,968 | 325,933 |
| Dairy products | 212,641 | 249,661 | 256,594 | 277,953 |
| Coffee, tea, cocoa and spices | 55,598 | 54,939 | 46,889 | 60,515 |
| Other food and live animals | 1,364,563 | 1,354,959 | 1,259,766 | 1,382,118 |

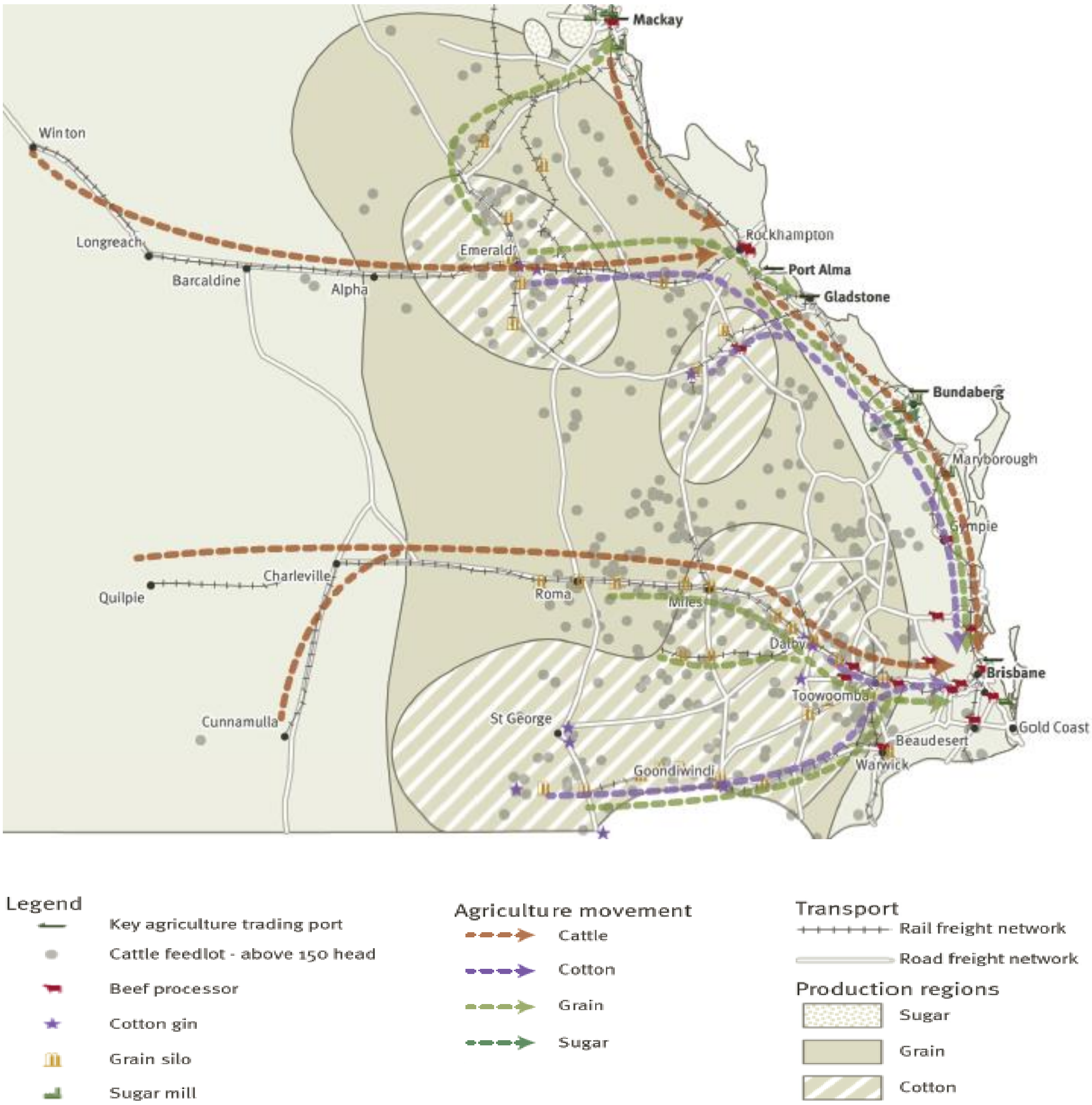
n.p. - not published due to confidentiality.
Note: Based on the Standard International Trade Classification (Revision 4).

Source: Australia Bureau of Statistics, *Interstate Trade Queensland*, June 2014.

# Transport networks for food and fibre industries in Central Queensland

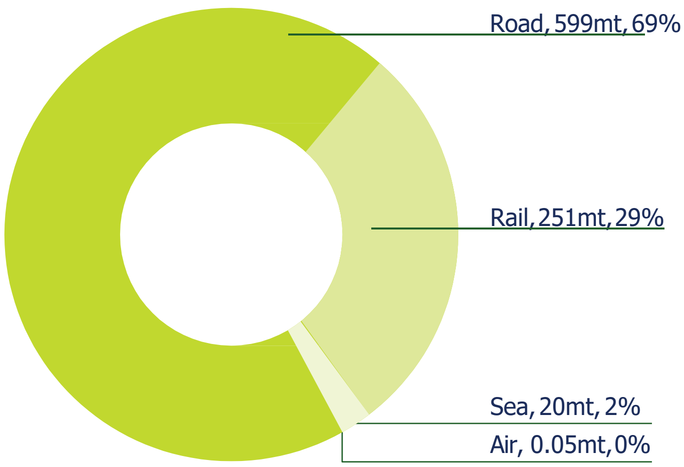
The Queensland economy comprises a higher proportion of agricultural, mining, manufacturing, construction, trade and transport industry sectors than any state other than Western Australia. These sectors comprise more than half of Queensland's $280 billion economy and are serviced supply chains which generate freight movement.[16] The main highways and roads utilised in Central Queensland for the transport and distribution of produce are Bruce Highway, Leichhardt Highway, Burnett Highway, Capricorn Highway, Landsborough Highway, and Fitzroy Developmental Road. Map 2 identifies the key agricultural production areas and road/rail links critical to supporting the agricultural industry throughout Southern Queensland.

**Map 2 – Key agricultural production regions – Southern Queensland – 2013**




Source: Department of Transport and Main Roads, Department of Agriculture, Fisheries and Forestry and Cotton Australia, 2013.

**Freight movements in Queensland by primary mode 2010-11**




Source: Centre for Transport Energy and the Environment: Queensland Transport Facts 2013.

Characteristics of general freight movements in Queensland include:

- Road transport supports the majority of general freight movements within Queensland
- Commodities predominantly move in a west to east direction to Queensland's ports
- There is a strong north-south flow between the major centres along the coastline
- The majority of commodities that move in bulk comprise of mining and agricultural exports
- Rail freight is predominately attributed to coal exports[17]

In 2016 Queensland had the third highest total freight tonnage carried (586.1 million tonnes) on its roads in Australia as reported to the Australian Bureau of Statistics (Survey of Motor Vehicle Use). Victoria had the highest with 639.6 million tonnes of total freight movements within its state.

The total weight in tonnage of 'food and live animals' freighted on Queensland roads in 2016 was 79.9 million tonnes. Queensland had the third highest freight tonnage of 'food and live animals' in Australia. Victoria had the highest with 104.2 million tonnes of 'food and live animals' freighted on their roads in 2016.

In 2016, 22.3% of all 'food and live animals' transported in freight vehicles within Australia occurred on Queensland roads.[18]

**Table 15 – Tonnes carried of food and live animals – 12 months ended 30 June 2016**

| | Queensland | Australia |
|---|---|---|
| | '000 | '000 |
| Light commercial vehicles | 454.7 | 3,529.6 |
| Rigid trucks | 9,740.3 | 62,876.9 |
| Articulated trucks | 69,743.6 | 292,260.6 |
| **Total freight vehicles** | **79,938.7** | **358,667.1** |

Note: Articulated trucks are constructed primarily for load carrying consisting of a prime mover which has no significant load carrying area, but with a turntable device which is linked to a semitrailer. Light commercial vehicles constructed for the carriage of goods and which are less than or equal to 3.5 tonnes GVM. Rigid trucks constructed with a load carrying area and which exceeds 3.5 tonnes GVM. Rigid trucks constructed with a load carrying area and which exceeds 3.5 tonnes GVM.
Note: Based on the Standard International Trade Classification (Revision 4).

Source: Australian Bureau of Statistics 9208.0 *Survey of Motor Vehicle Use*, Australia 12 months ended 30 June 2016.

## Forecasts for food and fibre industries in Central Queensland

The Queensland Government has outlined an Agricultural Strategy, which aims to double the value of Queensland's food production by 2040. However, meeting this target will only occur if the level of productivity within the sector increases across the supply chain.

Examples of how the Queensland Government will drive productivity growth across the supply chain include:

- Increase the uptake of best practice for – conservation cropping techniques, irrigation efficiency, machinery adaption and sustainable grazing land use
- Improve mechanisms to enhance resilience to natural disasters and biosecurity threats
- Focus on research projects through the Northern Beef Research Alliance that aims to improve the productivity and profitability of Queensland's beef industry
- Enhance science and technology capabilities
- Continue the Queensland Alliance for Agriculture and Food Innovation
- Invest in industries that have the potential for growth, such as tropical pulses, through investment with the Queensland University of Technology into research that will help increase the production and export of chickpeas, mungbeans and other pulses
- Deliver an updated Queensland climate adaptation strategy
- Collaborate with producer groups, industry and scientists from around the world to develop solutions and opportunities for Queensland's field crops and pasture industries, including winter cereals such as wheat, barley, oats, canary and triticale
- Work with producers, local governments and communities to continue the fight against weeds
- Hold a feral animal summit with key government departments, local governments, producers and other organisations to develop future approaches to feral animal management, including wild dogs[19]

The Queensland's Agricultural Strategy highlights the importance of improved freight access and options to support the agricultural industry's growth. Opportunities exist to develop more reliable, efficient and cost-effective freight solutions to satisfy future food consumption demands. This can be realised through enhancing supply chain relationships, challenging existing roles and responsibilities and better managing commercial risks.[20]

Queensland Government Transport and Main Roads in conjunction with a consultancy agency are developing two projects; Resources Rail Lines (Link Planning) and Sea Freight Action Plan (Coastal Shipping) that are due for completion by 30 June 2014.

### CQ Inland Port

The CQ Inland Port is currently under development at Yamala, 25km east of Emerald. The CQ Inland Port is designed for the handling, and where necessary, transfer of freight from one transport mode to another. It will be a multi-functional, multi-user facility that contributes to the effective transit of goods and materials with 24/7 operations.

The CQ Inland Port envisages growth in trade volumes via industrial and support activities on site. It will service the surrounding agricultural catchment and will facilitating bulk and containerised aggregation, intermodal transfers and efficient distribution.

A large range of services will be possible at the facility including transhipment of containers and break bulk, warehousing and storage, including cold storage options, cleaning, repairs and inspection of containers, quarantine, pre-assembly, packing, unpacking, repacking and value adding.

The CQ Inland Port will connect road and rail to Gladstone and Brisbane Ports.[21]

**Sea Freight Action Plan (Coastal Shipping) project**

The Sea Freight Action Plan (Coastal Shipping) project will examine the freight network benefits that could be achieved with the introduction of an intra-state coastal shipping service by:

- Provide the Resource sector with a cost effective alternative to trucking Over Size Over Mass (OSOM) mining equipment on the Bruce Highway
- Improve supply chain performance and export opportunities for the Agricultural industry in Central and Far North Queensland and improve the opportunities for the Construction industry to move large scale project materials in a cost effective and timely manner
- Increase port throughput with a multi-modal freight network focus
- Examine potential benefits that could be achieved by facilitating a coastal shipping service calling at a range of ports between Brisbane and Cairns

The introduction of an intra-state coastal shipping service would support the movement of OSOM cargo (other than by road) and connect regional ports to the Port of Brisbane, providing an opportunity to back load containerized exports of grain, cotton, fruit, vegetables and beef on these ships from regional areas of primary production. Coastal shipping could address road and rail infrastructure failures associated with annual and extreme weather events in Central Queensland and Far North Queensland given their impacts on supply chain security and productivity in these regions.

A coastal shipping service would also provide opportunities for Queensland’s agricultural exporters, providing an equipment pool of sea freight containers (TEU) at regional ports to back load coastal ships with agricultural commodities such as grain, cotton, citrus and beef for transhipment via the port of Brisbane to international and domestic markets.[22]

The Department of Transport and Main Roads’ *Moving Freight progress report – March 2016* lists the “proposed delivery” of the Sea Freight Action Plan – Coastal Shipping Study as due by 2018.

# Endnotes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# Notes

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