

# ECONOMIC PROFILE

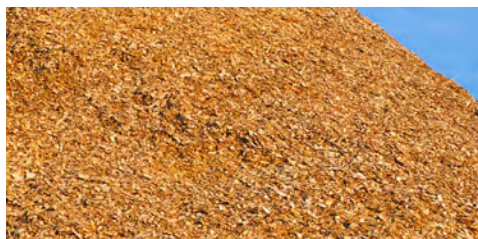


Mackay-Isaac-Whitsunday, Queensland  
March 2013

[www.mwredc.org.au](http://www.mwredc.org.au)









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## EXECUTIVE SUMMARY

Over the past 12 months, the Mackay-Isaac-Whitsunday region, which had previously experienced the most rapid growth in the region's history, has undergone a significant change in economic conditions. This has been brought about due to a retraction in the mining sector brought on by the high Australian dollar, declining commodity prices and issues with cost of production.

Despite these impacts, this report highlights the very strong economic foundation that this region holds. The fact that the Gross Regional Product (GRP) has increased by 0.5% to \$20.6billion in 2011/12 (up from \$17.5billion in 2010/11) reinforces the region's strength and the diverse range of industries, skills and leadership.

The report shows an accurate representation of the period up until December 2012. Among the highlights are signs of a continued rise in population (to 279,000 by 2031), ongoing low unemployment (3.7%) and a strong and growing workforce.

However, more recent events will point to a much different story in 2014. The loss of jobs from the resources industry has relaxed the skills shortage which plagued business and industry across the region. This region has facilitated two of the biggest booms in Australian History and this has enabled the region to take advantage of a period of opportunity where a highly skilled labour force can take on new ventures.

The move towards diversification and innovation throughout industry is ripe. Industry leaders understand the economic situation, previously reliant on mining, has changed and business are retraining the workforce and identifying how they can drive down costs and increase productivity.

Another factor affecting the social fabric of the region previously had been housing and accommodation. This report outlines data (conducted in line with the World Bank analysis) that housing in the region was unaffordable to the majority of residents. For example, the cost to home owners rose 54.7% in the region (compared with 38% in Queensland) between 2006-2011.

This untenable situation had become a serious risk to the three communities and was a major impediment to attracting and sustaining a workforce.

Since the data was gathered for this report, housing prices and rental rates have declined significantly, again providing an opportunity to encourage families, singles and non-mining related workers back into the region.

Despite the changes to the economy over the past 12 months, the region is expected to remain strong over the coming years. Already, signs of renewed growth are appearing and there is confidence in the market.





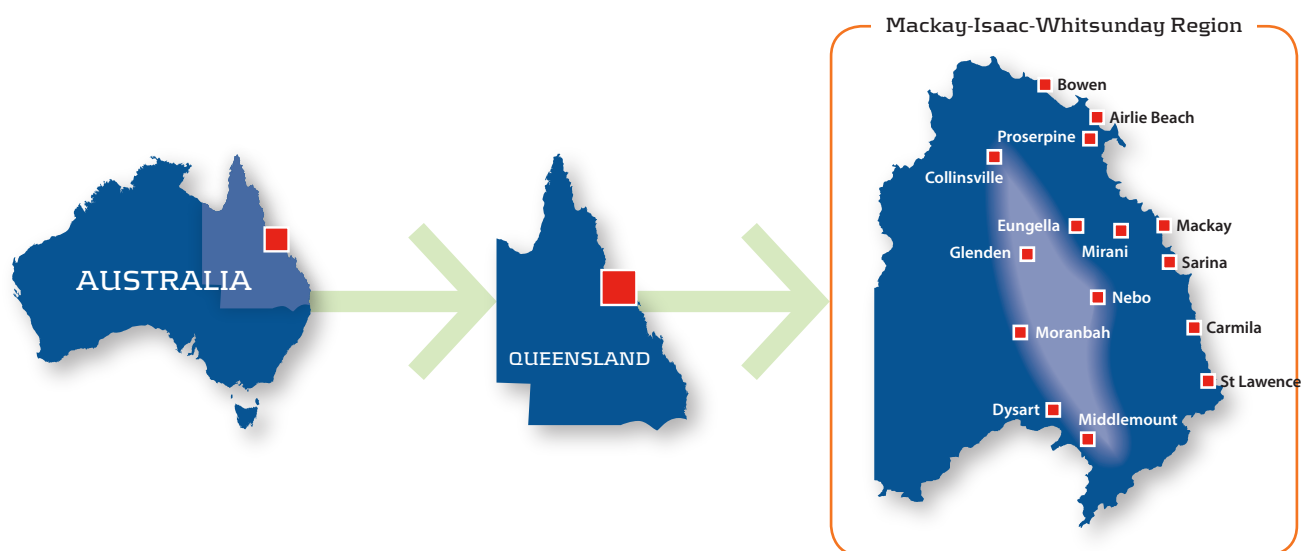
## ABOUT THE REPORT

*The Mackay-Isaac-Whitsunday Regional Economic Profile Report provides a summary of statistical information on the region's economy. It is released annually and encompasses the data provided by a range of government and industry sources.*

## ABOUT THE REGION

Located halfway between Cairns and Brisbane, the Mackay-Isaac-Whitsunday (MIW) Region incorporates the Mackay, Isaac and Whitsunday Local Government Areas (LGAs). The region boasts a resilient and diverse range of business and industry, low unemployment and numerous natural tourist attractions including the Whitsunday Islands.

The opportunities for investment are vast. REDC's latest Regional Development register (RDR) underlines more than \$98.4 billion worth of development either under way or planned for this region.



## ABOUT THE REDC



**The Mackay Whitsunday Regional Economic Development Corporation (REDC) represents the business, government, and community interests of the three local government areas which form the Mackay-Isaac-Whitsunday Region.**

REDC works in partnership with industry, business groups, government agencies, councils and other regional organisations interested in progressing employment growth, and economic and community development within the region.

As the peak economic body supporting the region, REDC is committed to working with business, industry, government and investors to achieve the best possible result for this dynamic and vibrant region.

For REDC's Board of Directors, it is vitally important to support local business to be able to grow and perform and take their share of this growth.



## ECONOMY

### GRP

*Gross regional product (GRP) is one of the primary indicators used to gauge the health of a region's economy. It represents the total dollar value of all goods and services produced over a specific time period - you can think of it as the size of the economy.*

Economic production and growth, what GRP represents, has a large impact on nearly everyone within an economy. For example, when the economy is healthy, you will typically see low unemployment and wage increases as businesses demand labour to meet the growing economy.

### GRP IN MACKAY-ISAAC-WHITSUNDAY

Gross Regional Product in Mackay-Isaac-Whitsunday was \$20.6 Billion in 2011/12, an increase of 0.5% in real terms since 2010/11.

At a total of \$20.6 billion, the Mackay-Isaac-Whitsunday's economy accounts for 7.3% of Queensland's Gross State Product (\$283.6), despite having only 3.8% of its population.



Mackay-Isaac-Whitsunday is the largest regional economy in Queensland, having the third largest gross regional product (\$20.6 billion) in Queensland behind the metropolitan centres of Brisbane (\$123.5 billion) and Gold Coast (\$32.6 billion).

The Mackay-Isaac-Whitsunday region's economy is significantly larger than other regional centres in Queensland, including Rockhampton (\$17.6 billion) and Townsville (\$11.4 billion).

The Mackay-Isaac-Whitsunday region continues to rely heavily on the mining industry which accounts for 50.3% of total Gross regional product (GRP).

The largest contributor to GRP in each region is mining. Other top performing industries in Mackay-Isaac-Whitsunday include :

- » **Construction (4.4% of total GRP),**
- » **Manufacturing (4.1% of total GRP),**
- » **Transport, postal and warehousing (3.6% of total GRP),**
- » **Wholesale trade (3.4% of total GRP) and;**
- » **Agriculture, forestry and fishing (2% of total GRP)**



GRP

TABLE 1: GROSS REGIONAL PRODUCT, 2011-12						
	Level (\$m) 2011/12					
Industry	Mackay	Whitsunday	Isaac	M-I-W Region	% of Regional Economy	Annual Growth
Agriculture, forestry & fishing	168.4	138.0	100.3	388.4	2.0	-6.1%
Mining	957.7	526.7	8,477.3	10,699.9	50.3	-2.0%
Manufacturing	632.6	117.1	62.7	774.6	4.1	8.4%
Electricity, gas, water & waste services	78.1	25.0	19.1	138.7	0.6	-16.3%
Construction	491.9	159.1	217.1	847.0	4.4	13.2%
Wholesale trade	523.6	79.6	59.2	703.4	3.4	9.8%
Retail trade	334.9	107.0	43.3	488.8	2.4	5.5%
Accommodation & food services	142.6	117.6	52.7	294.6	1.6	12.3%
Transport, postal & warehousing	468.2	169.1	73.4	664.1	3.6	6.7%
Information media & telecommunications	62.1	17.2	6.7	90.8	0.4	16.5%
Financial & insurance services	214.5	53.5	23.6	302.9	1.5	-19.0%
Rental, hiring & real estate services	135.5	43.0	26.3	209.8	1.0	8.7%
Professional, scientific & technical services	298.2	60.3	37.3	395.1	2.0	4.4%
Administrative & support services	78.3	38.8	35.5	166.2	0.8	11.6%
Public administration & safety	225.1	59.3	45.9	323.2	1.7	0.0%
Education & training	204.2	52.8	41.2	328.0	1.5	-2.3%
Health care & social assistance	317.3	76.4	30.5	434.1	2.1	-0.7%
Arts & recreation services	11.0	5.6	1.6	18.6	0.1	-1.8%
Other services	156.9	30.7	29.8	215.8	1.1	0.0%
Non classifiable industry	54.1	22.5	16.5	93.7	0.5	9.2%
<i>Total Industry Value Added</i>	<i>5,555.1</i>	<i>1,899.3</i>	<i>9,400.1</i>	<i>17,577.6</i>		
Ownership of dwellings	555.5	189.9	940.0	1,769.1		
<i>GRP at Factor Cost / Total Factor Income</i>	<i>6,110.6</i>	<i>2,089.2</i>	<i>10,340.1</i>	<i>19,346.7</i>		
Taxes less subsidies on production and imports	391.2	133.7	661.9	1,291.8		
Statistical discrepancy	23.1	7.9	39.0	-15.2		
<b>Gross Regional Product</b>	<b>6,524.9</b>	<b>2,230.9</b>	<b>11,041.0</b>	<b>20,623.2</b>		<b>0.5%</b>
Gross State Product, Queensland				283,604		
Gross Regional Product, Northern (Townsville)				11,434.3		
Gross Regional Product, Fitzroy (Rockhampton)				17,618.6		
Gross Regional Product, Far North (Cairns)				13,455.0		

Source: Lawrence Consulting, 2013.



## PRODUCTIVITY

*Productivity is a key component of economic growth and is a measure of the efficiency of production within a region. Dividing the real GRP of a region by total hours worked will measure the labour productivity within that region, i.e. the average amount of output produced by an hour worked by a person within that region.*

The Mackay-Isaac-Whitsunday region recorded total industry productivity (or industry value added per hour worked) of approximately \$97.24 in 2011/12, which represented a small annual decrease of 3.9% in real productivity. The Mackay-Isaac-Whitsunday region recorded a significantly higher total industry productivity average than Queensland (\$58.32) in 2011/12.



The Mackay-Isaac-Whitsunday region is 67% more productive than the Queensland average.

TABLE 2: PRODUCTIVITY

Industry	Mackay-Isaac-Whitsunday			Queensland		
	Level (\$ value added/hr) 2011/12	Annual change (\$)	Annual % change	Level (\$ value added/hr) 2011/12	Annual change (\$)	Annual % change
Agriculture, forestry & fishing	44.68	4.12	10.2	48.07	4.64	10.7
Mining	294.00	-115.72	-28.2	192.12	-29.90	-13.5
Manufacturing	55.71	3.59	6.9	59.82	4.10	7.4
Electricity, gas, water & waste services	73.51	-21.41	-22.6	76.01	-22.06	-22.5
Construction	49.91	3.55	7.7	53.62	3.95	7.9
Wholesale trade	97.35	9.69	11.1	101.96	10.10	11.0
Retail trade	36.98	3.30	9.8	38.17	3.51	10.1
Accommodation & food services	26.29	2.96	12.7	30.94	3.64	13.3
Transport, postal & warehousing	64.06	4.51	7.6	67.20	4.96	8.0
Information media & telecommunications	92.01	6.09	7.1	93.21	7.04	8.2
Financial & insurance services	148.12	-39.82	-21.2	139.73	-38.06	-21.4
Rental, hiring & real estate services	62.56	5.70	10.0	66.87	6.33	10.5
Professional, scientific & technical services	55.79	3.01	5.7	57.03	3.03	5.6
Administrative & support services	35.54	-0.17	-0.5	40.63	0.43	1.1
Public administration & safety	51.99	-0.58	-1.1	52.67	-0.43	-0.8
Education & training	36.84	-0.56	-1.5	36.86	-0.58	-1.6
Health care & social assistance	38.26	0.26	0.7	38.66	0.42	1.1
Arts & recreation services	24.65	-1.21	-4.7	24.22	-1.21	-4.7
Other services	27.08	-0.01	0.0	30.00	0.18	0.6
<b>Total Industry</b>	<b>97.24</b>	<b>-3.98</b>	<b>-3.9</b>	<b>58.32</b>	<b>1.93</b>	<b>3.4</b>

**Note:** All values are in chain volume measures.

**Source:** Lawrence Consulting.





## TURNOVER

*The most recent Australian Business Register indicated there were an estimated 15,823 businesses operating in the Mackay-Isaac-Whitsunday region in June 2011, which represented a slight decrease of 1.3% from the level recorded in June 2010 (16,030). The estimated total industry turnover for the Mackay-Isaac-Whitsunday region was \$6.6 billion in 2010/11, whilst the average turnover of all businesses was approximately \$420,000.*

With regard to turnover, the largest proportion of businesses recorded annual turnover in the \$0-\$99,999 range (42.1%), followed by the \$200,000-\$499,999 (20.5%) and \$100,000-\$199,999 (16.3%) turnover ranges. Approximately 5.7% of businesses in the Mackay-Isaac-Whitsunday region recorded annual turnover in excess of \$2 million in 2010/11.

TABLE 3: BUSINESSES BY INDUSTRY					
Industry	Level 2010/11	% of total	Total turnover (\$ million)	% of total	Avg turnover (\$'000)
Agriculture, forestry & fishing	3,223	20.4	979.2	14.7	303.8
Mining	205	1.3	119.0	1.8	580.6
Manufacturing	513	3.2	300.9	4.5	586.6
Electricity, gas, water & waste services	36	0.2	18.6	0.3	516.7
Construction	2,869	18.1	1,317.9	19.8	459.3
Wholesale trade	257	1.6	185.0	2.8	719.8
Retail trade	858	5.4	737.0	11.1	858.9
Accommodation & food services	586	3.7	423.3	6.4	722.3
Transport, postal & warehousing	956	6.0	358.7	5.4	375.2
Information media & telecommunications	66	0.4	13.4	0.2	202.3
Financial & insurance services	753	4.8	157.4	2.4	209.0
Rental, hiring & real estate services	1,725	10.9	505.7	7.6	293.2
Professional, scientific & technical services	1,055	6.7	431.4	6.5	408.9
Administrative & support services	526	3.3	213.5	3.2	405.9
Public administration & safety	30	0.2	18.8	0.3	627.5
Education & training	193	1.2	60.6	0.9	313.7
Health care & social assistance	488	3.1	237.4	3.6	486.4
Arts & recreation services	127	0.8	24.6	0.4	193.3
Other services	1,030	6.5	447.5	6.7	434.5
Non classifiable industry	327	2.1	95.8	1.4	293.0
<b>Total, 2010/11</b>	<b>15,823</b>	<b>100.0</b>	<b>6,645.5</b>	<b>100.0</b>	<b>420.0</b>
Total, 2009/10	16,030		6,680.0		416.7
Annual % change	-1.3		-0.5		0.8

Source: ABS 8165.0.



## DEMOGRAPHICS

### ESTIMATED RESIDENT POPULATION

#### Mackay-Isaac-Whitsunday resident population 2011

**171,297**

**↑ 7.2%**  
(since 2006)

#### Queensland resident population 2011

**4,474,098**

**↑ 9.4%**  
(since 2006)

The resident population in Mackay-Isaac-Whitsunday now sits at 171,297, having grown 7.2% between 2006 and 2011.

The fastest rate of growth has been in Isaac Local Government Area (LGA), where the population has increased 1.9% per annum on average the past five years. This is most likely a reflection of the expansion of economic investment and activity in the mining industry within the region.


 Mackay-Isaac-Whitsunday contributes 7.3% of Queensland's economy with only 3.8% of its population.

TABLE 4: ESTIMATED RESIDENT POPULATION

	Estimated resident population as at 30 June			Average annual growth rate	
	2001	2006	2011	2001-2006	2006-2011
	-number-			%	
Isaac (R)	18,524	21,113	23,212	3.3	1.9
Mackay (R)	91,084	107,332	115,677	2.7	1.5
Whitsunday (R)	27,931	31,355	32,408	2.2	0.7
<b>M-I-W Region</b>	<b>137,539</b>	<b>159,800</b>	<b>171,297</b>	<b>3.1</b>	<b>1.4</b>
QUEENSLAND	3,628,946	4,090,908	4,474,098	2.4	1.8

Source: QRSIS Database, accessed 08/08/2012. Based on ASGC 2011.



## POPULATION PROJECTIONS

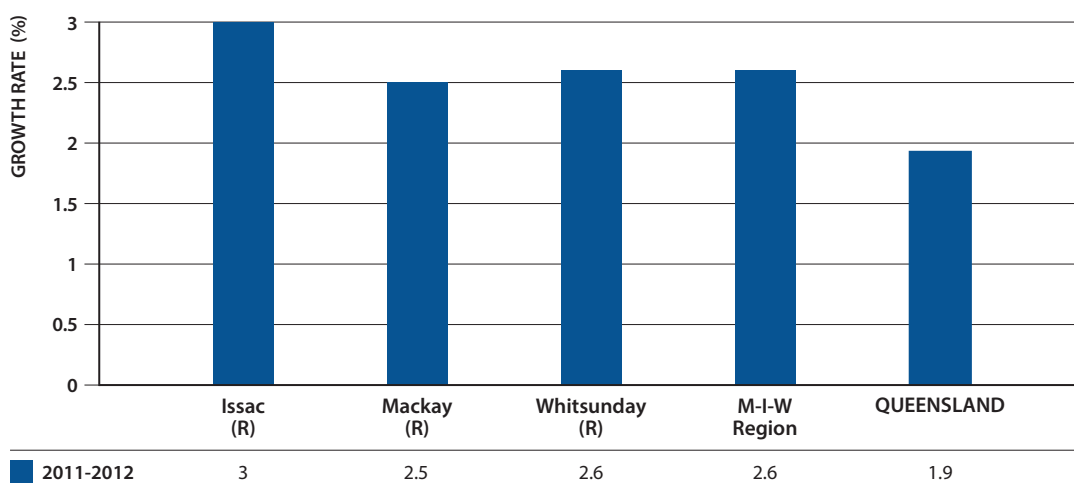
*Conservative growth predictions estimate that the Mackay-Isaac-Whitsunday will grow at a faster rate than Queensland over the next 10-20 years, reaching more than 279,000 people by 2031.*

TABLE 5: PROJECTED POPULATION GROWTH (MEDIUM SERIES) TO 2031				
	Projected Population as at 30 June		Average annual growth rate	
	2021	2031	2011-2021	2021-2031
	-number-		%	
Isaac (R)	31,418	37,000	3.0	1.6
Mackay (R)	156,117	187,367	2.5	1.8
Whitsunday (R)	46,008	55,451	2.6	1.9
<b>M-I-W Region</b>	<b>233,543</b>	<b>279,818</b>	<b>2.6</b>	<b>1.8</b>
QUEENSLAND	5,588,617	6,592,857	1.9	1.7

Source: QRSIS Database, accessed 03/07/2012. Based on ASGC 2011.

The growth rate is predicted to be fastest in the Isaac LGA due to the expected strength of the resources sector, however the majority of residents will still be concentrated in the Mackay LGA.

### Average Annual Growth Rate





## AGE DISTRIBUTION

*The Mackay-Isaac-Whitsunday region has a higher percentage of youth and working aged residents compared to Queensland.*

The Mackay-Isaac-Whitsunday region is expected to maintain its relatively low share of mature aged persons in coming decades, staying well below the Queensland average.

TABLE 6: POPULATION STRUCTURE						
	Estimated resident population as at 30 June			Average annual growth rate		
	Youth*	Working Age^	Mature#	Youth*	Working Age^	Mature#
	%					
Isaac (R)	25.0	71.2	3.8	23.1	72.4	4.4
Mackay (R)	20.6	68.1	11.2	19.8	63.9	16.2
Whitsunday (R)	16.6	71.3	12.1	16.0	66.0	18.0
<b>Mackay Region</b>	<b>20.4</b>	<b>69.1</b>	<b>10.5</b>	<b>19.5</b>	<b>65.5</b>	<b>15.0</b>
QUEENSLAND	19.8	67.1	13.1	18.3	62.1	19.6

Source: DSDIP calculations based on QRSIS database, accessed 03/07/2012. Based on ASGC 2011.

\*Youth = 0-14 yrs, ^Working Age = 15-64 yrs, #Mature = 65+ yrs.

Due to the employment opportunities on offer, the Isaac LGA has a significantly younger population than other LGAs.

Mackay and Whitsunday LGA have a slightly younger population than Queensland.

TABLE 7: MEDIAN AGE, 2001 TO 2011			
Region	2001	2006	2011
Isaac LGA	31.8	31.3	31.5
Mackay LGA	34.3	35.7	35.8
Whitsunday LGA	36.4	37.4	37.6
Mackay-Isaac-Whitsunday region	34.3	35.3	35.4
Queensland	35.0	36.0	36.6

Source: Australian Bureau of Statistics, Population by Age and Sex, Regions of Australia 2011, unpublished data.





## FAMILY COMPOSITION

*Forty-seven per cent of all households in Mackay-Isaac-Whitsunday consist of couple families with children.*

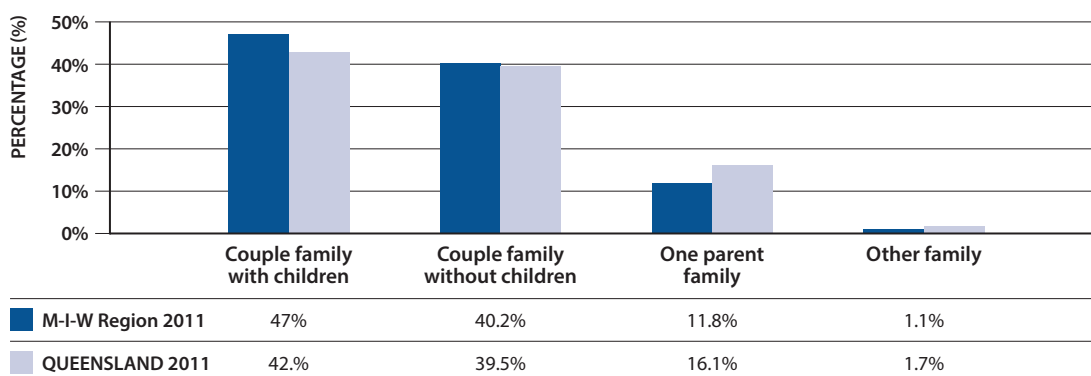
The highest percentages of couple families with children are in the Mackay (46.4%) and Isaac (55.8%) local government areas, while Whitsunday has a higher percentage of couples without children (46.4%).

The Mackay-Isaac-Whitsunday Region has a much lower proportion of one parent families (11.7%) compared to Queensland (16.1%).

TABLE 8: FAMILY COMPOSITION					
	Couple Family With Children	Couple Family Without Children	One Parent Family	Other Family	Persons Per Household
<b>Mackay (R)</b>					
2001	44.40%	40.60%	13.70%	1.30%	2.6
2006	42.70%	43.70%	12.20%	1.40%	2.5
2011	46.40%	39.10%	13.20%	1.40%	2.7
<b>Isaac (R)</b>					
2001	56.80%	35.70%	6.70%	0.80%	3.1
2006	56.40%	35.50%	7.40%	0.70%	2.8
2011	55.80%	35.10%	8.40%	0.70%	2.9
<b>Whitsunday (R)</b>					
2001	50.20%	35.50%	13.30%	1.00%	2.8
2006	48.90%	39.60%	10.60%	0.90%	2.8
2011	38.80%	46.40%	13.70%	1.10%	2.4
<b>M-I-W Region</b>					
2001	48.40%	36.80%	13.70%	1.20%	2.8
2006	47.60%	39.50%	11.70%	1.10%	2.7
2011	47.00%	40.20%	11.77%	1.07%	2.7
<b>QUEENSLAND</b>					
2001	44.70%	37.40%	16.00%	1.80%	2.7
2006	43.90%	39.20%	15.20%	1.70%	2.6
2011	42.80%	39.50%	16.10%	1.70%	2.6

Source: Australian Bureau of Statistics, Census of Population and Housing, 2001, 2006, 2011.

## Family Composition



Source: Australian Bureau of Statistics, Census of Population and Housing, 2011.



## EMPLOYMENT AND INCOME

### LABOUR FORCE (INCL UNEMPLOYMENT)

*The Mackay-Isaac-Whitsunday region's labour force has grown 1.5% between 2011 and 2012, compared to the 0.2% growth by Queensland for the same period.*

The strongest growth was seen in Mackay and Whitsunday LGAs ( both up 1.5%).

TABLE 9: LABOUR FORCE				
	Labour Force		Unemployment Rate	
Mackay (R)				
2011	66,582	↑1.5%	4.3%	↓0.6pp
2012	67,552		3.7%	
Isaac (R)				
2011	13,865	↑1.4%	1.1%	↓0.1pp
2012	14,065		1.0%	
Whitsunday (R)				
2011	20,017	↑1.5%	6.5%	↓0.2pp
2012	20,309		6.3%	
M-I-W Region				
2011	100,464	↑1.5%	4.0%	↓0.3pp
2012	101,926		3.7%	
QUEENSLAND				
2011	2,474,900	↑0.2%	5.5%	↓0.3pp
2012	2,480,700		5.8%	

Source: DEEWR, Small Area Labour Markets (smoothed series), December Qtr, 2012.

Unemployment in Mackay-Isaac-Whitsunday remains very low at 3.7% reflecting the continuing demand for skilled workers by the mining and mining support industries. Queensland currently sits at 5.8% unemployment.



#### Mackay-Isaac-Whitsunday unemployment rate 2012

**3.7%**

**↓ 0.3 percentage  
points**  
(since 2011)



#### Queensland unemployment rate 2012

**5.8%**

**↑ 0.3 percentage  
points**  
(since 2011)

The Mackay-Isaac-Whitsunday region has a strong labour market, with a higher participation rate and lower unemployment rate when compared with the State. The region relies heavily upon the comparative strength of its agriculture, forestry and fishing industry, mining industry, construction industry and transport, postal and warehousing industry for a large percentage of employment positions.



## WORKFORCE BY INDUSTRY

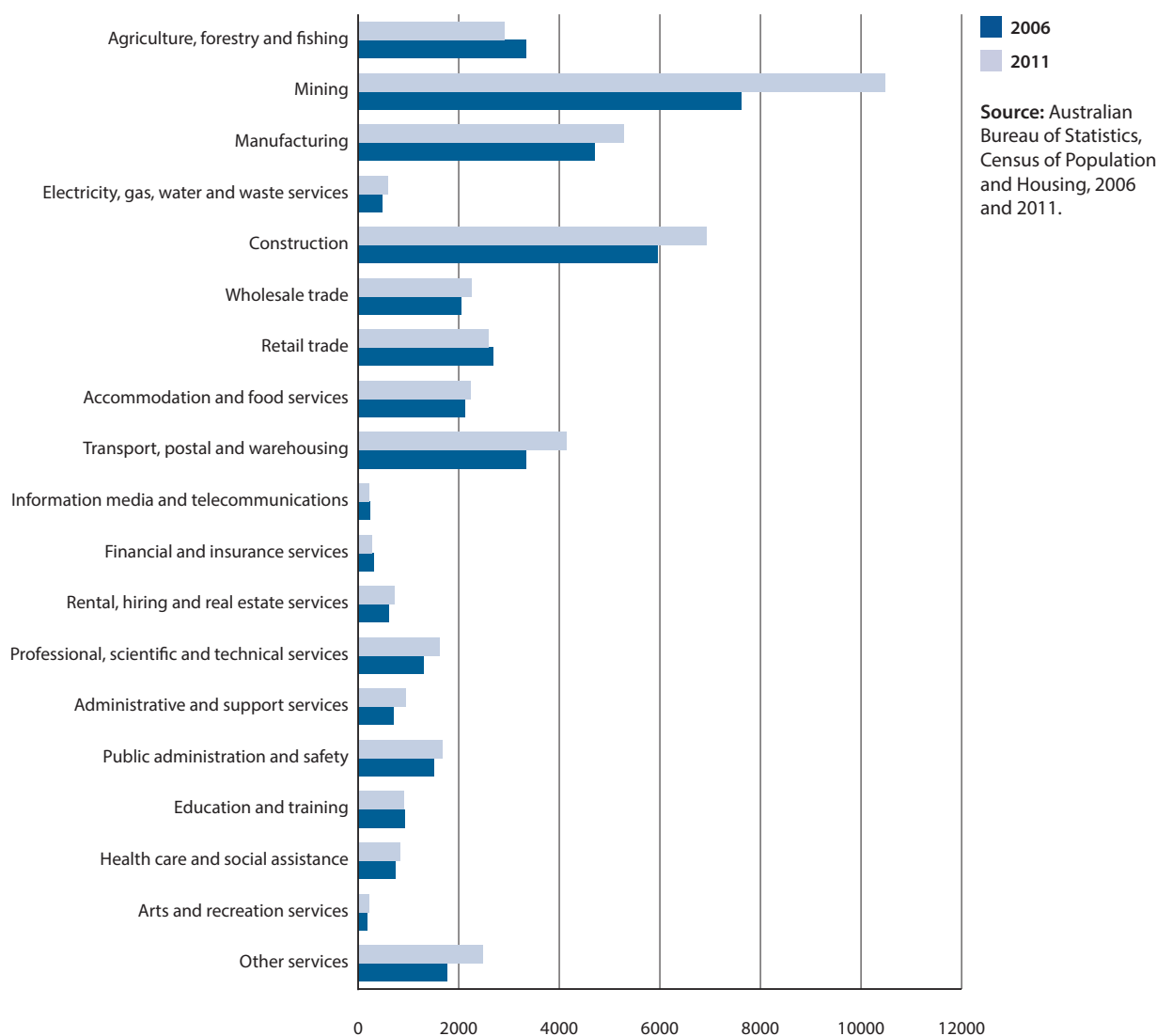
Between 2006 and 2011, employment in the Mackay-Isaac-Whitsunday region has seen significant growth in the following areas:

- » **Mining (37.8%)**
- » **Transport, Postal and Warehousing (24.1%)**
- » **Construction (16.4%)**
- » **Manufacturing (12.3%)**



Between 2006 and 2011, employment in the Mackay-Isaac-Whitsunday region has declined in the Agriculture, Forestry and Fishing industry [-13.2%], however the sector increased its contribution to gross regional product by 22.7%, indicating a significant increase in productivity.

### Workforce by Industry, Between 2006 and 2011



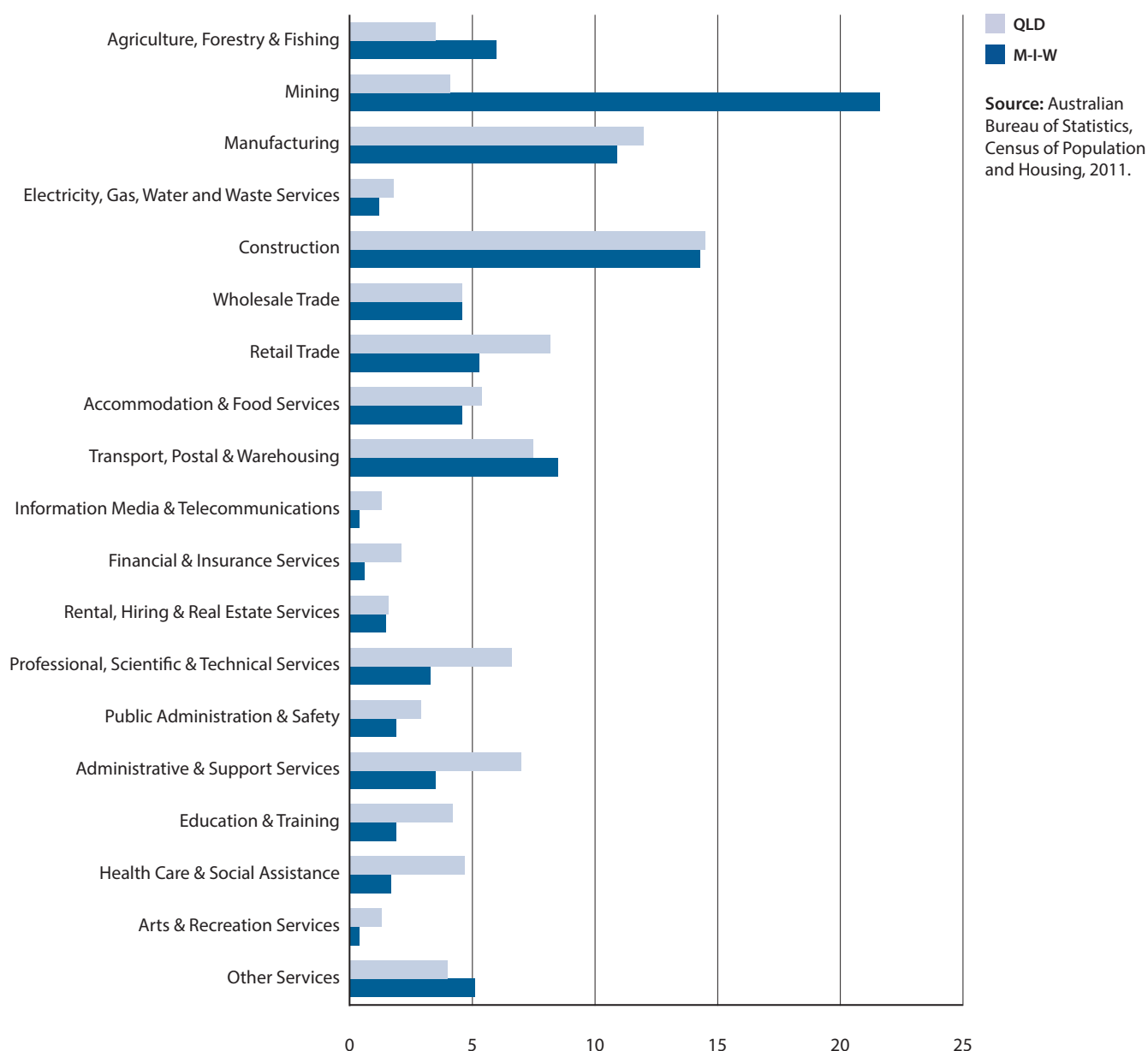


## WORKFORCE BY INDUSTRY

Compared to the State, employment in the Mackay-Isaac-Whitsunday region has a greater reliance on the industries of:

- » **Mining (21.6% compared to 4.1% for Queensland);**
- » **Agriculture, forestry and fishing (6% compared to 3.5% for Queensland); and**
- » **Transport, postal and warehousing (8.5% compared to 7.5% for Queensland).**

### Employment by Industry (% of total workforce), Mackay-Isaac-Whitsunday Region Comparison to Queensland, 2011







## WORKFORCE BY OCCUPATION

*There has been strong growth in employment across all occupations between 2006 and 2011.*

Compared with the State, the Mackay-Isaac-Whitsunday region has a higher proportion of:

- » **Technicians and trades workers (20.4% of total employment);**
- » **Machinery operators and drivers (15.0%); and**
- » **Labourers (12.0%)**

TABLE 10: EMPLOYMENT BY OCCUPATION						
		Mackay#	Isaac#	Whitsunday#	M-I-W Region	% Change
Managers	2006	n/a	n/a	n/a	8,855	n/a
	2011	5,894	1,441	2,064	9,399	6.1%
Professionals	2006	n/a	n/a	n/a	8,346	n/a
	2011	7,403	1,299	1,614	10,316	23.6%
Technicians & Trade Workers	2006	n/a	n/a	n/a	14,204	n/a
	2011	12,147	2,481	2,732	17,360	22.2%
Community & Personal Service Workers	2006	n/a	n/a	n/a	5,153	n/a
	2011	4,100	560	1,500	6,160	19.5%
Clerical & Administrative Workers	2006	n/a	n/a	n/a	8,685	n/a
	2011	7,474	1,152	1,659	10,285	18.4%
Sales Workers	2006	n/a	n/a	n/a	6,450	n/a
	2011	4,958	591	1,370	6,919	7.3%
Machinery Operators & Drivers	2006	n/a	n/a	n/a	10,052	n/a
	2011	7,992	2,927	1,849	12,768	27.0%
Labourers	2006	n/a	n/a	n/a	9,757	n/a
	2011	6,365	1,390	2,400	10,155	4.1%
<b>Total</b>	2006	n/a	n/a	n/a	71,502	n/a
	2011	112,798	22,587	31,428	166,813	133.3%

**Source:** Australian Bureau of Statistics, Census of Population and Housing, 2006 and 2011.

# Due to the change in ABS geographical boundaries, it is not possible to compare LGA level data in 2006.



## INCOME BY INDUSTRY

*According to the 2011 Census, there is still a significant disparity between income levels across industries in the Mackay-Isaac-Whitsunday Region with individual incomes highest for those working in mining, construction and manufacturing.*



Overall, more than half of all full time employees within the region's economy earned less than \$800 a week (consistent with the Queensland average), while just over 20% earned more than \$1,500 a week (compared to 11% of the Queensland economy).

- » In 2011, the median individual weekly income of employees in the Mackay-Isaac-Whitsunday Region was \$709.
- » Based on 2011 Census data, the largest share of the higher weekly income brackets occurred in the mining industry, as well as industries associated with mining (e.g. transport, postal and warehousing; electricity, gas, water and waste services) and highly-skilled industries (e.g. professional, scientific and technical services).
- » Conversely, there were a number of industries within the M-I-W region economy where the majority of weekly incomes fell within the low-end brackets. These industries, such as retail trade, accommodation and food services, and arts and recreation services, are generally considered as lower-skilled industries and may also have a higher share of part-time employment in comparison with other industries within the regional economy.
- » Of those earning \$2,000 per week or more, 38% work in the mining industry, 10.7% in construction, 9.1% in manufacturing and 8.9% in Transport, Postal and Warehousing.





## INCOME BY INDUSTRY

TABLE 11: WEEKLY INCOME BRACKETS BY INDUSTRY, MACKAY-ISAAC-WHITSUNDAY REGION, 2011								
	Weekly Income Brackets (% share of number of persons)							
Industry	\$1-\$299	\$300-\$599	\$600-\$799	\$800-\$999	\$1,000-\$1,249	\$1,250-\$1,499	\$1,500-\$2,000	\$2,000 or more
Agriculture, Forestry & Fishing	9.5%	25.2%	20.6%	14.6%	12.6%	6.9%	5.4%	5.3%
Mining	0.5%	1.6%	2.1%	2.8%	5.5%	7.6%	21.5%	58.3%
Manufacturing	3.3%	11.0%	13.7%	15.9%	15.7%	12.0%	15.7%	12.8%
Electricity, Gas, Water & Waste Services	1.5%	6.4%	7.9%	12.8%	17.1%	14.9%	23.5%	15.9%
Construction	3.6%	11.3%	10.7%	13.7%	16.0%	13.9%	16.0%	14.8%
Wholesale Trade	4.0%	12.0%	17.2%	15.6%	13.5%	9.4%	12.8%	15.4%
Retail Trade	23.1%	30.4%	20.8%	10.7%	6.2%	3.4%	3.1%	2.3%
Accommodation & Food Services	21.0%	31.5%	20.2%	12.8%	7.3%	3.1%	2.4%	1.8%
Transport, Postal & Warehousing	3.0%	11.3%	12.4%	13.5%	14.2%	11.5%	15.9%	18.2%
Information Median & Telecommunications	7.6%	20.0%	16.7%	14.8%	17.1%	8.9%	11.5%	3.3%
Financial & Insurance Services	4.3%	18.0%	17.6%	16.8%	11.0%	9.0%	11.4%	11.9%
Rental, Hiring & Real Estate Services	7.4%	17.5%	17.5%	11.3%	10.3%	9.6%	11.6%	14.8%
Professional, Scientific & Technical Services	6.3%	14.4%	13.1%	12.3%	12.0%	9.7%	13.6%	18.7%
Administrative & Support Services	10.0%	22.9%	17.8%	15.0%	11.5%	7.1%	8.0%	7.7%
Public Administration & Safety	3.3%	9.9%	12.6%	19.0%	20.1%	14.3%	14.6%	6.2%
Education & Training	8.4%	20.6%	13.5%	9.0%	14.7%	13.1%	17.5%	3.1%
Health Care & Social Assistance	6.9%	23.9%	21.9%	14.1%	12.0%	7.7%	7.1%	6.4%
Arts & Recreation Services	21.4%	26.0%	17.2%	11.9%	11.0%	6.4%	3.8%	2.2%
Other Services	9.1%	20.2%	13.7%	11.9%	12.4%	9.0%	12.1%	11.6%
<b>Total *</b>	<b>16.7%</b>	<b>22.5%</b>	<b>12.2%</b>	<b>9.7%</b>	<b>9.3%</b>	<b>7.1%</b>	<b>9.7%</b>	<b>12.9%</b>

Source: Australian Bureau of Statistics, Census of Population and Housing, 2011 (Based on place of usual residence).

\* Total does not include the following income brackets – negative income, nil income, not stated, not applicable.



## MEDIAN WEEKLY INCOME

TABLE 12: HOUSEHOLD FINANCES		
	Median Weekly Household Income	% Change
<b>Mackay (R)</b>		
2011	\$1,578	
<b>Isaac (R)</b>		
2011	\$2,579	
<b>Whitsunday (R)</b>		
2011	\$1,165	
<b>M-I-W Region</b>		
2006	\$1,138	
2011	\$1,572	↑38%
<b>QUEENSLAND</b>		
2006	\$1,033	
2011	\$1,235	↑19.6%

Source: Australian Bureau of Statistics, Census of Population and Housing, 2006 & 2011.

# Due to the change in ABS geographical boundaries, it is not possible to compare LGA level data.





## HOUSING AND COST OF LIVING

### HOUSING TENURE

*The percentage of households in Mackay-Isaac-Whitsunday renting (42.2%) is significantly higher than the State average (33.2%), while the percentage of households with a mortgage is less than the State average (27.3 compared to 34.5).*

The greatest proportion of households renting can be found Isaac LGA (60.7%) most likely reflecting the transient living conditions of the temporary and semi-permanent mining and construction workforce of these areas.

TABLE 13: HOUSEHOLD TENURE								
	% Fully Owning Home		% Purchasing Home		% Renting		% Renting (Housing Authority)	
Mackay								
2001	42.13%		24.30%		23.73%		2.03%	
2006	36.17%		34.60%		25.27%		2.27%	
2011	29.80%	↓	37.30%	↑	29.50%	↑	1.00%	↓
Isaac								
2001	28.73%		10.30%		45.73%		1.67%	
2006	26.20%		13.60%		55.40%		2.50%	
2011	20.90%	↓	14.60%	↑	60.70%	↑	1.50%	↓
Whitsunday								
2001	38.65%		16.85%		30.40%		2.25%	
2006	33.40%		28.35%		33.65%		3.00%	
2011	29.50%	↓	30.20%	↑	36.50%	↑	0.60%	↓
M-I-W Region								
2001	37.80%		21.90%		30.40%		3.10%	
2006	32.50%		31.80%		31.90%		3.40%	
2011	26.73%	↓	27.37%	↓	42.23%	↑	1.03%	↓
QUEENSLAND								
2001	36.60%		25.80%		30.10%		3.50%	
2006	31.60%		33.80%		31.10%		3.40%	
2011	29.00%	↓	34.50%	↑	33.20%	↑	2.40%	↓

Source: Australian Bureau of Statistics, Census of Population and Housing, 2011.

Note: Totals do not add to 100%, due to exclusion of 'other tenure type' and 'tenure type not stated'.



## HOUSING TENURE

Since 2006, the number of households with a mortgage has decreased by almost 5%. This may be an indication that some residents are uncertain about remaining in the region longer term.

### Housing Tenure



Source: Australian Bureau of Statistics, Census of Population and Housing, 2011.

## HOUSING (MEDIAN HOUSE, UNIT, LAND PRICE)

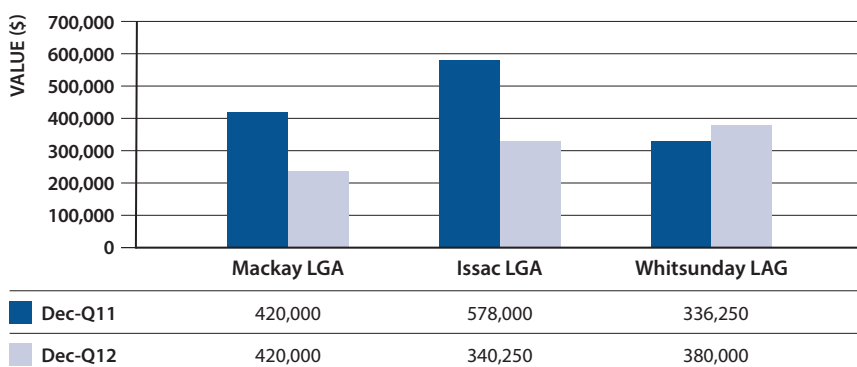
The median house price in Mackay LGA has remained stable over the past twelve months, while values in Whitsunday LGA have increased by 13%. In Isaac LGA, the median house price dropped by 52%. This significant decrease is due in large part to the recorded housing sales including those between employers and employees and family members, which are often well below market value.

TABLE 14: MEDIAN HOUSE PRICES, MACKAY-ISAAC-WHITSUNDAY

Location	Dec Q 11	Dec Q 12	% Change
Mackay LGA	420,000	420,000	nil
Isaac LGA	578,500	340,250	-52
Whitsunday LGA	336,250	380,000	13

Source: REIQ, Market Monitor, Dec 2012.

### Median House Prices





## HOUSING (MEDIAN HOUSE, UNIT, LAND PRICE)

*In Mackay LGA, median unit prices dropped by 5.6% to \$324,000 between 2011 and 2012. In Whitsunday LGA, the median unit price increased by 34% to \$370,000.*

TABLE 15: MEDIAN UNIT PRICES, MACKAY-ISAAC-WHITSUNDAY			
Location	Dec Q 11	Dec Q 12	% Change
Mackay LGA	355,000	324,000	-5.6
Whitsunday LGA	201,000	370,000	34

Source: REIQ, Market Monitor, Dec 2012.

### Median Unit Prices

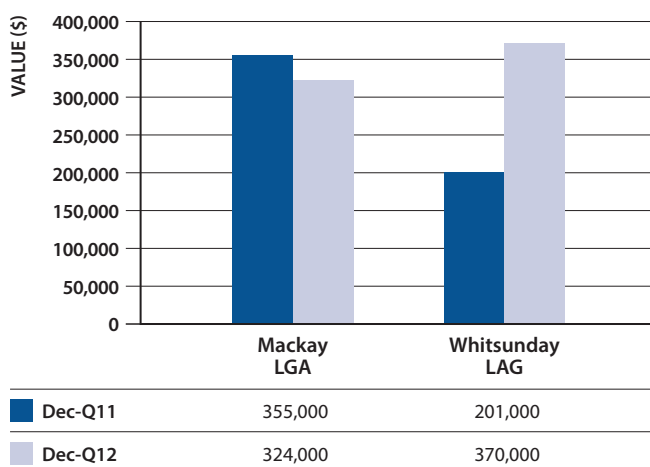
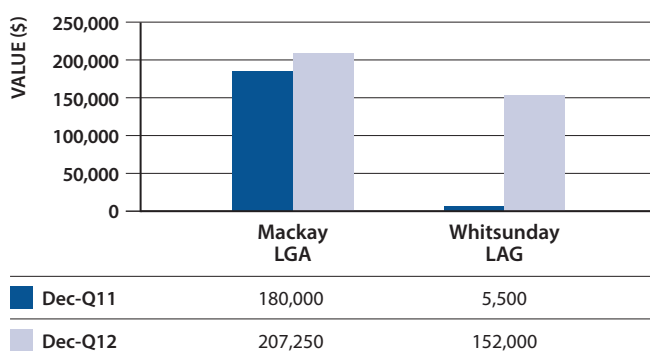


TABLE 16: MEDIAN LAND PRICES, MACKAY-ISAAC-WHITSUNDAY			
Location	Dec Q 11	Dec Q 12	% Change
Mackay LGA	180,000	207,250	15.1
Whitsunday LGA	5,500	152,000	127

Source: REIQ, Market Monitor, Dec 2012.

### Median Land Prices





## HOME LOAN REPAYMENTS

*The median weekly home loan repayment in Mackay-Isaac-Whitsunday increased 54.7% between 2006 and 2011 to \$464 per week. In the same period, Queensland's median weekly rent rose 42% to \$426 per week.*

TABLE 17: HOUSEHOLD FINANCES		
	Median Weekly Home Loan Repayment	% Change
<b>Mackay (R)</b>		
2011	\$500	
<b>Isaac (R)</b>		
2011	\$440	
<b>Whitsunday (R)</b>		
2011	\$408	
<b>M-I-W Region</b>		
2006	\$300	
2011	\$464	↑54.7%
<b>QUEENSLAND</b>		
2006	\$300	
2011	\$426	↑42%

Source: Australian Bureau of Statistics, Census of Population and Housing, 2006 & 2011, RTA Median Weekly Rents, Dec 2012.

# Due to the change in ABS geographical boundaries, it is not possible to compare LGA level data.



The increase in median weekly home loan repayments and rents in Mackay-Isaac-Whitsunday between 2006 and 2011 was significantly higher than the increase in income for the same period [54.7% compared to 38%].





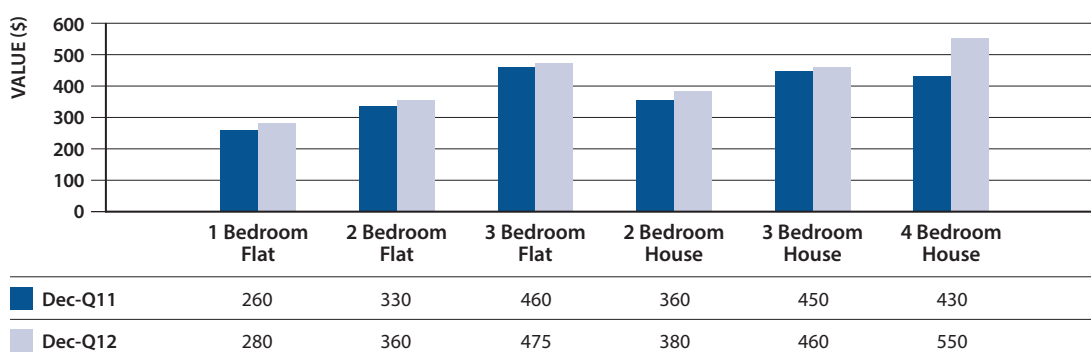
## HOUSING RENTAL

Median weekly rental prices in Mackay-Isaac-Whitsunday have continued to rise across the board. The most significant increases were seen in the median weekly rental prices of 2 bedroom units in Whitsunday LGA (up 33%) and 4 bedroom houses in Mackay LGA (up 24%).

TABLE 18: MEDIAN WEEKLY RENT (\$ WEEK)							
Location	Dec Q 11	Dec Q 12	Annual % Change	Location	Dec Q 11	Dec Q 12	Annual % Change
<b>Mackay LGA</b>				<b>Whitsunday LGA</b>			
1 bedroom flat	260	280	7.7	1 bedroom flat	180	220	22
2 bedroom flat	330	360	9	2 bedroom flat	225	300	33
3 bedroom flat	460	475	3.0	3 bedroom flat	330	370	12
2 bedroom house	360	380	5.4	2 bedroom house	300	285	-5
3 bedroom house	450	460	2.2	3 bedroom house	350	350	-
4 bedroom house	430	550	24	4 bedroom house	400	400	-

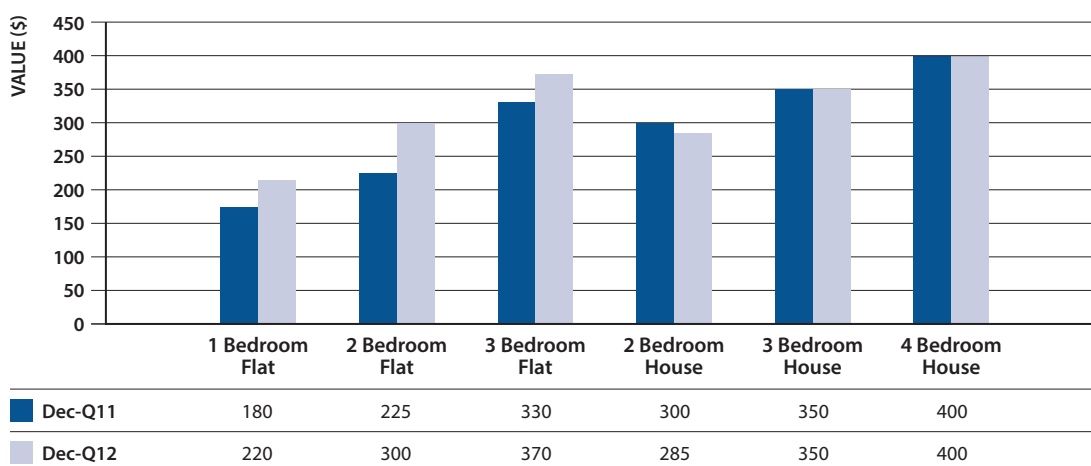
Source: Residential Tenancy Authority, Dec 2012.

### Median Weekly Rent, Mackay LGA



Source: Residential Tenancy Authority, Dec 2012.

### Median Weekly Rent, Whitsunday LGA



Source: Residential Tenancy Authority, Dec 2012.



## RENTAL YIELD

*The return on rental investment properties remains strong, with Isaac LGA achieving the highest rate of return in Queensland (7.3%).*



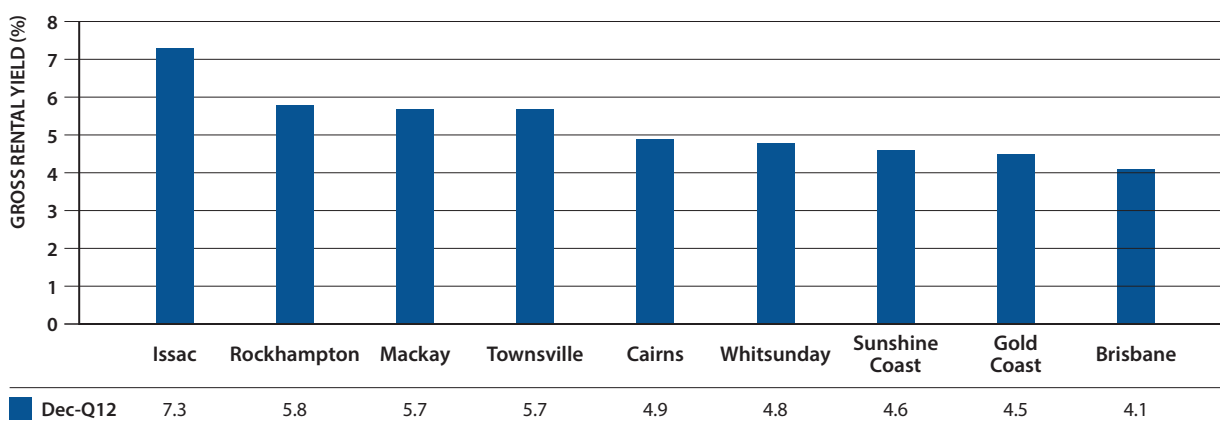
Mackay, Isaac and Whitsunday local government areas are amongst the highest performing rental property investments in the State.

TABLE 19: GROSS RENTAL YIELD – QLD (%)

LGA	Dec Q 11	Dec Q 12	Annual Change (percentage points)
<b>South East Qld</b>			
Brisbane	4.1	4.1	0
Gold Coast	4.7	4.5	-0.2
Sunshine Coast	4.4	4.6	0.2
<b>Regional Qld</b>			
Mackay	5.6	5.7	0.1
Isaac	15.3	7.3	8.0
Whitsunday	5.4	4.8	-0.6
Rockhampton	5.4	5.8	0.4
Townsville	4.9	5.1	0.2
Cairns	4.7	4.9	0.2

Source: Residential Tenancy Authority, Dec 2012.

## Gross Rental Yield, QLD



Source: Residential Tenancy Authority, Dec 2012.



## HOUSING AFFORDABILITY

The 'Median Multiple' is a method of measuring housing affordability, endorsed by the World Bank, United Nations and Harvard University. It is calculated by dividing the median house price by gross (before tax) income. The resulting housing affordability score indicates the level affordability, with scores under 3 being considered affordable and scores over 3, ranging from moderately to severely unaffordable.



According to the standard set by the World Bank and the United Nations, housing in Mackay-Isaac-Whitsunday is unaffordable for the majority of residents.

Income		House price (\$'000)														
Week	Year	100	150	200	250	300	350	400	450	500	550	600	650	700	750	800
199	10348															
299	15548	6.4														
399	20748	4.8														
499	25948	3.9	5.8													
599	31148	3.2	4.8													
699	36348	2.8	4.1	5.5												
799	41548		3.6	4.8												
899	46748		3.2	4.3	5.3											
999	51948		2.9	3.9	4.8	5.8										
1249	64948			3.1	3.8	4.6	5.4									
1499	77948			2.6	3.2	3.8	4.5	5.1	5.8	6.4						
1999	103948				2.4	2.9	3.4	3.8	4.3	4.8	5.3	5.8	6.3			
2499	129948						2.7	3.1	3.5	3.8	4.2	4.6	5.0	5.4	5.8	
2999	155948							2.6	2.9	3.2	3.5	3.8	4.2	4.5	4.8	5.1
3499	181948									2.7	3.0	3.3	3.6	3.8	4.1	4.4
3999	207948											2.9	3.1	3.4	3.6	3.8
4499	233948												2.8	3.0	3.2	3.4
4999	259948														2.9	3.1
5499	285948															2.8
% of m-i-w population		7.2%	14.7%	7.4%	13.1%	9.7%	13.6%	7.5%	3.2%	4.7%						

Median house prices (3 bedroom) in Mackay-Isaac-Whitsunday sit in this price range.

- Mackay \$455,000
- Isaac \$520,000
- Whitsunday \$369,500

Source: Australian Bureau of Statistics, Census of Population and Housing, 2011.

	Affordable 3.0 or less		Moderately unaffordable 3.1 – 4.0		Seriously unaffordable 4.1 – 5.0		Severely unaffordable 5.1 & over
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To afford a 3 bedroom house at the median price (Mackay \$455,000; Isaac \$520,000; Whitsunday \$369,500), family household income must be between \$130,000 and \$180,000.



## DEVELOPMENT

### RESIDENTIAL DWELLING APPROVALS (NUMBER AND VALUE)

*There has been a significant increase in the number and value of residential buildings approved in Mackay-Isaac-Whitsunday over the past 12 months.*

The greatest increases have been recorded in Isaac LGA and Whitsunday LGA.

TABLE 21: RESIDENTIAL AND NON-RESIDENTIAL BUILDING APPROVALS					
	Quantity		Value		Proportion of total building value that is residential
	number	% change (2011 to 2012)	(\$ '000)	% change (2011 to 2012)	%
Mackay	997	34.2%	318,257	37.2%	71.8%
Isaac	438	61.4%	90,614	72.9%	64.4%
Whitsunday	108	88.9%	33,268	88.3%	40.5%
<b>M-I-W Region</b>	<b>1,543</b>	<b>45.8%</b>	<b>442,139</b>	<b>48.3%</b>	<b>66.4%</b>
Queensland	14,358	3.8%	413,702	2.2%	57.3%
M-I-W as % of QLD	10.7%		10.7%		

Source: Australian Bureau of Statistics, Building Approvals, Australia, December 2012, cat. no. 8731.0.



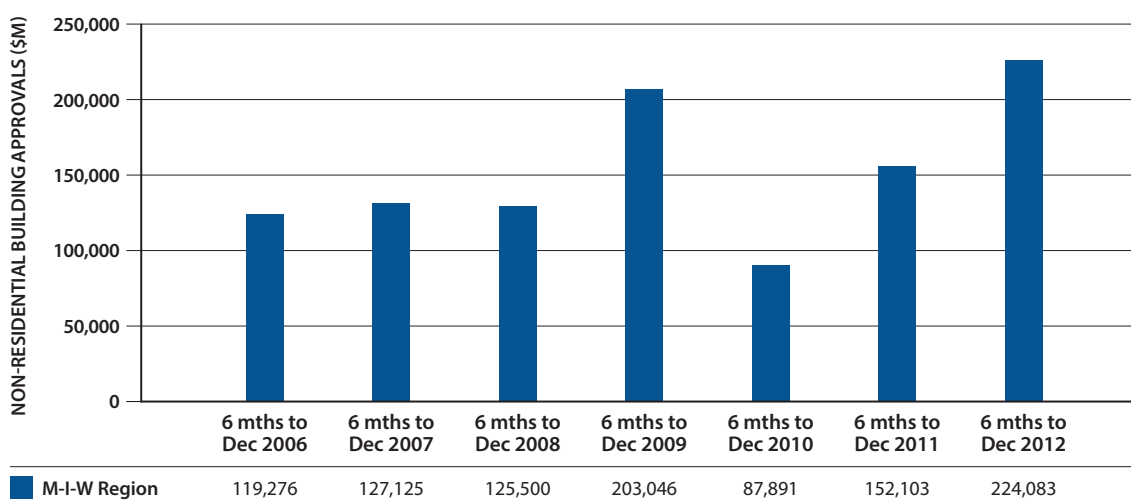
## COMMERCIAL (NON-RESIDENTIAL DWELLING APPROVALS)

*Commercial development in Mackay-Isaac-Whitsunday for the 6 months to December 2012 was \$224 million, the highest amount recorded in the past five years.*

TABLE 22: NON-RESIDENTIAL BUILDING APPROVALS 2008-2012 (\$M)					
Year To	Mackay LGA	Isaac LGA	Whitsunday LGA	M-I-W Region	% Change
6 mths to Dec 2008	67,627	39,501	18,372	125,500	61.8%
6 mths to Dec 2009	165,617.1	13,320	24,109.2	203,046	-56.7%
6 mths to Dec 2010	55,882	15,289	1,4327	87,891	73.1%
6 mths to Dec 2011	138,165	18,209	4,548	152,103	47.3%
6 mths to Dec 2012	125,089	50,183	48,811	224,083	61.8%

Source: Australian Bureau of Statistics, Building Approvals, Australia, 2008-2012, cat. no. 8731.0.

### Non-Residential Building Approvals 2008-2012, M-I-W Region





## MAJOR DEVELOPMENTS (RDR)

According to REDC's Regional Development Register (RDR), there were \$98.4 billion worth of developments either planned, in progress or completed in Mackay-Isaac-Whitsunday at the end of December 2012.

TABLE 23: MAJOR DEVELOPMENTS BY SECTOR, DECEMBER 2012

Category	Not Started	In Progress	Completed	Total	Previous
Agribusiness	\$440.00	\$136.00		\$576.00	\$245.00
Community Infrastructure	\$55.90	\$492.10	\$19.00	\$567.00	\$540.20
Construction	\$1,417.50	\$4,153.20		\$5,570.70	\$5,493.20
Energy	\$3,475.00	\$160.00		\$3,635.00	\$3,675.00
Manufacturing	\$5,050.00	\$1,182.00		\$6,232.00	\$6,252.00
Marine	\$750.00	\$500.00		\$1,250.00	\$1,200.00
Mining	\$33,389.00	\$10,692.00		\$44,081.00	\$35,421.00
Ports - Sea	\$16,508.00	\$4,000.00		\$20,508.00	\$22,848.00
Professional Services	\$77.17	\$48.80		\$125.97	\$132.97
Rail	\$12,055.00	\$1,120.00		\$13,175.00	\$16,114.00
Retail	\$78.00	\$348.00	\$5.00	\$431.00	\$431.00
Roads	\$52.10	\$153.50	\$15.10	\$220.70	\$262.00
Tourism	\$35.00	\$117.00		\$152.00	\$130.00
Water	\$1,567.10	\$285.10	\$37.50	\$1,889.70	\$1,710.20
<b>Total</b>	<b>\$74,949.77</b>	<b>\$23,387.70</b>	<b>\$76.60</b>	<b>\$98,414.07</b>	<b>\$94,454.57</b>

Source: Mackay-Isaac-Whitsunday REDC, Regional Development Register, Dec 2012.

# To be considered a major development, a project must be valued above \$1 million.

TABLE 24: MAJOR DEVELOPMENTS BY LOCAL GOVERNMENT AREA (LGA), DECEMBER 2012

Local Government Area	Not Started	In Progress	Completed	Total	Previous
Mackay Regional Council	\$14,661.47	\$7,422.40	\$74.70	\$22,158.57	\$21,694.87
Isaac Regional Council	\$33,988.00	\$11,913.70	\$1.90	\$45,903.60	\$37,557.10
Whitsunday Regional Council	\$26,300.30	\$4,051.60		\$30,351.90	\$35,202.60
Mackay-Isaac-Whitsunday Region	\$74,949.77	\$23,387.70	\$76.60	\$98,414.07	\$94,454.57

Source: Mackay-Isaac-Whitsunday REDC, Regional Development Register, Dec 2012.





## TOURISM

### ACCOMMODATION - SUPPLY

*There are two tourism districts in Mackay-Isaac-Whitsunday; Mackay – which encompasses Mackay and Isaac, and Whitsunday which encompasses Bowen, Proserpine, Airlie Beach and the Whitsunday islands.*

*There was a decrease across the board in the number of rooms and bed spaces in the twelve months between September 2011 and 2012.*

TABLE 25: ACCOMMODATION - SUPPLY						
	Establishment (no)		Rooms (no)		Bed Spaces (no)	
	Sept Q 11	Sept Q 12	Sept Q 11	Sept Q 12	Sept Q 11	Sept Q 12
Mackay	54	53	2,082	1,903	5,590	5,328
Whitsunday	34	34	2,841	2,690	10,216	10,148

Source: ABS, Tourism Accommodation Supply and Demand, catalogue 8365.3.

### ACCOMMODATION - DEMAND

*Although there was an increase in the average length of stay in Mackay (from 2 to 2.2 nights), there was a decline in the room occupancy rate (down 6 percentage points) and the value of takings for the September Quarter 2012 (down \$4m on the 2011 figure).*

*Whitsunday saw a slight increase in room occupancy rate (up 2.8 percentage points) and its average length of stay remained stable. Whitsunday also experienced a modest decrease in the value of takings for September Quarter 2012 compared to the same period in 2011.*

TABLE 26: ACCOMMODATION - DEMAND						
	Room occupancy rate (%)		Average length of stay		Takings from accommodation	
	Sept Q 11	Sept Q 12	Sept Q 11	Sept Q 12	Sept Q 11	Sept Q 12
Mackay	84.6	78.6	2	2.2	25,692,153	21,728,270
Whitsunday	57.2	60	3	3	32,436,593	32,169,434

Source: ABS, Tourism Accommodation Supply and Demand, catalogue 8365.3.

Queensland's commercial accommodation sector has rebounded from the impact of natural disasters and global economic issues, to record strong growth above the national average and across all key indicators.

The impact of an active resource sector was apparent with additional room stock in Townsville and Central Queensland and the largest increase in room occupancy rate in Mackay with a 11.2% lift.

The Whitsundays leads the state with their average room rate which increased a further 7% to lift both revenue and yield in spite of room occupancy rates that were lower than other regions in Queensland.

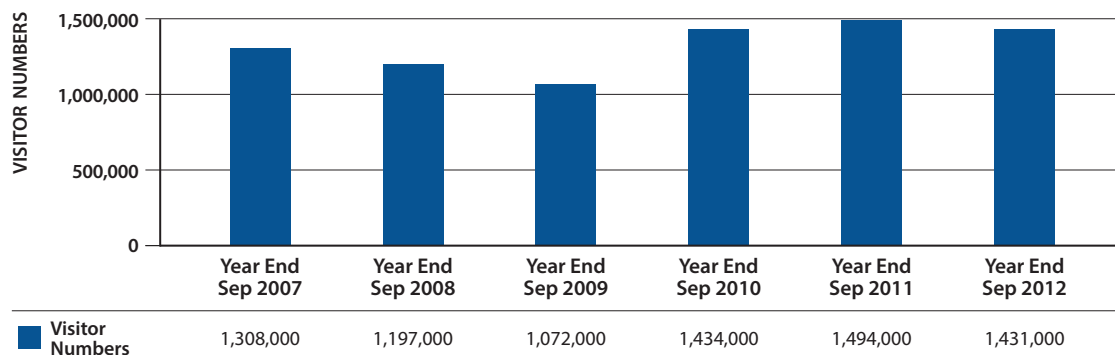
Even though supply growth has flattened for serviced apartments across most states, the burgeoning growth in demand for serviced apartments has continued in Queensland, Victoria and Western Australia. Resource sector growth has been evident in strong demand particularly in Central Queensland and Mackay.



## VISITOR NUMBERS

*The Mackay-Isaac-Whitsunday region saw a modest decrease in the number of visitors between September 2011 and 2012, with the number of visitors declining from 1,494,000 to 1,431,000.*

### Visitor Numbers



## AIR ACCESSIBILITY

*Virgin Blue has added an additional 10 flights per week (more than 500 extra seats per week) between Brisbane and Mackay Airport, since December 2012.*

*Jetstar and Virgin are both operating the same number of flights between Brisbane and Proserpine since December 2012, however Virgin have added an additional 15 seats per week.*

*Jetstar has added an additional flight between Melbourne and Hamilton Island since December 2012, providing more than 200 additional seats.*

**TABLE 27:  
FLIGHTS TO MACKAY AS AT  
MARCH 2013**

Airline	Frequency per week	Total Seats Per week
<b>Qantas</b>		
Brisbane	22	1,982
<b>Jetstar</b>		
Brisbane	23	4,065
<b>Virgin Blue</b>		
Brisbane	35	5,039
Sydney	7	739

Source: Tourism Queensland.

**TABLE 28:  
FLIGHTS TO HAMILTON ISLAND  
AS AT MARCH 2013**

Airline	Frequency per week	Total Seats Per week
<b>Jetstar</b>		
Sydney	7	1,239
Brisbane	4	720
Melbourne	4	720
<b>Virgin Blue</b>		
Brisbane	7	1,034
Sydney	7	1,215

Source: Tourism Queensland.

**TABLE 29:  
FLIGHTS TO WHITSUNDAY  
COAST AIRPORT (PROSERPINE)  
AS AT MARCH 2013**

Airline	Frequency per week	Total Seats Per week
<b>Jetstar</b>		
Brisbane	7	1,260
<b>Virgin Blue</b>		
Brisbane	12	1,721

Source: Tourism Queensland.



## EXPORT MARKETS

### SUGAR

*Australian sugar production is estimated to be 4.3 million tonnes in 2012–13, around 15 per cent more than the 2011–12 harvest that was affected by tropical cyclone Yasi.*

*This is due to an increase in the area harvested (between June and December) and a recovery in cane and sugar yields. In 2013–14 Australian sugar production is forecast to increase by a further 6 per cent to 4.5 million tonnes, based on increased cane plantings in 2012–13.*

TABLE 30: SUGAR PRODUCTION							
	2006	2007	2008	2009	2010	2011	2012
Cane crushed (t)	9,748,229	9,839,181	8,124,872	8,120,000	6,534,300	6,696,078	8,447,038
Sugar content (CCS/PRS)	13.88	13.72	14.45	15.00	13.17	13.42	14.61
Sugar production (t)	1,300,300	1,347,567	1,183,008	1,200,000	820,500	894,014	1,203,233
Total Value of Crop (\$M)	\$477.00	\$363.00	\$402.22	\$550.00	\$368.00	\$427.28	Estimate \$556.20

Sources: Canegrower Mackay.

*Australian sugar exports are forecast to increase by 10 per cent in 2012–13 to 3 million tonnes and by a further 7 per cent in 2013–14 to 3.2 million tonnes. However, the value of Australian sugar exports is forecast to decrease by 9 per cent in 2012–13 to around \$1.4 billion, due to lower world sugar prices, and to \$1.3 billion in 2013–14.*

TABLE 31: OUTLOOK FOR SUGAR (AUSTRALIA)									
	UNIT	2010–11	2011–12	2012–13	2013–14	2014–15	2015–16	2016–17	2017–18
<b>Australia</b>									
Production	kt	3,610	3,733	4,300	4,541	4,672	4,766	4,815	4,877
Export volume	kt	2,735	2,572	2,996	3,241	3,356	3,429	3,461	3,498
<b>Export value</b>									
– nominal	A\$m	1,436	1,556	1,399	1,333	1,347	1,421	1,537	1,605
– real	A\$m	1,505	1,594	1,399	1,301	1,282	1,320	1,393	1,419

Sources: ABARES; Australian Bureau of Statistics; International Sugar Organization; Intercontinental Exchange.



## COAL

*The Bowen Basin in Mackay-Isaac-Whitsunday has 47 operating coal mines that produce all of Queensland's high-grade coking coal, and much of the export-traded thermal coal.*

**TABLE 32: COAL PRODUCTION 2012**

Mine	Coking	Thermal	Net Output Total
Blair Athol		2,458,106	2,458,106
Burton Coal	1,089,526	318,265	1,407,791
Carborough Downs	1,476,967		1,476,967
Clermont Coal		5,046,201	5,046,201
Collinsville Opencut	1,227,772	2,387,129	3,614,901
Coppabella	2,673,736		2,673,736
Foxleigh	2,643,739		2,643,739
German Creek	2,892,012	14,868	2,906,880
German Creek - Bundoora	21,105		21,105
German Creek - Lake Lindsay	2,835,125	60,311	2,895,436
Goonyella - Riverside	9,781,897		9,781,897
Grasstree	2,798,956		2,798,956
Hail Creek	7,485,638		7,485,638
Isaac Plains	1,641,863	785,605	2,427,468
Lake Vermont	3,845,580		3,845,580
Middlemount	1,194,600		1,194,600
Millennium	1,850,595	126,540	1,977,135
Moorvale	1,180,330	1,218,831	2,399,161
Moranbah North	2,883,647		2,883,647
Newlands	12,591	878,976	891,567
Newlands Eastern Creek	368,421	723,860	1,092,281
Newlands Northern u/g		2,684,067	2,684,067
North Goonyella	2,447,305		2,447,305
Norwich Park	2,246,521		2,246,521
Peak Downs	7,113,213		7,113,213
Poitrel	2,611,206		2,611,206
Saraji	5,830,283		5,830,283
Sonoma Coal	895,222	2,585,114	3,480,336
South Walker Creek	3,940,612	109,546	4,050,158
Wollombi	1,061,425	887,822	1,949,247
<b>(All) Total</b>	<b>74,049,887</b>	<b>20,285,241</b>	<b>94,335,128</b>

Source: Queensland Department of Natural Resources and Mines.

**TABLE 33: COAL MINES AND PROJECTS - NEW MINES UNDER CONSTRUCTION**

Name	Resource (Mt)	Type	Capacity	Company	LGA
<b>Caval Ridge</b>	100-500	Open-cut mine	5.5Mt	BHP Billiton Mitsubishi Alliance	ISAAC
<b>Daunia</b>	10-100	Open-cut mine	4Mt	BHP Billiton Mitsubishi Alliance	ISAAC
<b>Eagle Downs</b>	100-500	Underground mine	7Mt	Eagle Downs Coals Management Pty Ltd	ISAAC

Source: Mackay-Isaac-Whitsunday REDC, Regional Development Register, Dec 2012.



COAL

TABLE 34: COAL MINES AND PROJECTS - ADVANCED COAL PROJECTS					
Name	Resource (Mt)	Type	Capacity	Company	LGA
Byerwen	>500	Open cut and Underground	10Mt	Byerwen Coal Pty Ltd/Qcoal pty Ltd	ISAAC
Codrilla	140-100	Open cut mine	2.7Mt	Peabody Energy Australia PCI Pty Ltd	ISAAC
Cows	-10	Open cut mine	1Mt	Bowen River Coal Pty/Qcoal Pty Ltd	WHITSUNDAY
Drake	100-500	Open cut mine	6Mt -9 Mt	Drake Coal Pty Ltd/Qcoal Pty Ltd	WHITSUNDAY
Eaglefield Mine expansion	100-500	Open cut mine	10Mt	Peabody Energy Australia Pty Ltd	ISAAC
Ellensfield	10-100	Underground Mine	4.7Mt	Vale Australia Pty Ltd	ISAAC
Foxleigh Plains	10-100	Open cut mine	3.2Mt	Anglo American Metallurgical Coal Pty Ltd	ISAAC
Goonyella Riverside Mine expansion	100-500	Open cut and Underground mine	8Mt	BHP Billiton Mitsubishi Alliance	ISAAC
Grosvenor	100-500	Underground Mine	4.5Mt	Anglo American Metallurgical Coal Pty Ltd	ISAAC
Integrated Isaac Plains Project	10-100	Open cut mine	4Mt	Vale Australia Pty Ltd	ISAAC
Jax	10-100	Open Cut mine	1.8Mt	Jax Coal Pty Ltd/Qcoal Pty Ltd	WHITSUNDAY
Lake Vermont Mine Expansion	100-500	Open cut mine	6 to 8Mt	Jellinbah Group	ISAAC
Lenton/New Lenton	10-100	Open cut mine and underground mines		New Hope Corporation Limited	ISAAC
Middlemount mine expansions	100-500	Open cut mine	from 2Mt to about 4Mt/5.4Mt	Peabody Energy Australia PCI Pty Ltd	ISAAC
Millennium Mine expansion	10-100	Open cut mine	about 5Mt from 2Mt /7.5Mt	Peabody Energy Australia Coal Pty Ltd	ISAAC
Olive Downs	10-100	Open cut mine	2Mt	Peabody Energy Australia PCI Pty Ltd	ISAAC
Peak Downs Mine expansion	500-1000	Open cut mine	2.5Mt	BHP Billiton Mitsubishi Alliance	ISAAC
Sarum	100-500	Open cut mine and underground mines	3 to 10Mt	Xstrata Coal Queensland Pty Ltd	WHITSUNDAY



## COAL

TABLE 35: COAL MINES AND PROJECTS - OPERATING MINES

Company	Name of mine	LGA	Saleable (t) 2010-11
Anglo American Metallurgical Coal	Foxleigh	ISAAC	1,966,303
	German Creek - Aquila	ISAAC	122,154
	German Creek - Grasstree, Bundoora	ISAAC	3,554,800
	German Creek - Lake Lindsay	ISAAC	1,896,305
	German Creek East - Oak Park	ISAAC	1,160,809
	Moranbah North	ISAAC	4,635,197
BHP Billiton Mitsubishi Alliance BHP Mitsui Coal Pty Ltd	Broadmeadow	ISAAC	10,229,859
	Goonyella Riverside	ISAAC	10,229,859
	Norwich Park	ISAAC	2,237,621
	Peak Downs	ISAAC	6,874,692
	Poitrel	ISAAC	2,677,755
	Saraji	ISAAC	5,406,914
	South Walker Creek	ISAAC	3,133,619
Peabody Energy Australia PCI Pty Ltd	Coppabella	ISAAC	2,808,992
	Middlemount	ISAAC	63,011
	Moorvale	ISAAC	2,394,010
Peabody Energy Australia Pty Ltd	Burton	ISAAC	2,237,265
	Millennium	ISAAC	1,617,327
	North Goonyella , Eaglefield	ISAAC	2,760,171
Rio Tinto Coal Australia Pty Limited	Blair Athol	ISAAC	3,858,146
	Clermont	ISAAC	6,499,001
	Hail Creek	ISAAC	6,878,982
Vale Australia Pty Limited	Carborough Downs	ISAAC	1,569,185
	Isaac Plains	ISAAC	1,736,860
Xstrata Coal Queensland Pty Ltd	Collinsville	WHITSUNDAY	3,134,521
	Newlands	ISAAC	8,285,953
Other Companies Operating Coal mines in Queensland	Lake Vermont	ISAAC	3,382,550
	Sonoma	WHITSUNDAY	3,367,535
Total			104,719,396

## GRAIN

*There are 91,111 hectares of grain crops in Mackay-Isaac-Whitsunday, predominantly grown in the Isaac Regional Council area. These are exported via the Mackay Port elevator.*

TABLE 36: GRAIN EXPORTS FROM MACKAY PORT, 2009/10 – 2012/13

	2009-2010	2010-2011	2011-2012	2012-APRIL 2013
Grain-sorghum	263,879	350,056	368,324	260,024

Sources: North Queensland Bulk Ports, 2013.





## EXPORT FACILITIES

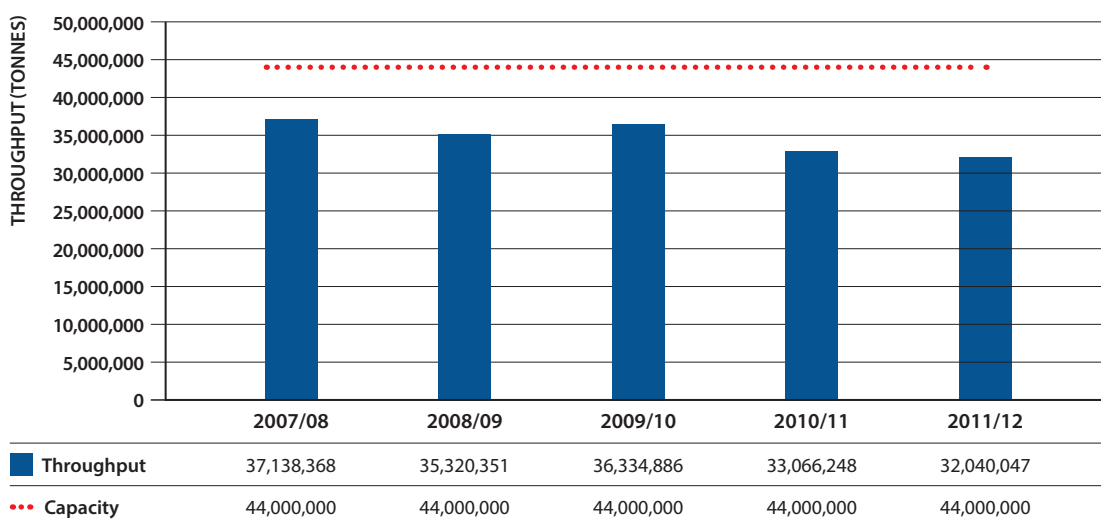
### CAPACITY AND THROUGHPUT

*There are three world-class port facilities in Mackay-Isaac-Whitsunday: Hay Point and Dalrymple Bay in Mackay and Abbot Point in Whitsunday. All three ports export coal to international markets.*

TABLE 37: CAPACITY AND THROUGHPUT OF COAL (TONNES)						
		2007/08	2008/09	2009/10	2010/11	2011/12
Hay Point	Throughput	37,138,368	35,320,351	36,334,886	33,066,248	32,040,047
	Capacity	44,000,000	44,000,000	44,000,000	44,000,000	44,000,000
Dalrymple Bay	Throughput	43,291,802	47,129,313	63,130,205	54,737,976	50,843,846
	Capacity	68,000,000	72,000,000	85,000,000	85,000,000	85,000,000
Abbot Point	Throughput	12,475,908	14,443,487	16,933,596	15,063,943	13,602,137
	Capacity	15,000,000	21,000,000	21,000,000	50,000,000	50,000,000

Source: North Queensland Bulk Ports.

### Hay Point Coal Terminal Throughput (Tonnes) 2011-12



### Hay Point Expansion Plans

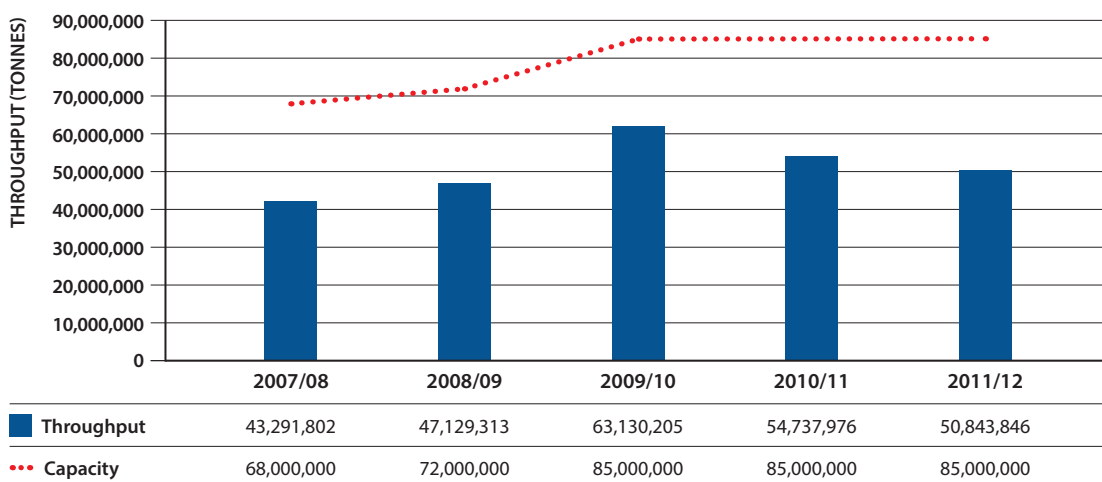
Plans are progressing for the proposed Dudgeon Point Coal Terminals Project. This expansion at the Port of Hay Point involves two new coal terminals in the port, with an estimated capacity of up to 180 Mtpa.

Dudgeon Point Coal Terminals Project (DPPM) and Adani Mining Pty Ltd (Adani Group) are the preferred proponents for the development of new coal export infrastructure at Dudgeon Point.

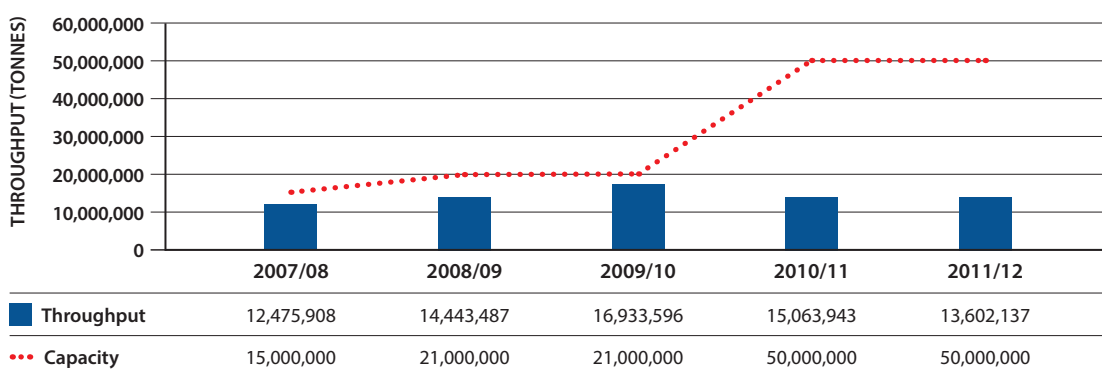


## CAPACITY AND THROUGHPUT

### Dalrymple Bay Coal Terminal Throughput (Tonnes) 2011-12



### Abbot Point Coal Terminal Throughput (Tonnes) 2011-12



### Abbot Point Expansion Plans

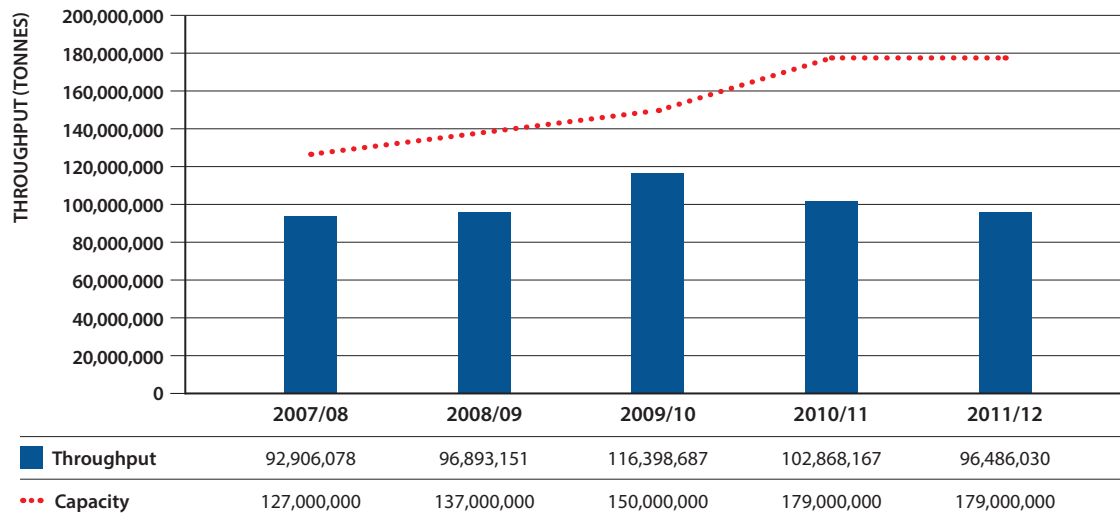
Since obtaining a 99-year lease of the X50 Abbot Point Coal Terminal, Adani identified the need to increase terminal capacity.

Adani are proposing a 35 megatonnes per annum (Mtpa) expansion of the existing terminal 1 (T1), along with an additional two offshore berths).



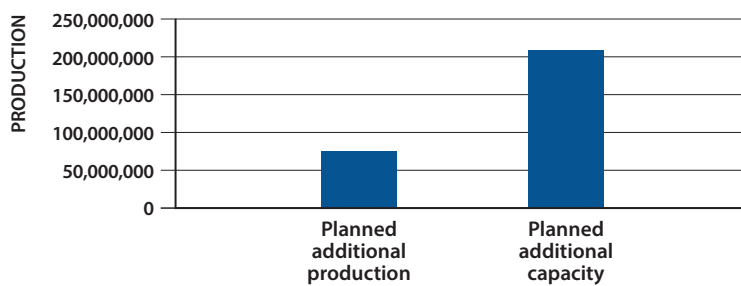
## CAPACITY AND THROUGHPUT

### M-I-W Region Throughput (Tonnes) 2011-12



Source: North Queensland Bulk Ports.

### Proposed increases to production vs planned port capacity expansion projects





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