THE TABLELANDS
ONE BIG ECONOMY

Mareeba Chamber of Commerce
Inaugural Economic Development Forum

Ref: J2123
14 August 2008
Queensland’s Northern and Central Regions & Regional Capitals
The Tropical North Queensland region serviced by the city of Cairns is $1\frac{1}{2}$ times the size of Victoria. It is as deep from north to south as the State of New South Wales, in area as large as the British Isles, and about the size of California.
TABLELANDS COMPARED WITH TASMANIA

Tableland Council Area
65,000 sq km

Tasmania
68,000 sq km
TROPICAL -

- Initial challenges to technology from north west Europe.
- Late settled.
- Initially slow to develop.
- Now catching up.
TROPICAL AUSTRALIA

EST RESIDENT POPULATION 2006 & GROWTH 1996 to 2006

Source: ABS Data.
TABLELANDS INCREASING POPULATION
(Estimated Residential)

<table>
<thead>
<tr>
<th>Year</th>
<th>Population</th>
</tr>
</thead>
<tbody>
<tr>
<td>1976</td>
<td>26,320</td>
</tr>
<tr>
<td>1981</td>
<td>29,810</td>
</tr>
<tr>
<td>1986</td>
<td>33,898</td>
</tr>
<tr>
<td>1991</td>
<td>36,849</td>
</tr>
<tr>
<td>1996</td>
<td>39,894</td>
</tr>
<tr>
<td>2001</td>
<td>40,801</td>
</tr>
<tr>
<td>2006</td>
<td>43,627</td>
</tr>
</tbody>
</table>
Asian Crisis – mineral prices.

Asian Crisis – tourism.

Tobacco industry closure.

Dairying deregulation.

Slower growth of whole region.
TABLELANDS BUILDING APPROVALS

Number of Dwellings

No.

2003/04 2004/05 2005/06 2006/07 2007/08

184 294 297 427 438

CUMMINGS CONOMICS
<table>
<thead>
<tr>
<th></th>
<th>Atherton</th>
<th>Eacham</th>
<th>Herberton</th>
<th>Mareeba</th>
</tr>
</thead>
<tbody>
<tr>
<td>2001/02</td>
<td>39,000</td>
<td>53,500</td>
<td>22,000</td>
<td>45,800</td>
</tr>
<tr>
<td>2002/03</td>
<td>44,100</td>
<td>46,100</td>
<td>20,000</td>
<td>44,200</td>
</tr>
<tr>
<td>2003/04</td>
<td>52,600</td>
<td>42,300</td>
<td>23,800</td>
<td>42,800</td>
</tr>
<tr>
<td>2004/05</td>
<td>72,800</td>
<td>60,700</td>
<td>31,000</td>
<td>50,900</td>
</tr>
<tr>
<td>2005/06</td>
<td>85,200</td>
<td>81,700</td>
<td>36,700</td>
<td>66,600</td>
</tr>
<tr>
<td>2006/07</td>
<td>104,300</td>
<td>120,400</td>
<td>51,300</td>
<td>68,900</td>
</tr>
</tbody>
</table>

Source: Cummings Economics from Q’ld Dept of Infrastructure & Planning data.
## TABLELANDS MEDIAN HOUSE PRICES

<table>
<thead>
<tr>
<th></th>
<th>Atherton</th>
<th>Eacham</th>
<th>Herberton</th>
<th>Mareeba</th>
</tr>
</thead>
<tbody>
<tr>
<td>2002</td>
<td>$122,500</td>
<td>$109,000</td>
<td>$70,000</td>
<td>$98,000</td>
</tr>
<tr>
<td>2003</td>
<td>$135,000</td>
<td>$104,000</td>
<td>$78,000</td>
<td>$103,000</td>
</tr>
<tr>
<td>2004</td>
<td>$165,000</td>
<td>$138,000</td>
<td>$90,000</td>
<td>$130,000</td>
</tr>
<tr>
<td>2005</td>
<td>$205,000</td>
<td>$180,000</td>
<td>$120,000</td>
<td>$163,000</td>
</tr>
<tr>
<td>2006</td>
<td>$258,250</td>
<td>$250,000</td>
<td>$175,000</td>
<td>$197,000</td>
</tr>
<tr>
<td>2007</td>
<td>$319,000</td>
<td>$285,000</td>
<td>$210,000</td>
<td>$208,000</td>
</tr>
</tbody>
</table>

Source: Cummings Economics from RP Data.
<table>
<thead>
<tr>
<th>Description</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mareeba Shire ABS data 2000/01</td>
<td>$107 m</td>
</tr>
<tr>
<td>Est Mareeba Dimbulah Irrigation Area based on DPI information, 2004/05</td>
<td>$146 m</td>
</tr>
</tbody>
</table>
## CAIRNS AIRPORT PASSENGER MOVEMENTS
(Excluding international transits)

<table>
<thead>
<tr>
<th>Year</th>
<th>No.</th>
<th>%</th>
<th>Event</th>
</tr>
</thead>
<tbody>
<tr>
<td>1997/98</td>
<td>2,725,000</td>
<td>0.4%</td>
<td>Asian crisis</td>
</tr>
<tr>
<td>1998/99</td>
<td>2,770,000</td>
<td>1.7%</td>
<td>+6%</td>
</tr>
<tr>
<td>1999/00</td>
<td>2,882,000</td>
<td>4.0%</td>
<td>Ansett collapse</td>
</tr>
<tr>
<td>2000/01</td>
<td>2,972,000</td>
<td>3.1%</td>
<td></td>
</tr>
<tr>
<td>2001/02</td>
<td>2,878,000</td>
<td>(-3.2%)</td>
<td></td>
</tr>
<tr>
<td>2002/03</td>
<td>3,083,000</td>
<td>7.1%</td>
<td>+ 32%</td>
</tr>
<tr>
<td>2003/04</td>
<td>3,402,000</td>
<td>10.3%</td>
<td></td>
</tr>
<tr>
<td>2004/05</td>
<td>3,689,000</td>
<td>8.4%</td>
<td></td>
</tr>
<tr>
<td>2005/06</td>
<td>3,832,000</td>
<td>3.4%</td>
<td></td>
</tr>
<tr>
<td>2006/07</td>
<td>3,889,000</td>
<td>1.4%</td>
<td>High dollar</td>
</tr>
</tbody>
</table>

Source: Cummings Economics from TRA.
MINING
EMPLOYMENT
UP
ADDITIONAL PROCESSING

TABLELANDS INCLUDE:

- Sugar mill.
- Poultry.
- Stockfeeds.
- Stock licks and supplements.
- Wines.
- Dairy products.
- Chocolates.
- Coffee.
- Timber.
OTHER FACTORS INCLUDE:

- DECENTRALISED REGIONAL FACILITIES.
- BUILDING AND LANDSCAPING RAW MATERIALS AND BRICKS.
- LIFESTYLE MOVEMENTS.
GOOD REASONS FOR CONTINUING OPTIMISM
A diversity of microclimates and production reduces vulnerability

- Avocado
- Banana
- Basil
- Bush foods
- Cashews
- Coffee
- Custard apple
- Flowers
- Grapefruit
- Grass seed
- Hay
- Legume seed
- Lemons ‘Eureka’
- Limes
- Longan
- Lychee
- Macadamia
- Maize
- Mandarin
- Mango
- Mixed vegetables
- Native foliage
- Pawpaw
- Peach
- Peanuts
- Pineapple
- Potatoes
- Poultry
- Pumpkin
- Sorghum grain
- Soybeans
- Sugarcane
- Sweet potatoes
- Table grapes
- Tea
- Tea-tree
- Tea-tree mulch
- Turf
- Watermelon
THE REGION ACCOUNTS FOR 26% OF AUSTRALIA'S WATER RUNOFF
### Per Capita Supply (1) of Some Selected Food Stuffs
India, China & Australia, 2002

<table>
<thead>
<tr>
<th></th>
<th>India</th>
<th>China</th>
<th>Australia</th>
</tr>
</thead>
<tbody>
<tr>
<td>Food Calories</td>
<td>2,459</td>
<td>2,951</td>
<td>3,054</td>
</tr>
<tr>
<td>Food Protein (Gr)</td>
<td>57.3</td>
<td>81.5</td>
<td>103.5</td>
</tr>
<tr>
<td>Fat (Gr)</td>
<td>49.6</td>
<td>90.3</td>
<td>131.2</td>
</tr>
<tr>
<td>Sugar &amp; Sweeteners Kg/Year</td>
<td>24.7</td>
<td>7.2</td>
<td>48.2</td>
</tr>
<tr>
<td>Fruits (excl wines)</td>
<td>37.7</td>
<td>47.3</td>
<td>93.3</td>
</tr>
<tr>
<td>Stimulants (coffee/tea etc)</td>
<td>0.8</td>
<td>0.4</td>
<td>5.5</td>
</tr>
<tr>
<td>Meat</td>
<td>5.2</td>
<td>52.5</td>
<td>108.8</td>
</tr>
<tr>
<td>Fish/Seafood</td>
<td>4.8</td>
<td>25.6</td>
<td>22.3</td>
</tr>
</tbody>
</table>

(1) **Note**: Supply – Production, Imports, Stock less exports.  
Source: Cummings Economics from FAO (website).
HIGH OIL PRICES AND CLIMATE CHANGE RESPONSES

↓

INCREASED BIOFUEL PRODUCTION

↓

NEED FOR EXPANDED AGRICULTURAL PRODUCTION
TROPICAL LAG CLOSING

NEW BIO TECH PRODUCTS

- Bio pharmaceuticals
- Nutriceuticals
- Cosmeceuticals
- Bio fuels
- Bio energy
- Bio degradable fibres
- Bio degradable plastics
- Industrial – chemicals, paints, etc.
## Motor Vehicle Numbers & Television Sets per ‘000 Pop’n India, China & Australia, 2004

<table>
<thead>
<tr>
<th></th>
<th>India</th>
<th>China</th>
<th>Australia</th>
</tr>
</thead>
<tbody>
<tr>
<td>Motor Vehicles</td>
<td>13</td>
<td>10</td>
<td>634</td>
</tr>
<tr>
<td>Television Sets</td>
<td>13</td>
<td>321</td>
<td>554</td>
</tr>
</tbody>
</table>

Source: Cummings Economics from UN Statistics.
MINING GROWTH . . . . .

- Support/Need for New Infrastructure.

- Possible New Industrial Development Opportunities.
TOURISM PROSPECTS LIKELY TO CHANGE . . . .

- Fuel cost – locals at home.
- Baby boomer grey nomads.
- Downward correction in the Australian dollar.
- New airline capacity.
TOURISM GROWTH
A NEW PHASE IN SIGHT

New Generation of Aircraft in 2009

Boeing Dreamliners
Airbus A380
NEW TOURISM MARKETS EMERGING, EG. CHINA
SOUTHERN TABLELANDS

- Continuing agricultural intensification and diversification.
- Continuing major focus for tourism growth.
- Continuing major focus of lifestyle population movements.
NORTHERN TABLELANDS

- Major irrigation expansion (Nullinga), (also Mt Garnet area).
- Focus of cattle industry services.
- Focus of mining industry services.
- Industrial expansion for mining industry and diversion from coast.
- Any airport services diversion.
- Transport hub.
TRANSPORT INFRASTRUCTURE DEVELOPMENT VITAL . . .

- KURANDA RANGE ROAD – LARGE FREIGHT EFFICIENT VEHICLES.
- CAPE YORK and MITCHELL RIVER FEEDER ROADS.
- ROAD TRAIN ROUTE – FROM MAREEBA VIA PETFORD/ALMADEN TO KENNEDY HWY AT MT GARNET.
- KENNEDY DEVELOPMENTAL ROAD – MISSING LINK LYND TO HUGHENDEN – DIRECT PRODUCE FREIGHT ROUTE TO MELBOURNE and ADELAIDE.
NEED FOR NEW THINKING ABOUT WHERE THE REGION IS GOING ...