



# LIVE EXPORTS FORUM GEORGETOWN

12 AUGUST 2011

**“ARE IMPACTS BROADER THAN BEEF”**



**ADDRESS BY W.S (BILL) CUMMINGS | CUMMINGS ECONOMICS, CAIRNS**

# LIVESTOCK INDUSTRIES

## Value <sup>(1)</sup> of Livestock Production by Production Area

	Peninsula	Gulf	Tableland	Wet Tropics	Burdekin	North West	Total
Cattle	\$25.0 m	\$190.2 m	\$18.5 m	\$19.5 m	\$11.0 m	\$353.1 m	\$617.3 m
Dairy			\$37.8 m				\$37.8 m
Pork			\$3.7 m				\$3.7 m
Poultry			\$4.5 m				\$4.5 m
<b>Total</b>	<b>\$25.0 m</b>	<b>\$190.2 m</b>	<b>\$64.5 m</b>	<b>\$19.5 m</b>	<b>\$11.0 m</b>	<b>\$353.1 m</b>	<b>\$663.3 m</b>

•*Note:* Excludes transport to markets elements.

Source: DEEDI (Primary Industries Section).

# LIVESTOCK INDUSTRIES

## Value of Livestock Production by Statistical Division

	<b>Cattle</b>	<b>Dairy</b>	<b>Pork</b>	<b>Poultry</b>	<b>Total</b>
Far North	\$161 m	\$37.8 m	\$3.7 m	\$4.5 m	<b>\$207 m</b>
North	\$120 m				<b>\$120 m</b>
	\$336 m				<b>\$336 m</b>
<b>Total</b>	<b>\$617 m</b>	<b>\$37.8 m</b>	<b>\$3.7 m</b>	<b>\$4.5 m</b>	<b>\$663 m</b>

# EMPLOYMENT TO OUTPUT RATIO

	<b>Employment</b>	<b>Est Ratio Output per Person Employed</b>
Far North	1,600	\$130,000
North	1,100	\$110,000
North West	1,400	\$240,000
<b>Total</b>	<b>4,100</b>	<b>\$162,000</b>

# POST FARM GATE

## CATTLE TRANSPORT (1)

	Turnover	Employment
Far North	\$7.4 m	60
North	\$6.5 m	50
North West	\$17.7 m	140
<b>Total</b>	<b>\$31.6 m</b>	<b>250</b>

(1) To meat works and export from region only

## MEATWORKS & PROCESSING

	Value Added	Employment
Far North	\$12 m	110
North	\$60 m	850

# SUMMARY OF POST-FARM GATE VALUE ADDING

Summary of Post-Farm Gate Value Adding				
Est Post-Farm Gate Value Adding				
Industries	Far North	North	Northwest	Total
Sugar	\$140 m	\$300 m	-	\$440 m
<b>Cattle</b>				
Processing	\$12 m	\$60 m	-	\$72 m
Transport	\$7 m	\$6 m	\$18 m	\$31 m
<b>Fruit &amp; Vegetables</b>				
Transport	\$62 m	\$5 m	-	\$67 m
Other Livestock	\$80 m	-	-	\$80 m
Fishing & Forestry	\$43 m	\$7 m	\$1 m	\$51 m
Other	\$46 m	\$6 m	-	\$52 m
<b>Total</b>	<b>\$390 m</b>	<b>\$384 m</b>	<b>\$19 m</b>	<b>\$793 m</b>
Est Employment				
Sugar	800	1,700	-	2,500
<b>Cattle</b>				
Processing	110	850	-	960
Transport	60	50	140	250
<b>Fruit &amp; Vegetables</b>				
Transport	470	35	-	505
Other Livestock	360	-	-	360
Fishing & Forestry	329	51	8	388
Other	265	50	-	315
<b>Total</b>	<b>2,394</b>	<b>2,736</b>	<b>148</b>	<b>5,278</b>

# SUMMARY ASSOCIATED ACTIVITY

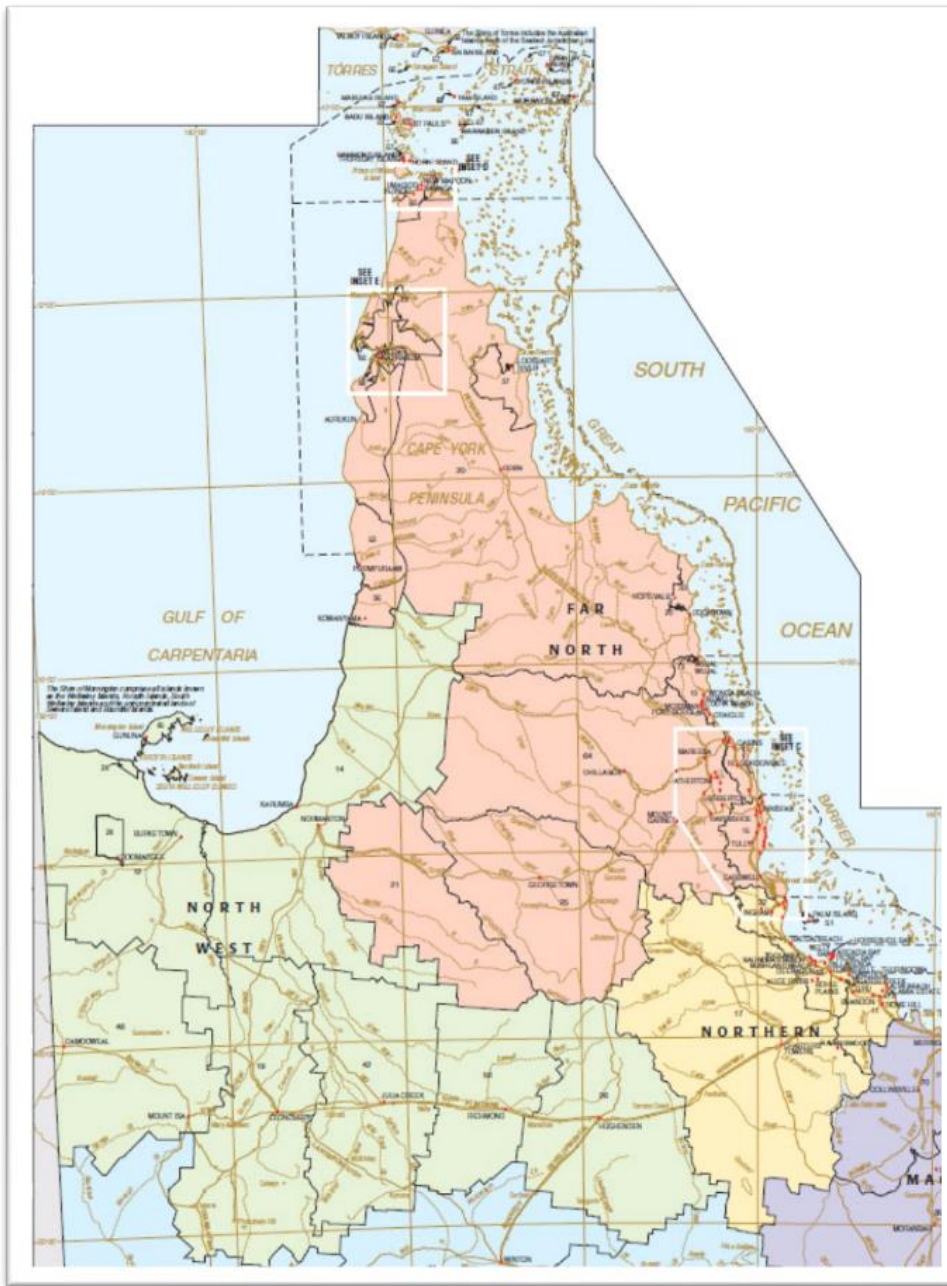
## Summary of Associated Activities Value Adding

### Est Value Added

	Far North	North	Northwest	Total
Government Services	\$35 m	\$17 m	\$2 m	<b>\$54 m</b>
Education	\$6 m	\$26 m	\$1 m	<b>\$33 m</b>
<b>Total</b>	<b>\$41 m</b>	<b>\$43 m</b>	<b>\$3 m</b>	<b>\$87 m</b>

### Est Employment

Government Services	308	148	15	<b>471</b>
Education	52	156	5	<b>213</b>
<b>Total</b>	<b>360</b>	<b>304</b>	<b>20</b>	<b>684</b>





# VALUE ADDED BY PRIMARY INDUSTRIES TO THE REGIONAL ECONOMY

## Calculation of Total Value Added to the Economy \$M

	Far North Region		North Region		North West Region	
	Output	Total Value Added	Output	Total Value Added	Output	Total Value Added
Grains	7	5.4	2	1.5		
Beef cattle	160	158.2	120	109.1	336	296.7
Dairy cattle	38	33.1				
Pigs	4	3.8				
Poultry	5	4.4				
Other agriculture	905	913.1	701	721.3		
Forestry and logging	2	2.3				
Commercial fishing	207	170.9	42	35.4	15	12.0
Meat and meat products	55	62.5	60	67.8		
Dairy products	35	35.6				
Fruit and vegetable products	21	19.6	6	5.8		
Other food products	141	137.1	273	268.7		
Other manufacturing	8	8.2	1	0.9		
Wholesale trade	43	46.6	12	13.1	1	0.8
Road transport	71	71.1	12	12.3	18	17.1
Services to transport, storage	16	16.2	26	26.9		
Government administration	35	47.3	17	23.5	1	2.5
Education	6	9.1	26	39.9	1	1.5
<b>Total</b>	<b>\$1,761</b>	<b>\$1,744.5</b>	<b>\$1,296</b>	<b>\$1,326.2</b>	<b>\$373</b>	<b>\$330.6</b>

# EMPLOYMENT GENERATED

## Calculation of Total Employment Generated in the Region

	Far North Region		North Region		North West Region	
	Initial	Total	Initial	Total	Initial	Total
Grains	31	57.41	11	20.14		0.00
Beef cattle	1324	2025.72	1100	1739.10	1400	1950.20
Dairy cattle	309	497.18		0.00		0.00
Pigs	30	38.76		0.00		0.00
Poultry	37	63.01		0.00		0.00
Other agriculture	4169	6491.13	2389	3777.01		0.00
Forestry and logging	40	89.44		0.00		0.00
Commercial fishing	740	1481.46	370	758.13	100	181.10
Meat & meat products	350	912.45	850	2215.95		0.00
Dairy products	120	418.20		0.00		0.00
Fruit & vegetable products	130	375.05	50	144.25		0.00
Other food products	791	3111.79	1552	6105.57	80	0.00
Other manufacturing	60	185.94	5	16.32		0.00
Wholesale trade	322	903.85	46	130.92	8	18.82
Road transport	530	1217.41	85	199.49	140	291.76
Services to transport, storage	91	291.47	148	487.07		0.00
Government administration	308	688.07	148	355.64	15	30.92
Education	52	91.16	156	276.59	5	8.16
<b>Total</b>	<b>9434</b>	<b>18939.50</b>	<b>6910</b>	<b>16226.18</b>	<b>1668</b>	<b>2480.96</b>

# SOME COMPARISONS

## Input Structure of Industries Total Value of Output

	Other Agriculture	Mining Non Ferrous Ores
Intermediate Inputs	33%	34%
Compensation Employees	18%	9%
Gross Operating Surpluses	43%	50%
Other	6%	7%
<b>Total</b>	<b>100%</b>	<b>100%</b>

## Estimated Total Turnover Compared – Primary Industries & Tourism

Region	Primary Industries 2008/09	Visitor Expenditure <sup>(1)</sup> 2009
Far North	\$1,758 m	\$2,554 m
North	\$1,326 m	\$577 m
	\$373 m	nsr <sup>(2)</sup>
<b>Total</b>	<b>\$3,457 m</b>	<b>\$3,131 m</b>

<sup>(1)</sup> Source: Tourism Research . <sup>(2)</sup> nsr – not separately recorded.

# SURVEY RESULTS – WHERE FROM

Name	Tableland/ Area	Townsville/Charters Towers Area	Georgetown	Other
<b>Main Shopping</b>				
Along Road	46%	48%	6%	-
West of	69%	31%	-	-
<b>Vehicle Equipment Repair</b>				
Along Road	38%	54%	8%	-
West of	72%	24%	4%	-
<b>Medical</b>				
Along Road	39%	28%	11%	22% (RFDS)
West of	58%	24%	18%	-
<b>Legal Services</b>				
Along Road	50%	50%	-	-
West of	50%	50%	-	-
<b>Schooling</b>				
Along Road	-%	89%	11%	-
West of	13%	79%	9%	-
<b>Accounting</b>				
Along Road	54%	43%	3%	-
West of	47%	35%	-	18%
<b>Fuel</b>				
Along Road	84%	16%	10%	-
West of	58%	8%	33%	-



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