Agriculture, Fisheries and Forestry in the Greater Brisbane region of Queensland, 2013

Tim Caboche, Peter Martin, Robert Curtotti, Kristen Corrie and Ian Frakes

Research by the Australian Bureau of Agricultural and Resource Economics and Sciences

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1 Regional overview

The Greater Brisbane region comprises eight local government areas. It includes the major town centres of Brisbane, Caboolture, Redcliffe and Ipswich (Map 1). The region covers a total area of around 15 800 square kilometres or 1 per cent of Queensland’s total area and is home to approximately 2 066 000 people (ABS 2011).

The total land held by farm businesses was estimated to be 1 million hectares in the Greater Brisbane region in 2010–11. Agricultural land in the region was mainly used for grazing (978 556 hectares), with some cropping (39 101 hectares). In addition, 20 742 hectares of land held by farm businesses was set aside for conservation (ABS 2012).

Map 1 Greater Brisbane region of Queensland

Employment

Australian Bureau of Statistics (ABS) census data from 2011 indicate that around 1 million people were employed in the Greater Brisbane region. The Greater Brisbane region accounts for 50 per cent of total employment in Queensland and 13 per cent of all people employed in the Queensland agriculture, forestry and fishing sector.

Health care and social assistance was the largest employing sector (125 174 people) followed by retail trade (101 918 people) (Figure 1). Other important employment sectors in the region were manufacturing (93 629 people), professional, scientific and technical services (84 117 people), construction (83 691 people) and education and training (81 669 people).

The agriculture, forestry and fishing sector employed 7433 people, representing 1 per cent of the region’s workforce. Of this, 85 per cent were employed in agriculture, 8 per cent in support...
services for the agriculture, forestry and fishing sector, 3 per cent in fishing, hunting and trapping, and 2 per cent in both the forestry and logging, and aquaculture industries. In addition, an estimated 18,515 people were employed in food product manufacturing and 5375 people were employed in wood, pulp and paper product manufacturing in the region (included in manufacturing sector employment).

Figure 1 Employment profile, Greater Brisbane region

Source: Australian Bureau of Statistics
2 Agriculture sector

In 2010–11 the gross value of agricultural production (GVAP) in the Greater Brisbane region was $814 million, which was 9 per cent of the total gross value of agricultural production in Queensland ($9.6 billion) for 2010–11. This is the most recent year for which data are available from the ABS on GVAP for this region.

The Greater Brisbane region has a relatively small agricultural sector with a few significant commodities. In 2010–11, the Greater Brisbane region accounted for around 89 per cent of the total value of carrot production, 67 per cent of the total value of berry fruit production and 56 per cent of the total value of poultry in Queensland.

The most important commodity in the region, based on the value of agricultural output, was poultry (Figure 2). In 2010–11, poultry contributed 27 per cent ($222 million) to the total gross value of agricultural production in the Greater Brisbane region. Vegetables accounted for 25 per cent ($208 million) with the main crops being beans ($27 million), mushrooms ($23 million) and onions ($15 million). Nurseries, flowers and turf accounted for 15 per cent ($119 million). Cattle and calves accounted for 12 per cent ($99 million), fruit 9 per cent ($77 million), milk 7 per cent ($57 million) and hay 2 per cent ($20 million).

Figure 2 Value of agricultural production, Greater Brisbane region, Queensland, 2010–11

Number and type of farms

ABS data indicate that in 2010–11 there were 3132 farms in the Greater Brisbane region with an estimated value of agricultural operations of more than $5000 (Table 1). The region contains 11 per cent of all farm businesses in Queensland.
Table 1 Number of farms, by industry classification, 2010–11

<table>
<thead>
<tr>
<th>Industry Classification</th>
<th>Greater Brisbane region</th>
<th>Queensland</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>no.</td>
<td>%</td>
</tr>
<tr>
<td>Beef Cattle</td>
<td>1,350</td>
<td>43</td>
</tr>
<tr>
<td>Other livestock</td>
<td>352</td>
<td>11</td>
</tr>
<tr>
<td>Vegetable</td>
<td>319</td>
<td>10</td>
</tr>
<tr>
<td>Fruit and nuts</td>
<td>166</td>
<td>5</td>
</tr>
<tr>
<td>Dairy</td>
<td>141</td>
<td>4</td>
</tr>
<tr>
<td>Nurseries, Cut Flowers and Turf</td>
<td>132</td>
<td>4</td>
</tr>
<tr>
<td>Other Crop growing</td>
<td>102</td>
<td>3</td>
</tr>
<tr>
<td>Poultry</td>
<td>80</td>
<td>3</td>
</tr>
<tr>
<td>Other</td>
<td>490</td>
<td>16</td>
</tr>
<tr>
<td>Total Agriculture</td>
<td>3,132</td>
<td>100</td>
</tr>
</tbody>
</table>

Note: Where the estimated value of agricultural operations is more than $5000.

Source: Australian Bureau of Statistics

Farms are classified in Table 1 according to the activities that generate most of their value of production. Beef cattle (1350 farms) were the most common, accounting for 43 per cent of all farms in the Greater Brisbane region, and 11 per cent of all beef cattle farms in Queensland.

A large proportion of farms in the region are small in terms of their business size. Estimated value of agricultural operations (EVAO) is a measure of the value of production from farms and a measure of their business size, and is somewhat similar to turnover. Around 55 per cent of farms in the Greater Brisbane region had an EVAO of less than $50 000 (Figure 3). These farms accounted for only 5 per cent of the total value of agricultural operations in 2010–11. In comparison, 12 per cent of farms in the region had an EVAO of more than $350 000 and accounted for an estimated 75 per cent of the total value of agricultural operations in the region in 2010–11.

Figure 3 Distribution of farms by estimated value of agricultural operations, Greater Brisbane region, Queensland, 2010–11

Source: Australian Bureau of Statistics
Farm financial performance—Queensland

Each year, ABARES interviews Australian broadacre and dairy producers as part of its annual survey program. Broadacre industries covered in this survey include the grains, grains–livestock, sheep, beef and sheep–beef industries. The information collected is a basis for analysing the current financial position of farms in these industries and expected changes in the short term. This paper uses data from the ABARES Australian agriculture and grazing industries survey (AAGIS) and Australian dairy industry survey (ADIS) to compare estimates of financial performance indicators (Box 1) for broadacre and dairy farms in Queensland.

Box 1 Definitions

<table>
<thead>
<tr>
<th>Major financial performance indicators</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total cash receipts</strong>: total revenues received by the business during the financial year.</td>
</tr>
<tr>
<td><strong>Total cash costs</strong>: payments made by the business for materials and services and for permanent and casual hired labour (excluding owner manager, partner and family labour).</td>
</tr>
<tr>
<td><strong>Farm cash income</strong>: total cash receipts – total cash costs</td>
</tr>
<tr>
<td><strong>Farm business profit</strong>: farm cash income + changes in trading stocks – depreciation – imputed labour costs</td>
</tr>
<tr>
<td><strong>Profit at full equity</strong>: return produced by all the resources used in the business, farm business profit + rent + interest + finance lease payments – depreciation on leased items</td>
</tr>
<tr>
<td><strong>Rate of return</strong>: return to all capital used, profit at full equity * 100 / total opening capital</td>
</tr>
<tr>
<td><strong>Equity ratio</strong>: Farm capital minus farm debt expressed as a percentage of farm capital</td>
</tr>
</tbody>
</table>

Industry types

- **Grains**: farms mainly engaged in producing broadacre crops such as wheat, coarse grains, oilseeds and pulses, and including farms running sheep and/or beef cattle in conjunction with substantial broadacre crop activity.
- **Sheep**: farms mainly engaged in running sheep.
- **Beef**: farms mainly engaged in running beef cattle.
- **Dairy**: farms mainly engaged in milk production.

Performance of broadacre farms—Queensland

Farm cash income for Queensland broadacre farms is projected to increase from an estimated average of $95 500 per farm in 2011–12 to an average of $101 000 per farm in 2012–13. If achieved, the 2012–13 farm cash income would be around 25 per cent above the average farm cash income recorded for the 10 years to 2011–12 (Table 2, Figure 4).

The projected increase in average broadacre farm cash income is mainly a consequence of increased crop receipts, particularly in central Queensland, combined with increased receipts from sale of beef cattle in some regions.
Overall, production of winter crops in 2012–13 is estimated to have been similar to 2011–12, but production of summer crops is projected to decline significantly. However, the reduction in overall crop production is projected to be more than offset by much higher grain prices to result in crop receipts increasing, on average. Significant differences are expected across regions with the largest increase in crop receipts occurring in central Queensland.

Figure 4 Real farm cash income, broadacre industries, average per farm

Receipts from beef cattle typically account for around 70 per cent of average total cash receipts in Queensland. Overall receipts from beef cattle are projected to decline slightly due to lower saleyard prices and despite an increase in turnoff in most inland regions resulting from drier seasonal conditions and increased availability of sale cattle following above average seasonal conditions in 2010–11 and 2011–12.

Table 2 Financial performance, Queensland broadacre industries, 2010–11 to 2012–13, average per farm

<table>
<thead>
<tr>
<th>Performance indicator</th>
<th>units</th>
<th>2010–11</th>
<th>2011–12p</th>
<th>RSE (%)</th>
<th>2012–13y</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total cash receipts</td>
<td>$</td>
<td>375 150</td>
<td>360 400</td>
<td>(4)</td>
<td>365 000</td>
</tr>
<tr>
<td>Total cash costs</td>
<td>$</td>
<td>287 450</td>
<td>265 000</td>
<td>(5)</td>
<td>263 000</td>
</tr>
<tr>
<td>Farm cash income</td>
<td>$</td>
<td>87 700</td>
<td>95 500</td>
<td>(9)</td>
<td>101 000</td>
</tr>
<tr>
<td>Farms with negative farm cash income</td>
<td>%</td>
<td>26</td>
<td>28</td>
<td>(13)</td>
<td>28</td>
</tr>
<tr>
<td>Farm business profit</td>
<td>$</td>
<td>32 160</td>
<td>33 800</td>
<td>(26)</td>
<td>23 000</td>
</tr>
<tr>
<td>Profit at full equity - excluding capital appreciation</td>
<td>$</td>
<td>80 940</td>
<td>80 200</td>
<td>(12)</td>
<td>66 000</td>
</tr>
<tr>
<td>Farm capital at 1 July a</td>
<td>$</td>
<td>5 131 190</td>
<td>5 255 200</td>
<td>(7)</td>
<td>na</td>
</tr>
<tr>
<td>Farm debt at 30 June b</td>
<td>$</td>
<td>585 060</td>
<td>569 700</td>
<td>(10)</td>
<td>573 000</td>
</tr>
<tr>
<td>Equity ratio b</td>
<td>%</td>
<td>88</td>
<td>89</td>
<td>(1)</td>
<td>na</td>
</tr>
<tr>
<td>Rate of return - excluding capital appreciation c</td>
<td>%</td>
<td>1.6</td>
<td>1.5</td>
<td>(12)</td>
<td>1.3</td>
</tr>
<tr>
<td>Off-farm income of owner manager and spouse b</td>
<td>$</td>
<td>23 650</td>
<td>30 400</td>
<td>(11)</td>
<td>na</td>
</tr>
</tbody>
</table>

Note: a Excludes leased plant and equipment. b Average per responding farm. c Rate of return to farm capital at 1 July.

p ABARES preliminary estimates. y ABARES provisional estimates. na Not available. RSE Relative standard errors, expressed as a percentage of the estimate provided.
Average total cash costs are projected to decline around 1 per cent in 2011–12, mainly due to a further reduction in beef cattle purchases expenditure combined with lower expenditure on interest payments.

Despite an increase in average farm cash income, average farm business profit is projected to decline as the rate of increase in beef cattle numbers slows and as stocks of grain on-farm are reduced relative to those held in 2011–12.

**Performance of grains industry farms—Queensland**

Average farm cash receipts increased, on average, for Queensland grains industry farms in 2011–12 as a result of larger summer and winter crop harvests. Total cash costs also increased in 2011–12 due to higher expenditure on fertiliser, crop chemicals, fuel and costs associated with harvesting a larger crop compared with 2010–11. Average farm cash income for grains industry farms in Queensland increased to around $107 600 per farm in 2011–12 (Figure 5).

In 2012–13, average farm cash income for grains industry farms in Queensland is projected to increase further to an average of around $139 000 per farm in 2012–13, around 63 per cent above the industry average for the previous 10 years (Figure 5).

While Queensland’s winter crop production is estimated to have remained largely unchanged in 2012–13 compared with 2011–12, the area planted to summer crops in Queensland is forecast to decline by around 11 per cent in 2012–13, reflecting the very dry start to the summer cropping season. With lower yields also expected, total summer crop production is forecast to fall by 14 per cent. However, lower overall crop production is expected to be more than offset by higher grain prices to result in a small increase in average cash receipts for grains industry farms. The increase in crop receipts is expected to be only partly offset by increased cash costs, mainly resulting from increased expenditure on repairs and maintenance, fertiliser and hired labour compared with 2011–12, and despite a reduction in interest expenditure.

**Figure 5 Real farm cash income, grains industry, average per farm**

Note: p Preliminary estimate. y Provisional estimate.
Performance of beef industry farms—Queensland

In 2011–12, beef cattle turnoff was reduced on Queensland beef industry farms and cattle numbers increased. Average beef cattle receipts declined by 5 per cent despite an increase of around 2 per cent in average sale prices received for beef cattle. The decline in farm receipts was more than offset by a large reduction in expenditure on beef cattle purchases as cattle purchase numbers were reduced from the very high numbers in 2010–11. This reduction, together with reduced interest payments, resulted in average farm cash income for beef industry farms increasing slightly to an average of $95 700 per farm in 2011–12 (Figure 6).

In 2012–13 drier seasonal conditions and high beef cattle numbers in northern Australia are projected to lead to an increase in beef cattle turnoff and a slowing in the rate of increase in herd sizes in Queensland. Lower average sale prices for beef cattle are projected to more than offset the increase in turnoff to result in a decline in average beef cattle receipts for Queensland beef industry farms. However, further reductions in expenditure on the purchase of beef cattle together with lower interest expenditure is projected to more than offset the reduction in beef cattle receipts and result in average farm cash income for Queensland beef industry farms increasing slightly to average $96 000 per farm in 2012–13. If achieved this would be around 17 per cent above the average for the previous 10 years, in real terms.

The slow-down in growth of beef herds resulting from increased cattle turnoff will reduce the the build-up in trading stocks on Queensland beef industry farms. As a consequence, farm business profit for the Queensland beef industry is projected to decline from an average of $32 800 per farm in 2011–12 to $26 000 per farm in 2012–13.

Performance of dairy industry farms—Queensland

In 2011–12, average farm cash incomes declined slightly for Queensland dairy farms, mainly as a result of increased cash costs and despite an increase of around 1 per cent in average milk prices received. Overall, average farm cash income for Queensland dairy farms averaged $106 200 per farm in 2011–12 (Table 3, Figure 7), around 19 per cent above the industry average for the previous 10 years.
In 2012–13, a reduction in average farmgate milk prices received of around 5 per cent, combined with a reduction of around 3 per cent in milk production, together with an increase of around 3 per cent in total cash costs are projected to result in reduced financial performance. Farm cash income for Queensland dairy farms is projected to decline to average $58 000 per farm, around 40 per cent below the average for the 10 years ending 2011–12.

Figure 7 Real farm cash income, dairy industry, average per farm

Table 3 Financial performance, Queensland dairy industry, 2010–11 to 2012–13, average per farm

<table>
<thead>
<tr>
<th>Performance indicator</th>
<th>units</th>
<th>2010–11</th>
<th>2011–12p</th>
<th>RSE (%)</th>
<th>2012–13y</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total cash receipts</td>
<td>$</td>
<td>477 210</td>
<td>482 700</td>
<td>(3)</td>
<td>444 000</td>
</tr>
<tr>
<td>Total cash costs</td>
<td>$</td>
<td>361 560</td>
<td>376 500</td>
<td>(4)</td>
<td>386 000</td>
</tr>
<tr>
<td>Farm cash income</td>
<td>$</td>
<td>115 650</td>
<td>106 200</td>
<td>(16)</td>
<td>58 000</td>
</tr>
<tr>
<td>Farms with negative farm cash income</td>
<td>%</td>
<td>5</td>
<td>11</td>
<td>(51)</td>
<td>24</td>
</tr>
<tr>
<td>Farm business profit</td>
<td>$</td>
<td>15 500</td>
<td>20 400</td>
<td>(81)</td>
<td>-40 000</td>
</tr>
<tr>
<td>Profit at full equity - excluding capital appreciation</td>
<td>$</td>
<td>36 550</td>
<td>45 300</td>
<td>(34)</td>
<td>-23 000</td>
</tr>
<tr>
<td>Farm capital at 1 July a</td>
<td>$</td>
<td>3 307 960</td>
<td>3 125 700</td>
<td>(9)</td>
<td>na</td>
</tr>
<tr>
<td>Farm debt at 30 June b</td>
<td>$</td>
<td>220 330</td>
<td>272 500</td>
<td>(15)</td>
<td>270 000</td>
</tr>
<tr>
<td>Equity ratio b</td>
<td>%</td>
<td>93</td>
<td>91</td>
<td>(2)</td>
<td>na</td>
</tr>
<tr>
<td>Rate of return - excluding capital appreciation c</td>
<td>%</td>
<td>1.1</td>
<td>1.5</td>
<td>(38)</td>
<td>-0.7</td>
</tr>
<tr>
<td>Off-farm income of owner manager and spouse b</td>
<td>$</td>
<td>10 680</td>
<td>7 500</td>
<td>(32)</td>
<td>na</td>
</tr>
</tbody>
</table>

Note: a Excludes leased plant and equipment. b Average per responding farm. c Rate of return to farm capital at 1 July. p ABARES preliminary estimates. y ABARES provisional estimates. na Not available. RSE Relative standard errors, expressed as a percentage of the estimate provided.
3 Fisheries Sector

The Greater Brisbane area is a key commercial fishing area in Queensland. The coastal area contains Moreton Bay, Moreton Island, North and South Stradbroke Island. The waters of Moreton Bay are within the Queensland Moreton Bay Marine Park. The marine park has five types of zones that allow different types of use and afford various levels of protection. Wild-caught species in the area include prawns (greasyback, banana and school prawns), a principal catch of the River and Inshore Beam Trawl Fishery, which is a subsector of the Queensland East Coast Trawl fishery. Blue swimmer crabs are also caught in the area — Moreton Bay is a high catch and effort region for this species. Common finfish species targeted by commercial fishers in the area are dusky and bartail flathead. The coastal areas in the vicinity of Moreton Bay are also popular for recreational fishing. The key recreational finfish species targeted are flathead, crabs, prawns and squid.

In 2010–11, the Brisbane and Moreton area contributed 18 percent ($15.8 million) of Queensland's total value of aquaculture production ($86.3 million). The Brisbane and Moreton area produced 910 tonnes of aquaculture production in 2010–11 accounting for 13 per cent of the volume of Queensland aquaculture production, utilising a pond area of 170 hectares. The aquaculture industry in the area employed approximately 106 persons in 2010–11. Aquaculture species produced in the Moreton area are prawns and Sydney rock oysters.

Although the participation rate (14 per cent) of Greater Brisbane region residents in recreational fishing is much lower than in regional centres, the large population means that 37 per cent of Queensland fishers live in this region (Taylor et al 2012). Greater Brisbane residents mostly fish in south-eastern Queensland, with equal amounts of fishing effort in estuarine and coastal waters. More days are spent fishing from the shore than from boats. The most numerous species harvested by Brisbane residents were sand whiting, trumpeter whiting, yellowfin bream, tailor, dusky flathead, blue swimmer crab and mud crab. The results of the 2010 statewide recreational fishing survey revealed that Brisbane region residents caught over 95 per cent of the Queensland harvest of blue swimmer crab and about half the harvest of whiting, tailor, snapper and pearl perch.

In 2010–11 the total gross value of Queensland's fisheries production was $271 million, a decrease of 16 per cent ($51 million) from 2009–10. Queensland contributed 12 per cent of the total value of Australian fisheries production in 2010–11. In value terms, the wild-catch sector accounted for 70 per cent ($188.5 million) of the state's total production and the aquaculture sector accounted for the remaining 30 per cent ($82.5 million).

Queensland's wild-catch fisheries sector provides a range of fisheries products. The highest contribution being from prawns, which account for 35 per cent of the total value of wild-catch fisheries with a value of $65 million, followed by crabs (16 per cent; $29 million), coral trout (14 per cent; $26 million) and bugs ($13 million; 7 per cent). Over the last decade the value of Queensland's wild-caught fisheries products has reduced from $337 million (2000–01) to $188 million (2010–11; in 2010–11 terms). Prawns and coral trout, showed the largest decline in the real value of production over the past decade, reducing by $43 million and $54 million respectively. A large proportion of prawns and coral trout is exported and the appreciation of the exchange rate since 2000–01 has had a significant effect on the value of exports of these products. Competition from imported prawns in the domestic market has also placed significant downward pressure on prices in recent years.
The value of Queensland's aquaculture production has declined by 17 per cent from $99 million in 2009–10 to $82 million in 2010–11. Prawn and barramundi farming account for the largest share of production by value, with prawns accounting for 67 per cent, and $56 million of production, followed by barramundi (26 per cent; $21 million).

Commonwealth fisheries active in the waters off the east coast of Queensland include the Commonwealth Eastern Tuna and Billfish fishery (mainly supplying export markets with tuna) and the Coral Sea Fishery. The final proposed Commonwealth Coral Sea Marine Reserves network released on 14 June 2012 is estimated to displace $4.0 million of gross value of production from these fisheries when the zoning comes into effect.

In 2011–12, Queensland's fisheries product exports were valued at $143 million. The main export products include live and fresh, chilled or frozen fish, prawns and rocklobster. Hong Kong, Japan and the United States are the major destinations for Queensland fisheries exports, accounting for 53 per cent, 20 per cent and 7 per cent of the total value of exports in 2011–12, respectively. Other major export destinations include Vietnam (5 per cent) and China (4 per cent).

Recreational fishing is popular in Queensland, with approximately 700,000 Queenslanders going recreational fishing, crabbing or prawning in Queensland in the 12 months prior to July 2010 (QDAFF 2013). Total expenditure in the sector is estimated to be between $350 million and $420 million in 2008–09 (DEEDI 2009). The tropical waters of Queensland are also a key area for tourism, attracting anglers from around the world and Australia. Popular target species include crabs, prawns and a range of finfish species including cods and groupers, coral trout, redthroat emperor, rosy snapper, and mackerel. For freshwater activity some key species caught include barramundi, eels, silver perch, and yabby and blueclaw crayfish.
4 Forestry Sector

In 2010–11, the total plantation area in the Greater Brisbane region was approximately 27 700 hectares, comprised of around 3500 hectares of hardwood plantations, 23 900 hectares of softwood plantations and 300 hectares of other plantation. In the South East Queensland National Plantation Inventory (NPI) region the main hardwood species planted is Dunn's white gum (Eucalyptus dunnii) and lemon-scented gum (Corymbia citriodora), and the main softwood species planted is hoop pine (Araucaria cunninghamii). Total log supply from plantations in the South East Queensland NPI region is forecast to increase to 2 million cubic metres a year for the 2015–19 period, producing mainly softwood sawlogs (75 per cent).

In 2008, there were around 480 700 hectares of native forests in the Greater Brisbane region, comprised mainly of eucalypt medium open (272 000 hectares), eucalypt medium woodland (95 700 hectares) and rainforest (51 200 hectares) forest types. The majority of the native forests are privately managed (258 000 hectares), with 51 200 hectares of multiple use forests available for timber production and 117 700 hectares managed for nature conservation. Major timber processing industries are located at Caboolture and Burpengary.

Queensland’s forest and wood product industry generated around $4 billion of sales and service income in 2010–11. Most of the income was generated from the sale of wood products (such as structural wood and woodchips) estimated at around $3 billion. The remaining $1 billion was generated from the sale of paper and paper products. Despite being Australia’s largest wood product export state, Queensland is a relative small exporter of woodchips. In 2010–11, Queensland exported 63 000 tonnes of woodchips, valued at $11 million. In 2011–12, woodchip exports from the state declined to 52 000 tonnes, valued at around $8 million.
References


