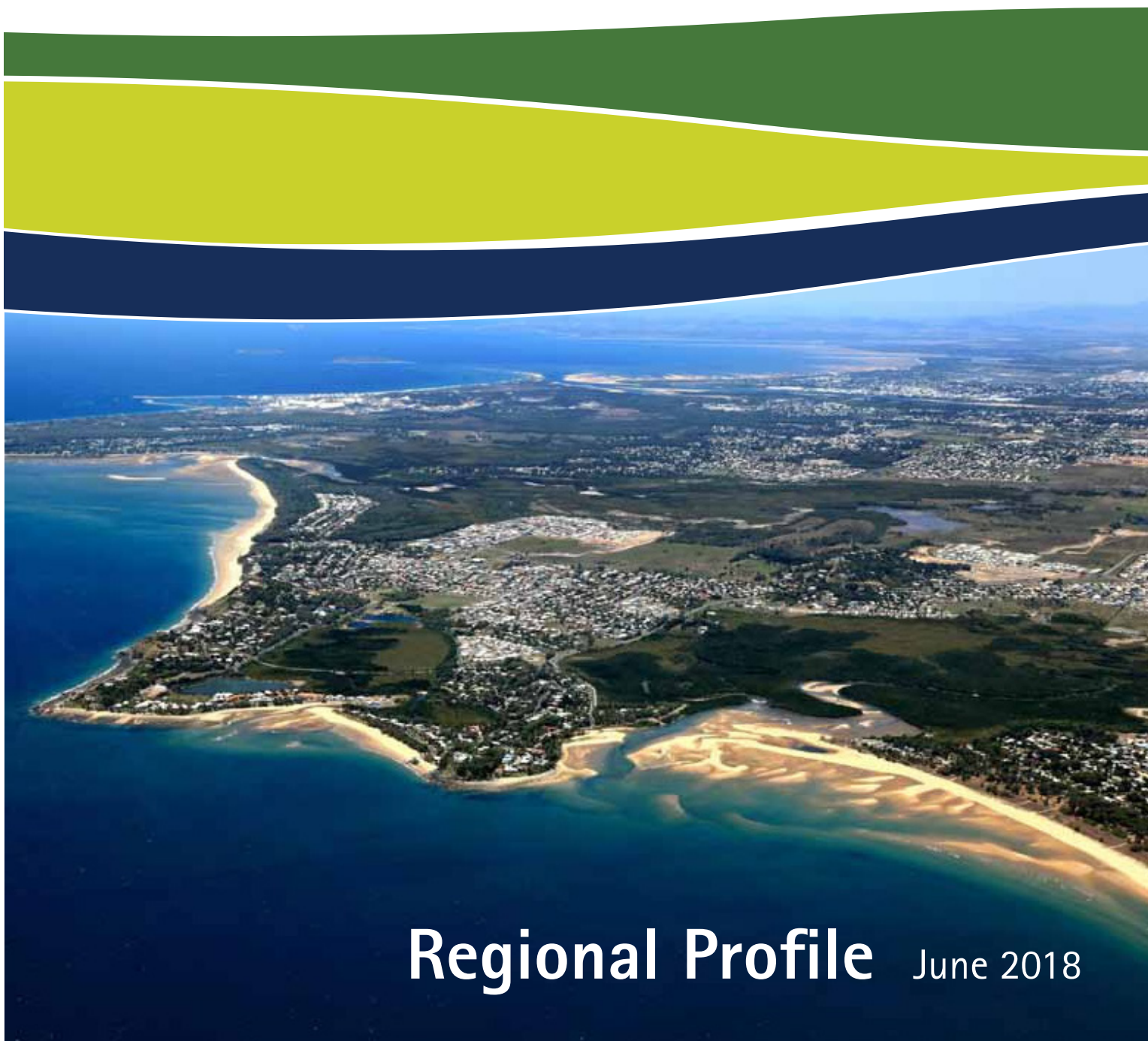




Regional Development *Australia*

MACKAY-ISAAC-
WHITSUNDAY QLD

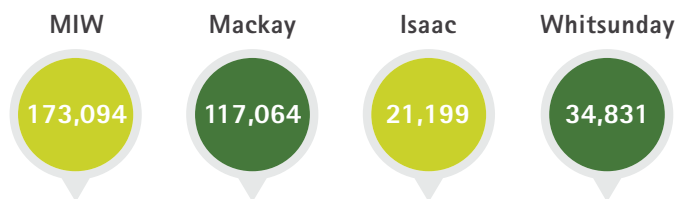


Regional Profile

June 2018



POPULATION

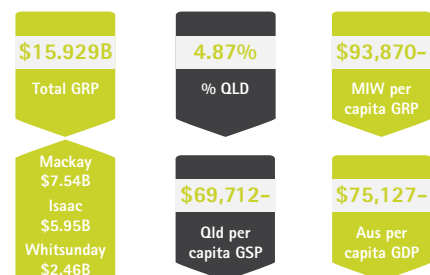


AVERAGE ANNUAL GROWTH

	MIW	Mackay	Isaac	Whitsunday
Over 5 years	-0.1%	-0.1%	-1.9%	0.8%
Over 10 years	0.9%	1.0%	0.1%	1.3%

Source: ABS 3218.0, Regional Population Growth, Australia, various editions

GROSS REGIONAL PRODUCT



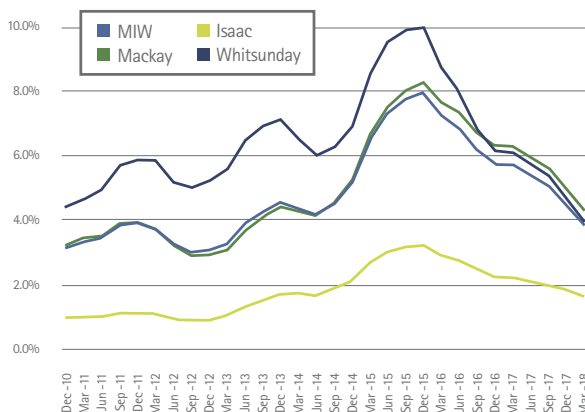
Source: REMPLAN

POPULATION FORECAST

	2011	2016	2021	2026	2031	2036
MIW	171,564-	186,499-	199,604-	215,309-	232,236-	249,898-
Mackay	115,960-	126,370-	135,312-	146,269-	158,464-	171,313-
Isaac	23,188-	24,915-	26,370-	28,171-	30,080-	31,933-
Whitsunday	32,416-	35,213-	37,923-	40,869-	43,692-	46,652-

Source: QGSO - Queensland Government population projections, 2015 edition

UNEMPLOYMENT DATA



Source: Australian Government - Small Area Labour Markets March 2018

INDUSTRY VALUES

OUTPUT PER INDUSTRY

	\$B	% of QLD
Mining	\$13.902	29.58%
Manufacturing	\$3.729	3.83%
Construction	\$2.875	3.08%
Rental, Hiring & Real Estate Services	\$2.340	3.54%
Transport, Postal & Warehousing	\$1.851	4.69%
Agriculture, Forestry & Fishing	\$1.403	7.39%
Accommodation & Food Services	\$1.104	5.00%
Health Care & Social Assistance	\$0.879	2.63%
Wholesale Trade	\$0.878	4.25%
Retail Trade	\$0.809	3.44%

Source: REMPLAN

COAL DATA



MIW MINING PRODUCES

71%
of Queensland's metallurgical coal

31%
of Queensland's thermal coal

62%
of Australia's metallurgical coal
export volume

81%
of the coal produced in MIW is
metallurgical coal

63%
of Qld's coal exports run through
our MIW regional ports

Sources: DNRM – Qld Production by Individual Mines
2016/2017; DTMR – Trade Statistics for Qld Ports – June
2017 & Office of the Chief Economist – Resources and Energy
Quarterly June 2018

TOURISM DATA



297,000 international
visitors to the region stayed
for an average of **5.9 visitor**
nights and spent on average
\$774– per visitor

1,451,000 domestic
overnight visitors to the
region stayed for an average
4.5 nights and spent on
average
\$609– per visitor

8,874 jobs in the MIW region
are supported by tourism

Tourism generates **\$1.645B** of
our total regional output

Sources: Tourism Research Australia – International &
National Visitors Survey – March 2018; REMPLAN

AGRICULTURE DATA



MIW Gross Value Agri Production – **\$1.393B**

equates to **9.9%** of Qld's gross value across **6.0%** of Qld's area of
holding. The MIW region is the fourth ranked region in Queensland in
relation to gross value of agriculture production.



5.1%
of Australia's
pumpkins



5.1%
of Australia's
beef cattle and calves



5.6%
of Australia's
sorghum



6.1%
of Australia's
sweet corn



7.6%
of Australia's
beans



3.6%
of Australia's
mangoes



28.4%
of Australia's
sugar cane



26.2%
of Australia's
capsicum



24.1%
of Australia's
fresh market tomatoes



18.7%
of Queensland's
aquaculture production

Sources: ABS 7503.0 Value of Agricultural Commodities Produced, 2016–2017 & Qld Gov't – Report to farmers –
Aquaculture production summaries 2016–2017

BUSINESS STATS



44.34% of MIW businesses turnover more than **\$200K** compared to **40.67%** Australia wide.

13.62% of MIW business employ more than **5 staff** compared to **11.59%** Australia wide.

Source: REMPLAN

Bowen and Galilee Basins – largest coal mining deposits in Australia

A strong Agribusiness sector including one of the nation's largest
sugar and bio commodity producers

One of the largest winter growing horticultural regions and a key
producer of grains and beef

Skilled construction and development industry

A METS sector that leads the way in heavy engineering,
manufacturing, maintenance and safety

Accessibility via port facilities, road, rail and air infrastructure

A world renowned tourism destination with 74 islands and the Great
Barrier Reef



HOUSING STATS

ANNUAL MEDIAN HOUSE SALE



	Dec 15	Dec 16	Dec 17	March 18	1 yr change as at March 18	5 yr change as at March 18
MACKAY	\$358,500-	\$325,000-	\$325,000-	\$333,250-	4.1%	-22.0%
ISAAC	\$190,000-	\$123,500-	\$135,750-	\$130,000-	-10.3%	-71.4%
WHITSUNDAY	\$380,000-	\$315,000-	\$330,000-	\$350,000-	7.7%	-2.8%

MEDIAN WEEKLY RENT - 3 BDR



	Dec 15	Dec 16	Dec 17	March 18	1 yr change as at March 18	5 yr change as at March 18
MACKAY	\$280-	\$278-	\$300-	\$320-	14.3%	-28.9%
ISAAC	\$225-	\$200-	\$210-	\$250-	19.0%	-41.2%
WHITSUNDAY	\$300-	\$305-	\$340-	\$330-	6.4%	-8.3%

RESIDENTIAL TENANCY VACANCIES

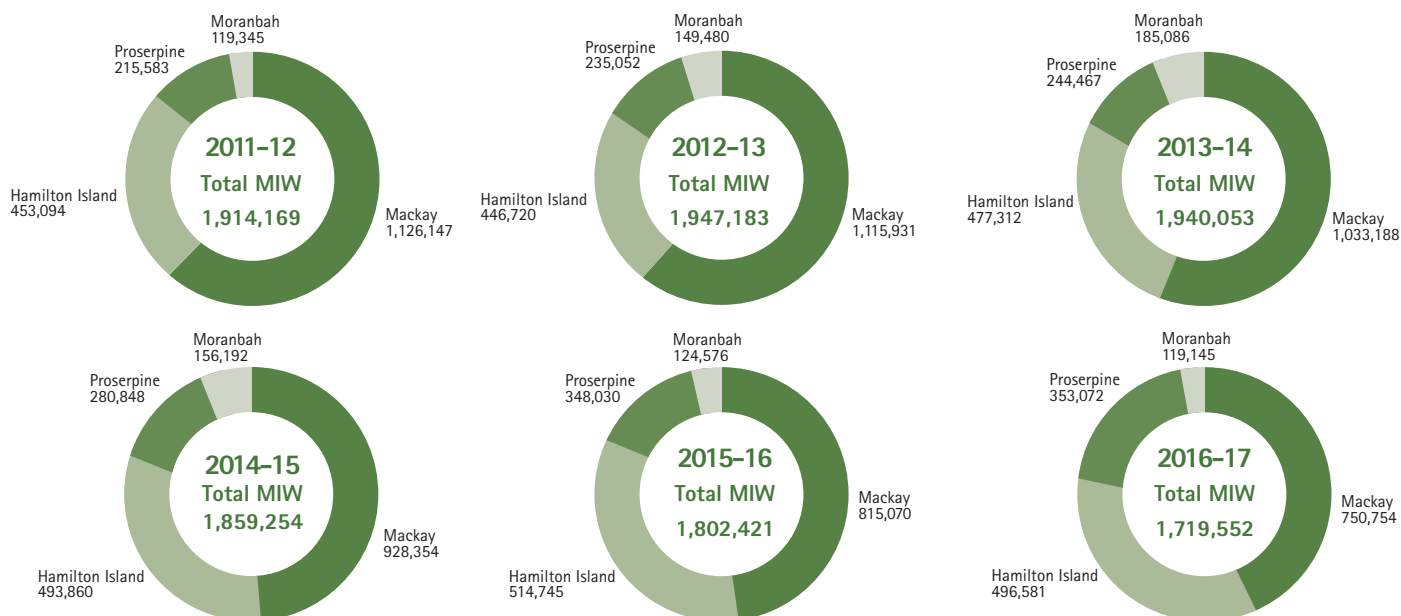


	Dec 15	Dec 16	Dec 17	March 18
MACKAY	9.30%	7.90%	3.00%	3.60%
ISAAC				
WHITSUNDAY	9.50%	5.80%	N/A	2.60%

Source: REIQ Market Monitor - various editions



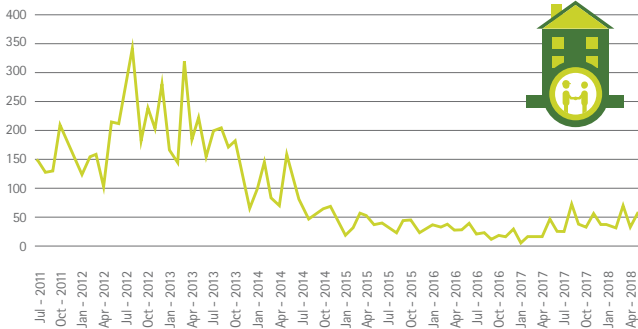
AVIATION PASSENGER NUMBERS



Source: BITRE - airport traffic data

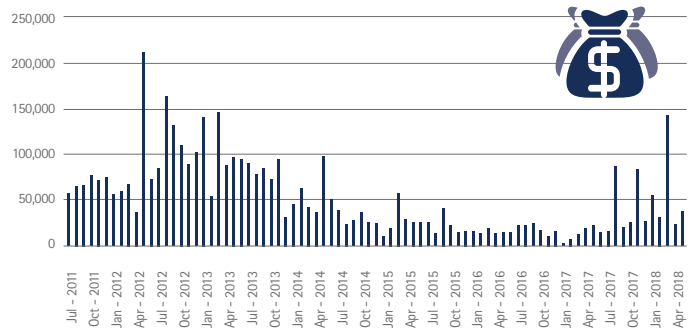
CONSTRUCTION DATA

Total Number of Dwelling Units



Source: ABS.Stat Building Approvals by SA2 and above

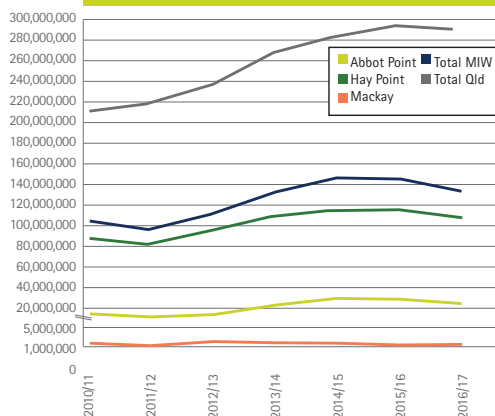
Total Value of Building Jobs \$000



Source: ABS.Stat Building Approvals by SA2 and above

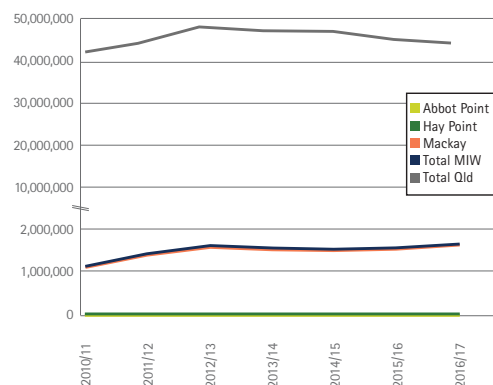
PORTS

EXPORTED TONNES



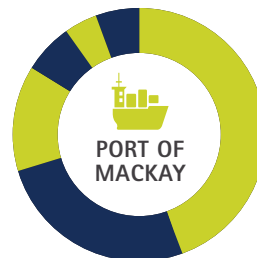
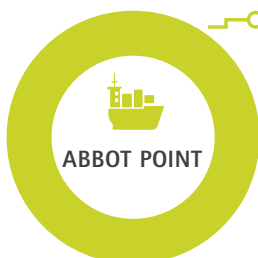
Source: DTMR – Trade Statistics for Qld Ports – June 2017

IMPORTED TONNES



PORTS DATA

THROUGHPUT BY COMMODITY



- 7.75% other including fertiliser, molasses and general cargo
- 5.34% iron concentrates import
- 7.87% grain export
- 48.20% petroleum product import
- 22.13% raw sugar export
- 9.31% refined sugar export

Source: DTMR – Trade Statistics for Qld Ports – June 2017

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