

# MITEZ

ECONOMIC DEVELOPMENT



## Regional Overview

[www.mitez.com.au](http://www.mitez.com.au)

MOUNT ISA TO TOWNSVILLE ECONOMIC DEVELOPMENT ZONE





# 1. The Region



The **Mount Isa to Townsville Economic Development Zone (MITEZ)** is the peak regional development organisation for an area encompassing seven local government associations - Mount Isa, Cloncurry, McKinlay, Richmond, Flinders, Charters Towers and Townsville.

The **MITEZ** region extends 920 kilometres inland from its most eastern point on the Great Barrier Reef, across North Queensland over the Great Dividing Range and across the outback of North West Queensland to the Northern Territory border. In total, the region covers approximately 16% of Queensland's land area.

The **MITEZ** region is home to approximately 230,000 local residents. Strategically located, the region acts as a vital integrated transport corridor; connecting the region and its extensive mineral and agricultural production to the rest of Queensland, Australia and internationally via road, rail, air and sea links.

Over the past 10 years, the region's resource-rich economy has diversified into new sectors while maintaining its established industry strengths. The region accounted for around 5% of Queensland's economic output over 2015-16.

**MITEZ** is committed to continuing the diversification of new industries, alongside the expansion of new markets and the promotion of existing investment opportunities.

This commitment will help to accelerate the growth of the region and ensure its continued prosperity well into the future.

For more information about the **MITEZ** region, please visit [www.mitez.com.au](http://www.mitez.com.au).



## 2. Demographic Profile

### 2.1 Population Growth and Change

The **MITEZ** region hosted a resident population of just under 230,00 persons with an average age of 35.9 years in 2016. Over the past five years, population growth has averaged 0.7% per annum, with growth concentrated in the Townsville Local Government Area (LGA).

**Table 2.1: Population and Average Age**

Local Government Area	Resident Population (June 2016)	Five Year Average Annual Population Growth	Average Age (2016)
Townsville	192,058	1.3%	36.0
Mount Isa	19,332	-2.6%	32.5
Charters Towers	12,074	-0.6%	39.5
Cloncurry	3,114	-1.4%	38.7
Flinders	1,569	-3.1%	41.5
McKinlay	810	-5.7%	39.3
Richmond	800	-1.1%	38.1
<b>MITEZ Total</b>	<b>229,757</b>	<b>0.7%</b>	<b>35.9</b>

Source: QGSO (2017), ABS (2017)

The Townsville LGA is the major population centre for the region with 83.6% of residents, followed by Mount Isa (8.4%), and Charters Towers (5.3%).

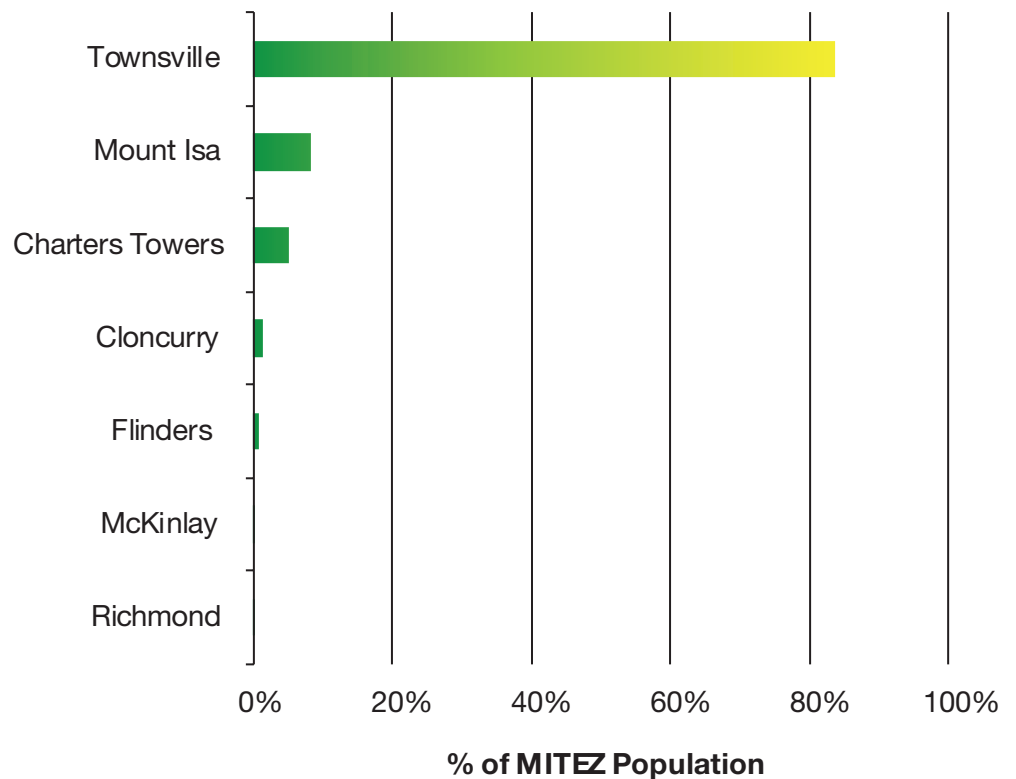


## 2. Demographic Profile (continued)

**Figure 2.1. Share of MITEZ Population**

Source: QGSO (2017)

The LGAs of Townsville, Mount Isa, and Richmond possess younger average ages than the State of Queensland (38.2 years).



### 2.2 Employment

The **MITEZ** region hosted a labour force of 113,000 persons with an unemployment rate of 10.5% as of March 2017.

Public administration and safety and health care and social assistance are the largest sectors of employment in the **MITEZ** region followed by retail trade, education and training, and manufacturing. Townsville is the major employment centre in the region with over three quarters of employment occurring within the Townsville LGA.

Mining is the dominant employment industry in the Mount Isa, Cloncurry, and McKinlay LGAs. Agriculture is also a major employment sector across the LGAs of Richmond, Flinders, and McKinlay. Education and training is the largest employment sector in Charters Towers.

## 2. Demographic Profile (continued)

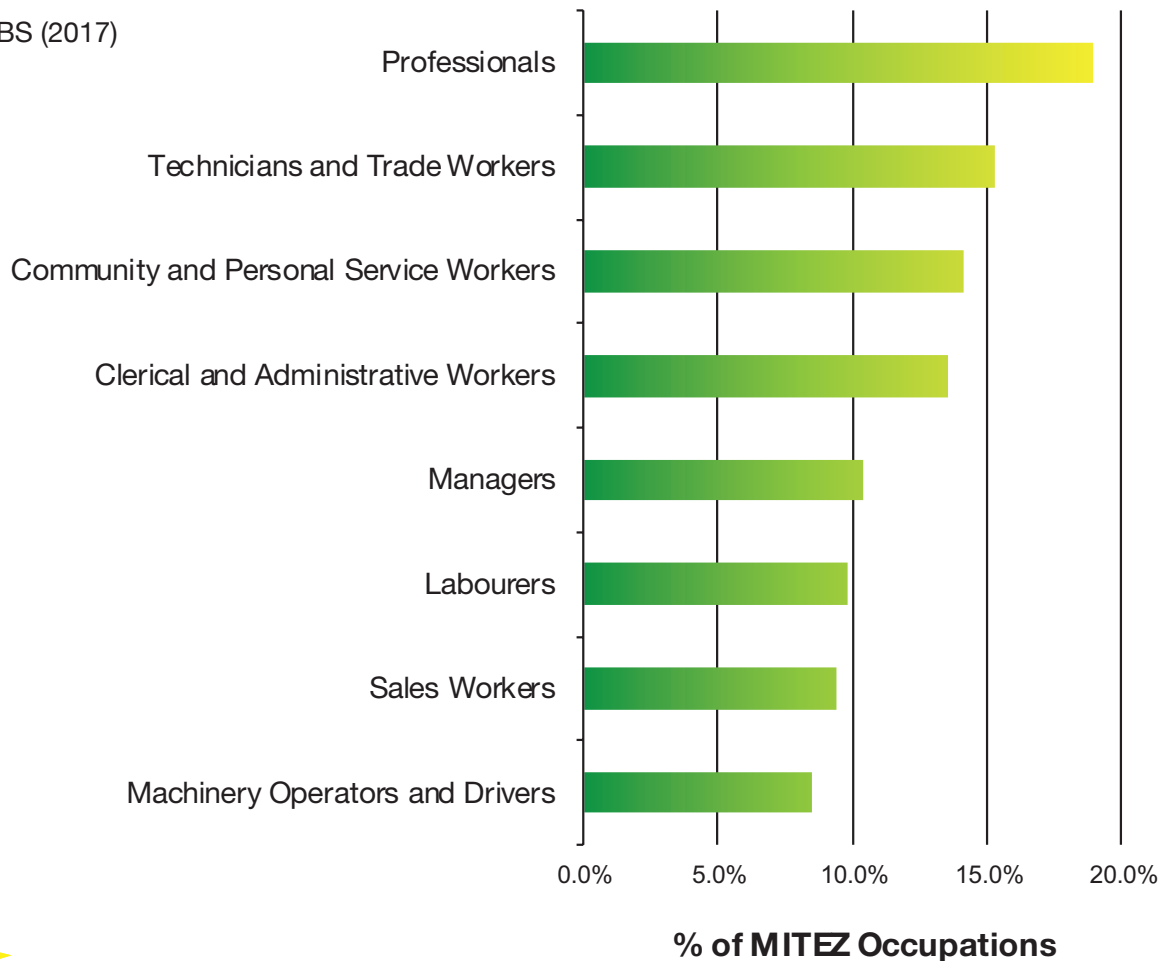


### 2.3 Occupations

The main occupational groups across the **MITEZ** region are professionals, technicians and tradespersons, and clerical and administrative employees. The **MITEZ** region as a whole features a strong balance of worker skills, with no occupational sector contributing more than 19% or less than 8.5% of total employment.

**Figure 2.3. MITEZ Region Employment by Occupation (Place of Work)**

Source: ABS (2017)





## 2. Demographic Profile (continued)



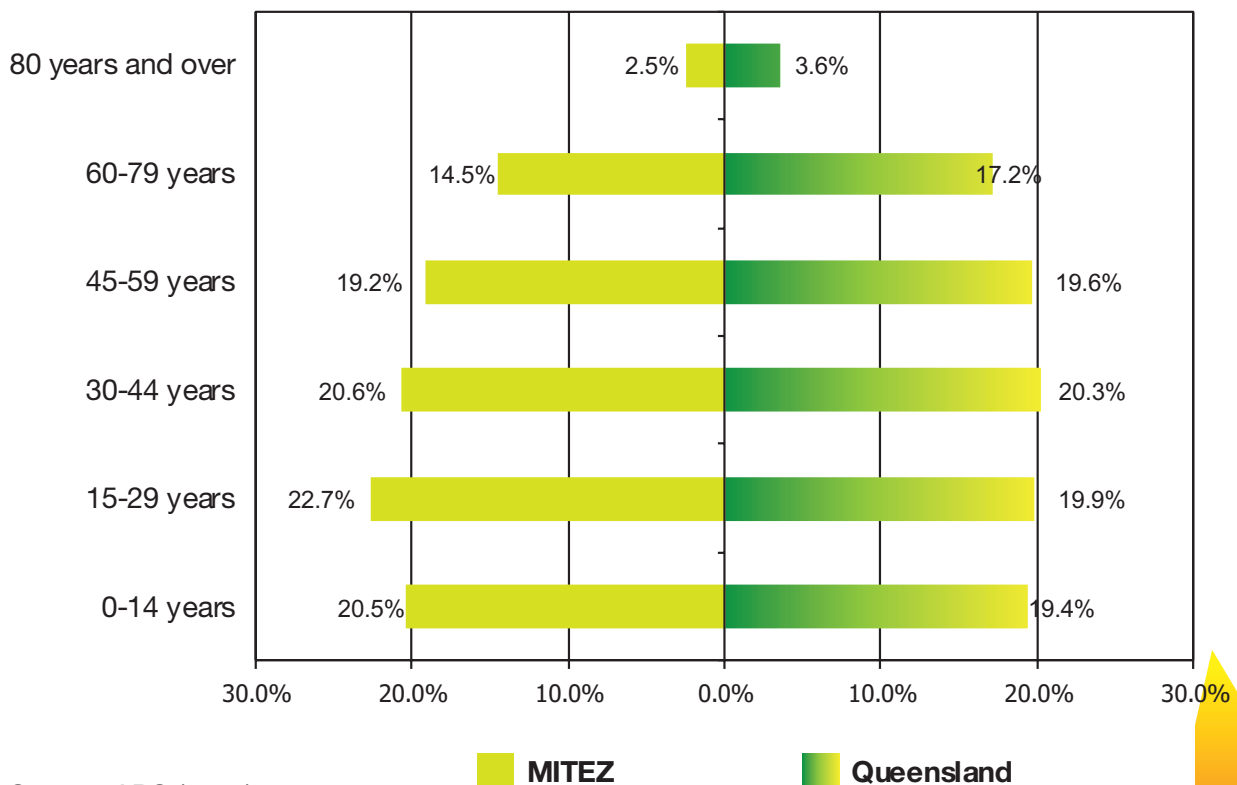
### 2.4 Age

The average age of **MITEZ's** residents is 35.9 years, 2.3 years younger than Queensland as a whole.

The proportion of local **MITEZ** residents when broken down by age groups are generally in line with Queensland as a whole. **MITEZ** residents aged between 15 and 29 accounts for the highest proportion of all age groups (22.7%, compared to 19.9% for Queensland). **MITEZ** residents aged between 30 and 44 years account for 20.6% of the local population (compared to 20.3% for the State).

Residents aged 60 years and over account for only 17.0% of **MITEZ** local resident population (compared to 20.8% for Queensland).

**Figure 2.4. Population by Age**



## 2. Demographic Profile (continued)



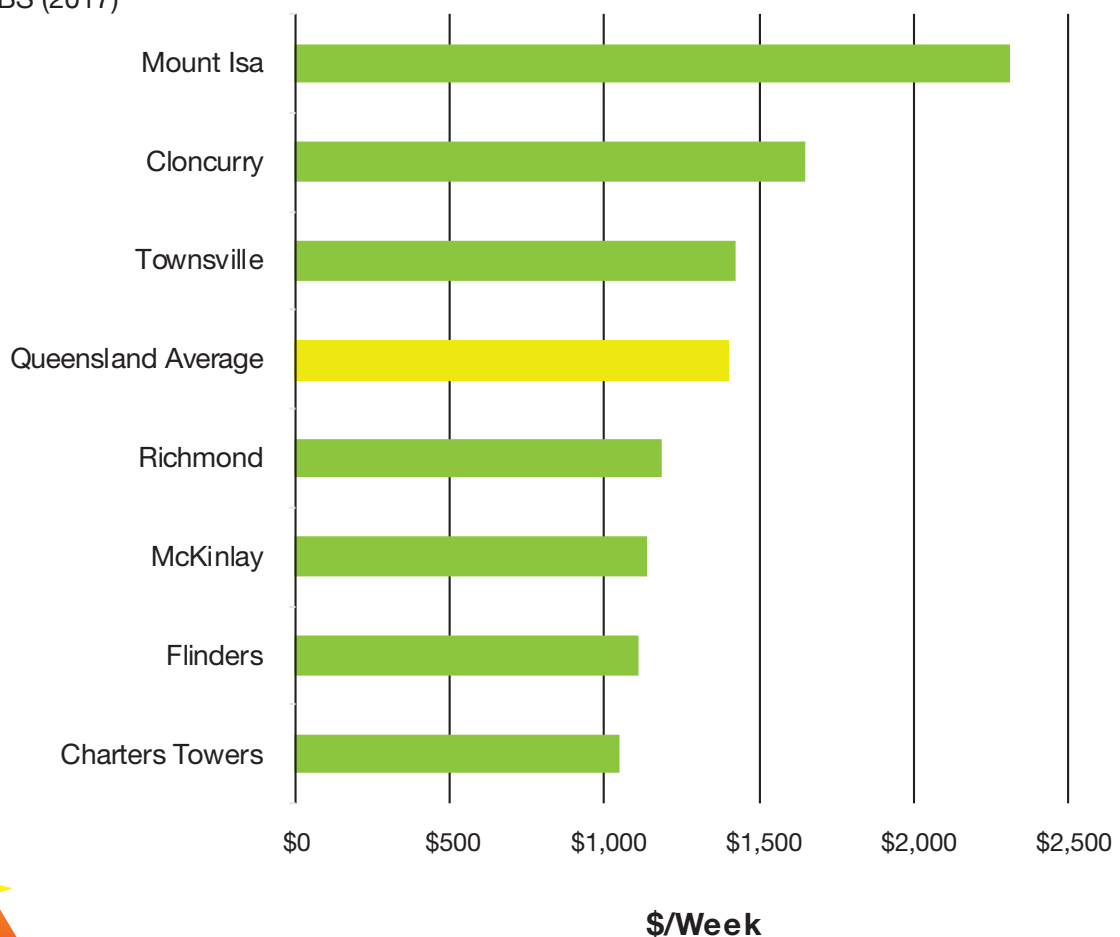
### 2.5 Household Income

The **MITEZ** region features a mix of household income levels, with major population centre Townsville and mining hubs Mount Isa and Cloncurry all featuring median incomes levels above the Queensland average. This is reflective of the prevalence of high paying industries in these regions, such as the mining industry.

Agricultural centres Richmond, McKinlay, Flinders and Charters Towers all feature more affordable labour costs, with median household incomes modestly below the Queensland average.

**Figure 2.5. *MITEZ* Median Household Incomes (\$/Week, 2016)**

Source: ABS (2017)





## 3. Economic Profile

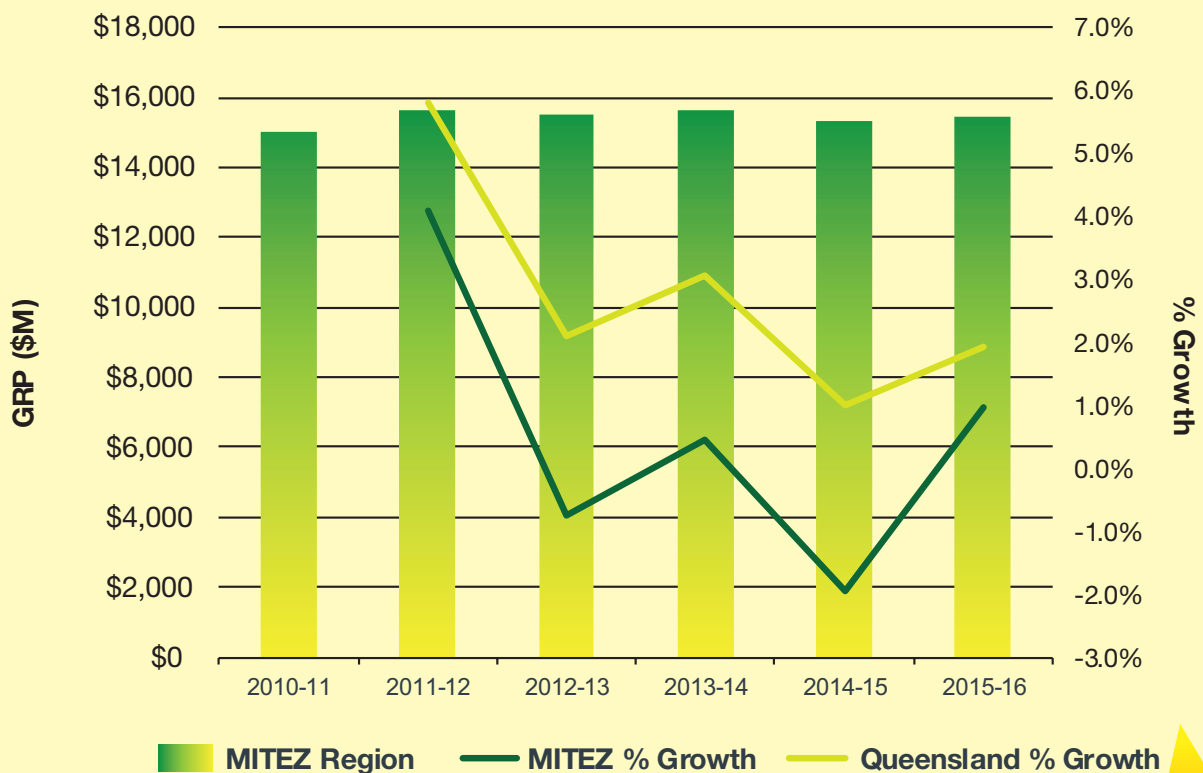


### 3.1 Gross Regional Product

Over 2015-16 the **MITEZ** region generated Gross Regional Product (GRP) totalling \$15.4 billion (approximately 5% of the Queensland economy). Over 2015-16 the region recorded growth of approximately 1.0%.

Over the past five years, GRP growth has averaged 1.4% per annum compared to 2.5% per annum for Queensland as a whole.

**Figure 3.1. MITEZ Region GRP**



Source: AEC

### 3. Economic Profile (continued)

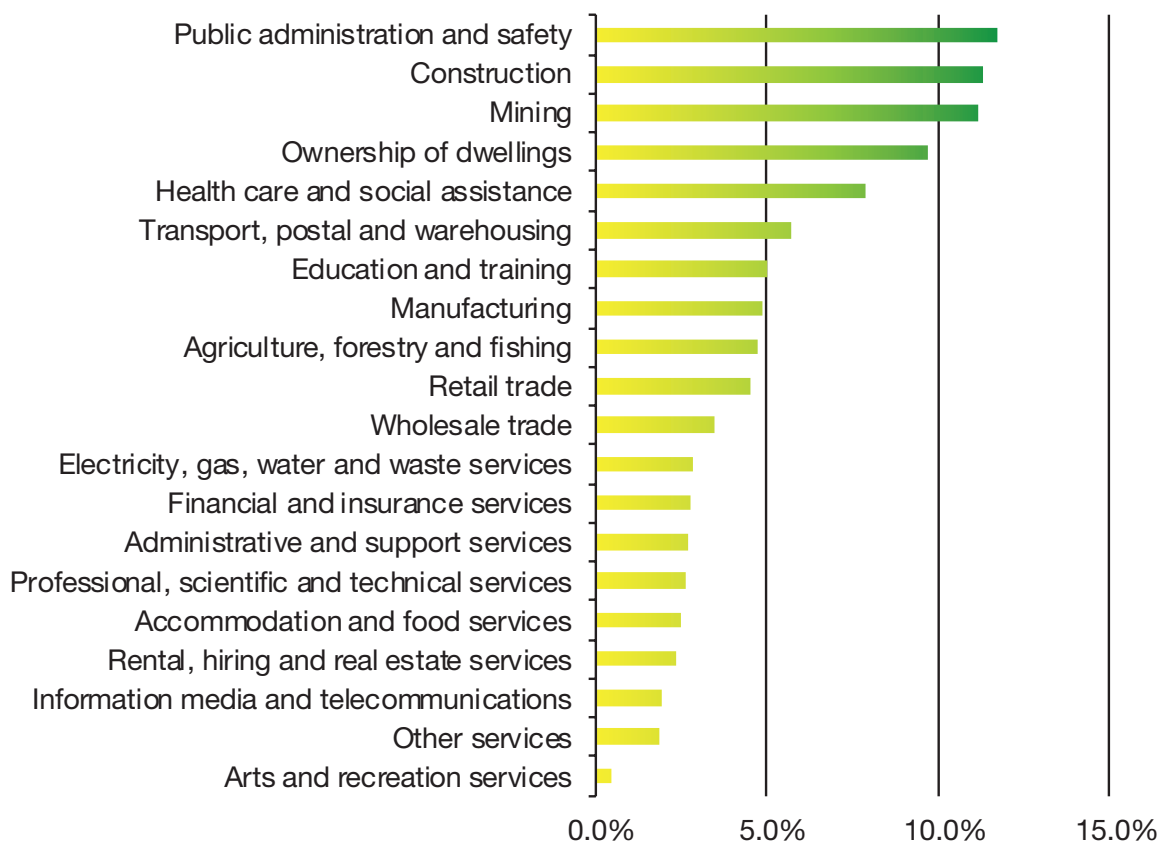
#### 3.2 Industry Value Added

The major industry sectors within the **MITEZ** Region include:

- Public administration and safety (11.7% of Industry Value Added (IVA, i.e. contribution to GRP)).
- Construction (11.3% of IVA).
- Mining (11.1% of IVA).

The breakdown of **MITEZ** industry sectors is provided in Figure 3.2.

**Figure 3.2. MITEZ Region % of IVA (2015-16)**



Source: AEC

**% of MITEZ IVA**

The Townsville LGA provides a major contribution to the **MITEZ** regional economy, with over 70% of IVA in 2015-16. Accordingly, Townsville's industry structure strongly influences the **MITEZ** regional industry structure.

When the Townsville LGA is excluded, the industry contribution to GRP changes significantly, to a predominantly resources-based economy. Across the six LGAs from Mount Isa to Charters Towers the major contributing industries are:

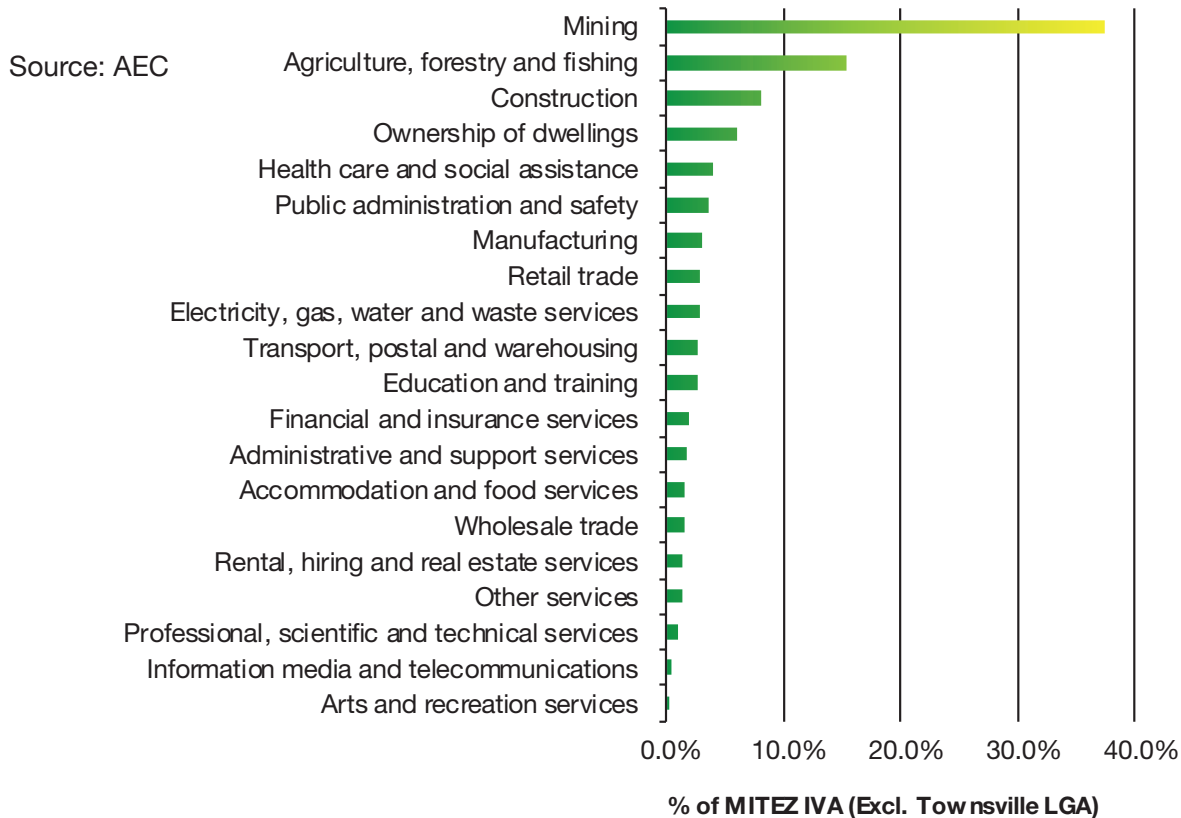
- Mining (37.4% of IVA).
- Agriculture, forestry and fishing (15.4%).
- Construction (8.1%).



## 3. Economic Profile (continued)

### 3.2 Industry Value Added (continued)

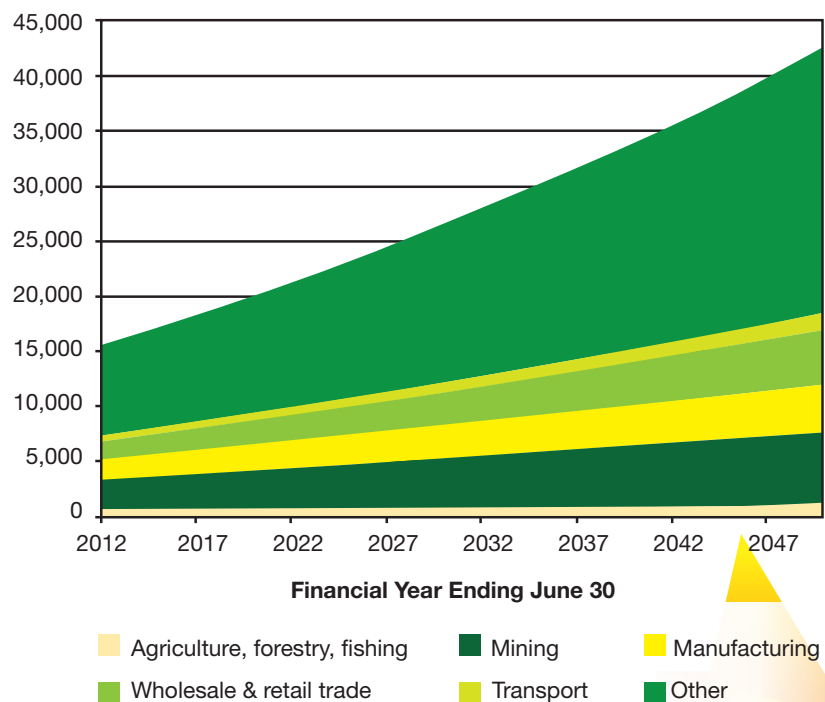
**Figure 3.3. MITEZ GRP by Industry (Excl. Townsville LGA, 2015-16)**



The MITEZ region is poised for substantial growth over the longer term. Forecasts for Gross Value Added (GVA) growth have been developed for the seven LGAs in the region for the MITEZ 50-Year Freight Infrastructure Plan.

It is anticipated that GVA will grow by almost 150%, from an estimated \$15 billion in 2011 to approximately \$40 billion in 2050 (around 2.5% per annum), as shown in the following chart.

The minerals sector is forecast to grow by over 100%, from \$2.2 billion to \$4.5 billion during this time.



**Figure 3.4. MITEZ Region Forecast GVA (\$M)**

Source: Juturna Consulting (2012)

## 4. Major Industries

### 4.1 Agriculture

The agriculture, forestry and fishing sector are major regional industries, estimated to have contributed \$686 million (or 4.7%) towards **MITEZ** GRP in 2015-16. Beef is the primary agricultural commodity produced in the **MITEZ** region, supporting Australia's position as the seventh largest beef producer in the world and the third largest beef exporting nation.

The medium to longer-term outlook for the **MITEZ** beef cattle industry is strong. Rising meat consumption, access to new markets, global supply constraints and a depreciating Australian dollar are all expected to contribute to growing international demand.

Numerous opportunities to diversify into irrigated cropping and higher value beef cattle fattening and finishing have been identified across the region. CSIRO (2013) has identified the potential for an irrigation development totalling 10,000 to 20,000ha in most years across the highly fertile soils of the Flinders Catchment, and detailed feasibility works are currently being undertaken into major new agricultural precincts at Hells Gate Dam (near Charters Towers) and Cave Hill Dam (within the Cloncurry LGA).

The agricultural sector currently accounts for nearly 2,000 jobs (2.0% of employment) in the **MITEZ** region. The industry is a key employer in the LGAs of Cloncurry, McKinlay, Richmond, Flinders and Charters Towers.

### 4.2 Mining

The **MITEZ** region encompasses Queensland's most significant metallic mineral bearing resource - the North West Mineral Province. The mining industry is a major regional economic driver, contributing almost \$1.6 billion (11.1%) to GRP over 2015-16.

The region is a leading supplier of copper, lead, zinc and silver both domestically and globally, possessing a large proportion of the world's proven economic resources of these metals.

The Charters Towers LGA represents Queensland's foremost gold producing region, with the Pajingo, Charters Towers, Warrior and Ravenswood gold mines currently in production and a number of projects in the pipeline for development.

In addition to these resources, copper and gold deposits across the area surrounding Mount Isa add to the region's gold production, with gold a critical co-product of the main minerals outputs.

Despite being an established production area, the region retains excellent prospectivity across a range of existing and new commodities, including:

- Uranium.
- Copper.
- Bauxite.
- Vanadium.
- Molybdenum.
- Silver.
- Phosphate.
- Zinc.
- Oil shale.
- Natural gas.

Recent mineral exploration activity has resulted in the discovery of several new deposits and the extension of known deposits, particularly around the Cloncurry area.

The diversity of production and opportunity provides the North West with significant protection against the commodity price volatility which intensifies the boom-bust cycle of many resource producing areas. This diversity and prospectivity places the North West in a strong position moving forward as the resources sector cycles back to profitability and expansion.

### 4.3 Manufacturing

The **MITEZ** region is a globally significant minerals processing base with major processing plants located in Townsville (Glencore's Copper Refinery and the Sun Metals Zinc Refinery which is currently considering a multimillion dollar expansion). In addition to these operations, Glencore currently undertakes lead smelting through its facilities based at Mount Isa.



## 4. Major Industries (continued)

### 4.3 Manufacturing (continued)

Incitec Pivot Limited (IPL) manufactures a range of ammonium phosphate fertiliser products associated with its Phosphate Hill mine operations in Cloncurry Shire. On site operations at Phosphate Hill include mining, ore processing, beneficiation, and production of ammonia, phosphoric acid, and granulation. IPL's export and warehouse facilities are located at Townsville. A key regional industry, the manufacturing sector contributed just under \$700 million (4.8%) to GRP over 2015-16. The sector accounts for 4.5% of persons employed in the **MITEZ** region.

Aside from mineral processing, the region is well positioned to take advantage of the opportunities presented by processing of horticultural outputs and value-added food production. The region has extensive surface water runoff, albeit on a highly seasonal basis, that may in the future drive major new agriculture developments.

Advanced manufacturing facilities and tropical science expertise present in the region provide potential investors with the opportunity to manufacture and supply niche horticultural products for export.

A 180,000 head per annum abattoir is currently proposed within the Flinders Shire at Hughenden, with proponents seeking to take advantage of the region's extensive beef production and strong demand outlook. The existing JB Swift Meatworks at Townsville is a major regional facility, employing 600 people with a processing capacity of over 900 head of beef cattle per day.

Comprehensive infrastructure networks in Townsville such as the international airport, energy, water, rail, road and telecommunications networks, and deep-water port facilities, lend significant support to the manufacturing sector. The region is well represented by local, national and international organisations, providing the necessary expertise for future manufacturing development.

### 4.4 Transport

The **MITEZ** region is linked to the Northern Territory via the Barkly Highway, whilst linkages to Central Queensland and South-West Queensland are via the Kennedy Development Road, Landsborough Highway and the Diamantina Development Road. The Burke, Gregory and Wills Development Roads provide linkages to Far North Queensland.

Connectivity between the North West Queensland area and the Port of Townsville has been significantly enhanced via the recently completed Port Access Road connecting the Port directly to the Bruce and Flinders Highway, removing an existing bottleneck and greatly improving transport efficiency in and out of the Port of Townsville.

A north-south rail link extends from Cairns to Brisbane through Townsville, while the Great Northern Railway runs east-west through the **MITEZ** region from Townsville to Mount Isa.

These rail networks are linked to the Port of Townsville enabling the smooth transition of commodities from land to sea or vice versa. Railway lines in both the greater Townsville and Mount Isa regions have the capacity to handle 114 tonne locomotives and 80 tonne wagons. The rail system carries a range of products including sulphuric acid, lead, cattle, copper, nickel ore, fuel, and zinc.

The Port of Townsville is one of Australia's major ports, facilitating over 9.2 million tonnes of throughput worth over \$10 billion in 2015-16. Now handling more than 30 commodities, the Port of Townsville is the largest general cargo and container port in Northern Australia, and the country's number one exporter of zinc, lead, sugar, fertiliser and molasses.

The primary airport for the region is the Townsville International Airport. In 2016-17, Townsville airport reached approximately 1.6 million total passenger movements and is currently planning a \$40 million terminal upgrade and expansion. The airport has two runways; one is able to accommodate Boeing 747 aircraft, while the other is suitable for aircraft up to 5,700 kilograms.

## 4. Major Industries (continued)

### 4.4 Transport (continued)

Mount Isa's airport is located in close proximity to the North West Minerals Province. Daily services operate between Townsville and Mount Isa linking the eastern and western extremities of the region, with regular direct flights to the state capital Brisbane also available. Mount Isa also has daily Boeing 717 services with the capability of handling larger jets.

The airport also provides regular links to Cairns. In the 12 months to December 2017, the Mount Isa airport reported 190,106 total passenger movements.

The Cloncurry Airport has regular services to Townsville and Brisbane and Mount Isa as well as charter services for local mines. The Hughenden, Richmond, and Julia Creek airports facilitate regular flights linking between Mount Isa and Townsville.

Airports capable of light aircraft traffic service other centres within the region and major mining projects have airport facilities catering for light charter to Fokker 100 size aircraft.

### 4.5 Engineering

Strong development in Northern and North West Queensland has encouraged many engineering firms to establish in the **MITEZ** region. As such, the area is home to many local, national and international engineering firms providing essential expertise and support to the agriculture, mining and manufacturing industries.

Supporting these industries is a strong base of technical/trade, machinery operator and professional services skills, with these occupations representing over 42% of total employment in the **MITEZ** region.

### 4.6 Service Industries

Although mining, manufacturing and agriculture comprise the mainstay of the **MITEZ** region's economic base, the region is supported by a range of service industries. Townsville acts as the major administration and service centre for

the **MITEZ** region as well as the greater North Queensland region.

Major service sectors include health care and social assistance (accounting for 14.6% of the **MITEZ** regional workforce), public administration and safety (13.1% in **MITEZ** compared to only 6.8% for Queensland, reflective of a significant defence force located in Townsville), and retail trade (10.1% of regional employment).

The region possesses extensive professional, personal and community services with the best level of services outside of South East Queensland. Many accounting, finance, insurance, legal and other professional business services have established in the region to support the needs of business, industry and the community.

The Federal and State Governments are well represented in the region with most offices located in Townsville and Mount Isa.

### 4.7 Education and Research

The **MITEZ** region is home to various education and research institutions of national importance. Facilities include James Cook University (Townsville and Mount Isa), TAFE Queensland North (Townsville, Mount Isa, Cloncurry and Charters Towers), Australian Technical College (Townsville) plus numerous research institutes including the Australian Institute of Marine Science (AIMS) and the Commonwealth Scientific and Industrial Research Organisation (CSIRO).

In late 2014, Central Queensland University opened a new campus in Townsville's CBD, as well as a Distance Education Study Hub in Charters Towers.

### 4.8 Tourism

Tourism is a significant industry for the **MITEZ** region, supporting local businesses and demand for services. A total of over 2.6 million visitors came to the **MITEZ** region over 2015-16. This comprised of 1.4 million day visitors, 1.1 million overnight visitors and approximately 130,000 international visitors.

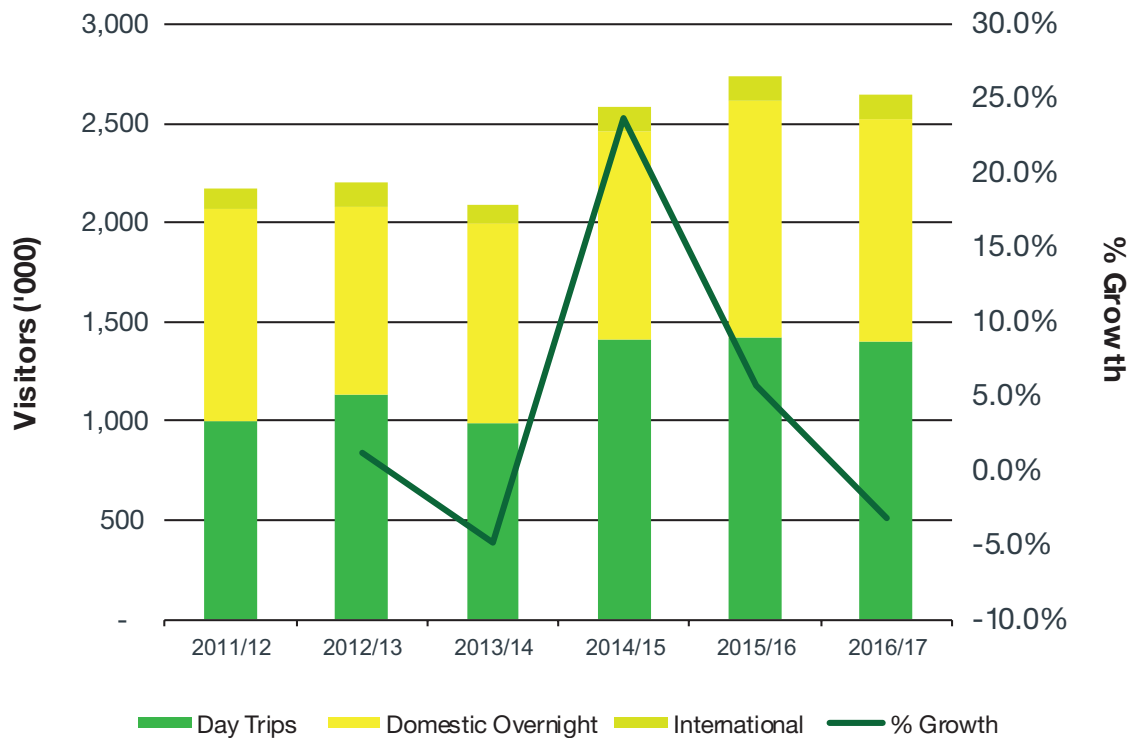


## 4. Major Industries (continued)

### 4.8 Tourism (continued)

Visitation has grown at an average annual rate of just over 4% per annum since 2011-12.

**Figure 4.1. MITEZ Region Tourism Visitation**



Note: Estimates based on the sum of visitation to respective tourism regions/Statistical Areas Level 2.

Source: TRA (2017)

Tourism is a key industry across the **MITEZ** region, with extensive attractions throughout the region.

A significant proportion of visitation to the region is to Townsville, with its key attractions of Magnetic Island and the Great Barrier Reef, as well as a strong events calendar throughout the year.

The Overlander's Way passes through the heart of the **MITEZ** region, and visitors can experience the wonders of the outback including the historic mining towns of Charters Towers and Ravenswood, the old fashioned country hospitality of Mingela, Pentland, Julia Creek and Cloncurry, the mining hub of Mount Isa with the world famous Riversleigh fossil fields, the dinosaur display centre at Hughenden and the marine fossil museum at Richmond.

The region features an impressive events calendar, including the iconic Julia Creek Dirt n Dust Festival and Mount Isa Rodeo.

In the **MITEZ** region, visitors can experience everything that the reef and the outback have to offer. Visitors can enjoy water-based activities such as sailing, diving, snorkelling and fishing or land-based activities such as bushwalking, horse riding and camping. Visitor centres have been established throughout the region to guide visitors to these activities as well as the natural and man-made attractions of the region.

## 4. Major Industries (continued)

### 4.9 Water and Energy

#### 4.9.1 Water supplies

The **MITEZ** region is serviced by several surface water supplies with the most prominent facilities in the region being the Burdekin Falls Dam, Ross River Dam, Mount Spec Dam, Lake Moondarra, Julius Dam and Chinaman Creek Dam. Major rivers or underground water supplies including the Burdekin, Cloncurry, Flinders, Leichhardt and Diamantina rivers service the remaining centres in the region.

A 113 kilometre North West Queensland pipeline supplies water from Julius Dam to Ernest Henry Mine in Cloncurry, while a 38 kilometre pipeline constructed in 2010 supplies water from an existing North West Queensland pipeline to the town of Cloncurry.

The Richmond, Charters Towers, Cloncurry and Flinders Shires are developing plans for water storages that will enable the establishment of significant agricultural irrigation precincts.

Aquifers along the Flinders River at Hughenden hold vast amounts of easily accessible water for cropping such as fodder and grain crops. Both shires welcome enquiries for potential investment into these projects.

The major water storages at Cave Hill Dam in the Cloncurry Shire and Hells Gate Dam near Charters Towers are currently undergoing detailed feasibility assessments.

#### 4.9.2 Electricity

Much of the region is connected to the National Electricity Market (NEM) power grid with electricity supplied from a mix of coal-fired and gas-fired power stations in Central and North Queensland that provide a reliable, competitively priced, secure power supply. In Townsville, a base load gas-fired power station is located at Yabulu (230MW) and at Mount Stuart the peak load power station is being expanded from 288MW to 414MW.

The recently constructed Diamantina and Leichhardt Power Stations are located six kilometres southwest of the city of Mount Isa. The Diamantina Power Station is a modern high-efficiency power station comprising of 242MW power generation from combined cycle gas turbines, with 60MW back up power supply available from the Leichhardt Power Station open cycle facility.

In the North West Minerals Province, the Mica Creek Power Station in Mount Isa has a capacity of 215MW and is fuelled by natural gas. Mica Creek is Mount Isa's longest-term power station and still remains a highly reliable, efficient and well maintained generator with power supply contracts with a number of mines. Glencore's Mount Isa Mines has installed a 30MW gas fired power station increasing the total capacity of the North West power grid. Electricity is sold to Mount Isa Mines, Ernest Henry Mining, Century Mine, Mount Gordon Mine and Ergon Energy.

Under open competition conditions arising in the Queensland energy market, the North West Minerals Province provides a vignette of competitive supply possibilities. APA currently operates a major gas pipeline from Ballera to Mount Isa (840 kilometres). At Ballera other pipelines connect down to Moomba in South Australia and east to Wallumbilla, the hub for Coal Seam Gas supply. Gas is available from a number of suppliers throughout the gas network.

An \$800 million gas pipeline connection between Mount Isa and Tenant Creek in the Northern Territory is currently under construction and due for completion by 2018.

The connection of North West Queensland to the NEM has been the subject of discussion for some time, and a number of proponents are now in discussions with customers in the region to advance this option. Connection to the NEM would provide significant long-term benefit to the region and provide a more competitive market for energy supply.

## 4. Major Industries (continued)

### 4.9 Water and Energy (continued)

Major industries setting up in the region are able to negotiate with suppliers to obtain suitable tariffs. Negotiations will depend upon the strategic importance of the project, load requirements, project timing and level of security of electricity supply needed.

#### 4.9.3 Renewable Energy

The **MITEZ** region has significant renewable energy resources. Renewable power schemes currently being considered include geothermal hot rock formations at Cloncurry and Julia Creek, wind farms near Mount Isa and solar thermal power projects throughout the region.

Solar and wind generation costs are decreasing at a steady rate, and costs may match traditional energy sources. Several solar projects are currently underway in the region, including the 116 MW Sun Meals and 148 MW Ross River Solar farms in Townsville and the 20MW Hughenden solar farm in the Flinders Shire.

Stage one of Windlab's Kennedy Energy Park, also located in Flinders Shire is scheduled to commence construction in March 2018. The \$120 million stage one includes wind turbines generating 50 MW of energy with an additional 2 MW from Lithium-ion battery storage. Should stage one prove successful, the company has much larger plans for a \$2 billion 1,200 MW stage two project.

In addition to renewable energy opportunities, large deposits of oil shale at Julia Creek and natural gas deposits within Lawn Hill and the Georgina Basin may also present future energy supply options for the region.

#### 4.9.4 Natural Resources

A significant proportion of Queensland's wealth is built on mining and mineral processing of which the **MITEZ** region is a significant contributor. The resource-abundant region encompasses the North West Mineral Province, centred on the Mount Isa and Cloncurry region, as well as gold and base metal deposits in the Charters Towers area.

#### 4.9.4.1 Copper, Lead, Silver, Zinc and Gold

The region encompasses the North West Mineral Province which is one of the premier regions in the world for base metals due to the quantity of resources discovered. Deposits of lead, silver, zinc and copper include Glencore's mines in Mount Isa and Cloncurry, the BHP Cannington deposit and Minmetals Dugald River deposit, which are some of the world's largest single producers of lead and silver and one of the world's largest producers of copper and zinc.

#### 4.9.4.2 Coal, Gypsum, Phosphate, Limestone and Granite

Pentland, near Charters Towers, is the northern tip of the Galilee Basin Coal Reserve which is continuous with the Bowen Basin. The Galilee Basin contains large quantities of sub hydrous non-coking coal. Gypsum deposits are located at Hughenden and Richmond. Deposits have been worked at Hughenden and used as a soil conditioner for agricultural purposes.

Phosphate Hill Mine near Duchess produces phosphate rock that is processed by Incitec Pivot's phosphate fertilizer plant.

Queensland has extensive limestone resources - the majority found in eastern Queensland. Limestone is primarily used in cement production as well as agricultural purposes. Finds in Mount Isa have potential to service the expanding industrial and mine development in the western areas of the region.

In addition, significant granite resources lie to the south and west of Mount Isa. The area encompasses several large out-crops of granitic gneiss which display a range of colours and textures of which pink is the most notable. Other reserves are located near Charters Towers. An opportunity exists to process these granite resources.

#### 4.9.5 Rare Earths (lanthanide elements)

Rare earths, or lanthanide elements, are also found in deposits such as Mary Kathleen and Ernest Henry as well as at Mica Creek south of Mount Isa and near Camel Creek north of Townsville.



## 4. Major Industries (continued)

### 4.10 THE FUTURE

The Mount Isa to Townsville Economic Zone is a nationally important economic zone with a strong long-term growth outlook.

The region possesses a diversity of resources and opportunities, providing a degree of protection and stability from the exogenous economic shocks which heighten the boom-bust cycles of many resource producing regions. The region generates extensive export revenues and has proven mineral resources to support strong growth into the foreseeable future.

Looking ahead, steady GRP growth of 2-3% per annum is projected in the **MITEZ** region over the coming years. Significant upside potential exists given the range of development opportunities available and under consideration across the region.

Overall the economic outlook for the region remains optimistic. MITEZ will continue to profile and market the region to investors and trade partners in an active partnership approach, committed to the continued prosperity of the MITEZ region.



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