Toowoomba Regional Council
Agriculture Sector Profile

FEBRUARY 2011

Introduction

Agriculture is one of the largest industries in the Toowoomba Regional Council (TRC) area, being a significant employer and contributor to the local economy. The region is a large producer of grain, cotton, beef, dairy products and pork and has a growing horticultural industry. Key highlights for the local agricultural industry include:

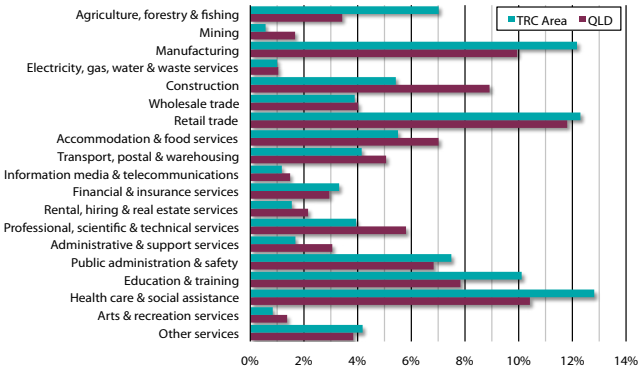
- Largest industry in terms of number of businesses;
- Second highest total industry turnover;
- Eighth largest industry contributor to Gross Regional Product;
- Sixth largest industry employer locally;
- Significant proportion of total State production across many pastures, broad acre crops, livestock types and fruit and vegetable crops; and
- Greater competitive advantage / net level of exports, with higher concentration of employment, then both Queensland and Australia.

Two major agricultural resource centres are situated in Toowoomba, namely the National Centre for Engineering in Agriculture, based at the USQ and the Queensland Centre for Climate Applications, which provides research into the climate impacts on agriculture.

Employment

The number of persons employed in the Agriculture, Forestry & Fishing industry in the Toowoomba Region, as at the 2006 Census, was approximately 4,211 persons, or 7.0% of the total working population, making it the sixth largest industry employer. The Toowoomba Region had a higher proportion of employment share in the Agriculture, Forestry & Fishing industry in 2006 than Queensland (3.4%).

Working Population
Employment by Industry



Source: ABS 2006 Census

Working Population, Employment by Industry, 2006

	TRC Area		Queensland	
	No.	% of total	No.	% of total
Agriculture, forestry & fishing:	4,211	7.0	59,507	3.4
Agriculture, forestry and fishing, nfd	33	0.1	394	0.0
Agriculture	3,948	6.6	52,392	3.0
Aquaculture	3	0.0	531	0.0
Forestry and logging	43	0.1	1,033	0.1
Fishing, hunting and trapping	0	0.0	1,508	0.1
Agriculture, forestry and fishing support services	184	0.3	3,649	0.2
Total	**59,993**	**100.0**	**1,737,619**	**100.0**

Source: ABS 2006 Census

Gross Value of Production

The total gross value of agricultural production in the TRC area was approximately $663.3 million in 2005/06, which comprised 7.6% of the total for Queensland ($8.7 billion).

Livestock slaughterings recorded the highest value of production in the TRC area in 2005/06, with $322.4 million or 48.6% of total agricultural production. This was followed by crops, with $233.9 million or 35.3%, and livestock products, with $107.0 million, or 16.1% of total.

Gross Value of Production ($ million), 2005/06

	TRC Area		Queensland	
	Value ($m)	% of total	Value ($m)	% of total
Crops:	233.9	35.3	4,167.9	47.9
Pasture, cereal and other crops cut for hay	15.4	2.3	114.7	1.3
Crops (excluding hay):	218.5	32.9	4,053.2	46.5
Nurseries, cut flowers and cultivated turf	22.9	3.5	297.0	3.4
Vegetables	27.0	4.1	945.0	10.9
Fruit	7.5	1.1	910.8	10.5
Livestock slaughterings	322.4	48.6	4,125.2	47.4
Livestock products	107.0	16.1	415.8	4.8
Total Agriculture	**663.3**	**100.0**	**8,708.9**	**100.0**

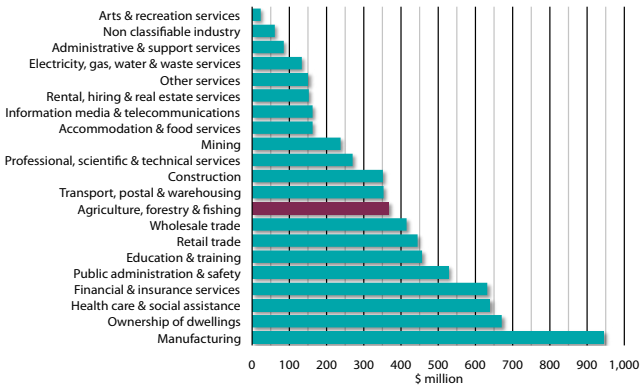
Source: ABS 7125.0

Contribution to GRP

The Agriculture, Forestry & Fishing sector in the TRC area recorded industry value added (or contribution to Gross Regional Product) of $366.1 million in 2009/10, or 4.8% of the total GRP for the region ($7.7 billion).

Agriculture, Forestry & Fishing was the eighth largest industry contributor to GRP in 2009/10 behind Manufacturing ($945.2 million), Health Care & Social Assistance ($639.0 million), Financial & Insurance Services ($631.8 million), Public Administration & Safety ($527.0 million), Education & Training ($456.6 million), Retail Trade ($444.6 million) and Wholesale Trade ($415.0 million).

Industry Contribution to GRP
TRC Area, 2009/10

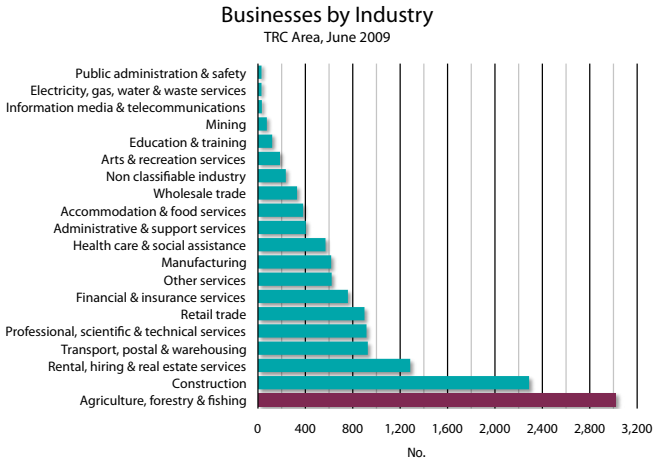


Source: Lawrence Consulting

The Agriculture, Forestry & Fishing sector in the TRC area comprised approximately 6.0% of the total industry GRP for Queensland in 2009/10 ($6.1 billion).

Business Numbers

There were an estimated 3,019 businesses in the Agriculture, Forestry & Fishing industry in the TRC area in June 2009, making it the largest regional industry in terms of business numbers, accounting for 22.0% of all businesses.



Source: ABS 8165.0

The estimated total turnover of the Agriculture, Forestry & Fishing sector in the TRC area was $1.9 billion in 2008/09, which represented 15.7% of the total industry turnover in the region ($12.1 billion) and was the second highest industry turnover in 2008/09 behind Retail Trade ($2.4 billion). The average turnover of Agriculture, Forestry & Fishing businesses in the TRC area was approximately $628,000 in 2008/09.

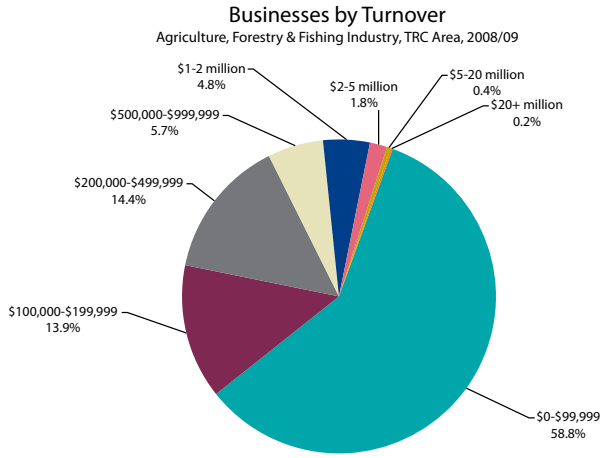
Businesses by Industry & Turnover, TRC Area, June 2009

Industry	Total (No.)	% of total	Total industry turnover ($m)	% of total	Avg. turnover ($'000s)
Agriculture, forestry & fishing	3,019	22.0	1,896.0	15.7	628.0
Mining	75	0.5	881.2	7.3	11,749.5
Manufacturing	618	4.5	517.5	4.3	837.4
Electricity, gas, water & waste services	30	0.2	26.6	0.2	887.5
Construction	2,288	16.7	1,262.4	10.4	551.7
Wholesale trade	330	2.4	1,069.1	8.8	3,239.8
Retail trade	899	6.5	2,396.4	19.8	2,665.6
Accommodation & food services	381	2.8	283.0	2.3	742.8
Transport, postal & warehousing	927	6.8	796.6	6.6	859.3
Information media & telecommunications	33	0.2	4.1	0.0	125.0
Financial & insurance services	759	5.5	337.0	2.8	444.1
Rental, hiring & real estate services	1,285	9.4	553.4	4.6	430.6
Professional, scientific & technical services	916	6.7	490.2	4.1	535.2
Administrative & support services	404	2.9	309.5	2.6	766.1
Public administration & safety	30	0.2	6.7	0.1	223.8
Education & training	120	0.9	130.4	1.1	1,086.6
Health care & social assistance	570	4.2	323.3	2.7	567.2
Arts & recreation services	186	1.4	44.5	0.4	239.1
Other services	622	4.5	694.3	5.7	1,116.3
Non classifiable industry	235	1.7	60.0	0.5	255.5
Total	13,727	100.0	12,082.2	100.0	880.2

Source: ABS 8165.0

Turnover & Workforce Size

The largest proportion of Agriculture, Forestry & Fishing businesses in the TRC area recorded annual turnover in the $0-$99,999 range (58.8%), followed by the $200,000-$499,999 (14.4%) and $100,000-$199,999 (13.9%) turnover ranges. Approximately 7.2% of Agriculture, Forestry & Fishing business in the TRC area recorded annual turnover in excess of $1 million in 2008/09.



Source: ABS 8165.0

The largest proportion of Agriculture, Forestry & Fishing businesses in the TRC area were non-employing (i.e. business owners only, no additional staff) with 81.1% in 2008/09, followed by businesses with workforces of 0-4 (13.3%) and 5-19 (4.7%). The average workforce size across all Agriculture, Forestry & Fishing businesses in the TRC area was 1.3 persons.

Agriculture, Forestry & Fishing Industry Turnover & Workforce Size, 2008/09

	No.	% of total
Turnover range		
Zero to less than $25,000	879	29.1
$25,000 to less than $50,000	474	15.7
$50,000 to less than $75,000	273	9.0
$75,000 to less than $100,000	148	4.9
$100,000 to less than $150,000	250	8.3
$150,000 to less than $200,000	169	5.6
$200,000 to less than $500,000	436	14.4
$500,000 to less than $1 million	173	5.7
$1 million to less than $2 million	145	4.8
$2 million to less than $5 million	54	1.8
$5 million to less than $10 million	9	0.3
$10 million to less than $20 million	3	0.1
$20 million to less than $50 million	0	0.0
$50 million to less than $200 million	3	0.1
More than $200 million	3	0.1
Total	**3,019**	**100.0**
Workforce size		
Non employing	2,449	81.1
0-4	402	13.3
5-19	141	4.7
20-49	18	0.6
50-99	9	0.3
100-199	0	0.0
200+	0	0.0
Total	**3,019**	**100.0**
Avg workforce	1.3	-

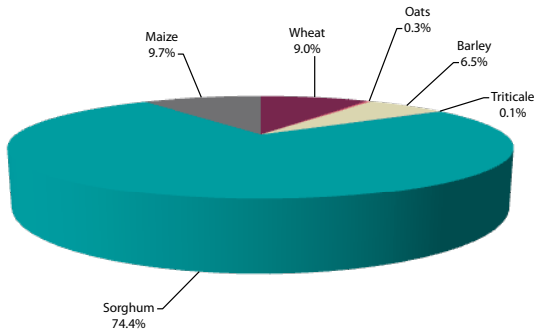
Source: ABS 8165.0

PASTURES & BROAD ACRE CROPS

Cereals

The total area of cereal crops for all purposes in the Toowoomba Region was 223,475ha in 2005/06, which represented approximately 13.1% of the total area for Queensland (1,711,978ha). The total production of cereals for grain was 500,589 tonnes in 2005/06, representing an average yield across all crops of 2.6t/ha, higher than the average yields for the Darling Downs (2.0t/ha) and Queensland (1.8t/ha).

Proportion of Cereal Crop Production
TRC Area, 2005/06

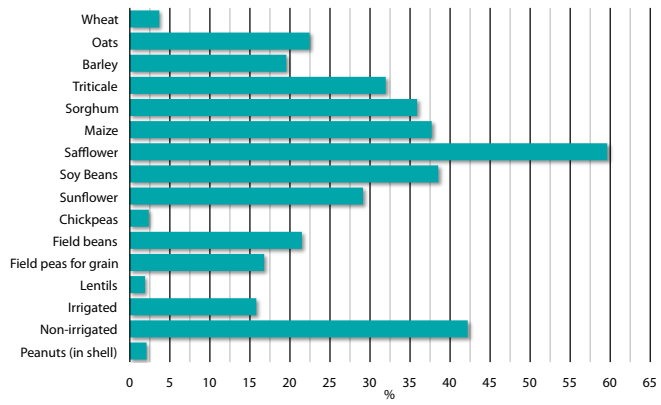


Source: ABS 7125.0

Non-Cereal Broad Acre Crops

The total area of non-cereal broad acre crops in the Toowoomba Region was 43,554ha in 2005/06, which represented approximately 6.3% of the total area for Queensland (691,517ha). Of the total area for non-cereal broad acre groups, Cotton constituted the largest area with 29,205ha, followed by Legumes (5,475ha) and Oilseeds (4,691ha). Cotton crops in the Toowoomba Region constituted 22.5% of the total area for Queensland, whilst Oilseeds and Legumes constituted 27.2% and 9.3%, respectively.

Proportion of State Production (%)
Pastures & Broadacre Crops, TRC Area, 2005/06



Source: ABS 7125.0

Pastures & Broad Acre Crops

	Area (ha)	Production (t)	Gross yield (t/ha)	Number of establishments	% of Qld Production
Cereal Crops					
Cereal for grain					
Wheat	37,614	44,827	1.2	354	3.7
Oats	2,471	1,675	0.7	121	22.5
Barley	32,159	32,450	1.0	456	19.6
Triticale	391	381	1.0	10	32.0
Sorghum	102,704	372,569	3.6	759	35.9
Maize	9,538	48,687	5.1	159	37.7
Cereals for grain (total)	191,348	500,589	2.6	1,008	19.6
All cereals for all other purposes (e.g. silage or fed off)	32,125			603	
Cereals for all purposes	**223,475**			**1,327**	
Non-Cereal Broad acre Crops					
Oilseeds					
Safflower	62	65	1.0	1	59.6
Soy Beans	2,631	5,203	2.0	47	38.5
Sunflower	1,998	2,388	1.2	50	29.1
Oilseeds (total)	4,691	7,656	1.6	96	33.9
Legumes					
Chickpeas	1,401	940	0.7	27	2.4
Field beans (including faba, tick, horse, broad, mung and other field beans)	3,870	3,019	0.8	62	21.5
Field peas for grain	198	71	0.4	4	16.8
Lentils	6	2	0.3	1	1.9
Legumes (total)	5,475	4,033	0.7	89	7.4
Cotton					
Irrigated	17,595	77,319,582	4,394.4	111	15.8
Non-irrigated	11,611	23,959,335	2,063.5	84	42.2
Cotton (total	29,205	101,278,917	3,467.9	150	18.5
Other Crops					
Peanuts (in shell)	300	502,520	1,675.1	4	2.1
Non-cereal broad acre crops n.e.c.	3,882			79	
Non-Cereal Broad acre Crops (Total)	**43,554**			**352**	

Source: ABS 7125.0

Horticulture

The total area of vegetable crops for human consumption in the Toowoomba Region was 1,526ha in 2005/06, which represented approximately 4.1% of the total area for Queensland (37,668ha). The most prominent vegetable crops in the Toowoomba Region with regard to proportion of the total production for Queensland in 2005/06 were Celery (31.8% of the total), Garlic (30.3%) and Broccoli (22.5%).

Major Vegetable Crops

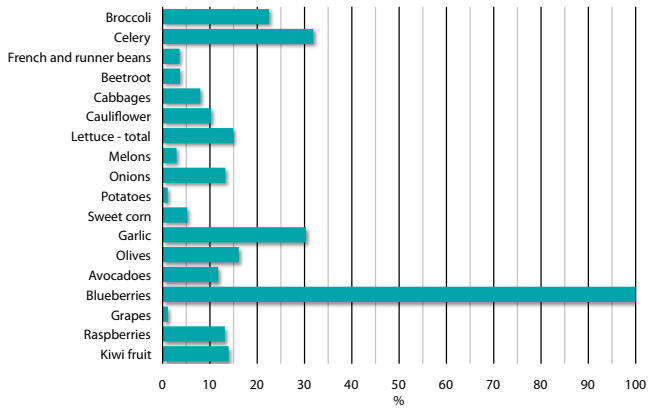
	Area (ha)	Production (t)	Gross yield (t/ha)	% of Qld prod.
Broccoli	305	2,298	7.5	22.5
Celery	49	1,738	35.5	31.8
French and runner beans	204	704	3.5	3.6
Beetroot	46	1,153	25.1	3.7
Cabbages	41	1,622	39.6	8.0
Cauliflower	56	1,546	27.6	10.3
Lettuce - total	327	7,910	24.2	14.9
Melons	96	3,342	34.8	2.9
Onions	142	3,633	25.6	13.3
Potatoes	41	1,002	24.4	1.1
Sweet corn	172	1,460	8.5	5.2

Source: ABS 7125.0

The total area of fruit crops (excluding grapes) in the Toowoomba Region was 2,472ha in 2005/06, which represented approximately 4.6% of the total area for Queensland (53,790ha). The total area of grape vines in the Toowoomba Region was 68ha, or 2.6% of the total area for Queensland (2,613ha).

Of all fruits excluding grapes, Avocados had the highest level of production with approximately 2.6 million kg in 2005/06, followed by Olives (227,115kg) and Oranges (89,684kg). The most prominent fruit crops in the Toowoomba Region with regard to proportion of the total production for Queensland in 2005/06 were Blueberries (100.0% of the total for Queensland), Olives (16.1%), Kiwifruit (14.0%), Raspberries (13.1%) and Avocadoes (11.7%).

Proportion of State Production (%)
Major Fruit & Vegetable Crops, TRC Area, 2005/06



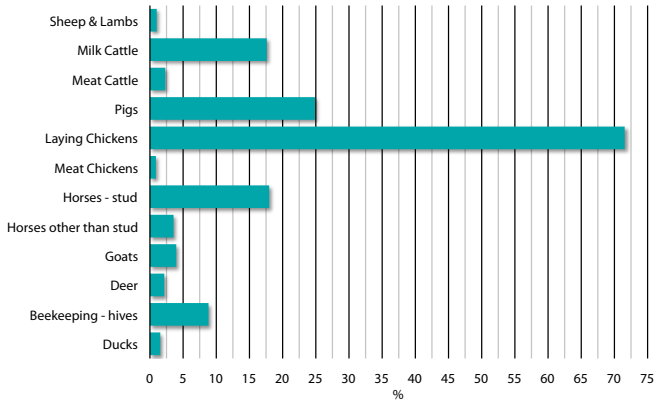
Source: ABS 7125.0

The total number of nurseries in the Toowoomba Region was 14 in 2005/06 covering an area of 127ha, which represented approximately 10.8% of the total area for all Queensland nurseries (1,175ha). There were 122ha of cut flowers (18.7% of the Queensland total) and 93ha of cultivated turf (3.3%) in 2005/06.

Livestock

The most prominent livestock type in the Toowoomba Region with regard to proportion of the total industry for Queensland in 2005/06 was Laying Chickens with a total of 2,478,314, or 71.5% of the total for Queensland. The Toowoomba Region contributed 75.8% of all eggs produced for human consumption in Queensland. Other prominent livestock industries with regards to numbers of animals included Milk Cattle (17.6% of total for Queensland), Pigs (24.9%) and stud Horses (18.0%).

Proportion of Queensland Total Livestock (%)
TRC Area, 2005/06



Source: ABS 7125.0

Livestock

	No.	Number of Est'ments	Sales/ Disposals	% of Qld (no.)
Sheep & Lambs	45,638	147	31804	1.0
Cattle				
Milk Cattle	34,086	217	12491	17.6
Meat Cattle	262,347	1841		2.3
Cattle (total)	296,430	1943		2.6
Pigs	171,850	141	314370	24.9
Chickens				
Laying Chickens	2,478,314	28	1173126	71.5
Meat Chickens	90,411	4	172429	0.9
Other Livestock:				
Horses – stud	4,343	212	4959	18.0
Horses other than stud (e.g. stock horses)	2,393	569		3.6
Goats	6,997	48	2298	4.0

Source: ABS 7125.0

For More Information

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