

REGIONAL TRANSFORMATION STRATEGY 2024

Greater Whitsunday



Queensland
Government



ACKNOWLEDGMENT OF COUNTRY

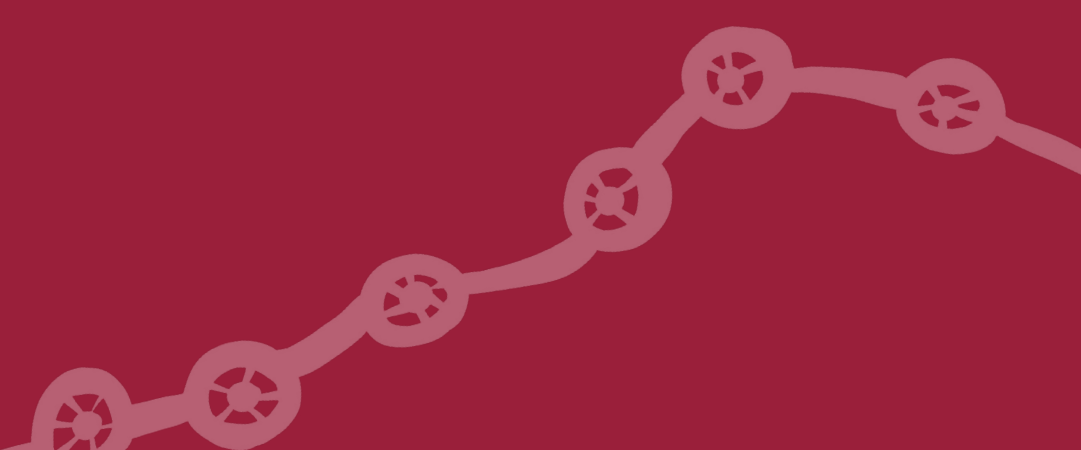
The Department of State Development and Infrastructure (DSDI) acknowledges the Country and people of Queensland's First Nations. We pay our respect to Elders past, present and emerging.

We acknowledge the continuous living culture of First Nations Queenslanders – their diverse languages, customs and traditions, knowledges and systems. We acknowledge the deep relationship, connection and responsibility to land, sea, sky and Country as an integral element of First Nations identity and culture.

This Country is sacred. Everything on the land has meaning and all people are one with it. We acknowledge First Nations peoples' sacred connection as central to culture and being.

We acknowledge the stories, traditions and living cultures of First Nations peoples and commit to shaping our state's future together. DSDI recognises the contribution of First Nations peoples and communities to the State of Queensland and how this continues to enrich our society more broadly.

The transformation priorities for the region have been developed in close consultation with the community and are intended for the benefit of all people in the region.







Queensland
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Department of State Development
and Infrastructure
PO Box 15009, City East, QLD 4002

Ph: 13QGOV (13 74 68) | dsdilgp.qld.gov.au
info@dsdilgp.qld.gov.au

CONTENTS

Foreword	5
The importance of transformation in regional Queensland	7
About the Greater Whitsunday region	18
Transforming the Greater Whitsunday region	30

FOREWORD

The global economy is undergoing a historic shift from carbon-intensive industries to a cleaner, decarbonised economy. As the impacts of climate change become increasingly evident, governments and investors around the world are transforming their economies at an unprecedented scale. This is changing how economies source their energy, where investors allocate capital, and the products customers buy.

The Queensland Government is committed to working with industry, local governments and the regions to harness opportunities that this transformation presents.

The Queensland Energy and Jobs Plan (released in 2022) outlines the Queensland Government's plans to transform Queensland's energy system to deliver clean, reliable and affordable power and achieve 80 per cent renewable energy by 2035. The Plan also targets the Queensland Government's plans to reduce emissions to 75 per cent below 2005 levels by 2025.

The Queensland New-Industry Development Strategy (released in 2023), identifies the key industries where Queensland is likely to have a competitive advantage in a decarbonised global economy.

The Regional Transformation Strategies build on these state-wide initiatives to identify specific opportunities for four regions – North West Queensland (including the corridor to Townsville), Greater Whitsunday, Central Queensland, and Darling Downs, South West and the South Burnett.

These regions are home to traditional, primary industries that today are a significant source of economic activity and jobs. However, they also have unique opportunities to support new industries like critical minerals, renewable energy and low-carbon fuels such as hydrogen and biofuels, which will thrive in a decarbonised global economy.

The Greater Whitsunday Regional Transformation Strategy (RTS) aims to build on the unique strengths and advantages of the region to support its long-term transformation.

Harnessing the region's diverse agriculture and aquaculture industry, a growing advanced manufacturing base, emerging biofutures industry, and world-class tourism, the strategy identifies key opportunities for jobs and investment growth in a low-emissions economy.

These include growing Mining Equipment, Technology and Services (METS), advanced manufacturing, agribusiness transformation, growing biofutures industry, strengthening renewable energy capability, and supporting tourism to meet net zero by 2050 goals. Some of these specifically harness opportunities associated with decarbonisation; others provide diversification opportunities as the region transitions over time from carbon-intensive industries.

The RTS sets out specific priorities to sustainably grow these industries and support resilient regional economies. It aims to ensure the Greater Whitsunday region has a strong future in a low-carbon economy, with a resilient economy, sustainable industries and thriving communities.

These priorities build on the significant investment already underway in the region, including more than \$1.3 billion from the Big Build for productivity-enhancing infrastructure and capital works, estimated to support 3,400 jobs and \$736 million on health and education.

The RTS details the range of support currently available to the regions to support transition. This includes the \$200 million of funding under the Regional Economic Futures Fund to support specific regional transition and the \$415.5 million Industry Partnership Program.

The objectives and priorities that underpin this RTS have been developed in partnership with local government, industry and the wider community.

As implementation occurs, the Queensland Government will continue to consult and partner with communities in the region.

The region has a strong, vibrant future – and the Queensland Government is committed to supporting its transformation towards a world-class, low-carbon economy.

QUEENSLAND REGIONAL TRANSFORMATION OBJECTIVES

Resilient regions with diversified, value-adding industries and a highly skilled workforce

Sustainable regions with innovative industries that lead the way in a net zero economy

Thriving, liveable and inclusive regions that attract and retain people, businesses and investment

Greater Whitsunday Priorities



METS capabilities and advanced manufacturing

Sustainable post-closure mine planning, with flexibility in mine-site rehabilitation to facilitate development of new industries and circular economy opportunities

Support existing METS and manufacturing industries to contribute to the growth of the critical minerals industry in neighbouring Queensland regions

Diversification of the region's METS technical skillset to manufacture componentry for emerging industries and renewables

Projects that grow industry capability

Capability and capacity enhancement for existing METS businesses, particularly start-ups and Small Medium Enterprises (SMEs) to support decarbonisation



Globally recognised biofutures production

Establishment and promotion of State Development Areas (SDAs) for biofutures manufacturing in the region, specifically the Mackay SDA

Accelerated and scalable biofutures research and development pilot projects to support start-up, innovation and collaboration precincts in biofutures

Creating a future foods industry through a Future Foods Biohub initiative

Investment in a sustainable ethanol industry, including for sustainable aviation fuels and other applications

Biofutures industry that capitalises on opportunities for biomass conversion to value-added exports, or inputs into adjacent industries



Renewable energy production and usage

Coordinated planning and establishment of renewable energy and hydrogen production, distribution and storage precincts across the Greater Whitsunday region

Accelerated use of renewables within key regional industries, including agriculture, construction, minerals processing, tourism, services and manufacturing, to grow and decarbonise these industries

Investment attraction in key industrial precincts, particularly through SDAs focused around renewable energy production and use, including the activation of Abbot Point SDA



Agribusiness innovation and transformation

Further modernisation of the region's agriculture, including fostering innovation (through piped, automated irrigation, precision agriculture and space-tech) by supporting small, regional agriculture businesses

Enable a low emissions agriculture transformation and its supply chains to target the premium markets domestically and abroad and tackle climate change

Growing Aquaculture Development Areas into leading aquaculture precincts for marine prawns (black tiger and banana prawns), barramundi and marine fish, opening up domestic and international export opportunities

Cooperation between aquaculture and agriculture industries to realise seasonality, efficiency and climate adaptation opportunities



Sustainable, accessible and eco-friendly tourism

Transition of tourist industry road and marine transport to renewable energy (such as electric and low-carbon fuels like hydrogen and its derivatives)

The Greater Whitsunday region to have a leading reputation as an ecotourism destination in domestic and international tourism markets

Growth in education-based tourism centred around attractions that are anchored in natural and heritage values and community identity in the Greater Whitsunday region

Remove the barriers to enable tourism opportunities in the Greater Whitsunday region

THE IMPORTANCE OF TRANSFORMATION IN REGIONAL QUEENSLAND

Why transformation matters

As Australia and nations around the world prioritise the decarbonisation of their economies, regional Queensland has an important role to play in the future industries that will underpin a low-emissions global economy. Adapting to that global shift and harnessing regional Queensland's distinctive strengths is key to ensuring that our state is globally competitive and home to vibrant regional communities that continue to prosper.

Being resource rich and trade-oriented, regional Queensland faces significant change over the coming decades. The global economy is undergoing a generational shift in response to the growing impacts of climate change, with an increasing focus on decarbonisation. In response, governments and industry around the world are shifting away from carbon-intensive supply chains towards new, low-carbon industries.

Regional Queensland is well positioned for this new economy. This is through a vast endowment of the minerals needed to support low-carbon industries, abundant land and resources suitable for sustainable agriculture and renewable energy generation and expertise in world-leading industries, such as mining.

Transformation relies on continued investment in economic and social enablers, such as diverse

housing, water, energy, health, education and transport infrastructure, a skilled workforce and digital connectivity.

Transforming the region around the key industries of mining, agriculture, renewable energy, and tourism will require working across government and with local governments and the community to have the right land use and infrastructure in place. Of particular importance to the region will be the protection of land for its best use. In some circumstances, multiple land uses can be navigated to achieve sustainable coexistence. Other times, competing land use must be assessed to ensure any identified adverse impacts are appropriately avoided, minimised or mitigated, to support and strengthen the region's ongoing competitive advantage.

That is why the RTS is designed to align with other government policies such as the Queensland Governments METS roadmap as well as federal and local government policies. The RTS will also support the national and Queensland emissions targets, as outlined in Figure 1 (page 8).

Queensland's agricultural, forestry and fishing, mining and manufacturing industries contributed

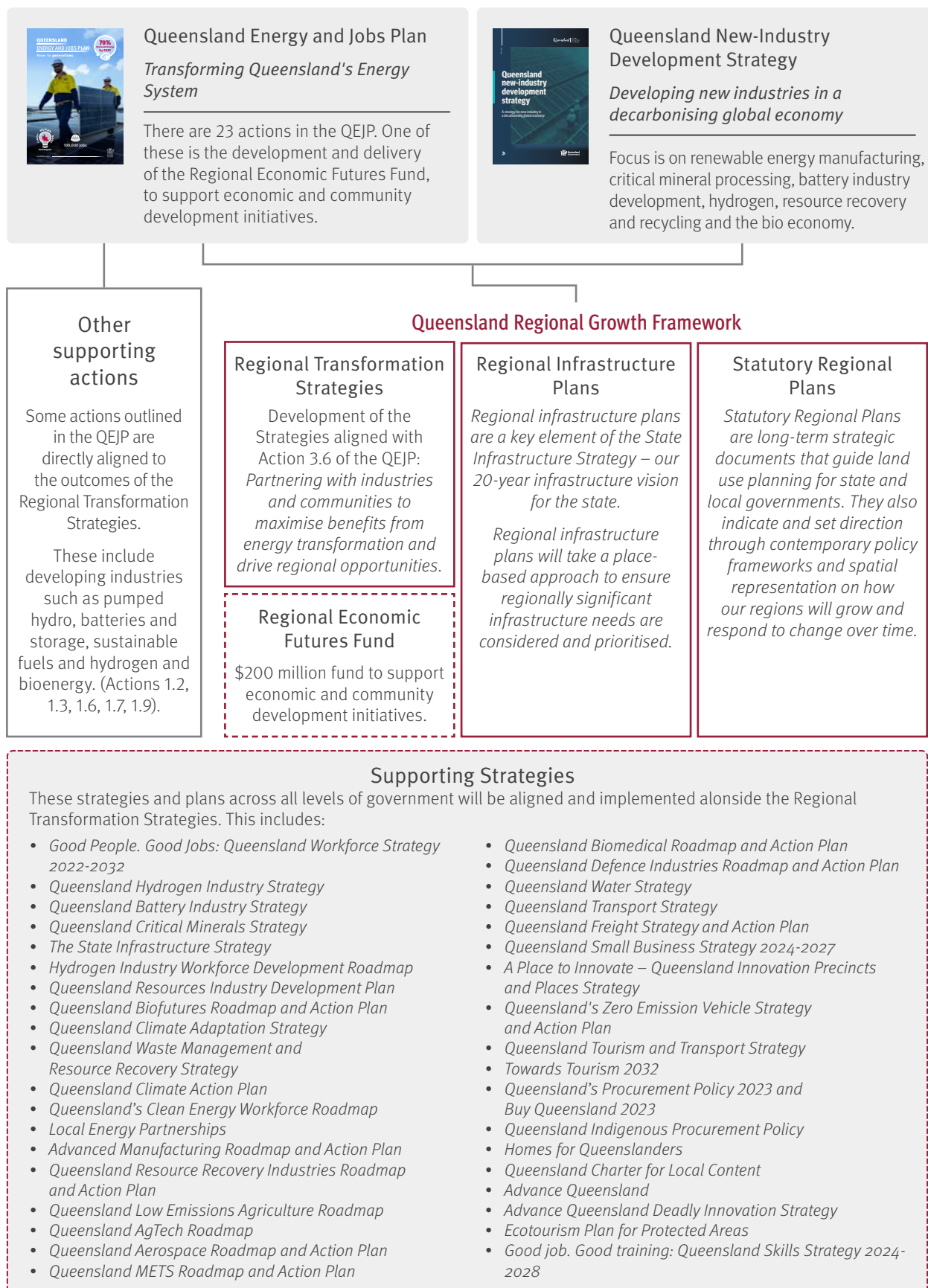


Notes

¹ As of 2022, Data sourced from REMPLAN, 2018-2022, Release 1.

Figure 1: Queensland regional transformation policy context.

AUSTRALIA AND QUEENSLAND'S TARGETS: NET ZERO EMISSIONS BY 2050



Queensland Energy and Jobs Plan and the Queensland New-Industry Development Strategy

The Queensland Energy and Jobs Plan (QEJP) outlines how Queensland's energy system will transform to deliver clean, reliable and affordable energy for Queenslanders. It outlines key renewable energy targets and actions for Queensland, including:

- a new renewable energy target of 70 per cent by 2032 and 80 per cent by 2035.
- a commitment to convert all of Queensland's publicly owned coal-fired power stations into clean energy hubs by 2035, backed by a Job Security Guarantee for workers.
- substantial investment across the state, with 95 per cent of clean energy infrastructure investment anticipated to be in regional Queensland.

The QEJP will harness Queensland's existing natural resources and skilled workforce to transform the state's electricity system and deliver clean, reliable and affordable power to Queensland's energy system. This will include around 25 gigawatts (GW) of large-scale wind and solar, foundation pumped hydro assets, plus additional storage and firming technologies and new transmission.

Queensland's natural advantages in renewables

Queensland has natural advantages in its high-quality renewable resources, including:

- **Solar** – Queensland has abundant solar resources and is well positioned for large scale solar generation, particularly in areas located near existing network infrastructure and major population centres.
- **Wind** – Queensland has high quality and nationally competitive wind resources, underpinned by recent improvements in wind turbine technology.
- **Biomass** – Queensland's strong agricultural industry generates substantial amounts of biomass. Using biomass to generate bioenergy (green electricity) and sustainable liquid fuels could contribute significantly to Queensland's renewable energy capacity.
- **Hydro-electricity** – There is significant potential to expand and build upon Queensland's opportunities.



Solar farm, regional Queensland

Other focus areas of the QEJP that will assist with regional transformation

These RTS are one action of the QEJP (Action 3.6 – partner with industries and communities to maximise benefits from the energy transformation and drive regional opportunities). Other actions under the QEJP that will help facilitate regional transformation include:

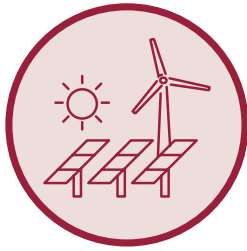
- Developing industries and technology such as pumped hydro (Action 1.2), batteries and storage (Action 1.3), future renewable hydrogen (Action 1.6), sustainable liquid fuels (Action 1.7) and bioenergy futures (Action 1.9)
- Continuing to support the Uniform Tariff Policy, ensuring regional Queenslanders can access affordable energy (Action 2.7)
- Implementing a \$150 million Job Security Guarantee to support affected energy workers in Queensland’s publicly owned coal-fired power stations and associated coal mines (i.e., Kogan Creek and Meandu mines) (Action 3.2)
- Delivery of Queensland’s Clean Energy Workforce Roadmap, which was released on 25 October 2023, and \$192 million for Powerlink to develop Transition and Training Hubs in Townsville and Gladstone (Action 3.3)
- Committing \$11.6 million to build capacity in the manufacturing industry and encourage local content in Queensland to grow the renewable energy supply chain in Queensland (Action 3.4)
- \$10 million to deliver a Queensland Microgrid Pilot Fund to support network resilience for First Nations communities and ensure an inclusive SuperGrid (Action 3.5).

The Queensland New-Industry Development Strategy (QNIDS) sets out the Queensland Government’s approach to proactively develop the industries that are critical to the global shift to a net zero economy. QNIDS outlines the impact of decarbonisation in reshaping commodity demand, and opportunities for Queensland to capitalise on manufacturing opportunities to build the infrastructure and products required to transition towards renewable energy sources. The six key industries identified by QNIDS are outlined in Figure 2 (page 11).



Flow battery, National Battery Testing Facility

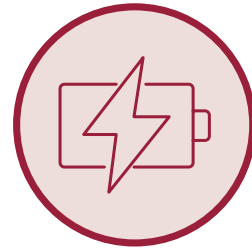
Figure 2: QNIDS industry priorities



Renewable energy manufacturing and infrastructure development



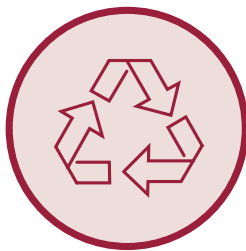
Critical mineral processing, manufacturing and product development



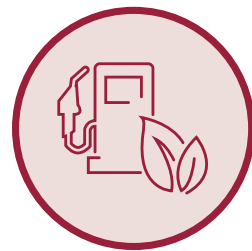
Battery industry development



Green hydrogen



Circular economy including resource recovery and recycling



Bioeconomy including biofuels and sustainable aviation fuel (SAF)

The Regional Economic Futures Fund (REFF)

The REFF is a \$200 million program to support communities, which will be directly impacted by the transition to a low-emission economy, to seize industry development opportunities presented by global decarbonisation.

The objectives of the REFF are to support long-term community prosperity by facilitating sustainable employment and increasing investment in economic development and diversification projects. The REFF supports activities which:

- create new jobs and a stronger workforce,
- strengthen regional supply chains,
- support decarbonisation and the QEJP,
- build or identify a region's strengths, and/or
- support renewable energy precinct development.

The REFF is a component of the QEJP and QNIDS. The RTS provide a coordinated approach to delivering state government programs, including REFF.

How does the RTS align to these priorities?

The RTS identifies key economic strengths and future industry priorities for those Queensland regions likely to be most impacted by the shift to a decarbonised global economy, based on the unique geography, resources and workforce skills of these regions. This will enable these regions to have a targeted and place-based approach in line with the state-wide strategic priorities outlined in the QNIDS, and the renewable energy targets outlined in the QEJP. The industry priorities in the RTS have been developed to align with both existing strengths and several of the industries identified in both QNIDS and QEJP.

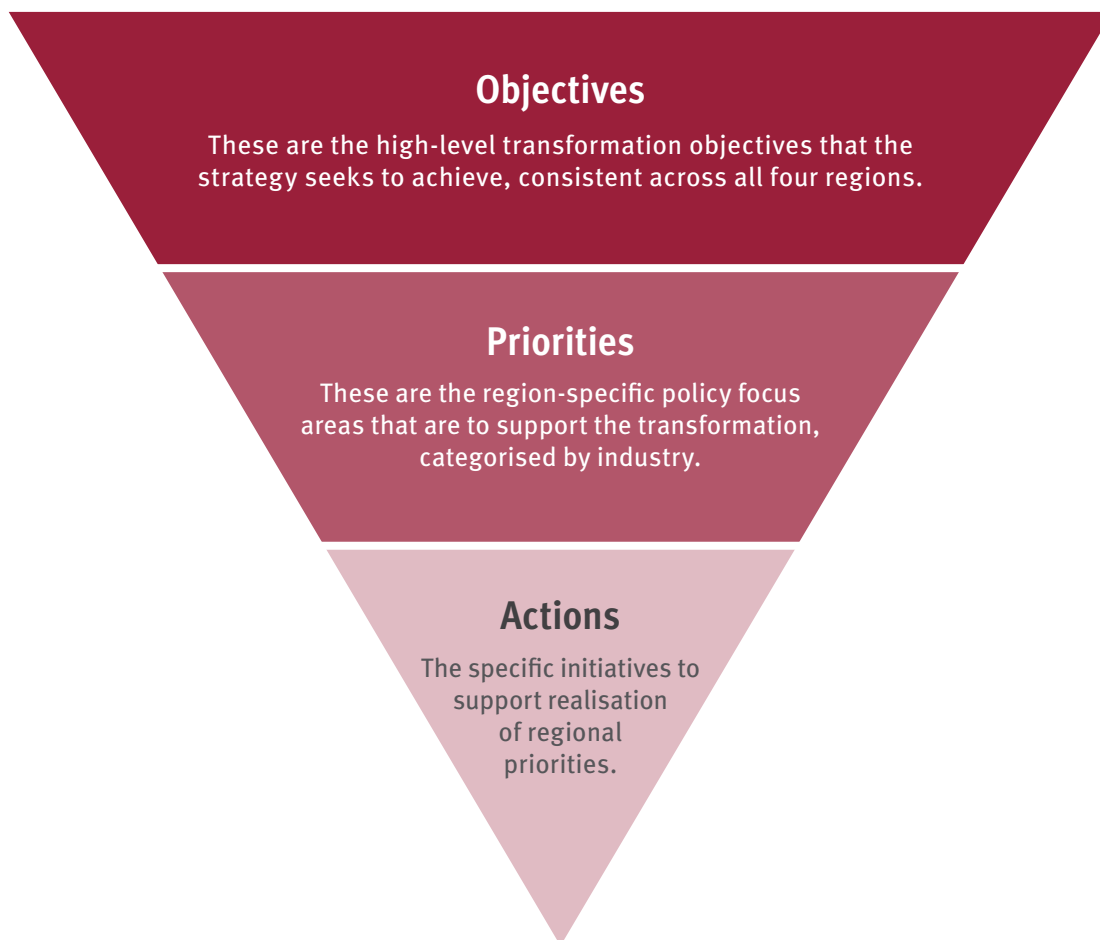
Framework for the Regional Transformation Strategies

The development of the RTS is based on a practical, outcome-based framework and provides a clear link between the strategic opportunities of each region and future actions and outcomes. It has been underpinned by extensive community and industry consultation. Their input is fundamental to these strategies, which have been developed with a 10–20-year horizon, acknowledging that advancing global decarbonisation and energy transition in the regions during this period will be critical to meeting the Queensland Government’s renewable energy target of 70 per cent by 2032, and 80 per cent by 2035.

The approach to the Regional Transformation Strategies

The strategy framework outlines how the overarching transformation objectives for regional Queensland are supported by region-specific priorities and targeted actions. The overarching objectives provide a long-term vision for all of Queensland’s regions that are the focus of transformation. They recognise the important relationship between sustainable, resilient and prosperous economies and thriving, liveable and inclusive communities.

Figure 3: Regional Transformation Strategy Framework



The objectives for regional transformation

Through close consultation with communities, a vision for regional Queensland has been developed that is encapsulated in three objectives.

Figure 4: Queensland Regional Transformational Objectives

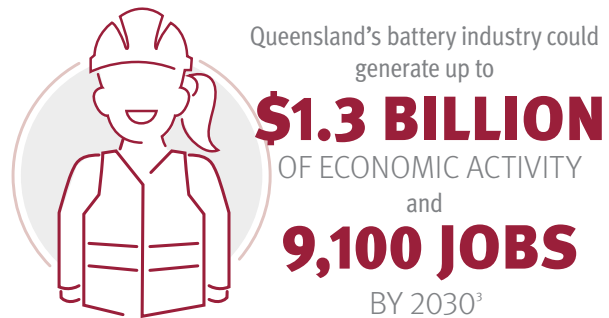


OBJECTIVE 1: Resilient regions with diversified, value-adding industries and a highly skilled workforce

The future of regional Queensland is one of resilient communities, underpinned by a diverse economy, value-adding industries and a highly-skilled workforce. In this context resilience means being ready to harness the opportunities of a decarbonised global economy. It is this proactive approach that will underpin the long-term future of our regions – a future with competitive industries and well-paid, highly-skilled jobs and a lifestyle to match.

Traditional industries, such as mining and agriculture, have and continue to underpin the economic prosperity of regional Queensland. They provide well-paid jobs for communities and produce high-quality exports for domestic and global markets. These industries are making significant investments to reduce their carbon footprint, and they will continue to play an important role in the Queensland economy.

While demand in these industries will continue for some time to come, and low-emissions producers will have a critical role in a transformed economy, the long-term economic resilience of our regions will depend upon having a range of industries. This will better insulate our economy against changes in global commodity prices, reducing the risk of ‘boom and bust’ economic cycles.



Value-adding industries will have a key role in our resilient regional economies, by helping to capitalise on our strong resource base while also providing well-paid jobs for communities. A shift to boosting sovereign processing and manufacturing capability in a more uncertain world is adding to the case for ‘moving up the value chain’ in areas where our regions will be competitive. A mix of primary and other industries will provide regional communities with highly skilled jobs, helping to attract and retain both people and investment.

What does this mean for the Greater Whitsunday region?

- An economy that continues to be underpinned by strong natural resources and agricultural industries but also harnesses this advantage to generate new, value-added products in sustainable ways.
- Strengthening existing value-adding industries, including mineral processing and METS, biofutures, and agriculture.
- Capitalising on the transition to renewable energy by building capability in wind, solar, bioenergy and hydrogen.

Notes

³ Accenture (2023, January 17). Battery industry opportunities for Queensland.

The Queensland Government's efforts to deploy a long-term connected industry development strategy can be seen with the following examples:

- Queensland University of Technology's (QUT) Mackay Renewable Biocommodities Pilot Plant (MRBPP), a research and development facility that converts biomass into biofuels, green chemicals and other bioproducts, was established in 2010 with support from the Queensland and Australian governments. The QUT facility is currently being further expanded, funded through the Queensland Government's Industry Partnership Program and the Australian Government, to enhance the capability of the facility to test a wider range of new and emerging food and fuel technologies.
- Support was provided by the Queensland Government to Mercurius to establish its pilot plant at MRBPP to test its patented REACH™ technology to produce valuable chemicals and fuels from sugarcane waste.
- Following international market sounding, the Queensland Government has partnered with Cauldron Molecules to undertake a feasibility study into the development of a contract manufacturing precision fermentation facility to support planning for the Mackay Future Foods Biohub.
- The Coordinator-General has established a State Development Area (SDA) in Mackay which will support the proposed BioHub and preserve land for long-term development.

CASE STUDY: BIOFUTURES INDUSTRY DEVELOPMENT

For over a decade the Queensland Government, along with local stakeholders and industry, have partnered to establish and grow the bioeconomy in the Greater Whitsunday region, with efforts supported by the *Queensland Biofutures 10-year Roadmap and Action Plan*. The Greater Whitsunday Biofutures Leaders Group, led by Greater Whitsunday Alliance (GW3) and comprising stakeholders from across the region, has been critical to this success working collaboratively with the Queensland Government to support the identification and realisation of opportunities.

The Queensland Government will continue to use the \$415.5 million Industry Partnership Program to support key emerging industries, leverage private sector investment, and strengthen and unlock supply chains in support of a decarbonised future.

OBJECTIVE 2: Sustainable regions with innovative industries that lead the way in a net zero economy

The future vision for regional Queensland is one underpinned by sustainable and innovative industries that will lead the way in a net zero economy. By leveraging existing economic strengths and natural endowments, each region can be well positioned to meet growing demand for sustainable products. This will involve both the decarbonisation of existing industries and the emergence of new, clean energy industries.

The QNIDS outlines the government's approach to proactively developing the industries that will be in demand in a decarbonising world. At the same time, we are transforming our energy system.

With a highly-skilled workforce, critical mineral deposits and abundant natural resources, Queensland's regions will be at the forefront of these strategic initiatives. This means the regions being underpinned by clean industries will be competitive in a world where supply chains and trade agreements place a growing emphasis on low emissions. Existing industries, such as manufacturing, resources, agriculture, transport and tourism, will play a key role in this. Businesses in these industries are already leading the way in reducing emissions. Innovative future industries will have an increasingly key role in our regions. A more circular approach to consumption and production will be prioritised, where we are recycling, re-manufacturing, re-designing and re-using products and materials at their highest value for as long as possible.

Preserving and ensuring the ongoing sustainability of our natural environments will be critical, particularly with the challenges brought by climate change. An important part of this will be recognising and elevating First Nations peoples' deep knowledge systems in land and sea management practices. Management of climate risk, including by adapting to expected climate change impacts and mitigating further change, is vital to ensure the sustainability of the region, economically, socially and in terms of assets and infrastructure.

What does this mean for the Greater Whitsunday region?

- Harnessing the region's significant sugar cane and other agricultural feedstocks / biomass to support biofutures-related industries.
- Developing innovative circular economies between aquaculture and agriculture industries that protect our rivers, creeks and reefs, reduce emissions and environmental impacts, and reduce costs to businesses.
- Ensuring the preservation and sustainability of the region's environments for the long-term future of the region's tourism industry.
- Assisting existing industries to decarbonise operations through education on environmental, social and governance (ESG) awareness and implementation of carbon reduction measures.

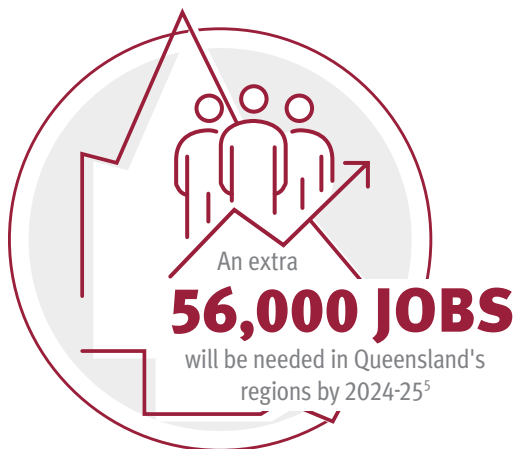


QUT Mackay Renewable Biocommodities Pilot Plant

OBJECTIVE 3: Thriving, liveable and inclusive regions that attract and retain people, businesses and investment

At the heart of the transformation of our regions and their future prosperity will be the communities within them. Retaining people and attracting new residents will be key to strengthening our communities and providing a sustainable future. There is immense opportunity for investment and jobs in Queensland's regions as the world continues to decarbonise. However, this will only be possible if our communities are thriving, liveable and inclusive.

Fit-for-purpose and quality enabling infrastructure, such as diverse housing, water, energy, transport and digital connectivity, that is planned and built with consideration of the changing climate, is fundamental to support thriving, liveable and inclusive communities. This will support the wellbeing of residents and ensure regional communities provide the services that will attract and retain a competitive workforce. This will also ensure families have access to the services needed to provide future opportunities.



Highlighting the economic opportunities for communities in regional Queensland.

To make Queensland a location of choice for businesses, opportunities offered by transformation will need to be provided for all people in the regions.

Making up over 97 per cent of all business enterprises in Queensland, small businesses are the foundation of our communities⁶. They employ around 42 per cent of the private sector workforce and play an important role in the supply chain of new industries, as well as continuing to support the growth of traditional industries⁷.

First Nations peoples have unparalleled cultural resources and traditional knowledge of the lands and waters in the regions and are central to the nation's identity and history.

What does this mean for the Greater Whitsunday region?

- Ensuring local opportunities for businesses and communities in renewable energy generation and storage infrastructure, particularly wind, bioenergy and solar.
- Upskilling the workforce through training programs for local and long-term jobs in renewable energy projects, particularly wind and solar.
- Prioritising enduring infrastructure that will enable the development of emerging industries, such as renewable energy, and support the community with the transition.
- Attracting new workers and business investment to the region.

Notes

⁵ Jobs Queensland. Data portal for the projection period 2021-22 to 2025-26. Net new jobs. Excludes Brisbane, Cairns, Gold Coast, Ipswich, Logan – Beaudesert, Moreton Bay – North, Moreton Bay – South and Sunshine Coast. Accessed on 18 September 2023.

^{6,7} Queensland Small Business Outlook – Beyond the pandemic, 2023, Queensland Small Business Commissioner, accessible at : < https://qsbcc.qld.gov.au/wp-content/uploads/2023/09/QSBC_Beyond-the-pandemic_Accessible-web.pdf >

How the RTS has been developed

The RTS has been informed by the outcomes and findings of extensive consultation processes with key regional stakeholders, including industry bodies, businesses, community members and organisations, local governments and other Queensland Government departments and agencies.

Consultation identified a diverse range of opportunities for each region and broadly supported the strategic direction of the underpinning

Queensland policy frameworks to help Queensland transition to a decarbonised future. Stakeholders also acknowledged that it will be important that regional transformation will need to be undertaken in a manner that is inclusive, sustainable and supports the liveability of our regions, with continued stakeholder input. Key stakeholders will continue to be periodically engaged through the regional **Local Economic Opportunity (LEO) Network**.



A Stakeholder Advisory Committee (SAC) for each region provided advice and feedback on a range of issues specific to each region. These consultations informed the development of the RTS by identifying key strengths and opportunities for the region, transformation objectives, key priorities and potential actions that would support the transformation of the region. These forums will continue to have a role supporting the implementation of the RTS for the region.

Targeted consultations have been undertaken with a range of stakeholders across each region to explore their insights on the economic strengths of the region, opportunities for economic transformation and actions that may support the transformation objectives and priorities.

A targeted survey was conducted to obtain stakeholder insights on key economic opportunities and challenges relating to economic development and transformation in each region.

Public consultation has been undertaken to obtain feedback from people who live, work, or own a business in one of the four targeted regions. This was done through a range of media channels and an online survey.

ABOUT THE GREATER WHITSUNDAY REGION

The Greater Whitsunday region, located in north-eastern Queensland, covers 90,140 square kilometres⁸ and comprises the three Local Government Areas (LGAs) of Mackay, Isaac and Whitsunday.

The Mackay LGA is the most populated LGA within the region, contributing up to 67 per cent of the region's total population⁹ and is the fourth most populated LGA outside of South East Queensland (SEQ). The LGA boasts the fast-growing coastal city of Mackay which is surrounded by the key centres of Sarina, Mirani, Marian and Walkerston, 31 beaches and with an economy underpinned by its strong activity in the resources industry, agribusiness and growth in construction and tourism.

The Isaac LGA includes key centres of Moranbah, Clermont, Dysart, Middlemount, Glenden and Nebo, and smaller coastal communities of Carmila, St Lawrence and Clairview. It has Queensland's largest metallurgical, and large thermal, coal reserves and boasts prime access to export infrastructure. Isaac LGA also has major sugar cane plantations along the east coast and significant broadacre cropping and beef production.

The Whitsunday LGA includes the town centres of Proserpine, Bowen, Airlie Beach, Cannonvale, Collinsville and many of the 74 Whitsunday Islands. The Whitsunday LGA's tourism and agriculture industries continue to be the key pillars of the economy, particularly as the gateway to the Great Barrier Reef, however the local economy is also driven by construction and mining industries.

The Greater Whitsunday region is home to the Ngaro, Darumbal, Gia, Juru, Girundala, Birriah, Jangga, Yuwibara, Widi and Barada Barna First Nations peoples, who are recognised as the Traditional Custodians of its lands and waterways, having lived in the region for many thousands of years and retaining strong connections to the region.

Figure 5 provides a geographic overview of the region. A statistical overview of the region is shown in Figure 6 (page 19).

Figure 5 Map of the Greater Whitsunday region

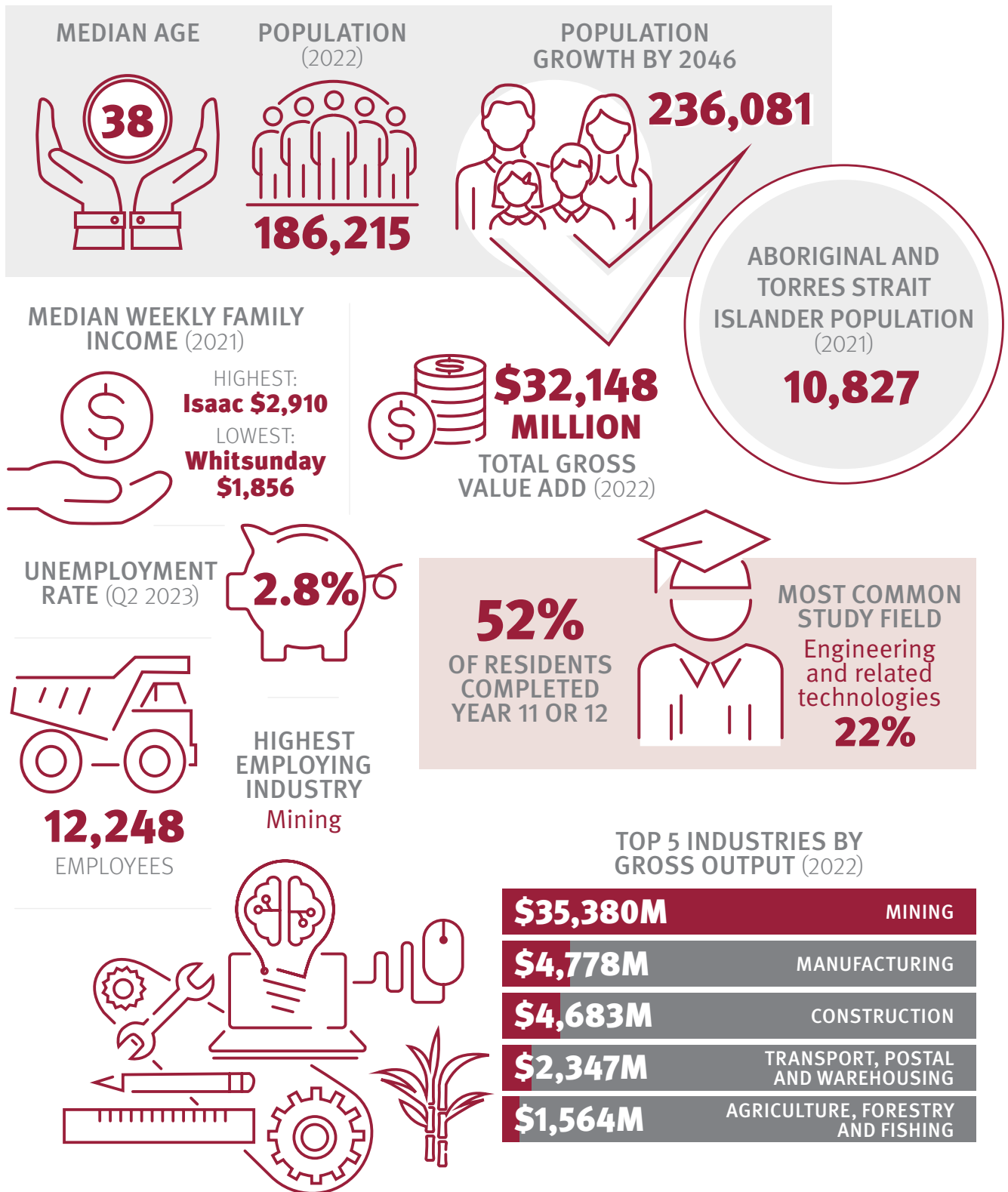


Notes

⁸ About Mackay Isaac Whitsunday (MIW), Greater Whitsunday Alliance, 2023

⁹ ABS LGA Level Data, 2011-2021, Regional Summaries

Figure 6 Greater Whitsunday Statistical Overview¹⁰



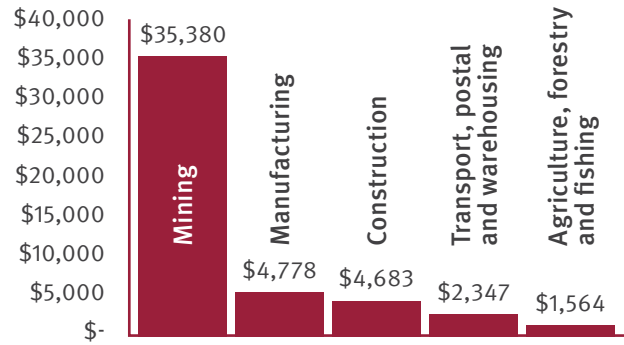
Notes

¹⁰ Data sourced from REMPLAN, 2018-2022

Economic overview

Agribusiness (agriculture and aquaculture), mining and METS, manufacturing and tourism are the key industries that underpin the region. The region has a variety of natural assets, irrigation access and coal and gas reserves that contribute to these key industries, with access to transport routes and infrastructure that support a large processing and manufacturing industry. More than a quarter (35 per cent) of Queensland’s mining output is produced in this region¹¹

Gross Output (\$m, Top 5 industries)



Mining

With the region located nearby the Galilee, Bowen and Surat Basins, mining is the largest source of economic activity totalling 56.4 per cent of the total regional output, with the majority driven by the Isaac LGA (accounting for 58.4 per cent of the region’s total output).



Construction

The construction industry continues to play a major role in the region’s economy, accounting for 8.9 per cent of jobs, and about 7.5 per cent of Regional Output as of 2022. New initiatives and projects requiring large capital investment and labour underpin growth in jobs in the region.



Manufacturing

Manufacturing contributes 7.6 per cent of the region’s economic output and employs 5 per cent of the region’s workforce. Manufacturing in the region is diverse, including heavy industry manufacturing supporting the resources sector, fermentation, meat processing and emerging biomanufacturing.



Transport, postal and warehousing

With three ports operating in the Greater Whitsunday region (Abbot Point, Hay Point and Mackay) and two separate coal terminals (Hay Point and Dalrymple Bay), there is a large freight and logistics industry, primarily focused around coal, that accounts for 3.9 per cent of the region’s total exports.



Agriculture, forestry, and fishing

Agribusiness contributes to 2.5 per cent of the region’s economic output, with 5 per cent of total businesses in the region being agriculture related. Key regional industry drivers include sugar cane plantations, milling and refining, cattle, grazing crop, vegetable and aquaculture.

Notes

¹¹ 2022 data. Data sourced from REMPLAN, 2018-2022

Biofutures can help reduce the ecological impacts of manufacturing and the use of petroleum-based products through the re-use of agricultural and municipal by-products.



Emerging industries in the region

There is a significant opportunity to realise and advance new industry clusters in advanced manufacturing, biofutures and renewables in the region, supporting long-term decarbonisation objectives.

Biofutures can help reduce the ecological impacts of manufacturing and the use of petroleum-based products through the re-use of agricultural and municipal solid waste. Bagasse, a plentiful agricultural waste product from the local sugar milling industry, can be reprocessed for use in manufacturing various biocommodities, such as plastics, fuels and other additives. An emerging industry in the region, it can support the shift away from fossil fuels with a renewable, carbon negative source.

The region's strengths in agriculture, horticulture and manufacturing supports the establishment of future foods and SAF industries which applies

innovative biotechnology to create, manufacture and export appealing new food products and ingredients that are nutritious and sustainable.

Supporting emerging and existing industries is the transition to renewable energy in the region. The region's renewable energy generation infrastructure is being expanded through further bioenergy, solar and wind production infrastructure. These green energy sources, including emerging projects such as the Collinsville Green Energy Hub combined with the Queensland Government's \$8.5 million commitment towards supporting Abbot Point for hydrogen export, can also be used to manufacture hydrogen. This in turn can be used as an energy source for freight, private vehicles and powering marine vessels for regional tourism, or as a feedstock for other fuels and commodities.

Mining and METS

The mining industry is the largest in the region by output, contributing \$35,380 million or 56.4 per cent of total gross output in 2021-22¹², of which 58.4 per cent is driven by the Isaac LGA's coal, and gas activities¹³. The region is responsible for 73 per cent of metallurgical, and 22 per cent of thermal, coal production¹⁴.

Despite exceeding the contribution of all industries in terms of output and total wages paid, mining and resources only account for 14 per cent of the region's employment¹⁵. This reflects the capital-intensive nature of the industry and its emerging embrace of automation.

As a result of the highly productive mining industry, the region is home to a highly advanced, innovative and a world-leading local METS industry, including a training facility led by the Resource Centre of Excellence (RCOE), established to connect the brightest minds in research, technology, education and METS to shape the resources sector of the future. The physical hub of RCOE is a central facility, located in Mackay, that is supported by multiple satellite extensions with a global scope. These extensions include both actual and virtual spaces that provide

a platform for the development of innovative solutions for the resources sector. The region's expertise in these industry leading areas makes notable contributions to the national economy.

There has been strong historical growth driven by the mining industry to date, which will continue to underpin the economic prosperity of the region. However, consumer demand and government policy in many countries suggests a general shift away from carbon intensive resources and heavy industry. Local communities will need support in training and identifying alternate industry opportunities to help transition the mining and METS workforce to parallel or alternate industries as the demand for coal eventually subsides.

OUTPUT: \$35,380 million
VALUE ADD: \$19,997 million
EXPORTS: \$33,164 million

REMPPLAN 2018-2022

Tourism

The natural attractions across the region make it an established tourist destination, including the attractions of the Great Barrier Reef World Heritage Area and the Whitsunday Islands.

While all three of the LGAs in the region have coastal access and other tourist attractions, the Whitsunday LGA has the strongest tourism focus given its coastal assets. In 2021-22, the tourism industry contributed an estimated \$730.1 million to the Whitsundays tourism region's economy (19.3 per cent of the Whitsundays gross regional product) and supported about 8,100 jobs (35.6 per cent of employment in the Whitsundays).¹⁷

Whilst the tourism industry continues to play a major role in the region's economy, the industry has been challenged to rebuild in the wake of the COVID-19 pandemic. Domestic tourism has led the recovery of tourism in the region, with many visitors seeing friends and relatives, holidaying along the coast or undertaking driving holidays inland.

OUTPUT: \$1,169 million
VALUE ADD: \$457 million
EXPORTS: \$449 million

REMPPLAN 2018-2022¹⁶

Notes

^{12, 13} Data sourced from REMPLAN, 2018-2022, Release 1.

¹⁴ Industry Profile – Isaac Region, 2021

¹⁵ Queensland Regional Profiles: Resident Profile for Greater Whitsunday, Queensland Government Statisticians Office

¹⁶ Data presented is for Accommodation and Food Services industry

¹⁷ Tourism Research Australia, Regional Tourism Satellite Accounts 2021-22

Agriculture and Aquaculture

Agriculture comprises 89 per cent of the region's land use, with the region boasting a diverse agricultural base dominated by livestock beef cattle production, sugar cane, broad acre cropping and horticulture (fruits and vegetables). Its location between Far North and Central Queensland makes it a key node in the broader supply chain.

Agribusiness contributes to the strong economic output from each LGA. The Whitsunday LGA is home to a major sugar farming and refining industry, which produces upwards of 240,000 tonnes of sugar from 1.7 million tonnes of sugar cane per annum.¹⁸ The Whitsunday LGA also includes the significant cropping area of Gumlu and Bowen, which (including Ayr) is the largest producer of winter vegetation crops in Queensland, generating farm gate production worth approximately \$650 million per annum.¹⁹ The Mackay LGA is known for its innovative sugar cane industry and is exceptionally well placed to serve as a catalytic Queensland site for the emerging biomanufacturing industry, while the Isaac LGA hosts major sugar cane plantations along the east coast.

The "Golden Mile" in the Isaac LGA, flanked by the Isaac, Connors and Mackenzie Rivers, boasts excellent soils and ample space for broadacre cropping and grazing. The beef industry is also a significant contributor, adding \$347 million to the regional product in 2020.²⁰ This is followed by broadacre cropping, with Isaac LGA accounting for 98 per cent of all grain produced and 78 per cent of all grain businesses in the Greater Whitsunday region.²¹ Aquaculture is also prominent, with prawn and barramundi farms along the coasts and rivers. Recently, the region has attracted investment from a large Australian salmon producer to establish the largest prawn farm in Australia, likely to exponentially increase prawn production in future years.

OUTPUT: \$1,564 million
VALUE ADD: \$639 million
EXPORTS: \$920 million

REMPLAN 2018-2022



Notes

¹⁸ Regional Economic Development Strategy 2022-2025, Whitsunday Regional Council

¹⁹ <https://bowengumlugrowers.com.au>

²⁰ Industry Profile – Isaac Region, 2021

²¹ Ibid – Industry Profile – Isaac Region

State development areas (SDAs) are clearly defined areas of land established by the Coordinator-General to promote economic development in Queensland.

The Greater Whitsunday region is now home to three SDAs. The 16,885-hectare **Abbot Point SDA** is located approximately 20 kilometres north-west of Bowen.

The Queensland Government is investing \$8.5 million for the Abbot Point Activation Initiative to rapidly advance the master planning, development and infrastructure arrangements that are needed for Abbot Point to become a hydrogen export super hub, including planning for the water and power supplies needed to produce hydrogen at scale in North Queensland.

The 105,996-hectare Galilee Basin SDA comprises two 500-metre wide corridors from the Galilee Basin to the Port of Abbot Point. The Galilee Basin is a 247,000 square kilometre thermal coal basin in central Queensland. It is located about 200 kilometres west of the Bowen Basin, extending north past Hughenden, south to Charleville and west beyond Winton and Middleton. The Galilee Basin SDA will support the development of the Galilee Basin and provide an efficient way to transport coal to the Port of Abbot Point. One rail corridor is designed to service the central Galilee Basin and a second corridor will service the southern Galilee Basin.

The 907-hectare **Mackay SDA**, recently declared across two sites in Racecourse Mill and Rosella, means work can now begin on a development scheme to guide future growth.

The Mackay SDA will become the space where businesses can be brought together to form value chains in exciting new job-creating industries focused on renewable energy and biofutures industries, including a Future Food BioHub.

Further technical studies will be undertaken to inform the content of the development scheme and guide:

- conceptual lot layouts of future industry areas and interface requirements
- detailed infrastructure planning to confirm water sewer and power requirements of future development and requirements for stormwater management and flood mitigation
- future roads and intersections layouts to service development in the SDA.

Economic and social enablers

Future transformation of the region is underpinned by strong, vibrant communities. This requires certain economic and social enablers to ensure that the region is best placed to harness future opportunities. These enablers, which include diverse housing, transport and social infrastructure, water, energy, utilities and a well-skilled workforce, are essential to support the economic prosperity of the region, its liveability and its ability to attract and retain people.

There are both opportunities and challenges in relation to these enablers, and the Queensland

Government is investing heavily at both a state and regional level to address these, as outlined below.

In addition, a key focus of government will be ensuring alignment between the priorities identified in this RTS and other Queensland Government strategies. This will include reflecting the transformation priorities for the region in other Regional Growth Framework strategies, such as the Regional Infrastructure Plan, as well as in other government policies.

Notes

²² Mackay and Whitsunday Life, Prawn Farm Expands, September 2023, accessible at: www.mackayandwhitsundaylife.com/article/prawn-farm-expands

ENABLER	HOUSING
OVERVIEW	<p>With vacancy rates in the Greater Whitsunday region down to 0.98 per cent²³, increasing the housing supply to improve availability and affordability will help attract and retain the local workforce and build stronger communities. Housing, for both purchase and rental, and short-term accommodation needs a place-based response to need in each township in the region for regional transformation to be successful.</p>
KEY INITIATIVES UNDERWAY IN THE REGION TO ADDRESS THIS	<p>With housing stress felt across the nation, multiple funding programs and plans are currently being delivered at a state and federal level to address housing affordability and availability:</p> <ul style="list-style-type: none"> • Government Employee Housing supports the attraction and retention of frontline staff such as, police, health workers and teachers, through the provision of suitable, good quality and safe housing. The demand for new housing increases each year, driven by the expansion of agency services in regional and remote communities. The program will build up to 439 homes and maintain an existing portfolio of approximately 2,900 homes for essential frontline workers in regional and remote communities • The Greater Whitsunday Housing Project, delivered by Greater Whitsunday Communities (GWC) and Regional Development Australia Greater Whitsundays (RDA GW) will explore collaborative solutions to the housing stress being faced in the Greater Whitsunday region • The Greater Whitsunday region falls under the Quickstarts Qld Mackay-Whitsunday regions • Under QuickStarts Qld and Social Housing Accelerator, the State has committed to commence 128 social homes in the Mackay-Whitsunday region by 30 June 2025 • From 1 July 2015 to 31 May 2024, 118 social homes have been delivered in Mackay-Whitsunday, including through QuickStarts Qld and the Social Housing Accelerator • Homes for Queenslanders will work across the broader housing spectrum bringing together private and public housing delivery, planning reforms, local government partnerships, state development, and significant infrastructure and public works as part of an additional \$3.1 billion investment across the state • The Queensland Government is also supporting federal housing initiatives such as the Help to Buy scheme • \$72 million paid to help first-time home buyers in the Greater Whitsunday region • \$34.7 million allocated to 16 projects for critical infrastructure in the region as part of the Building our Regions Fund, funding infrastructure projects in regional communities that improve liveability and economic conditions.
ENABLER	TRANSPORT
OVERVIEW	<p>There are four key regional airports located in Mackay, Moranbah, Whitsunday Coast (Proserpine) and Hamilton Island.</p> <p>Hay Point and Dalrymple Bay terminals service bulk coal exports, while the Port of Mackay provides a gateway for fuel, fertilisers, sugar and grain, and containerised freight. Two intermodal terminals south of the Port of Mackay provide rail freight connectivity.</p> <p>The Port of Abbot Point is a natural deep-water port which currently has a coal export capacity of 50 million tonnes per annum. The adjacent Abbot Point SDA provides the ideal location for industrial and port-related development that requires a large footprint and proximity to a port. Extensive road infrastructure provides general freight connectivity, with the Bruce Highway providing a connection to major trading centres as a major transport corridor running from Mackay to Townsville.</p>

Notes

²³ SQM vacancy data, February 2024 (<https://sqmresearch.com.au/vacancy.php>)

(CONTINUED)

KEY INITIATIVES UNDERWAY IN THE REGION TO ADDRESS THIS

Regional connectivity is still a key challenge. There is a need for integrated transport infrastructure to allow seamless movement across the region, including enhancing the function of the region’s airports and increasing direct flights from Mackay to capital cities.

There are currently multiple programs at state and federal levels to maintain and improve road quality and safety and reduce fatalities on the road. These include:

- The \$37.4 billion Queensland Transport and Roads Investment Program 2024-25 to 2027-28 outlines the current and planned investment in road and transport infrastructure for delivery over the four-year period²⁴
- \$497.4 million Mackay Ring Road (Stage 1) (jointly funded with the Australian Government). Construction of the Mackay Ring Road is complete, with remaining works associated with the connection to Bald Hill Road
- \$350 million funding commitment for Mackay Port Access, Bruce Highway to Mackay - Slade Point Road (Stage 1) (jointly funded with the Australian Government).

Queensland Freight Strategy and Queensland Freight Action Plan

The economic prosperity of regions is dependent on the strength of supply chains, which facilitate the movement of goods produced in regional areas to their final destination and vice versa. Freight networks are vital for regional economic growth, present an opportunity to decarbonise through investment in new, innovative technologies and skills development, which enable sustainable transport and promote sustainability across all aspects of the supply chain.

By investing in cleaner technologies, fostering innovation, and enhancing the skill set of the workforce, the region can move toward a more sustainable and economically prosperous future. These priorities are supported by the Queensland Freight Strategy²⁵ and the rolling two-year Queensland Freight Action Plan²⁶ which supports regions in:

- building effective partnerships between industry, customers and government
- unlocking economic opportunity
- smarter connectivity and access
- a more resilient freight system, and
- safer freight movements.

ENABLER

WATER

OVERVIEW

- The region has an extensive water infrastructure network, with total water reserves amounting to 2,681 gigalitres across five dams. In addition to rainwater and local streams, remote areas and farmers rely on water from local aquifers and groundwater.
- Water plays a key role in local mining, agricultural and manufacturing industries for ore processing, irrigation and cooling.
- The region faces challenges in ensuring sustainable and secure water supply to sustain its communities and industries in the face of increased climate variability. Access to additional water has the potential to unlock investment and increase higher value horticulture in the region.

KEY INITIATIVES UNDERWAY IN THE REGION TO ADDRESS THIS

Local plans and initiatives include:

- The Department of Regional Development, Manufacturing and Water (DRDMW) is progressing the review of the Pioneer water plan that will consider how best to support future development.
- Current water plans and the Great Artesian Basin Strategic Management Plan, to reduce water wastage, maintain pressure and preserve local ecosystems.

Notes

²⁴ <https://www.publications.qld.gov.au/dataset/queensland-transport-and-roads-investment-program-qtrip-2023-24-to-2026-27/resource/e2f11e9c-f59c-4292-a5cf-f35716d083dc>

²⁵ <https://publications.qld.gov.au/dataset/queensland-freight-strategy-advancing-freight/resource/ae528968-a698-422c-bdc7-2a38a911de45>

²⁶ <https://www.publications.qld.gov.au/dataset/queensland-freight-strategy-advancing-freight/resource/92f800f1-c8e5-4eaf-801b-3585e3883aeb>

(CONTINUED)	<ul style="list-style-type: none"> • \$2.1 billion infrastructure investment allocated across Queensland schools in 2023-2034 • \$290 million allocated annually across Queensland State Schools as part of Investing for Success • \$48.3 million for teacher housing in rural and remote areas of Queensland • \$3.4 million investment through Equipping TAFE for our Future to establish an Agriculture Centre of Excellence at Bowen TAFE • \$2 million through Equipping TAFE for our Future to establish an Aquaculture Centre of Excellence at Cannonvale TAFE • \$15.9 million total investment between 2022-2024 through Equipping TAFE for Stage 1 of CQUniversity's Rockhampton Campus consolidation and an expansion of the Mackay Ooralea Trade Training Centre to cater for heavy vehicle automotive training • A \$600,000 expansion to the Gateway to Industry Schools program to cover a dedicated renewable energy focus, and additional funding to support the development and implementation of online resources to support Queensland teachers to deliver clean energy content and student learning. • Up to \$10 million investment across the state to uplift state owned training infrastructure to support the skills needs of the clean energy workforce.
ENABLER	HEALTH
OVERVIEW	Proximity to healthcare services is key for attraction and retention of a skilled workforce in the region. This has important flow on effects for encouraging regional investment and economic development.
KEY INITIATIVES UNDERWAY IN THE REGION TO ADDRESS THIS	<p>The recent budget includes \$28.9 billion allocated to Queensland Health, with the majority to be spent on hospital and health Services across Queensland. This includes expansion, improvement and refurbishment works for the Mackay Base, Proserpine and Bowen Hospitals and the Moranbah Hospital.</p> <p>Total funding allocated to the Regional Hospital and Health services equals \$679 million.</p>
ENABLER	TELECOMMUNICATIONS
OVERVIEW	Access to digital connectivity is essential to growing business and adopting technologies. While satellite internet does provide coverage across the entire region, it is cost prohibitive for many residents and businesses who rely on cellular networks instead.
KEY INITIATIVES UNDERWAY IN THE REGION TO ADDRESS THIS	<p>The Queensland Government is delivering training and capacity-building programs to assist businesses to undertake digital transformation activities.</p> <p>In 2023, the Queensland Government committed to investing \$200 million over three years to grow the state's digital economy and improve digital connectivity.</p> <p>Connectivity is also being addressed through state initiatives, such as the under development Digital Infrastructure Plan, and Australian Government initiatives, such as the Telecommunications Disaster Resilience Innovation program.</p> <p>The Better Connectivity Plan is a key Australian Government initiative that will invest upwards of \$656 million across five years to improve connectivity in regional Australia, including coverage on regional roads, place-based connectivity infrastructure, on farm connectivity and more.</p>

<p>ENABLER</p> <p>OVERVIEW</p> <p>KEY INITIATIVES UNDERWAY IN THE REGION TO ADDRESS THIS</p>	<p>WORKFORCE</p> <p>Developing industry and the economy will require an increase in available workforce to support the development and ongoing operation of new industry.</p> <p>The <i>Queensland Workforce Strategy Action Plan (2022-2025)</i> includes a focus on local solutions. It contains actions to implement locally focused and led workforce planning and coordinate efforts across industry, the community and government at all levels. In part of this region, the Mackay Regional Jobs Committee brings together local stakeholders and is a key mechanism in supporting the delivery of the strategy.</p> <p>The Queensland Workforce Strategy builds on a suite of programs that have together powered the state's significant economic growth. This includes a \$200 million Future Skills Fund.</p> <p>On 25 October 2023, the Queensland Government released <i>Queensland's Clean Energy Workforce Roadmap</i> which recognises and supports regional Queensland to prepare for growth associated with energy transformation. Key actions out of this \$30 million strategy that will be delivered include:</p> <ul style="list-style-type: none"> • A \$600,000 expansion to the Gateway to Industry Schools program to cover a dedicated renewable energy focus, and additional funding to support the development and implementation of online resources to support Queensland teachers to deliver clean energy content and student learning • Up to \$10 million investment across the state to uplift state owned training infrastructure to support the skills needs of the clean energy workforce <p>The <i>Hydrogen Industry Workforce Roadmap 2022-2032</i>, released in July 2022, sets a clear path for industry and government to work together to deliver a strong and adaptable workforce for a safe and thriving Queensland hydrogen industry. This includes a \$800,000 investment in the Gateway to Industry Schools project for the hydrogen industry (GISPH2).</p>
<p>ENABLER</p> <p>OVERVIEW</p> <p>KEY INITIATIVES UNDERWAY IN THE REGION TO ADDRESS THIS</p>	<p>REGULATORY FRAMEWORKS</p> <p>Planning and regulatory frameworks are constantly evolving in response to emerging markets and challenges – to achieve economic, social and environment objectives. Project proponents must consider planning and environmental regulations under the relevant Australian, Queensland and local government legislation applying to the site, including the <i>Planning Act 2016</i> and State Development Assessment Provisions.</p> <p>Having the right policy and regulatory frameworks in place is important to enable new and emerging industries as well as evolution in existing industries.</p> <ul style="list-style-type: none"> • The Queensland Government is delivering on a commitment to review the planning framework for renewables. This includes working with government agencies, communities, local councils and stakeholders to provide more certainty and ensure individuals, communities and adverse impacts are considered in relation to local haulage routes, on-site construction camps and decommissioning of wind farms. • The Coordinator-General, under the <i>State Development and Public Works Organisation Act 1971</i>, provides significant support to the coordination of major projects, evaluation and responsible management of regional impacts. • Economic Development Queensland (EDQ) is the Queensland Government's land use planning and property development agency. • On 18 April 2024 the Queensland Parliament passed the <i>Clean Economy Jobs Act 2024</i> and the <i>Energy (Renewable Transformation and Jobs) Act 2024</i> to secure Queensland's spot at the centre of a global energy transformation. <ul style="list-style-type: none"> › The <i>Clean Economy Jobs Act 2024</i> sets out a pathway to decarbonisation that will support jobs in the state's key traditional industries, including agriculture, resources and manufacturing, and unlocking investment in new industries including renewables, manufacturing, critical minerals, hydrogen and sustainable aviation fuel.



TRANSFORMING THE GREATER WHITSUNDAY REGION

The Greater Whitsunday region has several key industries which are a significant source of economic activity and jobs. The region is also uniquely positioned to strengthen existing and develop new industries to harness the opportunities as the world transitions to net zero. The transformation of the Greater Whitsunday region will be underpinned by industries that leverage the region's strengths,

have significant growth potential, whilst supporting long-term economic growth, diverse economies and sustainable jobs.

Figure 7 sets out the distinctive strengths by industry for the region, while specific transformation priorities, in these current and emerging industries, are outlined on the following pages.

Figure 7 Greater Whitsunday's key industry strengths

MINING AND METS



- Highly advanced and innovative local METS sector
- METS Export Hub, RCOE and Resource Industry Network support strong connections and networks within the METS industry
- Mass deposits of metallurgical coal, with smaller deposits of thermal coal, silver and gold, amongst other minerals
- Bowen and Galilee basins – largest coal mining deposits in Australia and the majority of Queensland’s prime coking coal

MANUFACTURING



- Heavy industry and manufacturing that supports the regional mining sector
- Location, between the far North and Central Queensland, making it a key node in the broader supply chain as many products travel through the region enroute to market
- Existing skilled workforce and strong supporting services sector
- Consistent with agricultural and value-added production, biofutures and future foods are a key growth opportunity (e.g. QUT Mackay Renewable Biocommodities Pilot Plant)

AQUACULTURE



- The aquaculture sector within the region quantifies for more than half of the entire value of the state’s aquaculture sector
- Home to two Aquaculture Development Areas
- Enviable location with moderate climate and access to water
- Significant growth expected in the aquaculture sector over future years due to a range of new investments in the region
- Highly skilled workforce
- Sophisticated supply chain and transport network

AGRICULTURE AND VALUE-ADDED PRODUCTION



- Strong agricultural sector, including large sugar cane, cattle, horticulture, grazing crop and aquaculture industries
- Positive consumer sentiment for produce and abundance of natural resources contribute to food security, strengthening biofutures opportunities
- Rich source of first-generation fermentation feedstock from sugar cane
- Location enables the region as a key node in the broader supply chain
- Capability to produce a variety of products driven by stable climate and abundance in natural resources
- Favourable year-round warm climate which reduces input costs and the need for heating, ideal for bioindustry sector activities
- Emerging industrial biotechnology sector and expertise in research and development
- Counter seasonal production of vegetables relative to the rest of Australia

TOURISM



- Popular domestic and international tourist destination
- Extensive marinas and wharfs
- 39 national parks, 74 Whitsunday Islands (66 remain undeveloped)

AEROSPACE AND HYDROGEN



- Highly advanced METS sector (with existing technical skillset that can be transferred to emerging industries)
- Abbot Point SDA offers ideal location for industrial and port-related development that requires a large footprint, proximity to a port and separation from sensitive receptors

How the transformation will provide opportunities for First Nations peoples in the Greater Whitsunday region

Several priorities have been identified with a specific focus on facilitating economic participation for First Nations peoples as the region transforms. These include:

- **Priority 1.1** – Sustainable post-closure mine planning, with flexibility in mine-site rehabilitation to facilitate development of new industries and circular economy opportunities – this recognises the opportunities to work with local First Nations peoples in identifying sustainable post-mining land use options, or rehabilitating mine sites in a respectful and conscious manner that heals Country.
- **Priority 3.1** - Coordinated planning and establishment of renewable energy and hydrogen production, distribution and storage precincts across the Greater Whitsunday region – there is a large opportunity to incorporate First Nations businesses into construction, operation and maintenance supply chains as renewable energy generation capacity is increased to meet decarbonisation objectives.
- **Priority 4.2** – Enable a low emissions agriculture transformation and its supply chains to target the premium markets domestically and abroad and tackle climate change – including working with First Nations peoples to identify how Country can be protected while generating carbon credits, the proceeds of which would be returned to First Nations communities.
- **Priority 5.3** – Growth in education-based tourism around attractions that are anchored in natural and heritage values and community identity in the Greater Whitsunday region – this includes informational and experience-based education on the history and important sites of local First Nations peoples, both pre-and-post contact.

These priorities have been identified through consultation with First Nations stakeholders in the region. It is essential that the transformation of the region drives improvements in economic participation outcomes for First Nations peoples to support diverse and stronger economies and communities for all.

The Queensland Government is developing a First Nations Economic Strategy that will support agencies to engage with First Nations peoples, communities and businesses to address barriers and explore economic opportunities and pathways to jobs, skills and training, education, business development and entrepreneurship in current and emerging industries and sectors.

These priorities will also be supported by other government initiatives including the Queensland Indigenous Procurement Policy. A Queensland Indigenous Business Network has also been established and led by First Nations peoples to support First Nations-owned small businesses to grow and thrive.



Priority 1: Advanced Manufacturing and METS

Drive further growth in advanced manufacturing by leveraging existing METS capabilities and supporting existing and emerging businesses to harness new opportunities.



METS capabilities and advanced manufacturing

Priority 1.1: Sustainable post-closure mine planning, with flexibility in mine-site rehabilitation to facilitate development of new industries and circular economy opportunities.

Priority 1.2: Support existing METS and manufacturing industries to contribute to the growth of the critical minerals industry in neighbouring Queensland regions.

Priority 1.3: Diversification of the region's METS technical skillset to manufacture componentry for emerging industries and renewables.

Priority 1.4: Projects that grow industry capability.

Priority 1.5: Capability and capacity enhancement for existing METS businesses, particularly start-ups and SMEs, to support decarbonisation.

The Queensland Government has identified a strategic vision in its *METS 10-Year Roadmap and Action Plan* for the state's industry to lead the development of innovative, world-first solutions by 2027²⁷. The region's established METS industry and existing technical skillset are well-positioned to support this vision, responding to global industry challenges and capitalising on emerging opportunities from the transformation of the resources industry.

The Greater Whitsunday region is known for its world leading METS industry. The METS industry's workforce encompasses key skillsets, such as engineering, welding, machine operations and logistics, which have and will continue to underpin the region's significant coal industry and development of a critical minerals industry. The Greater Whitsunday region has direct access to key resources (metallurgical coal and critical minerals) in and around the region. With development of a pilot program to process mine tailings for extraction

of critical minerals (such as vanadium, indium and cobalt)²⁸, the region is well-positioned to support resource extraction and manufacturing of key componentry that will be needed for the expansion of renewable energy generation and storage.

Ongoing support of both existing and new METS businesses and showcasing the natural cluster of expertise to global markets will underpin growth in the advanced manufacturing and METS industries and unlock the state's strategic vision of becoming a global leader in development of responsible solutions for the energy and resources industry worldwide.

The skilled local workforce in the region will continue to play a key role in coal production in the near future. As global demand for coal begins to drop off, the skilled local workforce has an opportunity to pivot to support neighbouring regions in other METS related industries, such as mining and processing of critical minerals.

Notes

²⁷ Queensland Department of State Development, Infrastructure, Local Government and Planning, Queensland Mining Equipment, Technology and Services, 10-Year Roadmap and Action Plan, accessible at: <https://www.statedevelopment.qld.gov.au/__data/assets/pdf_file/0030/17949/mets-10-year-roadmap-and-action-plan.pdf>

²⁸ Anita Parbhakar-Fox, A (critically) wasted opportunity?, 2022, Global Mining Review, Sustainable minerals institute. Accessible at: <<https://smi.uq.edu.au/article/2022/06/critically-wasted-opportunity>>

Accelerated focus on diversifying the METS industry offerings and its skilled workforce will support development and growth of new industries, such as hydrogen, advanced manufacturing, circular economy and renewable energy generation and storage.

Growing the advanced manufacturing industry, including renewables componentry manufacturing, requires a diverse and skilled workforce that shares many common characteristics to the mining industry, such as welders, machine operations, freight and logistics operators. Development of the aerospace

industry can be accelerated through pilot projects that demonstrate the region's capabilities, attract investment and capitalise on its strategic location for aerospace activities.

Given the strong presence of mining in the region, there is also an opportunity in the longer term to leverage assets and infrastructure that are no longer required. Closed mine sites can be repurposed and reused, generating new economic activity and enhancing the industry's ESG outcomes.

Queensland Government actions to support implementing this priority:

The REFF is a new fund that supports economic and community development initiatives. REFF funding that aligns to this priority is expected to be announced in 2024.

Other activities include:

- The Queensland METS Roadmap and Action Plan (DSDI).
- The Queensland Aerospace Roadmap and Action Plan (DSDI).
- The Queensland Defence Industries Roadmap and Action Plan (DSDI).
- Mackay Regional Council received funding through the Regional and Remote Recycling Modernisation Fund (RRRMF) program for a project that will divert 3,978 tonnes of waste from landfill per annum (DSDI).
- QEJP represents long term opportunities for relevant manufacturing businesses to accelerate, establish or expand their operations in Queensland. Under the action 3.4 of the QEJP, to grow the renewable energy supply chain in Queensland, the Queensland Government committed \$11.6 million to help build capacity in the manufacturing sector and encourage local content in Queensland to supply future renewable energy projects (Department of Energy and Climate [DEC]).
- The Queensland Government has established a \$7.1 million Manufacturing Energy Efficiency Grant (MEEG) Program. The program awards \$5,000-\$25,000 matched funding grants to Queensland based manufacturers looking to increase energy efficiency measures and technology, reduce energy usage and costs, reduce emissions and increase awareness of energy use (DRDMW).
- Manufacturing Hubs established in Cairns, Townsville, Mackay, Rockhampton, Gladstone and Gold Coast engage directly with industry and provide targeted advice/support, training and professional development, along with facilitating applications for grants/funding assistance to build capacity, capability and sustainability (DRDMW).
- Manufacturing Hubs hosted industry showcase tours/events to introduce manufacturing stakeholders to developing supply chain networks and new business relationships (DRDMW).
- The \$33.5 million Manufacturing Hubs Grants program assists small to medium sized manufacturers to become more productive, build advanced manufacturing capabilities and create jobs (DRDMW).
- The \$121.5 million Made in Queensland grant program helps small to medium sized manufacturers to increase international competitiveness, productivity and innovation and to generate high skilled jobs of the future. The program also supports manufacturers to achieve energy efficiency, export, onshoring and the advancement of decarbonisation and net zero outcomes (DRDMW).
- The Manufacturing Sustainability Benchmarking Program enables manufacturers to benchmark their progress towards sustainability and provides a report outlining opportunities for further action. The program is subsidised by DRDMW.
- The Manufacturing Capability Development program provides a range of workshops, seminars and events to increase manufacturers' knowledge and understanding of contemporary issues and challenges within and facing the industry (DRDMW).

- Department of Transport and Main Roads (DTMR) is developing a comprehensive, integrated multi-modal regional freight plan for the North Queensland region to identify and prioritise freight network improvements to enhance overall supply chain efficiency.
- Regional Industrial Land Improvement Program announced \$45 million over three years to unlock industrial land in Mackay and Gladstone (DSDI).
- Launched the \$9.25 million Local Energy Partnerships initiative to create a framework for community participation and benefit sharing from the renewable energy transformation, including the expansion of the former GasFields Commission to Coexistence Queensland which will enable the commission to engage communities and support coexistence with other industries, including between the renewable energy and agriculture sectors (DEC).
- Queensland's Procurement Policy 2023 and Buy Queensland 2023 are the government's overarching policies for the procurement of goods and services. This will use procurement power to support local jobs through applying a 'local benefits' approach and supporting the establishment and growth of new industries through declaring Supply Chains of State Significance. These will boost Queensland manufacturing industries, Queensland content and manage risks for critical supply chains (DEC).
- The Queensland Indigenous Procurement Policy will also support this priority (DEC).
- Manufacturing Hubs (DRDMW) hosts professional development and business development workshops/training including:
 - » Technology Adoption Workshops/Webinars
 - » Lean Manufacturing Workshops
 - » Manufacturing Benchmark Program
 - » Introduction to Industry 4.0 Seminars
 - » Industry 4.0 Masterclass
 - » Decarbonisation Action Plan Workshop
 - » Digital Connectivity Program
 - » Paperless Quality Systems Seminars
 - » Technology in Manufacturing Workshops.



Austchrome, Mackay

Priority 2: Biofutures

Harness the growing demand for sustainable foods, fuel and energy by becoming an international leader in biofutures.



Globally recognised biofutures production

Priority 2.1: Establishment and promotion of State Development Areas (SDAs) for biofutures manufacturing in the region, specifically the Mackay SDA.

Priority 2.2: Accelerated and scalable biofutures research and development pilot projects to support start-up, innovation and collaboration precincts in biofutures.

Priority 2.3: Creating a future foods industry through a Future Foods Biohub initiative.

Priority 2.4: Investment in a sustainable ethanol industry, including for sustainable aviation fuels and other applications.

Priority 2.5: Biofutures industry that capitalises on opportunities for biomass conversion to value-added exports, or inputs into adjacent industries.

Biofutures refers to the biocommodities and biomanufacturing industries, which produce bioenergy, biochemicals, biofood, biofuels and bioplastics out of various carbon-based feedstocks (such as agricultural waste from cropping, horticulture and livestock). By offering a renewable and environmentally beneficial alternative to existing conventional chemical and fossil fuel refining, biofutures is globally recognised as a key next wave of jobs and growth.

With a competitive advantage due to its climate and world-class agricultural and research industries, Queensland is positioning itself as a place to invest, research and commercialise biofutures projects on a national and international scale.

Key to this is harnessing the Greater Whitsunday region's existing biofutures manufacturing as a hub for future growth in Queensland to serve growing domestic and international demand.

With an existing proven commitment and expertise in biofutures activities (demonstrated by the establishment of sugar mills, pilot plants and projects, biofuel production, cogeneration and well-established

supporting infrastructure), there are opportunities to capitalise on the region's ready access to feedstocks, global markets, strong manufacturing base and world-class expertise in research and development.

Unlocking the SDAs within the region will be critical to continue high-value and commercial-scale growth in the biofutures industry.

Further, supporting local pilot plants, along with research and development projects, will help maintain momentum in the region and accelerate industry growth.

Critical to establishing a world-class future-foods industry will be ongoing investment and support of the industry-led Future Foods Biohub initiative.²⁹ This will help strengthen the significant advances in the industry and position the region to meet the global demand for future foods.

The region has an opportunity to leverage its abundance of feedstock and sugarcane by-products to support biofutures and bioenergy initiatives, including producing sustainable, high-value products such as biochemicals, sustainable aviation fuel and bioethanol.

Notes

²⁹ Queensland Department of State Development, Tourism and Innovation, *Investing in the Mackay Future Foods Biohub*, accessible at https://www.statedevelopment.qld.gov.au/___data/assets/pdf_file/0014/22613/mackay-future-foods.pdf

Queensland Government actions to support implementing this priority:

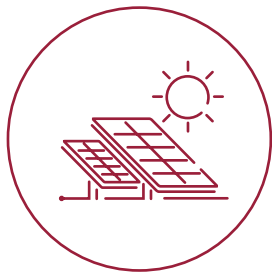
The REFF is a new fund that supports economic and community development initiatives. REFF funding that aligns to this priority is expected to be announced in 2024.

Other activities include:

- Regional Industrial Land Improvement Program supported \$45 million over three years to unlock industrial land in Mackay and Gladstone (DSDI).
- The Queensland Government's *Resource Recovery Industries 10-Year Roadmap and Action Plan* will not only reduce the impact of waste on the environment, but also transition to a circular economy while building economic opportunity in Queensland's regions (DSDI).
- The Queensland Biofutures Roadmap and Action Plan (DSDI).
- The Queensland Government is working with industry to deliver SAF refineries and position the state as a SAF hub (DSDI).
- Expansion of the Queensland University of Technology Mackay Renewable Bio-commodities Pilot Plant with investment from the Industry Partnership Program (DSDI).
- In conjunction with the Mackay Regional Council, working with local and international partners to attract investment and develop the Future Foods Biohub in Mackay (DSDI).
- The Mackay SDA, located across two sites at Racecourse Mill and Rosella, provides unique industry opportunities, with proximity to feedstocks and Racecourse Mill's existing mill and refinery, which supports development of biofutures industries across the two sites (DSDI, Office of the Coordinator-General (OCG) and EDQ).
- Rural Water Futures program (DRDMW).
 - » \$7.1 million allocated over four years to enhance water modelling capacity to support water planning, water security and infrastructure assessments.
 - » \$5.5 million to develop a Queensland bulk water infrastructure assessment plan, in the form of a Strategic Water Infrastructure Plan and Pipeline.
 - » \$4.9 million for a Queensland rural water compliance system.
- Queensland Water Strategy (DRDMW).
- Round 6 of Building our Regions has awarded over \$3.6 million to the Greater Whitsunday region, leveraging over \$8.2 million in additional contributions and supporting an estimated 25 jobs during construction to improve water supply and sewerage systems (DRDMW).
- The Advance Queensland (Department of Environment, Science and Innovation [DESI]) initiative is supporting sustainable and resilient regional economies through innovation, and the suite of targeted programs is empowering our regions to unlock potential, harness opportunities, be innovative, collaborate and create jobs, such as:
 - » *A Place to Innovate – Queensland Innovation Precincts and Places (QIPP) Strategy 2022-2032* is Queensland's ten-year strategy to release the potential from the state's innovation precincts and places and builds on decades of investment in Queensland's innovation ecosystem.
 - » \$15 million Queensland Innovation Precincts and Places Fund to help innovation places achieve their goals across the three pillars of people, place and purpose.
 - » Queensland Connects, based on the internationally regarded Massachusetts Institute of Technology (MIT) Regional Entrepreneurship Acceleration Program (REAP), supported a team of regional leaders to develop the Greater Whitsunday Biofutures Leaders Group to implement a regional biofutures strategy and collect data to pursue opportunities including the Biofutures Precinct and Future Foods Biohub.
 - » The Regional Futures Collaborative Projects Fund invested \$200,000 to support Mackay Canegrowers Ltd to adapt a spatial weather-based technology to apply remote sensing data to irrigation and crop management.
 - » Supporting the commercialisation of new ideas through the Ignite Ideas Fund.

Priority 3: Renewable Energy

Boost the region’s production and use of renewable energy, particularly bioenergy, solar and green hydrogen componentry.



Renewable energy production and usage

Priority 3.1: Coordinated planning and establishment of renewable energy and hydrogen production, distribution and storage precincts across the Greater Whitsunday region.

Priority 3.2: Accelerated use of renewables within key regional industries, including agriculture, construction, minerals processing, tourism, services and manufacturing, to grow and decarbonise these industries.

Priority 3.3: Investment attraction in key industrial precincts, particularly through SDAs focused around renewable energy production and use, including the activation of Abbot Point SDA.

The Greater Whitsunday region has a significant role to play in Queensland’s energy transformation, with a strong pipeline of renewable projects being proposed or under construction. As of June 2023, \$11.1 billion has been invested since 2015 into large-scale, operational renewable energy projects across Queensland.³⁰ This includes more than \$1 billion invested in the Greater Whitsunday region, representing more than 500MW of renewable energy capacity.³¹

The existing transmission infrastructure, including large areas suitable for solar and surplus bagasse, make it a prime area for the rapid expansion of renewable energy generation. Leveraging existing projects is key to further bolstering local renewable energy capabilities and use, particularly bioenergy, solar and green hydrogen. REZs are areas that help coordinate development of clean energy infrastructure, delivering better outcomes for Queensland communities and industries.

Expanding renewable energy capacity should be done in parallel to improving connectivity and uptake of renewable energy in key regional industries, including agriculture, construction, minerals processing and manufacturing, to grow and decarbonise these industries in line with the QEJP.

Australia has an estimated biogas potential of 371 PJ/yr (103 TWh/yr), which is almost 9 per cent of Australia’s total energy consumption. Biogas can play a role in the future zero emission economy. For example:

1. Biogas used for electricity and heat generation in a combined heat and power (CHP) plant.
2. Biogas upgraded to compressed biomethane (BioCNG).
3. Biogas upgraded to biomethane for grid injection (BioRNG).

Notes

³⁰ Queensland Government, Department of Energy and Public Works. *Queensland’s renewable energy target*. Statistics for large-scale (>5 MW) operational, under construction or financially committed projects since 2015. As of June 2023, accessed at: <https://www.epw.qld.gov.au/about/initiatives/renewable-energy-targets#:~:text=Queensland%20is%20accelerating%20towards%20its,under%20construction%20or%20financially%20committed>.

³¹ Queensland Government, Department of Energy and Public Works. *Mackay Isaac Whitsunday*, accessed at: <https://www.epw.qld.gov.au/energyandjobsplan/regions/mackay-isacc-whitsunday>

Or a combination of all three – for example part of the biogas could be used for CHP to meet a plant's energy demands, with the remaining biogas upgraded to biomethane. The carbon dioxide from the biogas upgrading process could be recovered and liquefied for sale (BioCO₂). The nutrient-rich digestate from the

biogas plant could be further processed into a solid fraction and a liquid fraction. The solid fraction could be sold as fertiliser while the liquid fraction could be recycled as process water.

Queensland Government actions to support implementing this priority:

The REFF is a new fund that supports economic and community development initiatives. REFF funding that aligns to this priority is expected to be announced in 2024.

Other activities include:

- The Office of the Queensland Chief Entrepreneur, Advance Queensland (AQ) and Trade and Investment Queensland (TIQ) are partnering with Climate Salad to grow the climate tech industry and community in Queensland (DESI).
- The Queensland Hydrogen Industry Strategy (DSDI and DEC).
- Activation of the Abbot Point SDA (DSDI, OCG, EDQ and DEC).
- Strategy 2 of the *Advanced Manufacturing 10-Year Roadmap and Action Plan* is to support manufacturers to grow in a carbon neutral future. It includes analysis of renewable supply chains and development of a renewable energy supplier database (DRDMW).
- Development of the Net Zero Emissions for Transport Roadmap (Transport Roadmap), a commitment under the Queensland Climate Action Plan. The Transport Roadmap will provide the foundational blueprint to reduce Queensland's transport sector emissions and contribute to achieving Queensland's emission reduction targets (DTMR).
- The Queensland Government has established a \$7.1 million Manufacturing Energy Efficiency Grant (MEEG) Program. The program will award \$5,000-\$25,000 matched funding grants to Queensland Based manufacturers looking to increase energy efficiency measures and technology, reduce energy usage and costs, reduce emissions and increase awareness of energy use (DRDMW).
- The Queensland Circular Economy (industry research) program is supporting the RCOE (Mackay) to work with key industry sectors in the region – Mining/METS, Agriculture and Tourism (DESI).
- Pioneer-Burdekin Pumped Hydro Energy Storage (PHES) project, located west of Mackay, will be the largest Pumped Hydro Energy Storage in the world, with the potential for stage one to be completed by 2035 (DEC).
- The 2023–24 Budget includes a landmark capital investment of around \$19 billion across the forward estimates to support the QEJP. The government's publicly owned energy businesses are leading Queensland's energy transformation, investing in new wind, solar, storage and transmission, supported by the \$4.5 billion Queensland Renewable Energy and Hydrogen Jobs Fund and the government's new progressive royalty rates (Queensland Treasury (QT)).
- Supported by the new progressive royalty rates announced in the 2022-23 Budget, the government (QT) is providing \$10 billion in funding to the Government Owned Corporations and Queensland Hydro. In the Greater Whitsunday region, this includes \$1 billion for the Pioneer-Burdekin PHES project.
- The Isaac Renewable Energy Zone (REZ) in Phase 2 of the Queensland Renewable Energy Zone Roadmap, is expected to result in 1,400-1,800 MW of new renewable energy generation capacity (DEC).
- The Zero Emission Vehicle Strategy includes a target that every new Translink bus added to the fleet is to be a zero-emission bus from 2025 in South East Queensland, and from 2025-2030 across regional Queensland (DTMR).
- Queensland's Clean Energy Workforce Roadmap (Department of Employment, Small Business and Training (DESBT)).
- As part of the Queensland Renewable Energy and Hydrogen Jobs Fund, the energy government-owned energy corporations will increase ownership of commercial renewable energy and hydrogen projects, as well as supporting infrastructure, including in partnership with the private sector (QT).

Priority 4: Agriculture and Aquaculture

Support the sustainable growth and transformation of the agriculture and aquaculture industries to unlock additional domestic and global export opportunities.



Agribusiness innovation and transformation

Priority 4.1: Further modernisation of the region’s agriculture, including fostering innovation (through piped, automated irrigation, precision agriculture and space-tech) by supporting small, regional agriculture businesses.

Priority 4.2: Enable a low emissions agriculture transformation and its supply chains to target the premium markets domestically and abroad and tackle climate change.

Priority 4.3: Growing Aquaculture Development Areas into leading aquaculture precincts for marine prawns (black tiger and banana prawns), barramundi and marine fish, opening up domestic and international export opportunities.

Priority 4.4: Cooperation between aquaculture and agriculture industries to realise seasonality, efficiency and climate adaptation opportunities.

The agriculture and aquaculture industries are growing industries in the Greater Whitsunday region and are expected to have an important role in the transformation of the region. The region is renowned for its major sugar farming and refining, livestock beef cattle production and horticultural winter produce production, with total agricultural exports from the region contributing 17 per cent Queensland’s total agricultural output.³² Aquaculture is a rapidly growing industry within the region and is expected to grow to represent more than half of the total value of the industry in Queensland.³³

The region’s strong and diverse agricultural industry is underpinned by natural assets including a temperate winter climate, abundance of natural resources, strong supply chain and highly skilled workforce. A growing population and positive consumer sentiment for produce, particularly in

Asian markets, will continue to fuel demand for the region’s products, particularly given its existing road infrastructure and port access.

Supporting the capacity of existing agriculture and aquaculture industries to adopt modern AgTech will be vital for the industry to reduce its environmental footprint and improve efficiency, productivity and competitiveness in farming, as well as adapt to the expected impacts of climate change. This will enable a larger capture of market share, both domestic and abroad, and open opportunities to expand value-adding activities.

TAFE Queensland run Agriculture and Aquaculture Centres of Excellence have recently opened in Bowen and Cannonvale, which offer exciting learning opportunities, skills and pathways for regional students working in these industries.

Notes

³² 2022 data. Calculated from data sourced from REMPLAN, 2018-2022.

³³ Department of Agriculture and Fisheries 2022, Aquaculture Production Summary for Queensland, State of Queensland

Further, support to expand accredited net-zero carbon farms will underpin the strengthening of supply chains and build capacity for businesses to access, remain competitive and advance market share within the wider carbon net-zero or carbon-neutral markets.

The region's location, climate, access to water and Aquaculture Development Areas (ADAs) provide a pathway for growth of the aquaculture industry and will position the region for export opportunities.

State Government actions to support implementing this priority:

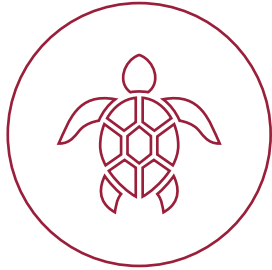
The REFF is a new fund that supports economic and community development initiatives. REFF funding that aligns to this priority is expected to be announced in 2024.

Other activities include:

- The Queensland Government announced and designated eight Aquaculture Development Areas (ADAs), including at Abbot Bay in the Whitsunday LGA and Bloomsbury in the Mackay LGA (Department of Agriculture and Fisheries [DAF]).
- Rural Water Futures program (DRDMW)
 - » \$7.1 million allocated over four years to enhance water modelling capacity to support water planning, water security and infrastructure assessments.
 - » \$5.5 million to develop a Queensland bulk water infrastructure assessment plan, in the form of a Strategic Water Infrastructure Plan and Pipeline
 - » \$4.9 million for a Queensland rural water compliance system.
- Queensland Water Strategy (DRDMW).
- Round 6 of Building our Regions has awarded over \$3.6 million to the Greater Whitsunday region, leveraging over \$8.2 million in additional contributions and supporting an estimated 25 jobs during construction to improve water supply and sewerage systems (DRDMW).
- Queensland Reef Water Quality Program (DESI).
- Low Emissions Agriculture Roadmap (DAF).
- Drought and Climate Adaptation Program - Delivering research, development and extension (RD&E) improving the drought resilience and preparedness of primary producers (DAF).
- Rural Economic Development grants – up to \$200,000 as a co-contribution grant to strengthen primary production sectors and bolster rural communities (DAF).
- The Regional Futures Collaborative Projects Program invested \$200,000 to support Mackay Canegrowers Ltd to implement a spatial weather-based irrigation scheduling and crop benchmarking tool to increase productivity and improve water use (DESI).
- Queensland's Land Restoration Fund supporting land-sector carbon projects and to increase participation in carbon farming by Queenslanders (DESI).

Priority 5: Tourism

Leverage the natural beauty and heritage of the Greater Whitsunday region to underpin a leading tourism industry.



Sustainable and eco-friendly tourism

Priority 5.1: Transition of tourist industry road and marine transport to renewable energy (such as electric and low-carbon fuels like hydrogen and its derivatives).

Priority 5.2: Greater Whitsunday region to have a leading reputation as an ecotourism destination in domestic and international tourism markets.

Priority 5.3: Growth in education-based tourism around attractions that are anchored in natural and heritage values and community identity in the Greater Whitsunday region.

Priority 5.4: Remove the barriers to enable tourism opportunities in the Greater Whitsunday region.

Domestic tourism has seen a strong recovery following the impacts of the pandemic, with domestic overnight visitor expenditure in Australia increasing by 35.5 per cent as of year ending December 2023 (compared to year ending December 2019). Domestic tourism growth has included regional and rural areas, with the Mackay tourism region, as well as Whitsundays tourism region, seeing an increase in domestic visitors (5.3 per cent and 8.8 per cent respectively) over the 3 years up to December 2023³⁴

The region is strategically positioned to provide a world-class tourism industry with its natural attractions, unique biodiversity values and tourism infrastructure, including the Great Barrier Reef, 74 iconic Whitsunday Islands, Eungella National Park and Finch Hatton Gorge, among many other parks and beaches. The unique tourism value of the

Greater Whitsunday region is evidenced by annual visitation to the Whitsunday and Mackay tourism regions reaching over 2 million visitors for the year ending December 2023, generating overnight visitor expenditure of almost \$2.18 billion³⁵

Local Governments and the state are continuing to support and reinforce sustainable management of the region's unique tourism offerings. This includes developing existing and attracting significant events (such as local rodeo and campdraft), developing new tourism experiences (such as mountain bike trails and public art installations), and building community awareness of the importance of tourism activities that preserve the region's unique natural assets for future generations.

To capitalise on the existing and planned works to support growth of the region's tourism offerings

Notes

³⁴ Tourism Research Australia, National Visitor Survey year ending December 2023.

³⁵ Tourism Research Australia, National Visitor (NVS) and International Visitor Surveys (IVS) year ending December 2023.

and prepare the tourism industry to operate in a low-emissions, and ultimately net-zero, environment by 2050, the region has an opportunity to establish critical supporting infrastructure to retain and grow its sustainable tourism base. By promoting and developing tourism experiences around the region's unique cultural and environmental heritage,

distinctive local histories, and by establishing infrastructure for renewables-powered transport, the region can strengthen its appeal as a sustainable tourism destination, which is a fast-growing consumer market that has the potential to enhance the good jobs and great lifestyle offered by the region.

Queensland Government actions to support implementing this priority:

The REFF is a new fund that supports economic and community development initiatives. REFF funding that aligns to this priority is expected to be announced in 2024.

Other activities include:

- The Queensland tourism industry strategy, Towards Tourism 2032 (TT32) – Transforming Queensland's visitor economy future, was developed in partnership with industry, to guide industry and government's partnership to deliver long-term growth and success for Queensland tourism. Key progress to date from implementation includes overnight visitor expenditure reaching \$34.3 billion (for the 12 months ending September 2023); government-industry partnership investment in international aviation and route attraction under the Attracting Aviation Investment Fund; delivering marketing initiatives to grow visitation from target markets; supporting improvements in accessibility and resilience of industry; attracting major international sporting events; ongoing delivery of grant funding programs to develop and enhance tourism product, infrastructure and experiences; private investment facilitation (Department of Tourism and Sport [DTS]).
- A range of support and financial assistance programs to support tourism operators, including the Growing Future Tourism and Tourism Business Capability Subsidy, Queensland Music Trails, Accessible Tourism Guide and podcasts, and marketing and event support through Tourism and Events Queensland (DTS).
- DTMR's Queensland Tourism and Transport Strategy has been developed jointly by DTMR and the DTS and details the Queensland Government's plan to improve access to Queensland's world class tourism destinations in an effort to enhance the visitor experience and grow the tourism industry.



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