

Prospects Update

December 2008



At a glance

Total value of Queensland's primary industries

In 2008–09, the total value of Queensland's primary industry commodities—comprising gross value of production (GVP) at the farm gate and first-round processing—is forecast at approximately \$13.028 billion. This is 5% higher than DPI&F's final estimate for 2007–08.

Gross value of production at the farm gate

In 2008–09, the gross value of production of Queensland's primary industry commodities at the farm gate is forecast at \$10.012 billion. This is 5% higher than DPI&F's final estimate for 2007–08.

Forecasts that have been revised **up** from DPI&F's September forecasts for 2008–09 have increased by:

- sugarcane—\$55 million
- cotton—\$40 million
- bananas—\$30 million
- cattle and calves—\$30 million
- avocados—\$15 million
- pigs—\$10 million

- poultry—\$10 million
- milk—\$10 million
- forestry and logging—\$8 million
- mangoes—\$5 million.

Forecasts that have been revised **down** from DPI&F's September forecasts for 2008–09 have decreased by:

- grain sorghum—\$170 million
- wheat—\$80 million
- tomatoes—\$40 million
- chickpeas—\$25 million
- sunflowers—\$15 million
- barley—\$12 million
- pineapples—\$10 million
- strawberries—\$10 million
- potatoes—\$10 million
- mandarins—\$5 million.

First-round processing

In 2008–09, the value of first-round processing (or value-added production) is forecast at \$3.016 billion. This is 6% higher than DPI&F's final estimate for 2007–08.

Summer/autumn 2008–09 climate forecast

Based on a consistently positive October phase of the Southern Oscillation Index (SOI) and historical rainfall data, there is a 50–70% chance of getting at least median rainfall throughout Queensland during November to January. A more detailed analysis indicates that rainfall is likely to be above average (upper third) rather than average or well below average (middle to lower third). For example, there is a 52% chance of exceeding the November to January median rainfall of 290 mm at Kingaroy, and there is a 64% chance of exceeding the November to January median rainfall of 159 mm at St George and the November to January median rainfall at 225 mm at Emerald. At Cloncurry there is a 70% chance of exceeding the November to January median rainfall of 168 mm, while Mareeba has a 73% chance of exceeding the November to January median rainfall of 339 mm.

According to the latest ENSO wrap-up from the Bureau of Meteorology, sea surface temperatures (SST) in the Pacific Ocean are in a neutral pattern, trade winds remain close to or slightly above average and cloudiness near the International Dateline is near normal. Therefore, SST values are most likely to remain in a neutral climate pattern with a low risk of a return to El Niño conditions over summer 2008–09. The 30-day average of the SOI as of 27 November was plus 14.4 (see Figure 1 overleaf).



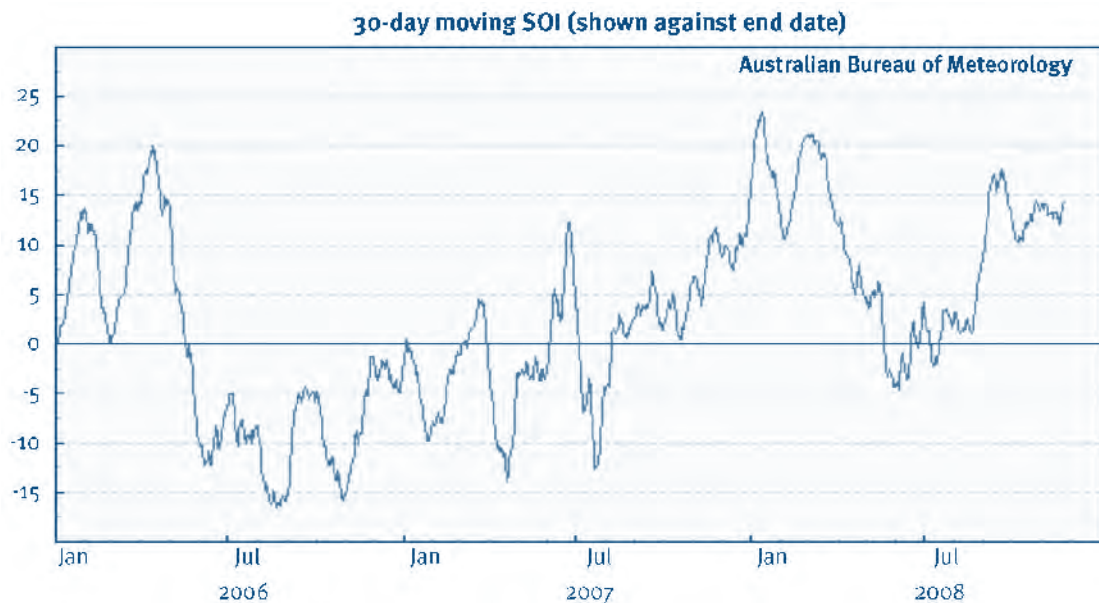


Figure 1. 30-day average of the SOI

Table 1. GVP, first-round processing and total primary industry estimates and forecasts 2006–07, 2007–08 and 2008–09

Commodity GVP (a)	2006–07 (b)	2007–08 (c)	2008–09 (d)	% change 2007–08 to 2008–09
	\$m	\$m	\$m	%
Livestock disposals				
Cattle and calves	3816	3440	3390	-1
Sheep and lambs	45	60	55	-8
Pigs	237	220	195	-11
Poultry	240	300	330	10
Other livestock	23	15	15	0
Total livestock disposals	4361	4035	3985	-1
Livestock products				
Wool	120	120	125	4
Milk (all-purpose)	207	255	265	4
Eggs	93	110	120	9
Total livestock products (e)	420	485	510	5
Total livestock	4781	4520	4495	-1
Horticulture				
Fruit and nuts				
Bananas	400	470	430	-9
Pineapples	65	55	45	-18
Mangoes	80	45	65	44
Mandarins	90	85	70	-18
Strawberries	120	130	140	8
Avocados	75	70	85	21
Macadamias	40	25	30	20
Apples	33	50	50	0
Table grapes	48	40	40	0
Other fruit and nuts	95	105	135	29
Total fruit	1046	1075	1090	1
Vegetables				
Potatoes	55	45	45	0
Tomatoes	169	205	160	-22
Capsicums and chillies (f)	100	100	100	0
Sweetpotatoes	45	55	45	-18
Other vegetables	425	375	590	57
Total vegetables	794	780	940	21
Total fruit and vegetables	1840	1855	2030	9

Commodity GVP (a)	2006–07 (b)	2007–08 (c)	2008–09 (d)	% change 2007–08 to 2008–09
	\$m	\$m	\$m	%
Lifestyle horticulture—production				
Nurseries (c)	375	410	451	10
Turf (c)	65	70	81	16
Cut flowers (c)	115	125	125	0
Total lifestyle horticulture production	555	605	657	9
Total horticulture	2395	2460	2687	9
Other field crops				
Sugarcane (g)	1122	750	895	19
Cotton (raw) (h)	121	110	380	245
Other crops (c)	260	150	208	39
Total other crops	1503	1010	1483	47
Cereal grains				
Wheat	188	360	420	17
Barley	19	55	33	-41
Grain sorghum	190	475	255	-46
Maize	25	60	60	0
Other cereal grains	15	20	20	0
Total cereal grains	437	970	788	-19
Total crops	4335	4440	4958	12
Total agriculture	9116	8960	9453	5
Fisheries (c) (i)				
Trawl	119	116	101	-13
Non-trawl	151	149	147	-1
Aquaculture	75	80	85	6
Total fisheries	345	345	333	-3
Forestry and logging (c) (j)				
	181	185	193	5
Kangaroos				
	46	41	33	-20
Total primary industries (farm gate)	9688	9531	10 012	5
First-round processing value-added (k)				
Meat processing (c)	1026	950	926	-2
Sugar Processing (c)	471	315	353	12
Milk and cream processing (c)	113	140	140	0
Fruit and vegetables processing (c)	181	182	202	11
Flour mill and feed processing (c)	81	181	196	8
Seafood processing (c)	25	25	24	-4
Log sawmilling and timber dressing and plywood and veneer manufacturing (c)	312	319	333	4
Lifestyle horticulture services (c) (l)	665	700	780	11
Cotton ginning (c)	14	13	39	211
Kangaroo processing (c)	22	20	23	15
Total primary industries (first-round processing)	2911	2844	3016	6
Total primary industries	12 599	12 375	13 028	5

(a) GVP is defined as the 'gross value of commodities produced'. It is a measure of economic output. In this publication, GVP relates to the output of primary industry commercial operations only. The GVP is the value of recorded production at wholesale prices realised in the market place (e.g. cattle sold at saleyards, sugarcane at the mill door, fruit and vegetables at the wholesale market). It is derived by multiplying the output from each primary industry by the average wholesale price paid to producers.

(b) ABS preliminary estimates for 2006–07 unless otherwise indicated.

(c) DPI&F estimates.

(d) DPI&F forecasts.

(e) Excludes minor commodities such as honey, beeswax, mohair.

(f) DPI&F estimate does not include chillies.

(g) Gross value of sugarcane at mill door.

(h) Includes value of cotton seed and lint.

(i) Includes catches from both commonwealth-managed (including Torres Strait, Gulf of Carpentaria and east coast tuna fisheries) and state-managed fisheries.

(j) Australian Bureau of Agricultural and Resource Economics (ABARE) estimates.

(k) See Notes section for definition of 'value-added'.

(l) The value of the lifestyle horticulture services sector has been calculated on a gross turnover basis rather than a value-added basis and therefore will contain elements of 'double counting'.

Livestock disposals

Cattle and calf disposals

Cattle and calves sold for slaughter and live exports Forecast

The GVP of cattle and calf disposals (including both animals sold for slaughter and live exports) for 2008–09 is forecast at \$3.390 billion, 1% greater than DPI&F's initial September estimate for 2008–09 and 1% lower than DPI&F's final estimate for 2007–08.

Discussion

The 1% increase can be attributed to an increase in cattle slaughtered, which has more than offset the slight decrease in price. Price has fallen from \$950/head in the September quarter to \$947/head for the December quarter.

The estimated value of cattle and calves sold for slaughter in 2008–09 is forecast at \$3.349 billion. The slaughter numbers for 2008–09 are forecast at 3.5 million, which is slightly below the number of cattle and calves slaughtered in 2007–08. However, favourable seasonal conditions are expected to see higher numbers of cattle turned off in the New Year.

Queensland lot feeders increased the number of cattle on feed during the past quarter by 17 422 head, yielding a total of 376 126 head on feed. Queensland lot feeders should benefit in coming quarters from an above average harvest across key grain regions that will result in lower grain prices and overall production costs. This may increase feedlot capacity and the number of cattle on feed. Trading conditions to export markets are also expected to improve; therefore there appears to be a positive impact on the feedlot sector.

Live cattle exports

Forecast

The GVP of Queensland's live cattle exports is forecast at \$40 million in the December quarter of 2008–09.

Discussion

Live cattle exports are projected to continue to grow as the availability and affordability of Australian cattle improves and demand in key markets also continues to grow.

Pigs

Forecast

The GVP of pigs sold for slaughter in 2008–09 is forecast at \$195 million, 5% higher than DPI&F's initial September estimate for 2008–09 but 11% lower than DPI&F's final estimate for 2007–08.

Discussion

Slaughter data from ABS and Australian Pork Limited indicate a steady downward trend in slaughter numbers for the first quarter of the 2008–09 year. However, as a response to large numbers of producers exiting the industry and smaller sow herds, supply in the pig market is becoming increasingly tight and pig meat prices have consequently increased. Higher prices, coupled with a sharp downturn in feed prices have rendered pig farming more profitable for those remaining in the industry.

Poultry

Commodity

Forecast

The GVP of poultry in 2008–09 is forecast at \$330 million, 3% greater than DPI&F's initial September estimate for 2008–09 and 10% higher than DPI&F's final estimate for 2007–08.

Discussion

An estimated 98 million chickens were slaughtered in Queensland in 2007–08 (based on initial ABS livestock slaughter data). This number is expected to remain stable in 2008–09. Prices are also expected to be relatively stable in 2008–09.

Livestock products

Milk

Forecast

Queensland's GVP of milk in 2008–09 is now forecast at \$265 million, 4% higher than DPI&F's initial September estimate for 2008–09 and DPI&F's final estimate for 2007–08.

Discussion

Expected increases in the GVP of milk can be largely attributed to dairy producers' success in locking in favourable long-term contract prices. In fact, Queensland's price growth is 2.5%, nearly double the national average growth of 1.3%.

Eggs

Forecast

In 2008–09, the GVP of eggs is forecast at \$120 million, the same as DPI&F's initial September estimate for 2008–09 and 9% higher than DPI&F's final estimate for 2007–08.

Discussion

The increase in the GVP of eggs can be attributed to increases in price and quantity. Farm gate prices in the egg industry are expected to rise by 5–10%. The quantity of eggs produced in Queensland is expected to increase in the latter half of the year as the new flock comes online.

Horticulture

Fruit and nuts

Pineapples

Forecast

The GVP of pineapples in 2008–09 is forecast at \$45 million, 18% lower than DPI&F's initial September estimate for 2008–09 and DPI&F's final estimate for 2007–08.

Discussion

The forecast for GVP of pineapples has been reduced because Golden Circle Ltd announced a 30% reduction in the intake of processing pineapples. This has resulted in a large amount of the Smooth Cayenne fruit being directed to the fresh market, causing a drop in fresh market prices for both hybrids and Smooth Cayenne.

Mangoes

Forecast

The GVP of mangoes in 2008–09 is forecast at \$65 million, 8% higher than DPI&F's initial September estimate of \$60 million for 2008–09 and 44% higher than DPI&F's final estimate for 2007–08.

Discussion

The crop is well down on last year and indications are that prices will remain high into the future.

Bananas

Forecast

The GVP of bananas in 2008–09 is forecast at \$430 million, 7.5% higher than DPI&F's initial September estimate of \$400 million for 2008–09 and 9% lower than DPI&F's final estimate for 2007–08.

Discussion

The increase in the forecast for the GVP of bananas to \$430 million was based on slightly higher-than-expected volumes and prices in the year to date.

Strawberries

Forecast

The GVP of strawberries in 2008–09 is forecast at \$140 million, 7% lower than DPI&F's initial September estimate of \$150 million for 2008–09 but 8% higher than DPI&F's final estimate for 2007–08.

Discussion

The prices during the 2008 season (May–October) were lower than originally forecast.

Mandarins

Forecast

The GVP of mandarins in 2008–09 is forecast at \$70 million, 7% lower than DPI&F's initial September estimate of \$75 million for 2008–09 and 18% lower than the DPI&F's final estimate for 2007–08.

Discussion

Exports were negatively affected by the high Australian dollar and prices have been even lower than expected.

Avocados

Forecast

The GVP of avocados in 2008–09 is forecast at \$85 million, 21% higher than DPI&F's initial September for 2008–09 and DPI&F's final estimate for 2007–08.

Discussion

Both production and prices for avocados have been higher than initially forecast, due to better seasons and new contracts with a major retail chain.

Vegetables

Potatoes

The GVP of potatoes in 2008–09 is forecast at \$45 million, 18% lower than DPI&F's initial September estimate of \$55 million for 2008–09 but the same as DPI&F's final estimate for 2007–08. This can be attributed to a combination of lower-than-expected average prices due to increased production volumes oversupplying the market.

Tomatoes

The GVP of tomatoes in 2008–09 is forecast at \$160 million, 20% lower than DPI&F's initial September estimate of \$200 million for 2008–09 and 22% lower than DPI&F's final estimate for 2007–08. Production volumes and yield have remained at the level anticipated by earlier forecasts despite a late start to the growing season. However, consumer demand has been subdued over most of this period in line with the mild spring climate.

Other field crops

Sugarcane

Forecast

The GVP of the 2008–09 Queensland sugarcane crop is forecast at \$895 million, 7% higher than DPI&F's initial September estimate for 2008–09 and 19% higher than DPI&F's final estimate for 2007–08.

Discussion

The current forecast is 7% higher than DPI&F's September forecast for the year, mainly because of the devaluation of the Australian dollar. The 2008 crop is expected to yield 30 million tonnes of sugarcane, at an average sugar content (CCS) of 14. Price expectations have improved in Australian dollar terms, resulting in an expected crop value of \$895 million.

Cotton

Forecast

The GVP of cotton in 2008–09 is forecast at \$380 million, 12% higher than DPI&F's initial September estimate of \$340 million for 2008–09 and 3.5 times higher than DPI&F's final estimate for 2007–08.

Discussion

Queensland cotton is expected to have a great season, with favourable water availability and no hail storms so far in production areas.

Irrigation water supplies are good in St George and Emerald, yet variable in the Darling Downs and Border Rivers regions. Dry land crops will rely on coming summer rainfalls to achieve good yield; however, dry land plantings have more than doubled due to significant rainfall throughout the year. Beside increased water availability, a forecast high world price of cotton also accounts for the substantial increase in Queensland cotton production.

Other crops

Soybeans

Forecast

The GVP of soybeans in 2008–09 is forecast at \$17.5 million, 9% higher than DPI&F's initial September estimate of \$16 million for 2008–09 and 35% higher than DPI&F's final estimate for 2007–08.

Discussion

The higher forecast GVP is due to a 44% increase in area sown, increasing production by 36% to 30 000 tonnes, despite a forecast reduction in price by 16%, from \$717 per tonne to \$603 per tonne.

Chickpeas

Forecast

The GVP of chickpeas in 2008–09 is forecast at \$37.5 million, 40% lower than DPI&F's initial September estimate of \$62.5 million for 2008–09 and 25% lower than DPI&F's final estimate for 2007–08.

Discussion

The lower forecast GVP is due in part to an expected 12% decline in production to 93 320 tonnes due to lower yields, but is primarily caused by a fall in price of 33% (from \$590 per tonne to \$395 per tonne).

Winter cereal grains

Wheat

Forecast

The GVP of wheat for 2008–09 is forecast at \$420 million, 16% lower than DPI&F's initial September estimate for 2008–09 and 17% higher than DPI&F's final estimate for 2007–08.

Discussion

There is a 7% forecast increase (782 439 hectares in September to 836 950 hectares in December) in area planted; however, this is more than offset by an expected drop in price.

Price per tonne has fallen significantly, by 18% from an average of \$326 per tonne for Australian Premium White (APW-minimum 10.5% protein), to \$268 per tonne, causing wheat GVP to fall. The world wheat price has fallen partly in response to a decline in world commodity prices following economic recession conditions in the US and Europe. Further, Northern Hemisphere countries have experienced good crop harvests in 2008, contributing to some softening of world grain prices. High domestic sorghum stocks will likely exert some downward influence on domestic feed wheat demand and, hence, prices.

As at mid-November 2008, the Queensland wheat crop is 80% harvested, with approximately 60% of the harvest classed as milling APW grade or stronger. Demand is remaining strong for Prime Hard (13% protein or higher). Lower-protein wheat is currently difficult to sell, in part due to the large supplies of previous season sorghum and also due to a glut of feedgrains on the world market.

If there is any improvement in wheat prices, it will likely be in the Prime Hard and H2 categories, due to increased flour demand in export destination countries—particularly in the Middle East for flat breads, and in Asia for noodles and soft variety breads based on Prime Hard wheat varieties. Strong income growth in Asia is driving flour demand.

Barley

Forecast

The GVP of barley is forecast at \$33 million in 2008–09, 27% lower than DPI&F's initial September estimate for 2008–09 and 41% lower than DPI&F's final estimate for 2007–08.

Discussion

The lower GVP estimate is due to a 28% fall in barley price, from \$282 per tonne to \$204 per tonne, since the September 2008 quarter. Production is forecast at around 158 000 tonnes for 2008–09. The lower barley price is due to Queensland barley quality problems and high supplies of close substitutes such as sorghum.

Western Australia produced a 3.5 million tonne sorghum crop over 2007–08, which means that there are substantial amounts of old-season sorghum in storage, which are substitutable to a degree for barley as a feedstock.

Summer cereal grains

Grain sorghum

Forecast

The GVP of grain sorghum is forecast at \$255 million, 40% lower than DPI&F's initial September estimate of \$425 million for 2008–09 and 46% lower than DPI&F's final estimate for 2007–08.

Discussion

The reduction in GVP is due in part to a decrease in expected area sown and yields, resulting in a forecast decline in production of 28% to 1.27 million tonnes. The expected decline in GVP is predominantly caused by a 21% fall in price per tonne (from \$251 in the September quarter to \$199 per tonne in the December quarter).

The area planted to grain sorghum in Queensland is forecast to decline by around 14% in 2008–09 from the record area planted in 2007–08. Parts of the 2007–08 grain sorghum area were double-cropped into wheat and will therefore not be planted to grain sorghum in 2008–09. Moreover, cotton prices have increased, and maize and soybeans have also become more attractive. There is also a glut of feedgrains in the world market, due to some grain being diverted from ethanol production and good crop harvests in the Northern Hemisphere over 2008. This has placed downward pressure on feedgrain prices. Additionally, world soft and coarse grain prices have fallen in line with softening commodity prices.

Yields are forecast to return closer to historical averages from the record 3+ tonnes a hectare achieved in 2007–08. Estimated stored soil moisture levels are less than 50% across most of the north-east Australian summer cropping region, and above average rainfall is needed in November and December to create favourable planting conditions. There is a 60% to 70% chance of rainfall exceeding the long-term median for most of the sorghum-growing regions in north-east Australia over November 2008 to January 2009.

Sunflowers

Forecast

The GVP of sunflower seeds in 2008–09 is forecast at \$15 million, 50% lower than DPI&F's initial September estimate of 30 million for 2008–09 and 40% lower than DPI&F's final estimate for 2007–08.

Discussion

The lower-than-expected GVP is due to a smaller area sown and slightly lower yields. Production of sunflower seed has declined by 26% to 25 940 tonnes and price per tonne has fallen by 24% (from \$793 to \$602).

The area planted to sunflower plantings is being revised downwards as there was a late cotton planting around St George, and some areas did not receive sufficient rain. There is significant interest to establish late summer plantings; however, this will depend on both soil moisture and ongoing concern about disease (tobacco streak virus).

There has been high demand for monounsaturated sunflower seeds. Sunflowers are expected to become increasingly competitive with sorghum as a summer crop in 2008–09, given the high price of sunflowers relative to sorghum, and provided there are good sub-soil moisture storage levels over summer 2008–09. All sunflower seed is expected to be sold in the domestic market, as domestic demand is expected to outstrip supply.

Forestry and logging

Forecast

The GVP of forestry and logging in 2008–09 is forecast at \$193 million, 5% higher than DPI&F's initial September estimate and DPI&F's final estimate for 2007–08.

Discussion

The Australian Bureau of Agricultural and Resource Economics (ABARE) recently revised its 2006–07 estimates of GVP for the Queensland forest-growing sector. ABARE now estimates that the forest-growing sector recorded GVP of \$199 million in 2006–07, an \$18 million revision on the previous estimate of \$181 million.

ABARE's data revision has necessitated adjustments to DPI&F's estimates of the Queensland forest industry in the September 2008 issue of *Prospects*. DPI&F now estimates that the forest industry has contributed just over \$504 million to the Queensland economy in 2007–08 (see Table 1). This comprised an estimated \$185 million from the growing sector, and an estimated \$319 million (on a value-added basis) from the first-round processing sector.

After an unprecedented period of sustained economic growth, economic conditions in Queensland have weakened significantly over the last few months, brought on by the flow-on impacts of the international financial crisis. Queensland Treasury's Office of Economic and Social Research (OESR) reports that dwelling approvals in Queensland have now declined in each month between November 2007 and September 2008 (trend data). Furthermore, OESR expects that dwelling investment in Queensland will continue to weaken in the near term.

The slow-down in new housing construction is now impacting on the demand for forest products. Queensland's principal forest grower, Forestry Plantations Queensland, reports a decline in the demand for structural sawn timber since the start of the 2007–08 financial year. There are some anecdotal reports of rising inventories at some Queensland timber processing plants, declines in production shifts, and even some labor shedding.

The medium-term outlook for the Queensland forest industry remains strong. Drivers such as continued strong population growth in Queensland, the positive climate and environmental connotations of forest products, cuts to interest rates, continued activity in the dwelling renovation market, and government policy initiatives designed to restore economic confidence such as increased government grant assistance for first home owners, underpin this positive outlook.

However, in line with the deteriorating economic conditions, especially the weakening dwelling investment data, DPI&F has moderated its 2008–09 forecasts for the Queensland forest industry outlined in the September 2008 issue of *Prospects*. DPI&F is now forecasting that the Queensland forest industry will record total GVP of \$526 million in 2008–09, a 4% increase from the 2007–08 estimate. The forest-growing and first-round processing sectors are estimated to generate \$193 million and \$333 million in activity, respectively.

Key assumptions

When calculating these forecasts, DPI&F follows the convention used by all government forecasting agencies—that 'normal' seasonal conditions will occur across Queensland throughout the forecast year (2008–09) or that part of the forecast year yet to be completed. This sets a benchmark for measuring variations from 'normal' as the season unfolds.

The prices of all internationally traded commodities are responsive to changes in the exchange rate of the Australian dollar, relative to the currencies of our trading partners. Prices to primary producers (and therefore gross unit values) decline when the A\$ exchange rate increases and vice versa.

Notes

Gross value of commodities produced (GVP). GVP is a measure of economic output. In this publication, GVP relates to the output of primary industry commercial operations only. The GVP is the value of recorded production at wholesale prices realised in the market place (e.g. cattle sold at saleyards, sugarcane at the mill door, fruit and vegetables at the wholesale market). It is derived by multiplying the output from each primary industry by the average wholesale price paid to producers.

Value-added production is measured as the value of the output produced minus the costs of the intermediate inputs.

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Contact the Business Information centre on 13 25 23.

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