

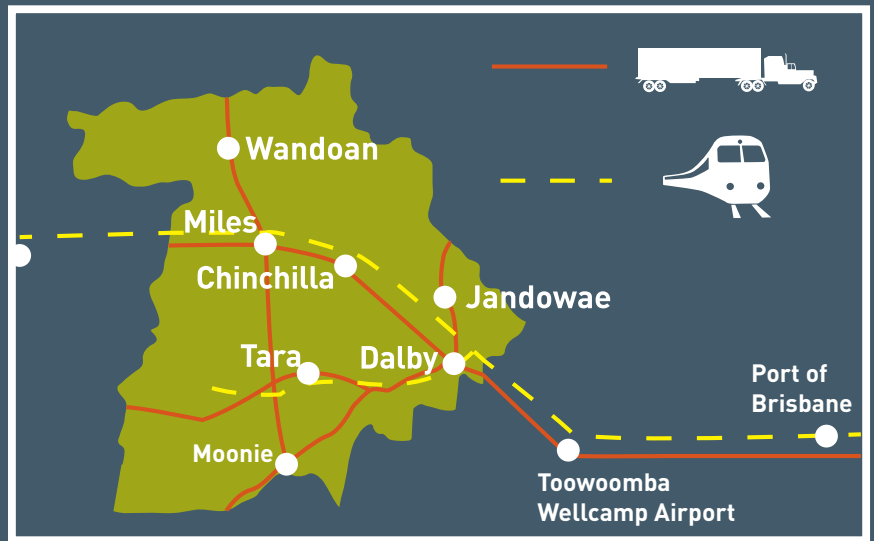
ESTABLISH YOUR BUSINESS IN THE WESTERN DOWNS

Locating your business in the Western Downs positions you with easy connectivity to national and international export markets, a growing diverse economy with established supply chains, lower location investment costs and the support of a progressive regional council.

As at June 2018, the Gross Regional Product (GRP) of the Western Downs region has grown by 26.3 percent over a twelve-month period to reach \$4 billion.

With a strong agricultural foundation that continues to grow and diversify, the region has also experienced investment over the past 15 plus years by the Energy Production Industry (EPI) into large scale resource sector developments.

These ongoing projects and others, provide flow-on economic opportunities for your business to increase business scope and profitability.



Fast Facts

- The Energy Capital of Australia
- Opportunity across a diverse range of established industries and access to major projects
- Access to the award-winning Western Down Regional Council Planning Scheme (fast approval process)
- Land zoned to allow for low, medium and high impact industry
- Up to 87% lower land acquisition costs per hectare when compared to the Brisbane city area
- Available land to expand your business as required
- A pool of skilled workers with positive team cultures and high workforce retention rates
- Efficiencies around connectivity (road, rail and air), with B-Triple approved routes
- Access to the Port of Brisbane and Toowoomba Wellcamp Airport create export opportunities
- Support from economic development groups, industry groups, active Chambers of Commerce and Western Downs Regional Council



INDUSTRY FOCUS

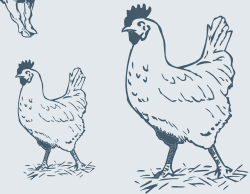
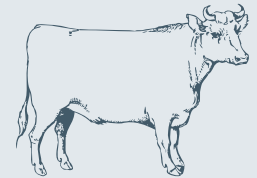
INTENSIVE ANIMAL INDUSTRY OPPORTUNITIES:

The location of the Western Downs provides intensive animal businesses easy access to:

- Store cattle producers in the state
- A central location active in grain production
- The doorstep of Queensland's meat processing hub
- Efficiencies around major infrastructure and lower transport costs with highway access to inland and seaport via the Toowoomba Second Range Crossing to Toowoomba Wellcamp Airport and the Port of Brisbane
- Increased profitability with 20% cheaper export costs via the Port of Brisbane to China

WESTERN DOWNS OFFERS YOUR BUSINESS:

- Rural land acquisition up to 41% per hectare lower than neighbouring regions
- Fast approval process
- Ideal location for access to Queensland's meat processing hub
- Established supply chain
- Strong pool of residential workers with qualifications in agriculture, environment and related studies (3.5% higher than Qld average)
- On the doorstep to agtech research – meat industry (Tertiary institutions)
- Proximity to TAFE Agricultural Centre of Excellence (Operational in 2020)
- Established industry, with Council, Chambers of Commerce and associated industry bodies support.



Dalby Regional Saleyards are the **largest same-day prime and store cattle yards** in Australia and the second largest selling and auctioning centre nationally.

The region's specialty in intensive animal farming is primed to expand into **quail and poultry meat markets**, with the stability of climate, land availability and central location equaling reduced transport timeframes and costs.

Development approval granted for an abattoir located at Jimbour with capabilities to process up to **20,000 tonnes of beef and pork per annum**. To be completed by November 2020 under the current approval.

RESOURCE AND RENEWABLES PROJECTS IN THE WESTERN DOWNS

RENEWABLE ENERGY PROJECTS:

- Two solar farms underway
- 18 approved and awaiting commencement
- One wind farm underway; and
- Another approved and scheduled to begin in early 2020

BIO-ETHANOL:

The Western Downs is home to Australia's first grain-to-ethanol facility - Dalby Bio-Refinery Ltd (DBRL).

GAS PROJECTS:

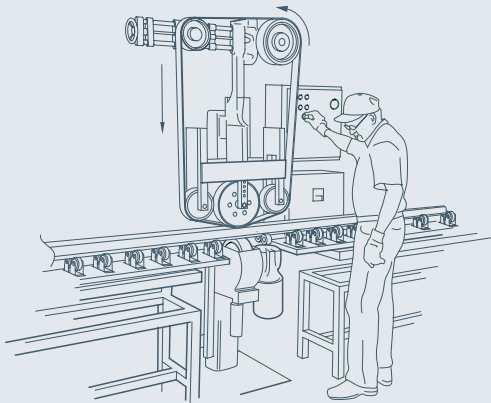
Queensland's Surat Basin in which the Western Downs sits, is currently the Australian region with the most coal seam gas activity. There are presently six gas projects in the Western Downs and expansions continue to be announced.

MANUFACTURING OPPORTUNITIES:

Manufacturers in the Western Downs benefit from lower land acquisition costs, a skilled, stable workforce, ease of access to supply chain, a collaborative manufacturing culture and a strong economy to assist with business sustainability.

Active, established agriculture, construction, resource and renewable energy industries across the region provide opportunities for manufacturing businesses to value-add, with a high demand for quality manufacturing products.

The Department of State Development, Manufacturing, Infrastructure and Planning suggests that global demand for commodities is expected to grow; providing long-term opportunities for Queensland's Mining Equipment, Technologies and Services (METS) sector. This growth potential flags opportunities for the manufacturing industry.



WESTERN DOWNS OFFERS YOUR BUSINESS:

- Industrial land acquisition up to 87 % less in the Western Downs region compared to Brisbane City per hectare
- Fast approval processes
- High presence of potential target market industries and energy resource projects (Energy Capital of Qld)
- Export via Toowoomba Wellcamp Airport and the Port of Brisbane
- Efficiencies around major infrastructure and transport costs
- Skilled workforce, culture and retention (In 2016, 14.4% of resident workers had an engineering and related technologies qualification. This is 2.8% higher than the Queensland average).
- Advanced manufacturing opportunities.

FAST COUNCIL APPROVAL PROCESS

An award-winning Planning Scheme geared towards development and developers throughout the region.

Assessment process averages 11 days which is 58.5 days below the statutory requirement.

In 2018 **\$1.9 billion** worth of development applications were assessed.

WESTERN DOWNS

OPEN CUT COAL MINES:

Coal mining has contributed to the Western Downs economy in some capacity since 1914. There are currently two open cut coal mines in the region. Coal is Australia's largest energy resource, with around 60% of the nation's electricity now produced in coal-fired power stations.

POWER STATIONS:

Gas and coal-fired power stations feature prominently in the region with a total of six active thermal power stations.

ACCORDING TO BUSINESSES WITH REGIONAL OFFICES - BENEFITS INCLUDE:

- Improved social engagement
- Positive Office culture (vs working from home or in one big centre)
- Community awareness
- Community ownership (my local business)
- Diversity of employees
- Client retention (within that region)
- Brand expansion recognition
- Flexibility to service opportunities locally as they arise
- The ability to expand the business scope

REGIONAL PROFILE

Known as the Energy Capital of Australia, the Western Downs is experiencing high economic growth, investment, consistently high employment and includes some 38,000 km² of land.

Home to a growing population of more than 34,000 residents, the Western Downs offers contemporary technology and opportunities in a friendly regional location. Modern facilities such as aquatic and fitness centres, art galleries, museums, cinemas and civic centres bring a metropolitan feeling to regional communities. The region also offers residents access to public and privately run medical and health care services.

The continued strength of traditional agricultural industries, construction, manufacturing and other support industries throughout the region, show the benefits of working alongside energy producers to maximise production outcomes.

The Western Downs has an established construction, manufacturing and labour force supply-chain, linking services and suppliers to industry and consumers.

Economic development businesses in the region such as the Chambers of Commerce and the Toowoomba and Surat Basin Enterprise (TSBE) group, contribute to supply chain strength by linking businesses with opportunities to create opportunity and diversity.

ECONOMIC INFRASTRUCTURE – FREIGHT AND TRANSPORT

Transport infrastructure in the Western Downs includes road, plane and train access. Road access is through the Leichhardt, Moonie, and Warrego Highways, with the Toowoomba Second Range Crossing reducing freight and transport times to key locations.

The Toowoomba Wellcamp Airport opens export opportunities through Queensland's only dedicated 747-8 International Freighter Service.

The rail network transports containerized freight to the Port of Brisbane for export, with imminent rail tunnel upgrades allowing for transport of 'Hi Cube' containers. Rail networks such as the Western Rail Line increase connectivity and provide direct access to the Toowoomba Wellcamp Airport and the Port of Brisbane.

The Inland Rail national project will link the Port of Melbourne and the Port of Brisbane by rail, via central-west NSW and Toowoomba creating new opportunities for businesses through increased capacity to transport goods, both into and out of Western Downs region.

The information and statistics included in this document are reliant on the accuracy of sources as listed and were accurate as at the time of printing - September 2019.

A SNAPSHOT



UNEMPLOYMENT RATE TRENDING LOWER THAN QLD AVERAGE



A SKILLED AND EXPERIENCED WORKFORCE



AS AT JUNE 2018 GRP: 26.3% INCREASE OVER 12 MONTHS TO REACH \$4 BILLION



DEVELOPMENT & DEVELOPERS SUPPORTED AND WELCOMED WITH WDRC PLANNING SCHEME



COMPARATIVELY STRONG INDUSTRY SUPPLY CHAINS PER CAPITA OF POPULATION

Energy Capital of Queensland: Resources & Renewables



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AVERAGE DISPOSABLE INCOME \$20K HIGHER THAN QLD AVERAGE