

Prospects update

March 2008



Flooding in Central Queensland causes short-term losses

Queensland's primary producers have weathered tough climatic conditions recently. Monsoonal rains in January and February 2008 brought some much-needed rain to many parts of the state but caused widespread flooding and damage, particularly in Central Queensland around Emerald and Charleville.

While the impacts of the flooding are substantial, the longer-term benefits are expected to outweigh the immediate hardship and losses.

A \$39 million loss in gross value of agricultural production (GVP) is anticipated in the short-term for Emerald and Charleville. This represents 5% of the region's anticipated agricultural output.

Itemised losses for the Central Queensland region are:

- cereal grains—\$22 million decline in GVP
- cotton—\$14 million decline in GVP (most producers lost some crop)
- beef—\$2 million loss in GVP (due to stock deaths)
- vegetables—\$500 000 loss in GVP
- sheep and wool—\$60 000 loss in GVP

In addition, there is an estimated \$46 million in infrastructure damages.

Flooding reaps longer-term benefits

Due to this rain, soil moisture has increased substantially and water supplies have been replenished. Queensland's two largest dams, the Burdekin Falls Dam and Fairbairn Dam, are now full.

Cereal grain and other crops' production are expected to benefit substantially from increased water availability in the region. Accordingly, production for the next financial year is expected to be 25% higher than for the current year.

Due to the high summer rainfall, cotton production is expected to be 2–3 times higher in 2008–09 than 2007–08.

Flooding in Bowen/Burdekin and Mackay regions

There have also been other parts of the state that have been affected by the monsoonal rains. The Bowen/Burdekin and Mackay regions have suffered damage and losses to agricultural gross value of production. While impacts on urban residents have been significant, losses to primary producers in these regions have not been as extensive as in Emerald and Charleville.

At a glance

In 2007–08 the total value of Queensland's primary industry commodities is forecast at approximately \$12.476 billion (figure comprising GVP¹ at the farm gate and first round processing²).

This forecast is 3% higher than the Department of Primary Industries & Fisheries (DPI&F's) final estimate for 2006–07.

Gross value of production at the farm gate

In 2007–08, the gross value of production of Queensland's primary industry commodities at the farm gate is forecast at \$9.624 billion.

This is 3% higher than DPI&F's final estimate for 2006–07.

First-round processing

In 2007–08, the value of first-round processing² (or value-added production) is forecast at \$2.852 billion.

This is the same as DPI&F's final estimate for 2006–07.

¹ 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.

² First round processing (or value-added production) is measured as the value of the output produced minus the costs of the intermediate inputs.



Climate outlook for summer/autumn 2007–08

Rain, storms and flooding during January brought much-needed relief to many areas of Queensland. The outlook for the remainder of the summer indicates reasonable chances for median rainfall.

The 30 day average of the Southern Oscillation Index (SOI) remained positive through January, and was plus 12.7 for the month. The SOI phase has been 'consistently positive' (phase 2) for the past few months. Based on this SOI and historical rainfall records, the outlook for February to April shows a 50 to 70% chance of above median rainfall for most of Queensland. Some isolated regions have a 40 to 50% chance of exceeding their median rainfall. Further analysis indicates rainfall for much of Queensland is more likely to be close to or above the long term average (or middle third to upper third) rather than below or well below average.

The monsoon trough was re-established across northern Australia with the last passage of the Madden-Julian Oscillation (MJO)³ through the tropics. During summer, northern Australia can expect MJO-enhanced rainfall probabilities. We expect to see a greater impact from the MJO on our (northern Australian) rainfall during our summer and autumn. The next passage of the MJO is now due mid-March. The March passage of the MJO will most likely be the last monsoonal burst for summer 2007–08. Cyclone development is also associated with the monsoon trough and with the passage of the MJO, so there is an increased probability of tropical cyclone formation in the Coral Sea region from late February to early March.

Source: Queensland Climate Change Centre of Excellence, on February 8, 2008.

³ The MJO is a tropical band of low air pressure originating off the east coast of central Africa travelling eastward across the Indian Ocean and northern Australia roughly every 30 to 60 days.

Table 1. Gross values of production^a, first-round processing and total estimates^b and forecasts for the major primary industry commodities in Queensland from 2005–06 to 2007–08, including the change between this year's forecast and last year's estimate.

Commodity GVP ^a	2005–06 ^c	2006–07 ^c	2007–08 ^d	change 2006–07 to 2007–08
	\$m	\$m	\$m	%
Livestock disposals				
Cattle and calves	3675	3625	3414	-6
Sheep and lambs	50	45	55	22
Pigs	220	210	220	5
Poultry	230	240	300	25
Other livestock	10	10	10	0
Total livestock disposals	4185	4130	3999	-3
Livestock products				
Wool	110	110	120	9
Milk (all purpose)	210	200	255	28
Eggs	100	100	100	0
Total livestock products^e	420	410	475	16
Total livestock	4605	4540	4474	-1
Horticulture				
Fruit and nuts				
Bananas	300	400	500	25
Pineapples	40	65	70	8
Mangoes	60	80	45	-44
Mandarins	75	90	95	6
Strawberries	120	120	130	8
Avocados	45	75	80	7
Macadamias	55	40	25	-38
Apples	35	35	50	43
Table grapes	n/a	n/a	40	n/a
Other fruit and nuts	55	95	105	11
Total fruit	785	1000	1140	14
Vegetables				
Potatoes	35	40	45	13
Tomatoes	165	200	225	13
Capsicums & chillies ^f	80	100	100	0
Other vegetables	460	470	430	-9
Total vegetables	740	810	800	-1
Total fruit and vegetables	1525	1810	1940	7

Commodity GVP ^a	2005–06 ^c	2006–07 ^c	2007–08 ^d	change 2006–07 to 2007–08
	\$m	\$m	\$m	%
Amenity horticulture				
Nurseries ^c	645	375	410	9
Turf ^c	90	65	70	8
Cut flowers ^c	130	115	125	9
Total amenity horticulture	865	555	605	9
Total horticulture	2390	2365	2545	8
Other field crops				
Sugarcane ^g	1000	1075	810	-25
Cotton (raw) ^h	395	120	80	-33
Other crops	350	260	360	38
Total other crops	1745	1455	1250	-14
Cereal grains				
Wheat	275	240	350	46
Barley	45	25	55	120
Grain sorghum	140	185	410	122
Maize	35	25	55	120
Other cereal grains	15	15	10	-33
Total cereal grains	510	490	880	80
Total crops	4645	4310	4675	8
Total agriculture	9250	8850	9149	3
Fisheries^{c, i}				
Trawl	100	85	85	0
Non-trawl	85	105	105	0
Aquaculture	65	65	85	31
Total fisheries	250	255	275	8
Forestry and logging^{c, i}	190	200	200	0
Total primary industries (farm gate)	9690	9305	9624	3
First round processing (value-added)^k				
Meat processing ^c	985	980	941	-4
Sugar processing ^c	420	450	340	-24
Milk and cream processing ^c	115	110	140	28
Fruit and vegetables processing ^c	150	175	191	9
Flour mill and feed processing ^c	95	95	164	73
Seafood processing ^c	25	20	20	0
Log sawmilling and timber dressing and plywood and veneer manufacturing ^c	330	345	347	1
Lifestyle horticulture services ^c	615	665	700	5
Cotton ginning ^c	45	15	9	-39
Total primary industries (first round processing)	2780	2855	2852	0
Total primary industries	12470	12160	12476	3

(a) *Gross value of production* is defined as the gross value of commodities produced (GVP). 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) As the Australian Bureau of Statistics (ABS) has not yet released final figures for 2005–06 and 2006–07, estimated GVP figures for these years are using DPI&F estimates only.

(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) First round processing (or value-added production) is measured as the value of the output produced minus the costs of the intermediate inputs.

Livestock disposals

Cattle and calf disposals

Forecast

The GVP for cattle and calf disposals (includes both animals sold for slaughter and live exports) for 2007–08 is forecast at just over \$3.4 billion.

Cattle and calves sold for slaughter (not including live exports)

Forecast

The GVP for cattle and calf slaughterings (not including live exports) for 2007–08 is forecast at \$3.344 billion.

Discussion

In the first half of 2007–08 (i.e. July to December), Queensland cattle and calf slaughter numbers were 6.5% lower and the average price per head was 6% lower than the same period in 2006⁴.

Slaughter numbers between January and March 2008 are expected to be down from the previous year. Industry sources suggest there will be 50 000–55 000 slaughterings per week until the end of March, compared to 70 000–75 000 per week for the same period in 2007. After March, slaughterings are then expected to increase to last year's levels.

While slaughter numbers are expected to recover in the latter part of the 2007–08 financial year, this revised forecast assumes that slaughterings will not reach the 3.9 million figure achieved in 2006–07.

The increased rainfall and prospects of better pasture growth will encourage producers to hold stock for finishing and to rebuild their herds. The rain and flooding has also restricted mustering and road transport. Because of this, slaughterings declined in January.

Competition from restockers and feedlotter is forcing cattle prices up (Meat and Livestock Australia state that the Eastern Young Cattle Indicator (EYCI) is at highest point since July 2007).

North Queensland processors have delayed opening or shortened work weeks because of reduced supply of cattle and the wet. The export works are also being pressured by the high Australian dollar and competition from the United States of America.

Pigs

Forecast

The gross value of pigs sold for slaughter in 2007–08 is forecast at \$220 million, 5% higher than DPI&F's final estimate for 2006–07.

Discussion

Slaughter data from ABS and Australian Pork Limited for the first half of the 2007–08 year show a decreasing trend in both slaughter numbers and GVP. This trend can be attributed to water scarcity and increased feed costs. However, despite these factors, the GVP is expected to be slightly higher than DPI&F's final estimate for 2006–07.

Poultry

Forecast

The gross value of poultry production in 2007–08 is now forecast at \$300 million, 25% higher than DPI&F's final estimate for 2006–07.

Discussion

Poultry prices continue to rise steadily absorbing the increasing cost of feed grain. Due to increased demand for poultry meat, overall production is also rising steadily.

Livestock products

Milk

Forecast

Queensland's gross value of milk production in 2007–08 is now forecast at \$255 million, 28% higher than DPI&F's final estimate for 2006–07.

Discussion

High rainfall allows for new fodder growth

The recent high rainfall has been greatly appreciated by most dairying regions around Queensland. However, the amount of rainfall varied greatly and some areas have still not received water. In fact, drought conditions continue across the northern Downs through to the northern Burnett and south eastern Central Queensland.

The rainfall has created much-needed fodder growth and crop-planting opportunities which dairy farmers have been harnessing to restore fodder storage levels, improve herd nutrition and reduce expensive grain-based drought rations.

Flooding causes infrastructure damage

In the flooded areas of South East Queensland, Southern Darling Downs and Central Queensland there was extensive damage to farm infrastructure and fodder crops. These farms will take some time to recover from these damages and return to full operational levels.

Operating costs still high

Due to continuing high grain prices, many producers are seeking alternative options to reduce grain use or find cheaper substitutes. High prices for other farm inputs such as fertiliser and fuel are also continuing to push up the cost of operations.

Competitive processors offer price and contract incentives

A great deal of competition still exists between milk processors in Southern Queensland and Northern NSW and processors have offered additional price, contract and supply incentives to producers. Over the last six months, prices have increased by approximately 25 to 30% to reach an average annual price of 50 to 55 cents per litre.

Overall decline in milk supply

With improved climatic conditions and increased on-farm fodder production, the decline in milk production (when compared to the previous year), has started to recover. However, it is still expected that the decline in production will level out to a decline of around 9% for the 2007–08 financial year.

⁴ Australian Bureau of Statistics unpublished data.

Table 2. Queensland milk production 2004–05 to 2007–08

	2004–05 (estimates)	2005–06 (estimates)	2006–07 (estimates)	2007–08 (forecasts)	2007–08 compared with 2006–07
	million litres	million litres	million litres	million litres	%
South East Queensland	492	486	419	377	-10
Far North Queensland (Malanda)	89	88	82	77	-6
Central Queensland	38	36	33	31	-7
Total Queensland	619	610	534	485	-9

Source: Dairy Australia

Although overall milk supply has partially recovered due to recent rainfall, dairy cow numbers are still a concern for industry. As mentioned in the last *Prospects Update*, cattle prices are still rising. Prices for replacement cows and heifers have more than doubled over the summer compared to prices paid last winter. This may encourage more producers to exit the industry causing a further contraction of dairy producers.

It is expected that the increase in milk prices will offset the decline in overall milk supply, resulting in an increase in GVP from last financial year to approximately \$255 million.

Strong prices for dairy products in medium term

With supply shortages and continually high international demand, dairy product prices are expected to remain strong in the medium term. If the climate outlook improves on top of these conditions, the Queensland dairy industry may be able to expand again. However, this is unlikely to occur until later in 2008 and into 2009.

Eggs

Forecast

The gross value of egg production in 2007–08 is now forecast at \$100 million, the same as DPI&F’s final estimate for 2006–07.

Discussion

There is currently an excess of eggs supplied by the Queensland industry. This oversupply may be attributed to the fact that some producers, who were expected to leave the industry due to introduction of new cage standards in January, have not left. The oversupply reflects a temporary production adjustment. Prices are expected to remain low until excess supplies are depleted.



Horticulture

Fruit and nuts

Bananas

Forecast

The gross value of banana production in 2007–08 is now forecast at \$500 million, 25% higher than DPI&F’s final estimate for 2006–07.

Discussion

DPI&F’s initial forecast for 2007–08 was valued at \$450 million. The increase in GVP is due to higher-than-expected production levels.

Mangoes

Forecast

The gross value of mango production in 2007–08 is now forecast at \$45 million, 44% lower than DPI&F’s final estimate of \$80 million for 2006–07.

Discussion

The current forecast is also lower than DPI&F’s initial forecast of \$55 million for 2007–08. Based on the biennial flowering pattern of mangoes, the 2007–08 crop was expected to be low. Good flowering led to initial forecasts of a better-than-normal crop, but subsequent poor fruit-set reduced harvest expectations. In addition, prices have been lower than expected.

Avocados

Forecast

The gross value of avocado production in 2007–08 is now forecast at \$80 million, 7% higher than DPI&F’s final estimate for 2006–07.

Discussion

The current forecast is also higher than DPI&F’s initial forecast of \$65 million for 2007–08. Production is now expected to be higher than was initially forecast and the price outlook has also improved.

Apples

Forecast

The gross value of apple production in 2007–08 is now forecast at \$50 million, 43% higher than DPI&F's final estimate for 2006–07.

Discussion

Higher than expected prices have pushed up the forecast GVP from DPI&F's initial forecast of \$45 million for the year.

Vegetables

Tomatoes

Forecast

The GVP of tomato production in 2007–08 is now forecast at \$225 million, 13% higher than DPI&F's final estimate for 2006–07.

Discussion

Reasonable rain and mild temperatures over the summer months have caused a slight decline in yield but an increase in prices as a higher quality crop was produced.

Lifestyle horticulture industry

The September 2007 edition of *Prospects* forecast a slight fall in GVP of the lifestyle horticulture industry in 2007–08 when compared to the previous year. However, recent heavy rainfall and increased consumer expenditure on lifestyle horticulture products and services have generated optimism about sales for the rest of the year.

The Queensland Water Commission recently released its *Drought Exit Strategy* which outlines the easing of water restrictions for residential consumers in South East Queensland. This announcement provides additional confidence for lifestyle horticulture businesses about their future trading conditions. Increased on-farm water storage levels, for a majority of the state, have also secured production for the coming quarter, and in many cases for much longer.

However, all lifestyle horticulture sectors are reporting difficulties attracting labour due to the current very strong labour market. This is becoming a significant impediment to business expansion, following on the heels of two relatively difficult trading years.

Amenity horticulture (production sector)

Forecast

The GVP for nursery products is forecast at \$410 million in 2007–08, 9% higher than 2006–07.

The GVP for turf is forecast at \$70 million, 8% higher than 2006–07.

The GVP for cut flowers and foliage is forecast at \$125 million, 9% higher than 2006–07.

Discussion

Production nursery and turf

Increased demand from the landscape sector has generated increased demand for production nursery and turf sectors. High rainfall in other states has also translated into strong sales in the production nursery sector.

Cut flowers

Demand for cut flowers has also recently improved and demand is now stronger than it has been for a few years. Increased rainfall has improved quality and production levels.

Native cut flower exports are also experiencing growth in value and quality.

Offsetting these positive trends however, has been the negative impact of cheaper, imported flowers from South East Asia on the local cut flower market. In particular, imported cut flowers are affecting sales to the larger retail chains.

Lifestyle horticulture services (service sector)

Landscaping businesses are reporting good trading conditions in the current quarter and the sector as a whole is expecting strong growth over the coming quarter.

Table 3. Lifestyle horticulture 2006–07 to 2007–08

Main industry sectors	2006–07	2007–08	2007–08 compared with 2006–07
	\$m	\$m	% change
Production sector			
Production nursery	375	410	9
Turf production	65	70	8
Cut flowers and foliage	115	125	9
Service sector			
Retail nursery	161	161	0
Landscape gardening ⁵	448	470	5
Grounds and maintenance	285	299	5
Indoor plant hire	40	40	0
Total lifestyle horticulture⁶	1220	1304	7

Note: Industry sectors derived from the 2001 survey undertaken by DPI&F.

⁵ Landscape gardening includes plant establishment only, does not include building structures like patios and associated labour costs.

⁶ Total adjusted to remove double counting.

The commercial landscaping segment is enjoying particularly strong growth due to sales generated by major infrastructure projects occurring around the state, but in South East Queensland in particular.

As previously reported, the demand for landscaping gardening⁷ services in the residential sector (especially green life-related activities) has declined in recent years due to urban water restrictions. However, businesses are confident that this market sector will recover over the next six months with the likely easing of these water restrictions as a result of significant rainfall.

Other field crops

Sugarcane

Forecast

The gross value of the 2007 Queensland sugarcane crop is forecast at \$810 million, 25% lower than DPI&F's final estimate for 2006–07.

Discussion

Due to an upturn in the sugar market, the current forecast is higher than both DPI&F's initial forecast in *Prospects* and that made in the December edition of *Prospects Update*. Although most of the crop had been priced by December, prices have since improved and, consequently, contributed to the increase in expected 2007 crop value to \$810 million.

Cotton

Forecast

The gross value of production of cotton in 2007–08 is forecast at \$80 million, 33% less than DPI&F's final estimate for 2006–07.

Discussion

The 2007–08 GVP for cotton will be the lowest in ten years due to ongoing water scarcity. The lack of water limited both planted area and availability of irrigation water. The rain in January and February came too late in the growing season to plant additional crop but has benefited the existing crop.

Flooding in the Emerald region following the monsoonal rains adversely affected cotton crops in the region but these losses were outweighed by the overall benefits of rain to dryland and irrigated crops in other parts of the state.

Winter cereal grains

Wheat

Forecast

The gross value of production for wheat in 2007–08 is forecast at \$350 million, 46% higher than DPI&F's final estimate for 2006–07.

Discussion

The higher GVP is due to a combination of higher-than-expected yields and higher prices throughout the majority of the year. Total production is forecast at around 965 000 tonnes in 2007–08.

Barley

Forecast

Barley gross value of production for barley in 2007–08 is forecast at \$55 million in 2007–08, more than double DPI&F's final estimate for 2006–07.

Discussion

The higher GVP is due to a combination of a larger area planted, higher yields and higher prices. Production is forecast at around 158 500 tonnes in 2007–08. Average prices during 2007–08 have remained high. However, many Queensland barley producers had quality problems which resulted in the slightly lower prices associated with lower quality grain.

Summer cereal grains

Grain sorghum

Forecast

The gross value of grain sorghum production in 2007–08 is forecast at \$410 million, more than double DPI&F's final estimate for 2006–07.

Discussion

The increase in GVP is due to a larger area planted and higher yields as a result of rain in December and January. The increase is also partly due to higher prices for sorghum during part of 2007–08.

Total sorghum production is forecast to be around 1.495 million tonnes.

Maize

Forecast

The gross value of production for maize in 2007–08 is forecast at \$55 million, more than double DPI&F's final estimate for 2006–07.

Discussion

As with grain sorghum, the increase in GVP is due to a larger area planted and higher yields as a result of rain in December and January. Production of maize for grain in 2007–08 is forecast at around 182 000 tonnes.



⁷ Landscape gardening includes plant establishment only, does not include building structures like patios and associated labour costs.

Fisheries

Aquaculture

Forecast

The gross value of production for aquaculture in 2007–08 is forecast at \$85 million, 31% higher than DPI&F's final estimate for 2006–07.

Discussion

The forecast for aquaculture production in 2007–08 is the highest it has ever been in Queensland. The significant increase in gross value can be attributed to both a strong expansion in the barramundi sector (as mentioned in the September edition of *Prospects*) as well as the strong fresh fish prices reported nationally. Consumers have preferred to pay higher prices for fresh Australian product rather than cheaper imported frozen product. All species have increased in price by over \$1.00 per kg at the farm gate in the last 12 months.

Marine prawns

Marine prawn production is forecast to increase by 10% from 3100 tonnes in 2006–07 to 3400 tonnes in 2007–08. Prices are also improving slightly and are up \$0.70/kg from the previous year. This combination has increased the value of this sector by 11% to just over \$50 million. The recent heavy rains may cause some losses but it is too early at this stage to accurately estimate these losses.

Freshwater fish

Barramundi production is expected to be up by 15% from 2100 tonnes in 2006–07 to 2400 tonnes in 2007–08. Over the last two seasons, total barramundi production has increased by 35% from 1750 tonnes to an estimated 2400 tonnes. Total industry value is forecast to increase by 30% up to \$24 million.

Other freshwater fish production is also increasing in line with barramundi production, increasing 30% from 170 tonnes to 220 tonnes over the last two seasons.

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 (e.g. 2007–08) or the 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

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