



Australian Government  
Australian Trade Commission




# NORTHERN AUSTRALIA

EMERGING OPPORTUNITIES  
IN AN ADVANCED ECONOMY







Northern Australia is an untapped market full of possibility yet situated firmly within the safety and security of a successful advanced economy.

Great Northern Highway Kimberley Project. Image courtesy of Laing O'Rourke Australia.  
Front cover: Agricultural development in Ord River. Image courtesy of Western Australia Government.





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## **FOREWORD FROM THE AUSTRALIAN MINISTER FOR TRADE AND INVESTMENT**

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In an increasingly inter-connected world it is rare for investors to be presented with high-performing yet relatively untapped markets with investor-ready projects and collaborative opportunities in place.

Northern Australia is one of very few such markets remaining globally: a market full of possibility yet situated firmly within the safety and security of a successful advanced economy – the Australian economy.

Northern Australia covers more than 40 per cent of Australia's land mass and contains up to 17 million hectares of arable soil, around 60 per cent of the water that falls in Australia and 90 per cent of Australia's gas reserves. It has natural advantages and industry strengths in many traditional sectors. The application of Indigenous knowledge and the latest research and development is expanding investor opportunities in fields such as cutting-edge agriculture and aquaculture, smart technology-based resource extraction, remote renewable energy, world-leading tropical medical research, high-end eco-tourism, and eco-systems service provision.

By 2050, an extra three billion people across Asia are likely to have living standards similar to those in Europe today, and will increasingly demand high quality food, reliable energy and minerals supply, global education opportunities and premium travel experiences. That's why Australia has moved swiftly to secure free trade agreements with the key Asian markets of China, Japan and Korea, to open up new markets for Australian goods and services.

Northern Australia's tropical zone locale and expertise also provide investors with the situation, know-how and connections to test product, develop strategies and access another of the world's largest growth economies – the tropical economy.

The demand for Australian product is real and growing. Investing now to produce the Australian supply response is the big opportunity for business globally. Northern Australia's proximity to Asia and its tropical location enable investors to locate in an advanced economy with the resources and know-how to meet that demand.

Northern Australia's economic development is a priority for the Australian Government. In close cooperation with the governments of the Northern Territory, Queensland and Western Australia, we are instituting a suite of business-friendly reforms, laying the right foundation for the long-term growth of the North.

Vibrant, well-skilled, northern communities with a can-do attitude, entrepreneurial businesses and world-leading governments are here to facilitate your path to investor success.

Together, we welcome you to northern Australia, a land of limitless potential and abundant opportunity.



**The Hon Andrew Robb AO MP**  
Minister for Trade and Investment  
The Australian Government

Australian Institute of Marine Science,  
Townsville, Queensland





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# WHY AUSTRALIA?



## CONNECTED TO ASIA

Australia has deep, strong economic and cultural ties with the fast-growing Asia-Pacific region



Australia provides a safe, low-risk environment in which to do business



## INNOVATIVE ECONOMY

Australia supports world-class, globally significant research and development (R&D) opportunities



## TALENTED WORKFORCE

Australia's labour force is among the most skilled and diverse in the world

## EASE OF DOING BUSINESS

Australia is one of the easiest places in the world to do business





## NORTHERN AUSTRALIA

Northern Australia – spanning all of the Northern Territory and north of the Tropic of Capricorn in Queensland and Western Australia – covers 3 million square kilometres. The region is characterised by rich cultures, biodiversity and unique landscapes, abundant natural resources, significant food production and agricultural activity, iconic tourist destinations and modern cities within an advanced economy. Just over 1 million people call northern Australia home.

Northern Australia is integral to Australia's economy, long-term security and regional engagement. Investments in resources and energy, over the past 15 years in particular, have driven economic growth for northern Australia and Australia more broadly. While this sector remains the primary generator of wealth for the north, northern Australia possesses world-class and growing strengths in agriculture, energy and resources, tourism and hospitality, tropical health and medical research and education. Opportunities for expansion and growth exist across all these sectors and in the services, infrastructure, logistics, training, innovation, and research and development that clusters around them.

Northern Australia is an investor's gateway to a rising Asia and a global tropical future. There are geographic advantages in its proximity to the booming economies of South East Asia and southern China in particular. For investors, the north is an economic powerhouse with the resources, ideas and people required to develop and capture opportunities.

## ECONOMY

### AUSTRALIA'S ECONOMIC FUNDAMENTALS

Australia is in its 24th year of consecutive annual economic growth, has a GDP of more than US\$1.5 trillion (2 per cent of global GDP), is the fifth largest economy in Asia and the 13th largest in the world.

Australia's economic resilience and sustained growth provide an attractive, safe and low-risk environment in which to do business.

Over the past 23 years, Australia's economy has achieved a real GDP average growth rate of 3.3 per cent per annum. Its forecast economic growth rate between 2015 and 2019 is the highest among major advanced economies.<sup>1</sup>

## NORTHERN AUSTRALIA'S ECONOMY

Northern Australia continues to out-perform many parts of Australia's south.

Its economy has had three distinct phases in recent years: a growth phase from 1990–91 until 1995–96; a phase of stagnation and decline around the Asian financial crisis from 1995–96 until 2000–01; and a phase of significant resource-driven growth from 2000–01.

### ABOVE AVERAGE GROWTH

Northern jurisdictions will account for nearly 42 per cent of the Australian economy by 2040, up from 35 per cent in 2011, according to Deloitte Access Economics. It also estimates gross regional product will increase by 3 per cent on average every year from 2020.<sup>2</sup>

## TRADE

### Australia's trade story

Australia's two-way trade in goods and services in 2013–14 totalled A\$669 billion, making up approximately 42 per cent of GDP. This is more than double the A\$316 billion recorded a decade earlier. More than seventy per cent of Australia's total trade is with Asia-Pacific Economic Cooperation (APEC) economies.<sup>3</sup>

Of the top 12 export markets in 2013, ten were in Asia and all were rated above investment-grade.

### Northern Australia's performance

Northern Australia accounts for a significant share of Australia's exports. In 2012–13, the value of international exports by sea via northern Australian ports reached A\$121 billion – 55 per cent of the Australian total.<sup>4</sup> The majority of northern Australia's exports are resources traded with China, Japan, Indonesia and South Korea. Despite a recent slowdown in investment growth in Australia's mining sector, demand for northern Australia's minerals and energy resources is expected to remain strong over the longer term, underpinned by growth in the major emerging markets of Asia.

Other growth areas include exports of livestock. More than 493,000 head of cattle were shipped through Darwin Port in 2014, breaking the previous record which had stood since 1997.<sup>5</sup> In early 2015, exports commenced to Hong Kong from The Australian Agricultural Company's new abattoir recently constructed in the Northern Territory. The abattoir will produce export beef products, hides and rendered products for markets across Asia and the US.

## INVESTMENT

### National Investment consistently strong

Australia's economy is well balanced with total real investment spending of private and public sectors making up 26 per cent (or A\$416 billion) of real GDP in 2014. The private business component of Australia's total investment spending has been strong with average new flows of fixed capital spending exceeding A\$250 billion each year over the past three years.

### More investment than the south

Total capital expenditure across northern jurisdictions (Western Australia, the Northern Territory and Queensland) has risen to around twice the level of investment across the rest of Australia over the last three years.

### Top-tier investors but limited competition

Australia's opportunities and fiscal credentials attract some of the world's largest investors. Eighteen of the Top 20 FT Global 500 companies and eight of the Top 10 Fortune 100 have operations in Australia. One in five businesses in Australia with more than 200 employees is at least 50 per cent foreign-owned. There are 18,000 foreign companies registered in Australia. The north is home to some of the world's top-tier investors including Chevron (US), INPEX (Japan), Shanghai Zhongfu Group (China) and ACCIONA (Spain).



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A vibrant society, with its citizens drawn from an ever-expanding pool, especially Asia ... Australia has always been a 'can-do' country.

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UK Prime Minister David Cameron, Parliament House,  
Canberra, 14 November 2014

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Japan has chosen to strengthen ties with Australia.  
A new special relationship – joining hands across the  
seas of prosperity from the Pacific to the Indian Oceans.

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Prime Minister Shinzo Abe, Parliament House, Canberra, 9 July 2014







Jillaroo counting cattle. Image courtesy of Queensland Government. Steve O'Connor, Astrebla Photography.



## ASIA RISING

Asia is changing the global economy as a new middle class emerges. Enhanced economic power, population growth and urbanisation across Asia will increasingly define the demand-driven potential of northern Australia.

According to the International Monetary Fund (IMF), China's nominal GDP was worth over US\$10 trillion in 2014. This is more than 13 per cent of the global economy and compares to 2 per cent 20 years ago.

China is the world's largest energy consumer, accounting for 18.4 per cent of global consumption. China's demand is expected to grow across every major industrial sector to 2035.

By 2019, Asian economies are expected to account for 42 per cent of global output, double that in 1980.<sup>6</sup> The combined economies of China and India are forecast to account for over one-quarter of the world's GDP. In just a few years, Asia will be the world's largest producer of goods and services.

By 2020, more than half the world's middle class will be from Asia and will demand high-quality food products, healthcare, aged care and education, household goods, tourism, banking and financial services. China's middle class alone could rise from 300 million to 630 million, accounting for 45 per cent of China's population and consuming goods and services worth an estimated US\$3.4 trillion.<sup>7</sup>

By 2050, an extra three billion people across Asia are likely to have living standards similar to those in Europe today.<sup>8</sup> All of Asia's key markets are within five hours flying time from Darwin.







Tea farm, Daintree.  
Image courtesy of Queensland Government.



## INVESTMENT OPPORTUNITIES

Northern Australia's proximity to Asian growth and emerging markets creates significant opportunities for international investors across northern Australia to access regional and international supply chains.

Demand-driven business opportunities in Asia which match northern Australia's comparative advantages exist in:

- **Resources and energy** – Industrialisation and urbanisation within the Asia region will continue to drive demand for natural resources.
- **Agribusiness and food** – At a time when food security is a global issue as populations grow, northern Australia is developing as a low-risk supplier of agricultural commodities and niche high-value food and fibre products. Rising incomes and an expanding Asian middle class are also boosting demand for food diversity and higher protein diets, including northern Australia staples like seafood and meat.
- **Advanced manufacturing, services and technologies** – As northern Australian businesses continue to join regional and global value chains, high-value and innovative products and services are becoming more viable. Australia's areas of world-class expertise include tropical health and medicines, opening up new opportunities for investment in R&D collaborations and intellectual property creation.

- **Major infrastructure** – Infrastructure development is required to enable investors to take advantage of markets in proximity to Australia's productive north. There are opportunities to capitalise on the Association of Southeast Asian Nations' (ASEAN) ambitious infrastructure connectivity agenda, which is identifying high-impact regional public-private partnership projects to develop infrastructure.<sup>9</sup>
- **Tourism infrastructure** – A growing Asian middle class is joining domestic, European and US tourists to create opportunities to invest in short-term accommodation, luxury lodges, camping facilities, and integrated resorts. There are also opportunities for nature-based amenities in areas of natural and cultural significance to capitalise on the demand for nature tourism, including immersive tourism attractions and experiences in national parks, adventure tourism, wildlife tourism and wellness retreats. Tourism transport infrastructure has potential for public-private partnership projects, including airports, cruise terminals and roads to improve access to tourism attractions.

Other growth areas include:

- Environmentally sustainable growth, natural resource management, infrastructure development, urban design, education, health and aged care, sport, the arts and creative industries, professional, banking and financial services, science and technology.



# THE FUTURE IS TROPICAL

Tropical economies produce 20 per cent of global economic output and the tropical zone is growing at a much faster rate than the rest of the world. Forty per cent of the world's population, and more than half of the children in the world, call the tropics home.

By 2025, the sum of the world's tropical economies – the global tropical product – is projected to reach US\$40 trillion.<sup>10</sup> An estimated 20 to 30 per cent of this will be spent on developing new industries and importing goods and services.

By 2050, half the world's population will live in the tropical zone, including 60 per cent of the world's children. The region will also have the largest middle class in the world, with 45 per cent living in urban centres (up from 31 per cent in 2014).<sup>11</sup>

While the region demonstrates great potential, it also bears witness to some of the most critical and pressing issues of our time: food insecurity, poor life expectancy outcomes, environmental and ecological challenges, compromised justice and the rule of law, and governance inadequacies.

There are massive health challenges across the region, including antibiotic-resistant tuberculosis, malaria and other vector-borne diseases.

In the tropics, hundreds of millions of people depend on local natural resources, many of which are under significant pressure.

Land use for agriculture in the tropics increased by only 2 per cent between 1980 and 2009. At the same time, productivity increased dramatically, with livestock production up by almost 90 per cent and cereal production more than doubled. Yet agricultural productivity remains significantly lower in the tropics than across the rest of the world.<sup>12</sup>

Many tropical nations have nonetheless experienced a demographic dividend as relatively high proportions of their population have reached working age. Improvements in youth and adult literacy are enhancing job opportunities and leading to an increasingly skilled workforce. Advances in technology provide platforms for expanded business opportunities, contributing to reduced poverty and improved health and education outcomes.

Australia is the largest developed country and the leading advanced economy in the tropical zone. Through the State of the Tropics report ([www.stateofthetropics.org](http://www.stateofthetropics.org)), James Cook University in northern Queensland and partner organisations are assessing the tropics and capturing tropical expertise. Partner organisations, including Nanyang Technical University, Singapore, Midol University, Thailand, the University of Papua New Guinea and the University of Hawaii, and

are working globally to assess the state of the tropics, developing pathways for a prosperous and sustainable tropical future.

Charles Darwin University, the University of WA, Australian Institute of Marine Science, North Australian Indigenous Land and Sea Management Alliance, CSIRO and the Australian National University are partners in other leading tropical capabilities across the north, including the Tropical Rivers and Coastal Knowledge (TRaCK) consortium, National Environmental Science Program (NESP) Hubs and the Northern Research Futures Collaborative Research Network (CRN). These institutions are building national and international networks and generating world-class research.

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The tropical economy is growing 20 per cent faster than the rest of the world. Northern Australia's tropical expertise is vast. We live here, we work here, we enjoy connections across the tropical zone. We are passionate about all things tropical. The R&D community of northern Australia is actively collaborating with investors, industry and governments to harness the great untapped potential the tropics have to offer.

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Professor Sandra Harding, James Cook University

# CLEAN, GREEN, PREMIUM AND SAFE

## LAND AND WATER

The Commonwealth Scientific and Industrial Research Organisation (CSIRO) estimates that up to 17 million hectares of soil in the north is arable and potentially suitable for agriculture.<sup>13</sup> However, water rather than soil is the resource that limits irrigated agricultural development in northern Australia, and it's estimated that 1.4<sup>14</sup> million hectares of new land is potentially available for irrigated agriculture over the long term.

The recent North Queensland Irrigated Agricultural Study identified 8 million hectares of potentially suitable agricultural land in the Flinders River Catchment and 2 million hectares in the Gilbert River Catchment alone. These adjoining catchment areas in north Queensland flow into the Gulf of Carpentaria.<sup>15</sup> This analysis included water capture and storage options to support up to 50,000 hectares of new irrigated agriculture across the two catchment areas.

The north has water resources that are commercially underused, but more work is required to understand the extraction capacities of regional water catchments. CSIRO reports that 1 million gigalitres (GL) of rainfall is recorded in northern Australia each year, potentially supporting a wide range of uses. This includes unique aquatic and terrestrial ecosystems, recreational and commercial fisheries including wild capture prawn industries, tourism and irrigated agriculture, stock and mining.

In the most comprehensive study of potential food & fibre supply chain investment undertaken for northern Australia, CSIRO<sup>16</sup> assessed land and water resources available in six discrete northern regions covering 120,000 hectares. The study found that irrigated agriculture in northern Australia has potential to add considerable economic activity to regional communities and produce high returns to investors.

Northern Australia's largest surface water resource is Lake Argyle (10,400 gigalitres) and an agricultural resource assessment identified that potential new surface water storage resources may be viable in Flinders & Gilbert catchments of 350 gigalitres and 725 gigalitres respectively. Similar assessments for other northern catchments may identify additional viable water resources for agricultural development.

In addition, CSIRO suggests that 600 gigalitres per year of extractable groundwater could be available to irrigate intensive agricultural developments including mosaic irrigation for the beef industry in northern Australia. This is primarily derived from three basins: the central Daly-Wiso and Georgina basins (Northern Territory), the coastal section of the Canning basin (Western Australia) and the Great Artesian Basin, the largest and deepest artesian basin in the world extending across multiple regions in Australia. Each of these basins has estimated extractable groundwater volumes of over 100 GL/year.<sup>17</sup>



## THE MARINE ESTATE

Australia has the third largest marine estate in the world, with 3.14 million square kilometres (excluding the Cocos-Keeling and Christmas Island territories) in tropical waters. Northern Australia's tropical marine estate is similar in area to its land mass.

## BIOSECURITY

Australia's biosecurity system is world leading. Australia is free from many exotic pests and diseases prevalent across the tropics. Effective biosecurity has enhanced Australia's reputation as an exporter of high-quality, clean and safe agricultural produce.

Australia's north has been protected through the Northern Australia Quarantine Strategy (NAQS) delivered via a network of scientific and operational staff based in Broome, Darwin, Nhulunbuy (Gove), Weipa, Bamaga, Cairns and throughout Torres Strait. This programme commenced in 1989 and is set to expand in line with growth and agricultural activity in the north.

## BIODIVERSITY

Research by the Australian National University and CSIRO highlights the uniqueness of northern Australia's biodiversity. The north contains the world's largest and most intact tropical shelf marine ecosystem. The Cape York Peninsula supports 3,000 plant species (of which 260 are endemic), half of Australia's bird species and one-third of Australia's mammal species. Northern Australia is home to 40 per cent of Australia's reptile species and 75 per cent of its freshwater fish species. The Kimberley region of Western Australia alone supports about 2,000 species of native plants, around 300 of which are endemic. Northern Australia contains 55 river systems with the highest density of continuous intact tropical river ecosystems globally. Combined, these rivers extend over one million kilometres and carry approximately two-thirds of Australia's fresh water.<sup>18</sup>







# THE PEOPLE

## POPULATION GROWTH

In 2011, northern Australia had 1.1 million people living on 40.5 per cent of Australia's mainland. The majority of northern Australians live in Townsville, Cairns and Mackay in Queensland, and Darwin in the Northern Territory. Karratha and Broome in Western Australia are also growing population centres. The north's economic development is expected to predominantly grow out of these regions, and other smaller regional towns will grow in line with regional development.

## SIZABLE INDIGENOUS COMMUNITY

Northern Australia is home to 30 per cent of Australia's Indigenous population. For over 50,000 years, Indigenous Australians have lived on and managed northern Australia's land and seas, engaging and trading with Australia's Asian neighbours. Australia's Indigenous culture is the world's oldest living culture.

Today, Indigenous enterprises like Northern Project Contracting and the Rusca Brothers are entering into partnerships with multinationals to facilitate resources and energy exports, while organisations like Centrecorp Aboriginal Investment Corporation are helping Indigenous groups invest in local industries.

Land and water are of particular significance to Indigenous Australians. The north has more native title determinations, and much greater areas of land allocated to Indigenous land rights, than the south. Native title and Indigenous land rights are fundamental to recognising Indigenous rights and interests and they can provide an opportunity for growth through partnerships with indigenous communities.

Indigenous populations of the inland and tropics are a local workforce and are often also the resource owners. The successful Ord East Kimberley Expansion Project demonstrates the value of working in partnership with Indigenous communities and generating mutually beneficial social capital. During 2010–13, 204 Indigenous people were employed on the project.

## MULTICULTURAL, REGIONALLY CONNECTED

Successive waves of recent migration have led to a modern, multicultural northern Australia equally at home in Western and Asian cultures. Immigrants from the UK, New Zealand and South Africa account for 47 per cent of the population, while people of Asian descent make up 24 per cent of recent arrivals.

## ENTREPRENEURIAL SPIRIT, 'CAN-DO' ATTITUDE

Northern Australians are resilient and innovative. They are well regarded for their entrepreneurial spirit, 'can-do' attitude and no-fuss approach. Investors taking a partnership approach can expect to be warmly welcomed.

## INDIGENOUS SMALL AND MEDIUM-SIZED BUSINESSES

### Northern Project Contracting

Northern Project Contracting (NPC) grew out of the 1998 Gulf Communities Agreement, signed between the Queensland Government, Zinifex Century Mine (now Minmetals – MMG Century) and the traditional owners of the land 300 kilometres north-west of Mt Isa, Queensland. The associated open-pit zinc mine is now the world's second largest.

NPC was originally established as a 50-50 joint venture with an experienced mining company. Since 2008, NPC has been 100 per cent Indigenous-owned and managed with an 80 per cent Indigenous workforce. It has doubled the industry average for retention rates of Indigenous workers and has grown rapidly with offices across northern, southern and western Queensland.

NPC specialises in contracting, concrete batching and plant hire, environmental revegetation, rehabilitation and regeneration, road building, site preparation and rehabilitation, landscaping, supply and delivery of road construction materials, earthmoving and medium-scale earthworks, and certified training in mining and civil construction.

NPC has won many awards, including the Queensland Premier's Smart Award in the Rising Star category in 2008, an award from the Queensland's Mining Industry Skills Centre in 2009 for mining innovation, and a Queensland Telstra Business Award for Social Responsibility in 2010.

### Centrecorp Aboriginal Investment Corporation

Centrecorp is an Indigenous business and property investment management company established in 1985. It was formed by the Central Land Council, Central Australian Aboriginal Congress and Tangentyere Council as a charitable trust. It manages its own portfolio of investments and the assets of other Indigenous organisations.

Centrecorp aims to build a sustainable portfolio of investments of sufficient mass and diversity to ensure long-term benefits to Indigenous Australians while facilitating their participation in the economic benefits available across a broad range of industries and geographic locations. Centrecorp aims to enhance the capacities of Indigenous Australians so they may participate fully in vocational, professional, commercial, cultural and social life.

Centrecorp controls assets worth more than A\$100 million. It has received approximately A\$25.1 million from the Australian Government and has built an impressive asset base over the past 30 years.

The Centrecorp Foundation, founded in 2009, is budgeted to spend A\$1.3 million per annum with a further A\$200,000 donated directly by Centrecorp trusts. Donations focus on Indigenous education and training, employment, health and welfare, and sport and culture.

### Rusca Brothers, NT

The Rusca Brothers Group – led by Sid Rusca and his sons Robbie and Shannon – is a 100 per cent Indigenous-owned mining and civil construction, human resources and training services business based in Darwin, Northern Territory. Around 250 people are employed across various arms of the business, half of whom are Indigenous. Sons Robbie and Shannon Rusca control a diversified business group with interests across Australia and Indonesia.

The Rusca Brothers operate a fleet of trucks, trailers and earthmoving equipment undertaking major infrastructure projects across remote areas of northern Australia. They recently completed a 170km haul road to the Bing Bong Port for Western Desert Resources. Among those on the Rusca client list includes Leighton Contractors for JKC on INPEX's Ichthys Oil & Gas Project, Glencore, Santos & Theiss.

The business was originally begun by Sid and has been training Indigenous Australians in mining and construction sector for more than 30 years including through the Sid Rusca Academy. The Rusca Brothers Indigenous Employment Strategy is based upon Sid Rusca's Indigenous capacity building commitment, work first then training follows. The business is an industry leader. Many of its staff – aged 16-60 – have never before had the opportunity to work and are based in regional and remote areas of Australia.

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Our family has had strong ties across the Northern Territory and Asian region for some time. For generations, we've been contributing to northern Australia reaching its potential. International investors calling upon the ingenuity of Indigenous Australians will always be welcome in the north.

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Northern Territory entrepreneur Sid Rusca,  
The Rusca Brothers Group



# WORLD-LEADING GOVERNANCE

In an uncertain global economic climate, safe, low-risk investment destinations are at a premium. Australia is one of the oldest and most stable democracies in the world. Its political institutions are recognised globally for transparency, impartiality and robustness. Australia's business environment offers flexibility and adaptability, a strong rule of law and commitment to justice, and a stable legal and regulatory framework.

Northern Australia comprises 74 local governments, three state and territory governments, and the Australian Government. State and territory governments are the lead interlocutors on investment in partnership with local councils, businesses and communities. The responsibilities of different levels of government vary and need to be well understood. Australian governments are committed to listening more, cooperating when issues or initiatives cross territorial boundaries, and coordinating their activities.

Since the World Bank's World Governance Indicators were first instituted in 1996, Australia has consistently outperformed almost all other nations in the areas of democratic voice and accountability, political stability, effective government, quality regulation, the rule of law and corruption control. Strong governance is key to economic growth and security, providing a drawcard for multinationals expanding their businesses or considering Australia as a base in the Asian region.

## GOVERNMENT POLICIES AND PROGRAMMES

### REFORMING THE NORTH

The Australian Government and the governments of the Northern Territory, Queensland and Western Australia are instituting new programmes and policies across northern Australia aimed at sustainable economic development, including through enhanced international investment.

This new approach to northern Australia includes more clearly identifying industry priorities; encouraging universities and other institutions of innovation and learning to expand activities and networks across the north; deploying existing government resources more strategically; clarifying federal-state-territory roles and responsibilities; and better engaging with and reaching out to both local communities and Asian and tropical neighbours.

The Australian Government has already cut A\$1 billion in red tape nationally, and this will extend to \$2.45 billion with new reductions in compliance costs announced in March 2015. These red tape reductions will expedite business and investment across northern Australia. Public service and defence assets and capabilities are also being repositioned.

## INCREASING BUSINESS, TRADE AND INVESTMENT

Governments across northern Australia are very active in pursuing and promoting overseas investment opportunities and trade barriers are now falling for northern Australian businesses seeking to take advantage of new export markets, particularly in the fast-growing markets of Asia.

Australia now has Free Trade Agreements (FTAs) in force with ASEAN (since August 2014), Japan (since January 2015), Korea (since December 2014), Malaysia (since May 2012), Singapore (since 2003) and Thailand (since 2005). Australia recently concluded an FTA with China (November 2014) and is negotiating FTAs with India, Indonesia and the Pacific region. These trade agreements remove trade barriers both at and behind borders, increase economic integration by enhancing the movement of people, capital, goods and services, and further strengthen regional relations.

## GROWING THE WORKFORCE OF THE FUTURE

As labour markets in the north are generally tight, many businesses seek skilled workers from southern Australia or overseas. Some larger companies have adopted fly-in-fly-out or drive-in-drive-out practices. This presents an opportunity to lift local work participation rates, particularly in some remote Indigenous communities, by increasing incentives and skill levels.

# AGRIBUSINESS AND FOOD

Northern Australia is already an important food and fibre producer for consumers in Australia and in major export destinations such as China, Japan, Indonesia, Europe, the Middle East and North America.

World food demand, combined with northern Australia's proximity to the high-growth emerging markets of Asia, creates the intersection of market opportunity and national advantage on which waves of economic growth are created.

Over the next 20 years to 2035, northern Australian agriculture (including aquaculture) and food and fibre processing has significant potential to expand. Research and development will lead to greater yields and profitability, and will explore new products, production methods, technologies and broad innovation. Better understanding of soils, water, endemic tropical and sub-tropical pests, diseases and weeds and further development of technical expertise will continue to improve northern Australia's rich asset base.

## BEEF PRODUCTION AND PROCESSING

The largest agricultural industry in northern Australia is the pastoral industry. There are around 11.7 million cattle in northern Australia, which is 45 per cent of the entire national herd.<sup>19</sup>

Value can be added to pastoral activities in the north through mosaic irrigation – small patches of intensive irrigated crop and pasture production, interspersed with native grass and deep-rooted perennial vegetation. For example, Beetaloo Station in the Northern Territory, with the assistance of external capital, has invested some A\$40 million in stock water infrastructure across more than 1 million hectares. This raised the carrying capacity of the property from 20,000 head of cattle in 2002 to 80,000 in 2014, significantly enhancing the profitability of the enterprise. Similar opportunities to add value to existing pastoral activities through techniques like these are available across northern Australia.

Santori's recent investments in the Underwood family cattle stations in the Northern Territory is an example of investors capitalising on a growing demand from Asian middle classes for increased protein and premium produce.

There is also interest in new investment in beef processing, including in new abattoirs in Darwin (Australian Agricultural Company) and Broome (Yeeda Australia Rangeland Meat with co-investment from Singaporean investor, Kimberley Investments). Further opportunities in beef processing are available across northern Australia to complement livestock exports.

## HORTICULTURE AND IRRIGATED CROPPING

Queensland produced 95 per cent of Australia's 4.75 million tonnes of sugar in 2012 and 85 per cent of Queensland's raw sugar is exported.<sup>20</sup> Northern Australia also produces more than 90 per cent of Australia's mango and banana production.<sup>21</sup> Significant potential exists to establish new broadacre crops at world-scale production levels, underpinning the viability of associated infrastructure and processing facilities.

Expanding niche, high-value products and large-scale essential agricultural commodities will enable northern Australia to capitalise on the demand for premium products and basic nutritional needs. Soya bean and chia, dragon fruit, poppies, rice, onions, sorghum and cotton are examples of new products being trialled or growing commercially in northern Australia to meet growing market opportunities.

## AQUACULTURE AND COMMERCIAL FISHING

The gross value of fisheries production in the north was around A\$404 million in 2011–12.<sup>22</sup> Primary seafood catches include billfish and finfish such as tuna, snapper, barramundi, mullet, cod, emperor and shark. There are also substantial northern fisheries for prawns, rock lobster, squid, scallops, crab, scampi, bugs, mussels, oysters, pearls, pearl meat and pearl shell, sea cucumber and aquarium fish.

Developing global tastes for fresh fish and seafood in a period of declining natural stocks will lead to greater opportunities for aquaculture investment in northern Australia. Significant capacity remains for growth in both new and existing marine species and production methods.

The billion-dollar Sea Dragon Project in the Northern Territory and Western Australia aims to breed up to 100 million juvenile prawns a week, mostly destined for Asia, and when fully developed would take Australia to amongst the global leaders in the aquaculture prawn sector. The Kimberley Aquaculture Development Zone in Cone Bay, King Sound, Western Australia also illustrates emerging large-scale aquaculture opportunities in northern Australia.

## CROCODILE PRODUCTION AND PROCESSING

Northern Australia currently produces 10 per cent of the world's market for crocodile meat and skins, with some of the world's finest quality crocodile skins exported to leading European fashion houses.<sup>23</sup>

## BIOFUEL PRODUCTION

Northern Australia is ideally positioned to produce quality biomass, supported by strong agricultural expertise and world-class research. The alignment of regional market opportunity and local supply capability, coupled with diverse climates to grow a range of feedstocks, creates attractive investment opportunities. The Asia-Pacific biofuel market has grown at a compound annual rate of 26.8 per cent between 2008 and 2012;<sup>24</sup> and there are a range of opportunities to co-invest in Australia, including in north Queensland where there are several future investment opportunities. A pilot project using sorghum in the Pilbara demonstrates how pastoral activities are diversifying to capture market opportunities beyond food and fibre production.

## ECOSYSTEMS SERVICES

Ecosystems services stemming from the north's unique biodiversity, Indigenous knowledge and culturally rich landscapes include habitat conservation, protection of water resources, and abatement of greenhouse gas emissions. These are tangible economic assets of international significance. The commercial value of northern landscapes contributing to carbon capture in Australia is already being recognised. For example, the Australian Carbon Farming Initiative is now part of the Emissions Reduction Fund, which companies can invest in to reduce their net carbon emissions.

Over the period to 2035, commercial, corporate social responsibility and environmental sustainability opportunities will also emerge across the north in ecosystem services provision, especially in partnership with Indigenous Australians. New partnerships are forming between several civil society organisations and private sector companies working together on innovative approaches to Indigenous-led land management. This includes Indigenous savannah burning programs funded by ConocoPhillips and Caltex.



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The development of northern Australia is a priority for the Australian Government, including by providing the best regulatory and economic environment for business.

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Prime Minister Tony Abbott, 28 February 2014



Indigenous Rangers. Image courtesy of ConocoPhillips Australia Pty Ltd.

## PILOTING PROJECTS OF THE FUTURE

### Producing biofuel from sorghum

A pilot project growing 150 hectares of sweet sorghum for biofuel is underway at Warrawagine cattle station in the Pilbara, Western Australia. The sorghum is used as fodder for 20,000 head of cattle and to produce natural gas for the Woodie Woodie Manganese Mine owned by Consolidated Minerals Ltd.

Sixty gigalitres of groundwater runoff from the mine is used to grow the crop. The first one hectare of sorghum is providing high-yield tonnages, with three to four cuts per year. The crop thrives on the 35-degree mine groundwater.

The groundwater, previously unused, would flow around 10 kilometres from the mine, across the cattle station, ending up in the Oakover River.

The sorghum is processed via anaerobic digestion to generate natural gas. It is then compressed or liquefied and sold to the mine to power dual fuel diesel and natural gas generators. The natural gas produced will offset 10 million litres of diesel and provide significant electricity and diesel cost savings.

Western Australia's Pilbara Hinterland Agricultural Development initiative, part of the Royalties for Regions program, has provided A\$4 million in partial project funding. The project has the capacity to expand to several thousand hectares and a second Pilbara site is being considered.

### Ecosystem services: ConocoPhillips funds the West Arnhem Land fire abatement project

The West Arnhem Land fire abatement project is an important new way that skilled Indigenous fire managers in Australia's fire-prone tropical savannahs can work with the broader community to reduce greenhouse gas emissions, protect culture and biodiversity on their country, and bring social and economic benefits to their communities.

The project is a partnership between traditional owners and Indigenous ranger groups, Darwin Liquefied Natural Gas (DLNG), the Northern Territory Government and the Northern Land Council. Through this partnership, Indigenous ranger groups are implementing strategic fire management across 28,000 square kilometres of West Arnhem Land in the Northern Territory to offset some of the greenhouse gas emissions from the LNG plant operated by ConocoPhillips at Wickham Point in Darwin.

To date, the project has reduced greenhouse gas emissions from this area by the total equivalent of approximately 959,000 tonnes of CO<sub>2</sub>, averaging over 100,000 tonnes annually since 2006. It has been formally declared an eligible offsets project by the Australian Government under the *Carbon Credits (Carbon Farming Initiative) Act 2011*.

Strategic fire management is helping conserve environmental and cultural values in the project region, which are equivalent to those in the adjacent World Heritage-listed Kakadu National Park. ConocoPhillips' Darwin LNG plant is paying the Indigenous fire managers around A\$1 million a year to provide this service, which creates about 200 jobs annually.



## CROPS AND PRODUCE

### Tried and tested

- Cattle and buffalo
- Sugar
- Melons
- Pumpkins
- Potatoes
- Sweet corn
- Red grapefruit
- Maize
- Chickpeas
- Beans
- Cotton
- Sunflowers
- Millet
- Bananas
- Mangos (including for wine)
- Avocados
- Peanuts
- Barramundi
- Prawns
- Crocodile skin

### Up and coming

- Sugar (for biofuel)
- Sweet sorghum (for biofuel)
- Soybean, pulses and legumes
- Lablab
- Maize
- Cassava
- Sandalwood
- Acacia
- Lemon myrtle
- Wattle seed
- Poppy
- Quinoa
- Chia
- Wild rice
- Tea
- Dragon fruit
- Camels
- Rock lobster
- Algae

## SUCCESS STORY

### Generations farming the Ord River Valley

The Ord River irrigation area in Western Australia has a water storage capacity of 10,400,865 million gigalitres, nine times the volume of Sydney Harbour. Agricultural products for domestic and international markets valued at A\$100 million are generated annually from an existing 14,000 hectares, using only a fraction of the available water. Over the longer term to 2035, the area could progressively grow to a conservative 80,000 to 100,000 hectares of intensive irrigated agriculture. New land is being prepared with the Ord East Expansion Project and negotiations are underway to allow for the potential expansion of the scheme into the Northern Territory. This would provide around 40,000 hectares of agricultural land.

The regional communities of the Ord support traditional families of farmers and corporate agricultural investment. Wilhelm and Gabi Bloecker epitomise the Ord's farming spirit. The couple emigrated from Germany and acquired land in the early 1980s. One of their sons, Christian Bloecker, now manages their 1,100-hectare farm and produces melons, pumpkins, chickpeas, borlotti beans, maize and hybrid seed sorghum. The farm is also growing chia for export markets, including the United States.

Shanghai Zhongfu – through its Australian subsidiary Kimberly Agricultural Investment (KAI) – is also seeking to leverage the natural resources of the Ord. The Chinese-based corporation has a long-term goal to establish an integrated agricultural industrial hub comprising 40,000 hectares of Ord sugar plantations for sugar milling, ethanol production, and renewable energy. The project aims to attract some A\$1 billion in investment, making it one of the largest greenfield agricultural projects in Australia.



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The Ord River irrigation area has amazing potential for agriculture in northern Australia. The abundant water, rich alluvial soils and plentiful sunlight provide a fantastic opportunity to grow a diverse range of horticultural and broadacre crops. We export globally and are proud members of the Ord's great family of multicultural investors. Continued Ord land releases mean the future of the Ord is bright.

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Christian Bloecker, Bothkamp Farm

## INVESTMENT AND FUTURE OPPORTUNITIES

### Agribusiness and food

- Project Sea Dragon, NT
- Tipperary Cattle Station, NT
- Integrated Food and Energy Developments Irrigation Project, Einasleigh, Qld
- Davco Integrated Cattle Feedlot, Farming and Beef Processing, Qld

Examples of regionally based priorities, each of which are at varying stages of development and which may offer new future potential investment opportunities or expansion, include:

- West Kimberley Water for Food Precinct, WA
- Expansion of the East Kimberley Ord River, WA
- Expansion of the Kimberley Aquaculture Development Zone in Cone Bay, King Sound, WA
- Pilbara Hinterland Agricultural Development Initiative, WA
- Ord River extension into the Keep River Plain, NT
- Tiwi Islands Horticulture Development, NT
- Development of Flinders-Gilbert Catchment Areas, Qld
- Fitzroy Agricultural Corridor and Southern Atherton Tablelands, Qld

## INVESTOR SUCCESS STORY

### Santori's investment in Riveren and Inverway cattle stations

Japfa Comfeed Indonesia is one of the largest agrifood companies in Indonesia. Its beef division trades under the brand name Santori and is the largest cattle breeding and feedlot operator in Asia. Santori is the single largest Indonesian importer of Australian cattle. With the imminent opening up of Asian markets, Santori sees northern Australia as a critical component of its regional value chains delivering protein to Asian consumers.

With the Northern Territory's close proximity to Indonesia, reputation for high-quality cattle and buffalo and with connections to roads and ports, Santori saw a great opportunity to invest with a view to meeting increasing Asian demand.

Santori invested in John and Terry Underwood's two large cattle properties, Riveren and Inverway. The properties are part of the Northern Territory's Victoria River District aggregation. The Underwoods are pioneering northern Australian farmers who moved to the territory in 1956. The family will continue to work with Santori as property managers.

The investment secured Santori 40,000 genetically superior Brahman cattle on 5,500 square kilometres, or a little over 1.3 million acres. This shows the scale of farming in northern Australia. Both cattle stations have abundant groundwater resources (47 bores) and spinifex grass. There is potential for further water development. Santori sees Riveren and Inverway as the start of further investment across northern Australia.

## INVESTMENT OPPORTUNITY

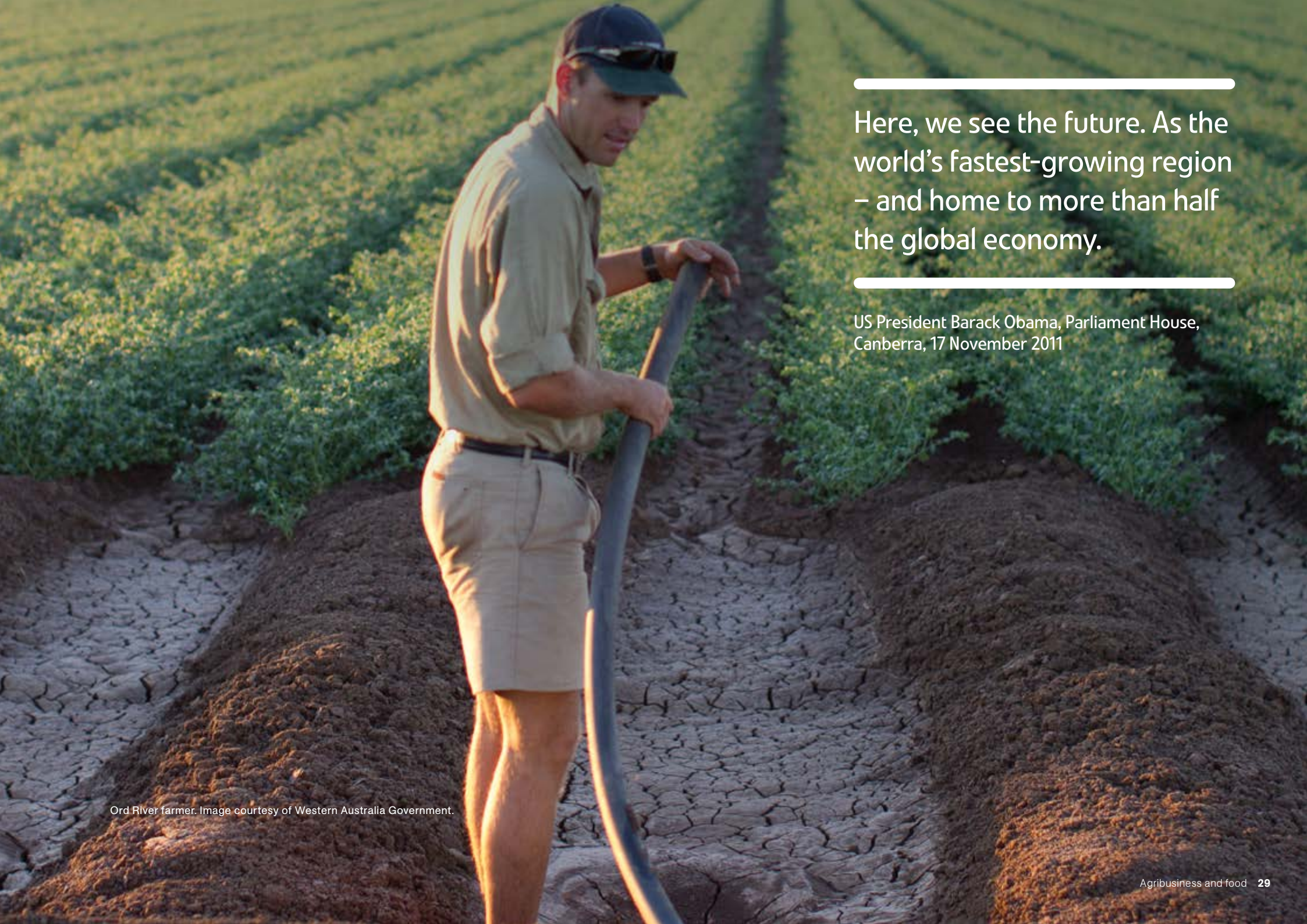
### Project Sea Dragon (NT and WA)

Project Sea Dragon is a large-scale greenfields aquaculture project worth A\$1.45 billion with Phase 1 costs amounting to A\$120–\$150 million. The project is designed by ASX listed Seafarms Group Ltd. Seafarms is the largest producer of farmed prawns in Australia. It grows, processes and distributes the premium-branded Crystal Bay™ prawns throughout Australia.

The project will have the capacity to produce around 120,000 tonnes per annum of Black Tiger Prawns and will be developed over five phases. The northern Australia location has been confirmed; with the grow out facilities to be at Legune, hatcheries in the Darwin and Exmouth regions and processing capabilities to be developed at Kununurra as the project expands. The project is now entering its final feasibility stage. Phase 1 will involve a 1,000-hectare grow-out facility, an on-site processing facility and headworks for planned expansions. Production modules will eventually be fully integrated with a feed mill, hatchery and broodstock facility, power station, processing plant, and storage and export facilities.

The project's bankable feasibility stage has now commenced and investment opportunities are available around either the entire integrated project or its sub-components. Product off-take and export market development investment opportunities also exist, particularly across the Asia-Pacific.





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Here, we see the future. As the world's fastest-growing region – and home to more than half the global economy.

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US President Barack Obama, Parliament House, Canberra, 17 November 2011

Ord River farmer. Image courtesy of Western Australia Government.



# RESOURCES AND ENERGY

The minerals and petroleum industries accounted for around 8 per cent of Australia's gross domestic product in 2013–14, and contributed to downstream mining related activities in industries such as manufacturing, construction, transport and storage, property and business services as well as electricity and gas.

Mining across northern Australia takes up less than 0.01 per cent of the land area. However, it contains a number of the world's largest resource provinces and mines, including the Pilbara iron ore province, Bowen and Galilee coal basins, the Cape York bauxite deposits, Argyle Diamond Mine, Mount Isa lead-zinc province and the world's largest manganese mine at Groote Eylandt. Diverse energy options complement the rich and varied mineral deposits in northern Australia. Many parts of northern Australia remain under-explored, with potentially large deposits of minerals and energy resources not yet identified.

## MINERALS

Northern Australia holds world-class deposits of iron ore, copper, uranium, base metals, bauxite and diamonds.

Australia ranks as the world's fifth largest producer of diamonds by weight after Russia, Botswana, the Democratic Republic of Congo, and Canada. All of Australia's operating manganese ore mines are in northern Australia, along with almost all of Australia's phosphate rock prospects.

Over 70 per cent of Australia's known resources of iron ore, lead and zinc, as well as significant deposits of silver, copper, manganese, nickel, bauxite, tungsten, molybdenum and rare earths, are found across northern Australia.

New deposits are being discovered and documented continuously. The Lower Gulf region of north Queensland is one of the most prospective mineral provinces in Australia for metals including copper, gold, phosphate and uranium.

## ENERGY

### COAL

Australia has the world's largest economic-demonstrated resource of recoverable coal, with 35 per cent of reserves in northern Australia

### OIL AND GAS

Woodside's North-West Shelf is Australia's largest operating oil and gas development. The company estimates it accounts for more than 40 per cent of Australia's total oil and gas production.

Significant liquefied natural gas (LNG) investments under construction include Chevron's Gorgon LNG Project, which will be Australia's largest single investment project, estimated at \$54 billion. INPEX's Ichthys LNG Project, worth \$33 billion, is one of the largest private investments made in the Northern Territory.

Australia's estimated shale gas resource is almost twice the size of its conventional gas resources, with the Canning Basin in Western Australia identified as the area with the largest shale gas resources nationally, estimated to contain 229 trillion cubic feet.



## RENEWABLES

Renewable energy, particularly in off-grid mining and industrial applications, is a viable way to provide fuel savings and energy security.

The Northern Territory is estimated to have the largest off-grid community electricity demand in Australia, accounting for 59 per cent of Australia's off-grid community electricity consumption in 2013.

## RESOURCES AND ENERGY OPPORTUNITIES

Investors who balance commercial outcomes with social and environmental responsibility through good governance will have a stronger social licence to operate in northern Australia's resources and energy sector.

In 2013–14, private new capital expenditure in the mining industry across Australia was valued at \$90 billion. In October 2014, there were 44 committed projects (projects that have received a positive final investment decision) at a value of \$228 billion. These 44 committed projects included:

- 22 energy projects at an estimated value of \$203 billion;
- 12 minerals, mining and processing projects at an estimated value of \$15 billion; and
- 10 infrastructure projects at an estimated value of \$10 billion.

Despite the cyclical softening of global mining commodity prices, mining across northern Australia will continue to be a major driver of the region's prosperity over the coming decades.

Significant investment in mining infrastructure and productivity over past decades places Australia at the leading-edge of global mine production.

## MINERALS

Recent discoveries of rare earths offer significant potential with demand from rapid technological advances. The Northern Minerals Heavy Rare Earth Elements Development, spanning Western Australia and the Northern Territory, seeks to seize upon this market.

## LIQUEFIED NATURAL GAS (LNG)

There are significant opportunities to increase the supply of energy, particularly LNG, to fuel global growth. Seven major projects are under construction in northern Australia with the first of these, Queensland Curtis LNG, commencing production early in 2015. These projects combined are expected to treble Australia's LNG export capacity by 2018–19, making the country the world's largest LNG exporter.

The three gas trains in Gladstone, Queensland, are the first LNG export projects in the world to use coal seam gas (CSG) as their primary feedstock. Exports began in January 2015 and will continue to ramp up over 2015–16.

LNG projects across northern Australia provide opportunities for innovative supply chain firms to operate and maintain significant upstream programs and downstream facilities for up to 50 years. Around 200 companies in the north supply resource projects around the world, providing leading-edge technologies and services, with a niche in servicing operations in tropical or remote environments.

## RENEWABLES

Increasing consumer demand for clean energy across the Asian and tropical regions offer opportunities to make investments in renewable energy over the long term.

Off-grid and fringe-of-grid generation is an emerging clean energy market. Energy providers and industrial users such as mines are increasingly looking to substitute expensive transported diesel in remote locations with cost-effective renewable energy solutions.

The use of hybrid renewables will start at low to medium levels in remote regions of Western Australia, the Northern Territory and Queensland in the short to medium term, with up to a possible 213 megawatts or approximately A\$600 million in the capital value of project opportunities. As confidence in, and demand for, renewable energy grows and technology costs fall, higher uptake levels are likely, with an additional 854 megawatts or a total of over one gigawatt of additional installed off-grid renewables capacity in the longer term, at a capital value of approximately A\$2 billion.<sup>25</sup>

The demand for electricity in community growth regions, particularly mining towns such as Weipa in Queensland, and Karratha, Newman and the greater Pilbara in Western Australia, has grown significantly as a result of fly-in-fly-out and permanent population expansion over recent years. Off-grid interconnected systems include the North-West Interconnected Systems in Western Australia operated by Horizon Energy, the Darwin to

Katherine System in the Northern Territory operated by Power and Water Corporation, and Mount Isa Grid in Queensland operated by Ergon Energy.

Systems integration expertise and remote training programmes will be essential to ensure reliability and provide sustained confidence to northern Australian end users. Deploying cost-effective enabling technologies will support greater renewable energy integration and uptake.

Potential market entrants looking to establish or expand investment in the northern Australian off-grid clean energy market need a long-term approach to understanding the Australian market and developing collaborative domestic partnerships with the local industry, end users and the finance sector.

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The Ichthys Project is a catalyst for much larger growth in northern Australia. It will prove to others that it is a great place to do business and in turn the local economy will flourish and provide unprecedented opportunities for generations to come. INPEX is proud to be a part of this growth and even prouder to be a part of the northern Australian community for the long term.

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Seiya Ito, INPEX President Director Australia



LNG facility on Curtis Island, Queensland.







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## China supports Australia's plan to develop its northern region.

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China President Xi Jinping, Parliament House,  
17 November 2014

## INVESTMENT OPPORTUNITIES

### Resources and energy

- Northern Minerals Limited's Heavy Rare Earth Elements Development, WA and NT
- Amour Energy's Oil and Gas Conventional Shale Developments, NT
- KGL Resources' Jervois Copper Projects, NT
- Rum Jungle's Ammaroo Phosphate Project, NT
- TNG's Mount Peak Project, NT
- Advent Energy Limited's drilling and seismic mapping in oil and gas – conventional and shale project, NT and WA

## INVESTOR SUCCESS STORY

### Chevron's Gorgon Natural Gas Project

The Chevron-operated Gorgon Project – the largest single resource development in Australia's history – is developing the Gorgon and Jansz-lo gas fields between 130 and 220 kilometres off the coast of Western Australia. The Project includes a 15.6 million tonne per annum liquefied natural gas (LNG) plant and a 300 terajoules per day domestic gas plant on Barrow Island – a Class A Nature Reserve – where its operator has shown for more than 50 years that with the right management, industry and the environment can co-exist.

Incorporated within Gorgon is one of the world's largest Carbon Dioxide injection projects expected to reduce the Project's greenhouse gas emissions by approximately 40 per cent.

The Gorgon Project is achieving key construction milestones with the first gas turbine generator now successfully started-up, a key element in the gas plant's start-up sequence. The Project expects to deliver LNG and domestic gas to the market in late 2015.

The Project is a story of energy and the environment as well as technology and expertise providing a range of long-term economic and social benefits for both the State and the nation. Gorgon has already spent \$29 billion with Australian companies, and opportunities will continue into operations.

## INVESTOR SUCCESS STORY

### INPEX Ichthys LNG Project

INPEX's large-scale US\$33 billion Ichthys LNG Project is located about 220 kilometres off Western Australia and 820 kilometres southwest of Darwin. The project, currently under construction, represents the largest discovery of hydrocarbon liquids in Australia in 40 years and is ranked among the most significant oil and gas projects in the world.

Effectively three mega-projects in one, the Ichthys LNG Project involves some of the industry's largest and most advanced offshore facilities, significant onshore infrastructure at Bladin Point near Darwin, and an 889-kilometre pipeline to connect them. It has an operational life of at least 40 years.

The project is a joint venture between INPEX group companies (the operator), major partner Total, CPC Corporation, and the Australian subsidiaries of Tokyo Gas, Osaka Gas, Kansai Electric, Chubu Electric Power and Toho Gas.

A final investment decision for the project was reached in 2012 and first production is scheduled for the end of 2016. The project is expected to produce 8.4 million tonnes of LNG and 1.6 million tonnes of LPG per annum, along with approximately 100,000 barrels of condensate per day at peak.



## **INVESTMENT OPPORTUNITY**

### **Northern Minerals' Heavy Rare Earth Project**

Northern Minerals Limited (ASX: NTU) listed on the ASX, with a market cap of approximately A\$100 million, is focussed on the delivery of the heavy rare earth (HRE) element, dysprosium. Northern Minerals has a large landholding in Western Australia and the Northern Territory that is highly prospective for this element.

Through the development of its flagship project, the Browns Range Project (the Project), Northern Minerals aims to be the first significant world producer of dysprosium outside of China. Dysprosium is an essential component in the production of neodymium iron-boron magnets used in clean energy and high technology solutions, and as a result of increasing global demand for these applications, dysprosium supply is critical.

The Project's xenotime mineralisation is a rich source of dysprosium, terbium and yttrium, and facilitates the use of a relatively simple and cost effective processing flowsheet to produce a high value, high purity dysprosium-rich product. A successful exploration programme has increased the Mineral Resource more than fivefold since 2012 to 56,663,000kg, providing an 11 year project mine life. Recent completion of the Project's Definitive Feasibility Study confirms its economic and technical viability, and with primary environmental approval and secure tenure in place, together with community support the Project paves the way for construction.

Northern Minerals currently has a non-binding MOU for offtake with Sumitomo Corporation and is in discussions with potential customers in China, Japan, the USA and Europe. As best in class and with an equity investment of A\$329 million sought the Browns Range Project provides a significant investment proposition.

# UNIQUE NATURAL LANDSCAPES AND TOURISM OFFERINGS

Northern Australia's coral reefs, beaches, escarpment country, heathlands, tropical jungles, savannah, woodlands, floodplains, mangroves and deserts have outstanding national and international significance. These unique natural landscapes, accessed via modern infrastructure and coupled with world-class food and wine experiences, attract around 1 million international visitors each year.

## WORLD HERITAGE SITES

Northern Australia includes many of Australia's most recognisable tourism destinations and is home to seven World Heritage sites with outstanding natural and scientific value: the Great Barrier Reef, the Wet Tropics of Queensland, Kakadu National Park, [Uluru-Kata Tjuta](#) National Park, Ningaloo Coast, Purnululu National Park and the Riversleigh Australian Fossil Mammal Site. The cultural values of Kakadu and [Uluru-Kata Tjuta](#) are also recognised on the World Heritage List.

Indigenous tourism is a key element of the existing and potential tourism offering, and a competitive strength of Kakadu and [Uluru-Kata Tjuta](#) National Parks with great opportunity for growth. Indigenous culture is a major drawcard for a large proportion of international tourists and domestic visitors to northern Australia. Developing Indigenous enterprises in parks can provide sustainable economic and social independence for traditional owners and local communities.

## REGIONAL TOURISM SECTOR PERFORMANCE

Northern Australia is ideally situated in the Asia-Pacific – the world's fastest growing tourism market. The vast majority of tourists visiting northern Australia are domestic tourists. Traditionally, international visitors have been European or American, but Asian markets (especially China) have recently grown. With more direct flights from Japan and China, Cairns in particular has directly benefited from this increase in Asian visitors.

Investors can access a wide range of data on northern Australia, including visitor statistics and hotel performance, through Tourism Research Australia, a government-funded agency.

Australia's tourism industry is supported by government-funded marketing agencies at the state and national level. In 2014–15, Tourism Australia will receive A\$143 million in government funding to carry out marketing activities to grow demand for Australia as a leisure and business tourism destination. This includes initiatives such as Australia's global tourism brand '*There's nothing like Australia*' and current campaign '*Restaurant Australia*', which showcase many of northern Australia's tourism attributes to a global audience.



## TOURISM OPPORTUNITIES

Northern Australia offers a wide range of tourism investment opportunities including islands (available on leasehold), beach resorts, business hotels to service the resources sector, nature-based experiences and developments, cruise terminals, convention facilities and recreation activities.

To assist large-scale tourism developments, the Australian Government has established the Tourism Major Program Facilitation Service to help proponents obtain approvals in a faster and more streamlined manner.

## INVESTMENTS TO DATE

Recent large-scale investments in the northern Australia tourism sector include the purchases of: Double Island by Chang Yuang Group for A\$5.8 million in October 2013; Daydream Island by China Development Capital Group for A\$30.5 million in February 2015; and the Sheraton Mirage Port Douglas by Fullshare Group.

The Ella Bay resort and residencies complex is an investor-ready example of the ecotourism investor offerings of tropical north Queensland and the ecotourism project at Francois Péron National Park, Shark Bay illustrates Western Australian opportunities.

The success of Longitude 131°, [Uluru](#), Northern Territory demonstrates that focusing on Australia's unique characteristics is a successful strategy to compete with cheaper international destinations. Longitude 131° is also a benchmark for investors in how to sustainably and respectfully improve access to natural landscapes and Indigenous tourism experiences.

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Tropical north Queensland is paradise on earth. We are committed to growing the local economy sustainably. We want to protect the World Heritage Wet Tropics and the Great Barrier Reef for generations to come. The vision of northern Australians combines economic prosperity, strong investor dividends, respect for Indigenous culture and ecological sustainability.

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Rob Lamb, CEO, Ella Bay

Ella Bay. Image courtesy of Queensland Government.

## INVESTOR SUCCESS STORY

### Longitude 131° Luxury Eco-Resort

Longitude 131° is located on a secluded dune at the gateway to dual World Heritage-listed [Uluru-Kata Tjuta National Park](#). Australia's most recognisable natural icon, [Uluru](#) is the region's gem with the domes of [Kata Tjuta](#) also nearby.

The resort offers a luxury ecotourism experience enabling visitors to explore the surrounding desert with expert Indigenous guides, soaking up the peace and silence, learning ancient creation stories, and encountering an expansive living landscape rich in unique fauna and flora and Indigenous cultural heritage.

At Longitude 131°, luxurious tented pavilions float over rust-red dunes with classic and Indigenous furnishings. Each residence has a private glass wall with unparalleled views of [Uluru](#). Guests dine under the stars on world-class cuisine celebrating a fusion of modern and Indigenous flavours.

Longitude 131° is the result of a joint partnership between Baillie Lodges and the local Indigenous community around [Uluru](#). Baillie's properties are recognised for their socially and environmentally responsible, sustainable and dynamic approach to tourism in standout natural locations. They are also recognised for their architectural integrity, locally sourced fine cuisine, and high standards of personalised service. Longitude 131° joined the Baillie Lodge collection in 2013.

## INVESTMENT OPPORTUNITY

### Ella Bay Integrated Resort and Residential Project

Ella Bay is located in tropical north Queensland, 90 minutes by car south of Cairns International Airport. The region attracts more than 2 million international and domestic visitors every year and Cairns is approximately seven to eight hours by direct flight from Guangzhou, Hong Kong, Osaka, Tokyo and Singapore.

The Ella Bay Integrated Resort and Residential Project is an A\$1.8 billion equity or joint venture investment opportunity set to become one of the largest ecotourism developments in Australia. The project is located on 470 hectares of freehold land within Queensland's Wet Tropics World Heritage Area alongside the iconic Great Barrier Reef. The resort and residences will cater for 2,000 tourists and 1,000 residents and will comprise:

- six five-star resorts and 890 units and villas along the coast
- five residential precincts of 540 residences, many overlooking the golf course
- 70 exclusive residences located within pristine tropical rainforest overlooking the Great Barrier Reef
- a village precinct accommodating retail, professional services, offices and restaurants
- an 18-hole competition golf course, clubhouse, sports facilities, community services and parkland
- an international school, and sustainability and Cassowary research centres.

Development will unfold over a 10 to 15 year period.

## INVESTMENT OPPORTUNITY

### François Péron National Park, Shark Bay

François Péron National Park lies at the northern tip of the Péron Peninsula within the Shark Bay World Heritage Area inscribed on the UNESCO World Heritage List in December 1991. It covers 52,500 hectares of arid scrublands, rolling sand plains and spectacular scenery accessible by 4WD. Its features include scenic coastlines with dramatic contrasts of red cliffs, turquoise blue water and white beaches.

A potential ecotourism development site of approximately 131 hectares with beach access is available within the park. The site is relatively flat and just north of a large gully leading to the beach, allowing for excellent views of the ocean and a diverse approach to development style and design. The development site is 40 minutes from Shark Bay Airport, which has scheduled flights from Perth. The land is leasehold and terms are to be negotiated with the Western Australian Department of Parks and Wildlife.

This area satisfies all four natural criteria for World Heritage listing and provides an excellent opportunity for a developer with a passionate appreciation of the uniquely Australian natural landscapes and cultural values to create a quality wilderness retreat and tourism experience.



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Australia is renowned for its diverse  
culture and unique landscapes.

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China President Xi Jinping, Parliament House,  
Canberra, 17 November 2014



Longitude 131° Luxury Eco-Resort, Uluru, Northern Territory.  
Image courtesy of Longitude 131°.





# RESEARCH, DEVELOPMENT AND MEDICAL EXPERTISE

Australia is renowned globally as an innovative country, with world-class scientific and academic institutions, high levels of R&D investment, modern ICT infrastructure, strong intellectual property protection and a generous R&D tax incentive.

## WORLD-CLASS RESEARCH

Australia's CSIRO ranks in the top 1 per cent of the world's scientific institutions in 14 of 22 research fields.<sup>26</sup> It is at the forefront of collaborative R&D across northern Australia with a presence at five northern locations including Darwin and Townsville, with significant capability from other locations (particularly Brisbane) deployed to northern Australian issues.

James Cook University, Charles Darwin University, the Australian Institute of Marine Science and the University of Central Queensland are also important research institutions based in northern Australia. Other northern Australia R&D institutions and collaborations include: the Tropical Rivers and Coastal Knowledge (TRaCK) consortium; National Environmental Science Program (NESP) Hubs; the Northern Research Futures Collaborative Research Network (CRN); the North Australia Marine Research Alliance; the Cooperative Research Centre for Remote Economic Participation; and the Northern Research Futures Alliance.

Other northern R&D institutions and industries are partnering across Asia and the tropics. For example, the Northern Territory Government and the Indonesian province of East Kalimantan have agreed to a Joint Statement of Cooperation to promote links between both governments and Charles Darwin University. More broadly, TropLinks, a network of research institutes, industry groups and individual companies is working to build the capacity of members to develop, commercialise and export northern Australian tropical expertise.

## MEDICAL EXPERTISE

Australian research into tropical medicine can support development objectives in tropical economies.

Tropical diseases such as malaria and dengue fever remain enormous problems globally, with up to 100 million cases of dengue fever annually. Australia's specialist tropical research institutes, facilities and networks are based both in northern Australia and southern states.

At James Cook University, medical expertise includes novel research into therapies for inflammatory bowel disease, coeliac disease and other disorders. The Australian Government has also recently committed A\$42 million to expand the Australian Institute of Tropical Health and Medicine at James Cook University for research into tropical diseases such as dengue fever.

The Menzies School of Health Research in the Northern Territory tackles areas of public health concern in the Asia-Pacific, including malaria, tuberculosis, bacterial infections, and maternal and child health and nutrition. It has partners in Indonesia, Malaysia and elsewhere in Asia.

QIMR Berghofer is investigating the effectiveness of malaria drugs in clinical trials and testing potential malaria vaccines in Queensland and in Papua New Guinea, with the PNG Institute of Medical Research. It also investigates how parasites such as the malaria parasite,



hookworm, threadworm and scabies cause disease and become drug-resistant. Facilities include state-of-the-art pathogen and insect containment facilities like the Mosquito Control Laboratory. Australia is leading efforts to eliminate drug-resistant malaria, with Victoria's Walter and Eliza Hall Institute developing a malaria vaccine.

Victoria's Burnet Institute is also working on vaccines of importance to the tropical region and beyond, including a novel prophylactic vaccine for Hepatitis C.

## TROPICAL AQUACULTURE SERVICES

Through its Biosecurity Control for Future Aquaculture Project, James Cook University is developing training modules for veterinarians who want to develop their skills in aquatic disease pathology, diagnosis and treatment. The university is also investigating the possibility of delivering a disease-testing service for the northern Australia aquaculture industry. These initiatives illustrate the niche expertise that is available in northern Australia and which has enormous potential to benefit both northern Australia and the broader region.

## EDUCATION OPPORTUNITIES

In 2014, there were over 580,000 international student enrolments in Australia, 26 per cent of which were from China (Austrade, 2014).

Asia is a growing international education market for northern Australia. James Cook University and Charles Darwin University have doubled international student enrolments over the last decade.

James Cook University has established two campuses in Singapore and has over 2,500 students from Singapore, China, India, Indonesia and Malaysia. Charles Darwin University has student exchange agreements with universities in Malaysia, Indonesia and China.

Their efforts are complemented by government initiatives such as the New Colombo Plan. Under the first phase of the Plan, students from James Cook and Charles Darwin universities will be supported to undertake studies in Asia.

Given its proximity to Asia and the focus and expertise of many of its institutions, northern Australia could become the education destination of choice for Asian students and researchers. This could be achieved through training and university education places that reflect the north's areas of expertise such as medicine, nursing, dentistry, allied health, biosecurity and veterinary science.

Investments in education could include online or distance education, as well as other less traditional delivery models. Charles Darwin University, for example, is a dual-sector university with more than 5,000 students studying online. James Cook University is developing digitally enabled teaching and learning methods to increase access to, and participation in, tertiary education.

## INVESTMENT OPPORTUNITY

### Universal Malaria Vaccine

A first-in-class malaria vaccine developed at Australia's esteemed Walter and Eliza Hall Institute (WEHI) by Professor Louis Schofield offers a significant opportunity for investors. The vaccine protects against all five species of malaria in pre-clinical animal models and is potentially the world's first multistage, universal malaria vaccine. With the support of investors, a pre-Investigational New Drug application could be filed with the United States Food and Drug Administration to enable human clinical trials to take place.

The Schofield vaccine addresses the unmet medical need for a prophylactic malaria vaccine. In contrast to conventional vaccines that target malaria proteins, the Schofield vaccine targets a universally conserved surface oligosaccharide found in all species and all life-stages of malaria.

There are currently no effective vaccines for malaria, which infects 5 to 10 per cent of the world's population annually, with around a million deaths. In the last 10 years, more than 40 malaria vaccines have entered clinical trials, most based on recombinant proteins, and have yielded very poor efficacy in Phase 2 trials.

The Schofield approach emulates the success of saccharide-conjugate vaccines, considered the most successful vaccination innovation in decades.

## FUTURE OPPORTUNITY

### Aquaculture biosecurity training

There is a worldwide shortage of veterinarians who have been suitably trained to diagnose and treat aquaculture animals. James Cook University is developing a two-week course that will be offered internationally to vets who want to develop skills in aquatic disease pathology, diagnosis and treatment. It is also investigating the possibility of delivering a disease-testing service to northern Australia aquaculture industry.

Current export trade protocols require Australian producers to measure and certify the disease status of their stocks pre-export. Very few tropical aquaculture businesses in Australia export consumable products (except for fingerlings to grow out elsewhere) so this has not been much of an issue. There are no commercial facilities in north Queensland and only limited facilities in the Northern Territory. All other testing is done in southern parts of Australia, which means turnaround times are too long to be of any value. For this industry to grow to supply niche markets with high-quality, safe food, this is a critical enabling step.

There is scope to co-invest in a fee-for-service diagnostic service as a joint venture with James Cook University that would support both diagnostics and training experience for veterinarian students. Part of the package could include scholarships for students to do specialist training at the new facility. Alternatively, foreign investors that want to secure the supply of aquaculture products for their markets could consider co-funding the diagnostic facilities.



James Cook University Centre for Sustainable Tropical Fisheries and Aquaculture. Image courtesy of Queensland Government.



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Empowered by technology, the young people in particular of this region are connecting and collaborating across borders and cultures like never before.

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US President Barack Obama, University of Queensland,  
Brisbane, 17 November 2014

# MAJOR INFRASTRUCTURE

## BUILDING BETTER INFRASTRUCTURE

Industry has invested over A\$15 billion in private infrastructure related to resource and energy projects across northern Australia since 2009 and demand for more and better infrastructure will increase as an enabler for agricultural, resources, energy and tourism investment. There is also private investment in social infrastructure. For example, Rio Tinto is working with local governments in the Pilbara region to deliver better infrastructure, events and services to towns near its operations (Shire of Roebourne 2013; Shire of Ashburton 2013).

## CAPTURING ABUNDANT WATER RESOURCES

A combination of factors – including a unique climate and geographic profile, under-developed infrastructure and markets, and the lack of detailed information on water systems – has limited the development of water resources in northern Australia. Water is not used as effectively or efficiently as it could be.

Australian jurisdictions are encouraging an efficient and sustainable water industry and balancing the long-term needs of the community, industry and the environment. Establishing markets gives water a value and a price, and provides secure water rights that support long-term investment and trade.

The parameters of new water markets will need to be informed by credible science. The Flinders and Gilbert Agricultural Resource Assessments have already been completed, delivering a comprehensive assessment of sustainable water resource development and the potential for new irrigated agriculture in several north Queensland catchments. There are numerous potential catchment areas across northern Australia which have not yet been fully explored.

New investments, including in water resource assessments and surface and groundwater infrastructure options, can help secure northern water supplies to meet future demands. These investments could also assist in flood migration and respond to community needs.

## INVESTOR SUCCESS STORY

### Darwin Convention Centre

Darwin Convention Centre is an iconic landmark of Australia's tropical harbour city. Its waterfront setting looks over the Darwin Harbour and Arufura Sea. The multi-award winning, purpose-built Centre offers world-class facilities that attract conventions and exhibitions. Since opening in 2008, the Centre has generated A\$243 million in economic impact and has attracted over 400,000 visitors to Darwin.

The Convention Centre is part of the A\$1.1 billion Darwin City Waterfront Redevelopment Project, a public-private partnership. The project has provided the Northern Territory with an events and exhibition facility on a 10,000 square metre site, including the 1,500 seat auditorium. The capital works on the Darwin Convention Centre and its associated infrastructure was valued at around A\$200 million.

The public-private partnership is between the Darwin Waterfront Corporation, AMP Capital (investment manager), Honeywell (facilities manager) and AEG Ogden (centre manager). A significant portion of the A\$1.1 billion funding includes residential and retail developments built as part of a staged process over a decade.

## INVESTOR SUCCESS STORY

### Laing O'Rourke's Great Northern Highway Kimberley Project

Team Savannah, a joint venture between Laing O'Rourke, BGC Contracting and Maunsell Aecom, completed a two-stage upgrade to the Great Northern Highway in Western Australia's Kimberley region in 2010. Part of the Auslink National Road Network, the highway is the main land transport route between Perth and the Kimberley, and the only sealed road connecting Western Australia with the Northern Territory. It is a vital corridor for freight transport, pastoralists, tourism and defence.

Construction was carried out at five discrete sites over a 200-kilometre section of road stretching between Kununurra and Halls Creek. The works included two new bridges, one replacement bridge, 20 kilometres of new road and 20 kilometres of road upgrading and widening. Strong relationships between key stakeholders enabled a smooth, timely and cost-effective transition between the development, design and construction phases.

Around 15 per cent of the Team Savannah workforce were Indigenous Australians, including trainees, direct employees and contractors. Laing O'Rourke's work was formally recognised at the East Kimberley Aboriginal Achievement Awards in 2009, when the company was presented with an Outstanding Contribution to the Employment and Training of Aboriginal People Award.

## INVESTMENT OPPORTUNITY

### Utah Point Bulk Handling Facility, Port Hedland

Utah Point, owned by the Pilbara Ports Authority (PPA), is one of four berths located at Port Hedland. PPA currently owns and maintains the facilities and infrastructure at Utah Point to facilitate the export of bulk commodities, predominantly iron ore. During 2013–14, 18.7 million tonnes were exported through the facility (51 per cent above the previous year's record of 12.4 million tonnes). In 2013–14, the Utah Point facility achieved an estimated EBITDA (*Earnings Before Interest, Taxes, Depreciation and Amortization*) of \$89.3 million, representing 47 per cent of Port Hedland Port Authority EBITDA and 32 per cent of total PPA EBITDA (Port Hedland Port Authority and Port of Dampier combined). The divestment process is overseen by the Asset Sales Unit, Western Australian Department of Treasury and is supported by Rothschild and Deloitte as Lead Financial Advisers. All enquiries should be addressed in writing to: [AssetSales@treasury.wa.gov.au](mailto:AssetSales@treasury.wa.gov.au)





Utah Point Bulk Handling Facility. Port Hedland.  
Image courtesy of Western Australian Government.



# LIST OF INVESTMENT OPPORTUNITIES

This is an illustrative list of northern Australian investment opportunities which has been compiled by State and Territory Governments with support from the Australian Government. It provides examples of investment opportunities in northern Australia

## FOOD AND AGRICULTURE

- Project Sea Dragon, Northern Territory
- Tipperary Cattle Station, Northern Territory
- Integrated Food and Energy Developments Irrigation Project, Einasleigh, Queensland
- Davco Integrated Cattle Feedlot, Farming and Beef Processing, Queensland

## MEDICAL SCIENCE AND TECHNOLOGIES

- Universal Malaria Vaccine, Walter and Eliza Hall Institute, Victoria

## MAJOR INFRASTRUCTURE

- Utah Point, Port Hedland (long-lease), Western Australia

## TOURISM INFRASTRUCTURE

- Ella Bay Integrated ecotourism resort, Cairns, Queensland
- Francois Péron National Park, Shark Bay, Western Australia

## RESOURCES AND ENERGY

- Northern Minerals Limited's Heavy Rare Earth Elements Development, Western Australia and Northern Territory
- Amour Energy's Oil and Gas Conventional Shale Developments, Northern Territory
- KGL Resources' Jervois Copper Projects, Northern Territory
- Rum Jungle's Ammaroo Phosphate Project, Northern Territory
- TNG's Mount Peak Project, Northern Territory
- Advent Energy Limited's drilling and seismic mapping in oil and gas – conventional and shale project, Northern Territory and Western Australia

For more information on these and other investment opportunities in northern Australia, please contact a representative of Austrade's global investment network, a list of which is available at [www.austrade.gov.au/Invest/Investment-Specialists](http://www.austrade.gov.au/Invest/Investment-Specialists), or simply write to [northernaustralia@austrade.gov.au](mailto:northernaustralia@austrade.gov.au).

## HOW AUSTRADE CAN HELP

The Australian Trade Commission – Austrade – contributes to Australia's economic prosperity by helping Australian businesses, education institutions, tourism operators, governments and citizens as they:

- develop international markets
- win productive foreign direct investment
- promote international education
- strengthen Australia's tourism industry
- seek consular and passport services.

Working in partnership with Australian state and territory governments, Austrade provides international investors with the information needed to establish or expand a business in Australia. Services for international investors include:

- initial coordination of investment enquiries and assistance
- information on the Australian business and regulatory environment
- market intelligence and investment opportunities
- identification of suitable investment locations and partners in Australia
- advice on Australian government programmes and approval processes.

**Our services for international companies are free, comprehensive and confidential.**

**w** [www.austrade.gov.au](http://www.austrade.gov.au)

**e** [northernaustralia@austrade.gov.au](mailto:northernaustralia@austrade.gov.au)





Northern Territory Indigenous Tours, Litchfield National Park, Northern Territory.  
Image courtesy of James Fisher/Tourism Australia.



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For Germany and Europe, it's important to know that Australia is a partner in the Asia-Pacific region which shares our values: universal human and fundamental rights as well as freedoms, democracy and the rule of law.

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German Chancellor Dr Angela Merkel, Sydney, 17 November 2014



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