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**CENTRAL QUEENSLAND REGIONAL ECONOMIC DEVELOPMENT
STRATEGY INCEPTION STUDY**

BACKGROUND REPORT NO. 8

**CENTRAL QUEENSLAND MANUFACTURING AND SPECIALIST
SERVICE PROVIDER SURVEY**



Joint Researchers: Ken Dooley and Liam Ryan, University of Central Queensland



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EXECUTIVE SUMMARY

This Manufacturing and Specialist Service Provider Census conducted in Gladstone, Rockhampton and Emerald in late 1990 and early 1991 provides very valuable information from a regional economic development perspective.

It identifies not only what is produced in these regional centres, but also raw material and service inputs and their places of origin, markets for finished products, supply and service problems encountered, skill and trades shortages, factors influencing location decision, perceived advantages and disadvantages of operating in the respective centres and levels of satisfaction with professional and service organisations.

The information collected by the comprehensive Survey Forms used in this Study is most valuable for Regional Development Organisations charged with the responsibility of providing reliable information to potential investors, firms wishing to relocate to the Region or those wishing to start up new businesses in the Region.

This is a user-friendly custom-built database for servicing the regional economic development process. It identifies genuine market opportunities and helps put a dimension on the potential local market for raw materials and services not presently supplied within the Central Queensland (CQ) Region.

The problems being experienced by businesses are highlighted. For example, the problem of efficient raw material or intermediate goods supply is a serious one. There is ample evidence in the sample of findings provided in this report to interest a specialist storage/freight forwarding company to set up operations in Rockhampton.

The need for anodising and galvanising services is clearly underlined. Table 5 points to numerous manufacturing and specialist service businesses that do not exist in Central Queensland. These must rate as business opportunities.

This factual information should be updated on a six monthly basis. Once the database is set up, the job of keeping it up-to-date should be an assigned responsibility for Regional Development Organisations and should be funded on an on-going basis.

This very important segment of an industrial database should be expanded to a comprehensive database covering tourism, retail, education and other professional services and should incorporate industrial/commercial land availability, freight charges, and real estate prices. One database could service the entire CQ Region.

1. SURVEY DESIGN

The Manufacturers and Specialist Services Providers Study, funded by the Department of Business, Industry and Regional Development (DBIRD), was based on separate surveys, using the same questionnaire, undertaken in Rockhampton, Gladstone and Emerald in late 1990 and early 1991. As surveys involved all those identified as manufacturers and specialist service providers, each survey was effectively a census. Nonetheless, some respondents failed to supply information, or considered that their operations did not fall into the appropriate category. Survey response rates were as follows:

	Sample	Responses
Rockhampton	185	88
Gladstone	113	40
Emerald	64	23

The Survey Questionnaire contained 25 questions, some of which had multiple parts, hence the information requested was very comprehensive. However, as could be expected, the use of a single questionnaire for operations which ranged from a major production facility to a small regional joinery had some limitations. It is reasonable to assume that the larger operations were not fully covered by the Survey, whereas the smaller operations found the Survey over-complex. Nonetheless, as can be seen from the detailed information provided by the Survey, there is a wealth of valuable information supplied for those interested in the development of manufacturing and specialist service providers in Central Queensland (CQ). Finally, it goes without saying that this information should be updated on a regular basis, meaning at least annually, but preferably every six months.

2. SAMPLE SELECTION

The target areas for the Survey were the urban centres of Gladstone, Rockhampton and Emerald, with operations in nearby Shires included where practical. There is a need for separate surveys of major organisations not originally included; for example, the coal mines in the Central Highlands. Other sectors also should be surveyed; for example, tourism in Rockhampton, retailing in all centres and agricultural services in Emerald.

3. VALUE OF SURVEY RESULTS

Information supplied by the respondents proved to be extremely useful. The value of the data collected becomes clear as the responses are considered according to each of the major questions or groups of questions. This information is of value, however, only if it is used. It is the belief of the researchers that the information obtained has only been utilised in a very limited sense to date. As development officers and government department officers become more familiar with the use of database information, it is anticipated that strategic information such as this will be used on a greater scale. It is imperative that those involved in regional development know these details on the manufacturing sector and specialist service providers in their respective regions. It is information which can be used directly in increasing production in the Region through import replacement, and indirectly through solving problems confronting existing manufacturing and specialist service providers.

The twenty-five question Survey Form, comprising fifteen pages, was designed and developed earlier for the Bundaberg District Tourism and Development Board Ltd for a survey of Bundaberg manufacturers and specialist service providers. It was subsequently revised to the satisfaction of the Gladstone Promotion and Development Bureau, Emerald Planning and Advisory Committee, and the Queensland Government's DBIRD. (Appendix 1) The questionnaire was dispatched to a list of manufacturers and specialist services provider firms in the Rockhampton, Gladstone and Emerald Districts. Some firms failed to respond; fortunately most of these were small firms such as hot-bread shops. Other firms were eliminated from the Survey because they had relocated outside the Region, were in fact part of other firms or were not located at premises listed at the address provided, or were agencies, retail or wholesale and hence not target respondents for the Survey. Considerable personal contact was involved in gaining satisfactory replies, with the combined resources of the Development Boards and the University of Central Queensland (UCQ) team being utilised to the full.

Having entered all information collected on the firms into DBase III, plus files on a standard IBM compatible micro computer, a user friendly front-end was developed so that the information could be accessed easily and quickly.

The information available on this Directory includes the following:

- . standard information, viz. name, address, fax and telephone numbers, principal officers, and so on
- . details of the firm's main business
- . inputs to the operation
- . products and markets
- . staffing levels
- . specialist services used and provided
- . problems and opportunities
- . advantages and disadvantages of locating in the area

- . interest in participating in joint venture agreements, interstate trade missions and the like
- . use of services provided by local development organisations
- . expansion, investment and relocation plans (confidential)
- . turnover for the year (confidential)

This information can be accessed using the database front-end either by selecting any particular firm and asking for specific information using menus available, or by selecting the category of information required and then asking for all firms fitting the selected category.

Without viewing this database, it is hard to visualise the 'great leap forward' that this database and its accompanying front-end provides for the development officer. Suffice it to say that, at the touch of a key, virtually anything that the officer needs to know about manufacturers and specialist services providers in the relevant region is available.

The information available is considered by category and the purpose and value of the information is discussed.

4. SURVEY STRUCTURE, AIMS AND OBJECTIVES

. Business Profiles

The better identification of the major manufacturers and specialist services providers in each area was an achievement in itself, and the resulting accurate mailing lists would be of great value to the development bodies. This was the first time that a comprehensive survey of manufacturers had been conducted in the areas under consideration. The database of information on these providers will be of value to regional development bodies, government planners and industry representatives. Information generated includes company title, parent companies (if any), contacts, addresses, fax and telephone numbers and other general details on the organisation concerned. Information was obtained on organisations in the Rockhampton (88), Gladstone (40) and Emerald (23) centres respectively.

. Inputs to Operations

The raw materials, components and specialist services used were identified, and the source of these determined. What materials and services are being sourced locally and what is being imported or used from outside the Region is of concern for those interested in import replacement in the Region. The areas of concern were the immediate local area, the CQ Region, the rest of

Queensland, other states and, if overseas, which country. A specific question addressed the possibility of any imported products or services being supplied locally.

Staffing Levels

Staff numbers by part-time or full-time, and by tradesperson, apprentice, blue or white collar, and whether seasonal or not were determined. In addition, staff training programs and perceived skill deficiencies were identified.

Specialist Services and Skills

The specific specialist services, competencies and technologies now provided within the organisations and the markets that they currently served were listed, on the understanding that any of these services could be supplied to other organisations within the district.

Similarly, such skills and/or services needed by the firm but not currently available in the immediate region were identified, together with the current source of these. Dollar values of such services were asked for so that a direct evaluation of opportunities for replacement of 'imported' services was possible.

Products and Markets

The organisations' products, their brand names and their respective markets by region, state or, if overseas, the country, were requested. This gives an idea of the amount of exporting currently occurring.

Problems

Each respondent was asked to list any existing problems within the following areas:

- (a) Raw Materials
- (b) Components
- (c) Plant/Office Equipment
- (d) Professional Services
- (e) Finance
- (f) Other services

This provides information which is of use to those on regional development bodies whose task it is to service their members, and, in particular, attempt to solve the problems which their members are confronted with in their operations. This information is extremely valuable to those in local, State and federal governments whose task it is to service these organisations.

Advantages/Disadvantages of Location

This information, relating to the present location of their business, is intended to provide promotional material to attract other manufacturers and specialist services providers, and also to highlight any difficulties which may need to be overcome if others are to relocate into the Region in question. Furthermore, there might be problems identified here which have to be addressed to prevent these firms leaving the area.

Opportunities

These relate to the interest which the organisations have in any or all of the following:

- (a) Joint Venture Partnership
- (b) Marketing Mission - Interstate
- (c) Marketing Mission - Overseas
- (d) Promotion by State or Federal overseas trade agencies
- (e) Venture Capital, Investment, Equity
- (f) Licensing
- (g) Business for Sale
- (h) Industry Group Training Schemes
- (i) Other (please specify)

Where interest is shown, the intention is that the firms so indicating will be contacted by government departments or regional development bodies wishing to organise missions, conferences, etc., or, where appropriate, take advantage of the opportunities presented; for example, by a firm wishing to become involved in a joint venture.

Use of Services of Specific Support Organisations

Questions were asked relating to the usage of services already provided by:

- (a) Local Group Apprenticeship Scheme
- (b) Local Regional Development Bodies
- (c) Chambers of Commerce
- (d) Trade Industry Association

- (e) Queensland Confederation of Industry
- (f) Any other nominated professional, trade or service organisation

The information gained here was to be passed on to the organisation concerned.

Financial Details and Future Plans

The turnover of the operation in broad categories was requested, together with planned expenditure on future plant, equipment, land and buildings. Locations of planned expansions were also requested. Details of plans to either close down the plant, relocate the operation, or open new retail or other outlets in the CQ Region were requested. Finally, the length of time that the business has been operating in Central Queensland, whether there had been a change of ownership in recent times and what industry the business depended on completed the Survey.

Clearly, this information was of vital interest to those concerned with the future economic development of Central Queensland. While intentions may change with changing circumstances, the stated intentions are the best indications at any point in time of the likely future actions of these organisations. Together, these can paint a very clear picture of the future of the manufacturing and specialist services sector in the Region.

5. SELECTIVE SURVEY FINDINGS

Business Profiles

The major commodity lines produced by CQ manufacturing and specialist service providers are shown in Table 1. This question used as a basis the ABS classification of commodity lines used in its surveys of manufacturing. The number of respondents in this Survey selecting the 'other' category suggests that there is a great variety of manufacturers and specialist service providers and that using the ABS classification does not take account of this variety. It must be noted by those wishing to promote economic development in this sector that much of the development will be in niche markets and not in traditional areas.

The lack of respondents involved in processed foods (only two out of 179) is worthy of note, given the amount of agriculture in the Region. This should be of some interest to the Queensland Department of Primary Industries (QDPI), Agribusiness and DBIRD.

TABLE 1: COMMODITY LINES PRODUCED AT EACH CENTRE

	R'ton	G'stone	Emerald
Farm machinery	3	3	2
Metal products	14	17	1
Concrete products	10	3	3
Pre-fab houses	3	0	0
Boats	0	5	0
Milled timber	6	1	1
Wood products & furniture	12	3	2
Paper, paper products, printing and publishing	4	0	2
Earth moving equipment	2	1	0
Fibreglass products	0	2	0
Pottery	0	3	0
Commercial art	0	0	0
Beverages	2	0	1
Processed foods	2	0	0
Baking & confectionery	4	0	1
Other	35	16	15
Total	97	54	28

Inputs to Operations

Most inputs to operations come from the CQ Region, from the rest of Queensland or from New South Wales. Very few components, raw materials or specialist services were imported from states other than New South Wales or from overseas. An indication of the products imported into the Region is given by the list of components, raw materials, and specialist services imported from New South Wales.

Components, raw materials and specialist services imported from overseas may be replaceable by local products. By establishing exactly what these products are, local producers are placed in a position to bid for their supply if it is within their capability. This selective import replacement generates the same results as new exports. The work of the Industry Supplies Office (Queensland) Ltd is geared towards this task. Nonetheless, all regional development bodies and agencies should be working towards identifying and publicising these market gaps.

TABLE 2: INPUTS TO OPERATION FROM NSW

Rockhampton	Gladstone	Emerald
Aluminium	Actuators	Ammonium Nitrate
An	Artware Clay	Bronze
Art Boards & Canvasses	Boat Fittings	Canvas
Artware Clay	Bricks & Castables	Welding Wires & Electrodes
Automotive Parts & Accessories	Eyelets	Equipment Spares
Bakery Equipment	Foam	Flocculent
Boat Fittings	Glass	Heavy Engineering Equipment
Bricks & Castables	Hardware	Hinges
Caustic Soda	Laminating	Machinery Parts
Cutting/Polishing	Pumps	Mining Equipment
Fabric	Parquetry Board	Rebuilt Engines
Finished Timber	Pitch	Mining Supplies
Foam	Sail Cloth	PVC Supplies
Galv & Zincalume Steel	Steel	Machinery Spare Parts
Gemstones	Valves	Steel
Glass		Tooling Tips & Cutters
Grinding Metal		Vinyl
Hardware		
Hardware Fittings		
High Tensile Wire		
Live Lamb		
Locks		
Medications		
Milling Machines & Parts		
Oats		
Oats & Medicinal Plants		
Paper		
Pipe & RHS Valves		
Pitch		
Refractories		
Sawn Timber		
Engine Seals		
Steel Products		
Sun Hulls		
Timber		
Tubing		
Vertical Drape Components		
Wire		

Inputs imported from overseas for use in Rockhampton, Gladstone and Emerald operations are as follows:

TABLE 3: LIST OF PRODUCTS CURRENTLY IMPORTED FROM OVERSEAS BY CENTRE

Rockhampton		Gladstone		Emerald	
Products	Country	Products	Country	Products	Country
Vertical Drapes		Oxides	Import via VIC	Mining Equip	
Electronic Components	USA	Caustic Soda	USA	Parts	USA
Petroleum Coke	USA	Cement Kiln	Denmark		Singapore
Dried Blood		Pistons	Japan/USA	Flock	Europe
Fish Meal	Samoa	S Line Pipe	Japan/Korea	Velvet	Europe
An	Norway	Kiln Bits &		Machinery Parts	USA
Electrodes	India/ Sth America	Furniture	Import via VIC		
Refractories	Germany/ Austria	Pottery Equip.	Import via VIC		
Oxides	Germany	Actuators	Holland		
Gemstones	Brazil	Varied Parts	France/Germany/ America		
Discs	Brazil	Moulds			
Grinding Metal	Belgium				
Mill Liners	Belgium				
Pipe & RHS Valves	Assorted				
Moulds	America				

Staffing Levels

Staff levels provided the information that in Rockhampton, for example, there were 72 businesses employing 2,050 persons; nineteen businesses employing 44 part-time staff and 31 businesses employing 139 persons. The break-up between office and trade employees was 381 office employees and 1469 trade employees.

While staff levels were provided for all organisations for full-time and part-time, trade and non-trade staff, the main interest in the answers to these questions was in the staff shortages identified. These shortages were mainly for tradespersons.

TABLE 4: LIST OF STAFF SHORTAGES IDENTIFIED BY CENTRE

Rockhampton	Gladstone	Emerald
Aluminium Welders	General Hands	Apprentices (Various)
Boilermaker	Engineers (Mechanical)	Labourers
Cabinetmaker	All Types of Glass Throwers	
Canvas Seamsters	Sheetmetal Workers 1st Class	
Carpenters	Instrument Fitters	
Ceramic Pourers	Joiners	
Engine Reconditioners	Upholsterers	
Fitters	Machinists	
Motor Trimmers	Motor Trimmers	
Production Throwers	Ceramic Pourers	
Upholsterers	Carpenters	
Sheetmetal Workers	Canvas Makers	
Bench Men, Sawyers	Cabinet Makers	
French Polishers	Boilermaker	
Specialist Exhaust Fitters	Slabbers	
Exp. Snr. Smallstock		
Printers		
Putters		

Specialist Services and Skills

Specialised services and skills that were provided by the organisations were listed so that this information could be used to assist firms with a use for such skills/services wishing to set up in the Region.

Specialised services and skills needed, but not available locally, provide opportunities for new operations to start up in the Region or for existing operations to expand to satisfy identified needs. Hence the list is of direct use to regional development officers. A sample of the specialist services currently obtained outside the Region which, in the opinion of the respondents could be supplied from within the Region, is given in Table 5.

This list is for Rockhampton only and clearly indicates that there is a prima facie case for the setting up of galvanising and/or anodising operations in the Rockhampton Area. Many other opportunities are identified.

TABLE 5: LIST OF SERVICES CURRENTLY OBTAINED FROM OUTSIDE THE REGION (BY ORGANISATION)

Anodising (4)	Brisbane
Blow Moulding	Melbourne/Brisbane
Boiler Services	Brisbane
Camshaft Lobe Grinding	Brisbane
Carton Printing	Melbourne/Brisbane
Cast Iron Foundry	Brisbane
Chrome Plating (2)	Brisbane
Chrome Cobalt Denture Construction	Bundaberg/Brisbane
Competitive Welding	Local or Brisbane
Computer Services	Brisbane
Computer Systems	Brisbane/Sydney
Computerised Machining	Bundaberg
Consulting Engineers	Brisbane/Sydney
Electronic Weigher	NSW or Southeast Qld
Electroplating	Brisbane/Mackay
Finished Picture Frame Moulding	Sydney/Melbourne
Floor Grating	Brisbane
Galvanising (19)	Brisbane/Bundaberg
Gear Generation	Bundaberg
Gold Plating/Investment Casting	Brisbane/Melbourne
Heavy Engineering Workshop	Mackay
Large Capacity Rolling/Pressing	Brisbane
Large Electric Motor Repair Shop	Brisbane/Mackay
Large Scale Engineering	Brisbane
Mechanical Services Drafting	Brisbane
Medication, Pharmaceutical & Pr	Brisbane/Sydney
Milling Engineering	Brisbane
Painting (Special)	Brisbane
Paper Sacks	Brisbane
Plastic Extrusion	Melbourne/Brisbane
Plastic Moulding	Brisbane

Plating	Brisbane
Powder Coating	Brisbane
Powder Spraying	Brisbane
Reconditioning Bakery Equipment	Brisbane
Refrigeration Specialties	Brisbane
Repair Work & Maintenance on I	Brisbane
Scales Mechanic	Brisbane
Service for Printing Machinery	Brisbane
Spray Painting	Brisbane
STD Test of Meas. Equipment	Brisbane
Stud Welding	Brisbane
Tool Making/Maintenance	Sydney
Wet Coating/Anodising	Brisbane
White Metal Bearings Cast	Overseas

Products and Markets

A sample of the products and services provided in the Region shows a great variety:

Steel Products	Beef	Concrete Products
Tallow	Timber	Timber Mouldings etc
Metal Products	Merchandise Hardware	Lamb Skins
Calf Skins	Full Range of Meat and Offal	Kit Homes
Meat Meal	Sheepskins	Steel Fabrications
Awnings	Security Doors & Screens	Pre Fab Housing
Kitchen Cupboards	Concrete Pipes & Products	Kitchens
Cabinets, Joinery	Glass & Aluminium Joinery	Bricks & Pavers
Sawn Timber	Trusses & W/F	Awnings
Hyd Jack/Ram Repairs	Joinery Products	Screens
Milk	Maintenance Fitting	Mining Timbers
Blinds	Fabricated Components	Faceting Machines
Security	Curtain Tracks	Metal Roofing
Survey Pegs	Vertical Drapes	Printed Brouchers
Printing Engineering	Faceting Laps	Flour
Printed Forms, Books	Metal Fabrication	Signs
Deadburned Magnesium	Masonry	Sheep Handling Products
Cattle Handling Equipment	Fab Stal Products	Soft Drinks
Bread	Electrofused Magnesium	Metal Products
Forestry Equipment	Rural Buildings	Reconditioned Pumps
Ballustrading	Buns	Art Materials
Lucerne Hay & Chaff	Furniture	Sculpture
Custom Picture Framing	Shaft Winders	Equipment Rebuilds
Woodwork	Pottery	Ductwork
Truck Repairs	Diesel Engine Rebuilds	Grass Seed
Formwork	Electronics	Bagged Horse Feed
Mungbeans	Scaffolding	Bagged Protein Meal
Bagged Pig Feed	Rhodes Grass	Bulk Pig Feed
Bulk Cattle Feed	Bagged Poultry Feed	
Bulk Poultry	Bulk Horses Feed	
	Grains Bagged	

The distribution of final products provides insights into where the output from the Region is sold. Table 6 shows that there is clearly a lack of overseas exporting from the Region by manufacturers. Most produce is destined for Queensland, with only a small number of items exported into other states or overseas. Table 6 below shows the percentage of products which are sent to the respective states or overseas by Rockhampton, Gladstone and Emerald manufacturers and specialist service providers.

[Note: The survey in Gladstone did not include responses from the major producers QAL, Boyne Smelters and ICI, hence the lack of exports.]

**TABLE 6: DISTRIBUTION OF MARKETS FOR CQ PRODUCTS
(PERCENTAGES)**

DIST	CQ REG	QLD	NSW	VIC	TAS	SA	WA	NT	Overseas Countries
Rockhampton									
29.80	40.65	15.27	2.71	1.46	.19	.28	1.26	.13	7.46
Gladstone									
62.71	31.47	3.09	1.88	1.88	.41	.41	.41	0	0
Emerald									
50.16	38.68	7.92	.62	.41	.41	.41	.41	.41	2.84

Supply and Other Problems

Problems identified by respondents provides valuable insights for those intent on maintaining existing operations in the respective centres. If the problems currently troubling the existing producers are not dealt with, it is likely that others will not locate in the Region, or if they do, they will likely face the same problems. Further, as many regional development bodies depend for at least part of their funding on the existing operators, it is their responsibility to, firstly, know what the problems are and, secondly, to attempt to find solutions to the identified problems. Problems were categorised according to whether they were associated with:

- (a) Raw materials supply
- (b) Components supply
- (c) Plant/Office Equipment supply
- (d) Professional Services
- (e) Finance
- (f) Other services

A sample of responses indicate that there are a number of common problems. In Rockhampton, the Survey was conducted in 1990, in which year there was a major flood; hence, the impact of the flood on supplies was fresh in the minds of respondents. Generally, the difficulty of obtaining supplies from all sources provides significant problems. The source of these problems appears to be associated with transport services or with delivery policies of capital city suppliers. The problems listed are sampled from those provided by Rockhampton respondents.

(a) Supply Problems Including Specific Items:

- Availability of grains and hay
- Availability of supply due to floods
- Cattle shortage from floods
- Difficulty of supply of products
- Exhaust tubing
- Expensive transport
- Extended lead times
- Flood prevented delivery
- Hardwood logs
- Ignorance - wrong products
- Availability of supply due to floods
- Labels/HDPE
- Lack of service on raw materials
- Late delivery
- No sand or aggregate during floods
- Often unavailable from local suppliers
- Poor quality of pine timber
- Rationing of basic materials
- Seasonal conditions
- Sheet metal and insulation
- Shortage of log supply in Central Queensland
- Shortage of scallops (seasonal)
- Some problems during flood
- Steel/aluminium
- Suppliers do not have back up
- Supplies of paper and card

(b) **Problems Identified with Components Supply:**

Availability of fittings and materials
 Components for plant
 Delay in supply
 Difficulty of supply of products during flood in January
 Electrical Equipment
 Flood prevented delivery
 General accessories for ductwork
 Oregon timber, scaffold tubing
 Out of stock from suppliers
 Suppliers do not have back-up
 Very slow supply

(c) **Problems Identified with Office/Equipment Supplies:**

All companies in Rockhampton depend on outside storage
 Shortage of computer equipment spares
 Poor service of storage system

(d) **Problems Identified with Professional Services:**

Analytical work
 Data bank service
 Excessive advertising charges
 Local papers refuse to advertise
 Market research
 Store decorations
 Too many ad salesmen ring

(e) **Problems Identified with Financial Services:**

Always a problem
 Bank unwilling to finance
 Borrowing problems
 High interest rates discourage investment
 High interest rates discourage investment
 Lack of financial support outside Brisbane
 Overseas finance unavailable, local finance limited

(f) **Problems Identified with Other Services:**

Customs service not available
 Most expensive transport in Australia
 Industry isolated during legalising of documents
 Postal service slow
 Reliable rail service needed
 Telephones - delay in repairs
 Transport costs too high
 Transport reliability poor
 Inadequate storage facilities

Advantages/Disadvantages of Location

The basis of the answers relating to advantages provides information which would be very useful for the promotion of the Region. Too often the advantages of a region are based on hearsay or on the opinions of a few regional development body committee members. This information provides hard evidence and insight into what keeps (and hence also what might attract) firms to the Region to set up manufacturing operations.

The lists below are sampled from the three centres, showing advantages and disadvantages of present location, location in the district and location in the Region. A number of problems identified in the relevant questions appeared again in the lists of disadvantages. In particular, difficulties with freight and flood was specified by Rockhampton respondents.

TABLE 7: ADVANTAGES**Advantages of Location in the *Present Location*****Rockhampton**

Low rent, central, out of public eye
 Source of raw material
 Central base for cranes and trucks
 Cattle supply, labour supply, suitable site
 Market accessibility with local government rate
 Industrial site close to city accessible to all markets
 Relatively central
 Ownership of property
 Parking, local government area, drive in hardware
 Handy to people being in city
 Central location, easy access for customers

Gladstone

Industrial site close to town
 Community acceptance, lifestyle
 Excellent sea transport
 Close to motor plants, QAL, power station, smelter
 Distance from main market makes demand larger
 Cheap rent
 Serviced industrial area
 Close to CBD and industrial sites
 As above - good site, good drainage, space

Emerald

Passing tourist traffic
 Handy to customer
 No competitors in this area
 Handy to all customers
 A central location
 Convenient access
 High credibility of the business

Advantages of Location in the *District***Rockhampton**

Accessibility to raw materials
 The economy of the area is steady
 Stable economy
 Very steady market
 Rockhampton has steady economy
 Local sawmill servicing Rockhampton central
 Rockhampton is a steady district for work
 Good demand, usually good on supplies
 Located near farming/mining/construction industries
 Rockhampton's steady economy

Gladstone

Close to markets, raw material, transport
 Have access to consultants, e.g. UCQ
 Backloading of freight cost, beautiful weather
 Adequate raw material and port access
 In an industrial environment
 Less travelling to country customers, better service

Emerald

District brings the tourists into the area
Can service others if needed
Coal source
An expanding area

Advantages of Location in the *Region*

Rockhampton

Growing Region
Region has constant steady progress
Stable economy rural aspect
Good weather
Servicing other areas, such as Mackay
Potential of the Region to expand

Gladstone

Can operate at coal fields
Staff retention
No close competitors Mooloolaba - Mackay nearest
Close to major players in market
Fills need
Good climate

Emerald

Quiet lifestyle associated with running the business
Plenty of work for us
Sapphire mines
Tourist destinations
Growing area

TABLE 8: DISADVANTAGES**Disadvantages of Location in the *Present Location*****Rockhampton**

Possible water supply problem
 Distance from container seaport
 Council restriction of building extensions
 Local flooding when river exceeds 8.2 metres
 Difficulty with highway
 Parking meters deter some people
 Isolation with regard to break and enter

Gladstone

Location
 Transport costs
 Lack of higher profile
 Major market in Southeast Queensland area
 High rent
 Present site off main road, no passing customers
 Freight expensive for supplies and stock

Emerald

Geographically remote from other cities
 Difficult to get spare parts
 High cost of transport
 Not updated by wholesale in major cities
 Dust problem, extremely bad in dry conditions
 Insufficient yard and premises

Disadvantages of Location in the *District***Rockhampton**

Would like better support from LGAs
 Problems with waste materials
 People selling products from residential addresses
 Distance from port
 Raw material availability
 Slow on modernising and updating
 Suppliers and other businesses not switched on

Gladstone

CQ population small in comparison to Southeast Queensland
Too few clients
Freight costs too high
Cost of freighting in parts
Lack of skilled staff

Emerald

Lack of services
Too far for coast (as above)
Freight cost is high
Delay in receiving goods
Far from suppliers
Distance between towns

Disadvantages of Location in the *Region*

Rockhampton

Small population spread over large area, making the CQ Region the hardest area to service
Lack of ads in local press by suppliers
Shortage of raw material - log timber
Distance from Brisbane
Transport dependency
Flood bound

Gladstone

Large district for person to person communication
Excessive travelling to mine sites
No calling for great quantity of use
Distance from major population centres
Less law enforcement (regulations, etc.)
Unavailability of a galvanising works

Emerald

High transport and postal freight cost
Unreliable delivery
Postal delays
Unavailability of technicians
Distance from major cities

Area is growing
Distance and freight costs

Financial Issues and Future Plans

Information was obtained on the turnover of the operation, on what investment was planned and whether this investment was in plant/equipment, land or building extensions. No details are provided here, as the answers were relevant at the time the Survey was carried out, and, as economic circumstances have changed dramatically since then, it is not considered appropriate to provide this information. Nonetheless, this information would be particularly useful to planners in the Region if obtained and used within reasonable time. Developments could be better staged, and better timing of decisions would result.

The respondents were also asked: What industry (if any) does your business particularly depend on? The answers provided insights into the source of wealth in the Region. The results are summarised in Table 9. The order of importance which resulted is Building, Coal, Mining, Cattle and the Aluminium industry in that order.

TABLE 9: OTHER INDUSTRY DEPENDENCY

Mining	10	Rural Industry	2	Printing Industry	1
Tourism	1	Forestry	2	Small Livestock	
Cattle	10	Railways	1	Industries	1
Building	26	Fishing	1	Local and State Govt	
Coal	11	Aluminium Industry	5	Infrastructure	1
Sugar	1	Steel Fabrication	2	Sawmilling	1
Timber	1	Trucking Industry	1	Bakers	
Dairy	1	Shipping Industry	1	Gas	1
Oil	1	Bulk Carriers	1	Dental	1
Farming	1	Electrical Power			
Paper	1	Supply	4		

What has been provided here is a sample of the type of strategic information contained on the database. This is the kind of information that decision-makers require. It is hoped that agencies involved in regional development will take note of a valuable resource that is not being efficiently or effectively used at present.

APPENDIX 1

MANUFACTURER AND SPECIALIST SERVICE SURVEY QUESTIONNAIRE

MANUFACTURER AND SPECIALIST SERVICE SURVEY

PART A: BUSINESS PROFILE

1. Please provide for your local business

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Name

Trading Address.....

..... Postcode.....

Postal Address.....

..... Postcode.....

Phone No. Fax No.

Contact person for entry in Directory

Phone No. Work.....

Parent company (if applicable) Name:.....

Parent company location:.....

Real property description of your main local manufacturing premises:

Factory floor area (Sq. feet)

Real property description of any other local manufacturing/storage
premises (if applicable):

Factory floor area (Sq. feet)

Is your business registered as:

a sole trader	()
a private company	()
a partnership	()
a limited liability company	()
a public company	()

2. Please describe the type of business that you operate. (e.g. sawmilling, metal fabrication)

.....

3. Which of the following commodity lines does your business produce? (If more than one category applies, please indicate in the frame the approximate percentage of each commodity produced.)

Farm machinery			Earth moving equipment						
Metal products			Fibreglass products						
Concrete products			Pottery						
Pre-fab houses			Commercial art						
Boats			Beverages						
Milled timber			Processed foods						
Wood products & furniture			Baking & Confectionery						
Paper, paper products, printing and publishing			Other (please specify)						

PART B: INPUTS TO YOUR OPERATIONFor
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4. Please list in order of importance the main raw materials (e.g. unmilled timber), components (e.g. locks, carburettors), specialist services (e.g. hot galvanising, re-boring, milling and grinding) used in your manufacturing operation, and where possible indicate the location of your supplier, i.e. where the raw materials etc. come from.

WHERE OBTAINED (TICK APPROPRIATE COLUMN)

Raw Materials	The District	The CQ Region	Qld Excl The CQ Region	Interstate						Overseas (Name Country)
				NSW	VIC	TAS	SA	WA	NT	
Component Parts										
Specialist Services										

5. What products, in your view, or inputs imported from outside the Region that are presently used in your business could be supplied locally at competitive prices?

Please specify

.....

.....

PART C: STAFF NUMBERS, SPECIALIST SKILLS AND SERVICES**For
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YES / NO (Please circle)

If YES, how many people on average (including yourself) are employed by your business during seasonal peaks and off-peak?

No. of Employees PEAK	No. of Employees OFF-PEAK
Full-time	
Part-time	
Casual	

Of these how many are;

Office (white collar) workers _____

Trades (blue collar) workers _____

If NO, how many people on average (including yourself) are employed in your business?

No. of Employees

Full-time _____

Part-time _____

Casual _____

Of these how many are;

Office (white collar) workers _____

Trades (blue collar) workers _____

7. Of the full-time employees, how many are:

Skilled tradespeople? _____

Trainees/Apprentices? _____

During the past twelve months have you experienced shortages of:

Tradespeople? _____ (If so, types) _____

Other staff? _____ (If so, types) _____

Does your firm have training needs not currently being satisfied within in the region?

Specify: _____

-
-
-
-

- YES / NO (Please circle)

MARKET AREAS FOR SERVICE

[illegible]

-

-

- (c) Approximately how much per month would you spend on these specialist services?

.....

.....

- 11(a). Could your firm develop the capacity (i.e. the specialised skills and technology) to provide such services?

YES / NO (Please circle)

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| |

- (b) If YES, please specify what is needed for you to develop this capacity.

Please supply details.

.....

.....

- c) If NO, please nominate an existing local firm as a potential future supplier of these specialised skills or technology.

Please supply details.

.....

.....

PART D: PRODUCTS AND MARKETS

12. Please indicate the approximate proportion (percent) of your finished product/products and/or services which are sold in the following markets together with their associated brand names if applicable.

MARKET AREAS

[illegible]

PART E: PROBLEMS, OPPORTUNITIES ETC.**For
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13. Please indicate whether, in the last 12 months, you have experienced any problems with:

(a) Raw materials (unworked) supply.

YES / NO (Please circle)

If YES, please specify.....

.....

.....

(b) Components supply.

YES / NO (Please circle)

If YES, please specify.....

.....

.....

(c) Plant or office equipment/supplies.

YES / NO (Please circle)

If YES, please specify.....

.....

(d) Professional services (e.g. advertising, market research)

YES / NO (Please circle)

If YES, please specify.....

.....

(e) Finance. YES / NO (Please circle)

If YES, please specify.....

.....

(f) Other services (e.g. transport, telephone & postal)

YES / NO (Please circle)

If YES, please specify.....

.....

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14.	What in your view are the major advantages of having your business located:	
(a)	At its present site?.....	
(b)	Within the district?.....	
(c)	Within the CQ region?.....	
15.	What in your view are the major drawbacks in having your business located:	
(a)	At its present site?.....	
(b)	Within the district?.....	
(c)	Within the CQ region?.....	
16.	Would your firm be interested in becoming involved in any of the following:	
(a)	Joint venture partnership or group contract arrangements? YES / NO / UNDECIDED (Please circle)	
(b)	Marketing delegations interstate? YES / NO / UNDECIDED (Please circle)	
(c)	Marketing delegations overseas? YES / NO / UNDECIDED (Please circle)	
(d)	Registering a business or investment opportunity for promotion by the local City or Shire Council YES / NO / UNDECIDED (Please circle)	

- (e) Seeking venture capital, investment in your firm, an equity partner?
YES / NO / UNDECIDED (Please circle)
- (f) Licencing others to produce/sell your products?
YES / NO / UNDECIDED (Please circle)
- (g) Selling your business?
YES / NO / UNDECIDED (Please circle)
- (i) Industry group training schemes?
YES / NO / UNDECIDED (Please circle)
- 17.(a) To date have you participated in the Local Group Apprenticeship Scheme?
(See Guidelines and Information)
YES / NO (Please circle)
- (b) If YES, please provide details of the use you have made of this scheme.
.....
.....
.....
If NO, why not?
Please specify details.....
.....
.....
18. In relation to your Local Development Organisation.
- (a) Have you recently used any of the services provided by these bodies? (See Guidelines and Information)
YES / NO (Please circle)
- (b) Indicate the type of services used.
.....
.....
19. Please indicate any services not presently provided by these bodies that you would like to have provided and any area where these bodies could assist your business.

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20.(a) Have you recently used any of the services provided by local business service organisations? (e.g. the Metal Trade Industries Association, Queensland Confederation of Industry, The Chamber of Commerce).

YES / NO (Please circle)

(b) If YES, please indicate the service.

.....
.....

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ALTHOUGH COMMERCIALLY SENSITIVE THIS KIND OF INFORMATION IS VERY VALUABLE FOR PLANNING AND PROMOTIONAL PURPOSES. BEFORE DATA ENTRY PAGES 11-13 WILL BE REMOVED AND ENTERED SEPARATELY SO THAT A COMPANY CANNOT BE IDENTIFIED WITH THE INFORMATION RECEIVED.

SHOULD YOU ANSWER THESE QUESTIONS, YOU ARE GUARANTEED THE UTMOST CONFIDENTIALITY

21. During the last financial year (1/7/1989 - 30/6/1990), what has been the approximate turnover of your business? (Please tick the appropriate box).

<input type="checkbox"/>	Less than \$250,000	<input type="checkbox"/>	From \$2,500,000 to \$3,000,000
<input type="checkbox"/>	From \$250,000 to \$750,000	<input type="checkbox"/>	From \$3,000,000 to \$3,500,000
<input type="checkbox"/>	From \$750,000 to \$1,000,000	<input type="checkbox"/>	From \$3,500,000 to \$4,000,000
<input type="checkbox"/>	From \$1,000,000 to \$1,250,000	<input type="checkbox"/>	From \$4,000,000 to \$5,000,000
<input type="checkbox"/>	From \$1,250,000 to \$1,500,000	<input type="checkbox"/>	From \$5,000,000 to \$10,000,000
<input type="checkbox"/>	From \$1,750,000 to \$2,000,000	<input type="checkbox"/>	From \$10,000,000 to \$20,000,000
		<input type="checkbox"/>	Above \$20,000,000

- 22.(a) Does your firm plan any increased investment in plant or equipment during 1991?

YES / NO (Please circle)

- (b) If YES, please provide approximate details in the chart below.

Type of Investment	At New Site in CQ	At New Site In R'ton District	Please Specify if Outside District	Location
Plant/Equipment	\$	\$	\$	
Land Purchase	\$	\$	\$	
Building Extensions	\$	\$	\$	

Within the next three years do you plan to:

- (c) Close down plant at your present address?

YES / NO (Please circle)

If YES, please supply details.....

.....

(d) Relocate plant operations within the District?

YES / NO (Please circle)

If YES, please supply details.....
.....

(e) Relocate plant operations within the CQ Region?

YES / NO (Please circle)

If YES, please supply details.....
.....

(f) Relocate plant operations outside the CQ Region?

YES / NO (Please circle)

If YES, please supply details.....
.....

(g) Open a branch factory within the District?

YES / NO (Please circle)

If YES, please supply details.....
.....

(h) Open a warehouse within the CQ Region?

YES / NO (Please circle)

If YES, please supply details.....
.....

(i) Open retail outlets within the CQ Region?

YES / NO (Please circle)

If YES, please supply details.....
.....

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23. How long has your business been operating:

(a) From these premises?YrsMths

(b) In this district?YrsMths

(c) In the CQ Region?YrsMths

24. Has there been a change in ownership of your business:
- (a) During the past year YES / NO (Please circle)
- (b) During the past two years YES / NO (Please circle)
- (c) During the past five years YES / NO (Please circle)
25. What industry (if any) does your business particularly depend on
e.g. coal industry, cattle industry.

Please name the industry

.....

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Your knowledge and experience are very valuable to any organisation wishing to promote the growth or development of the region. Any suggestions that you may have or constructive criticisms that you may wish to offer will be noted and followed up.

THANK YOU FOR YOUR ASSISTANCE WITH THIS
REGIONAL DEVELOPMENT PROJECT

YOUR VIEWS AND SUGGESTIONS?

Please list any difficulties you have experienced operating a business in this district. If there are any particular problems that, in your view, have held back your progress please provide details which will be treated confidentially.

On the other hand, if you have been encouraged by any recent developments in your district, or have reaped benefits from advisory or other services, please supply details.

[illegible]

Thank you for your valuable input to this regional development program.