

# FNQ AGRICULTURAL WORKFORCE

FNQ GROWERS



**Queensland  
Agriculture  
Workforce  
Network**  
Far North Queensland



## DOCUMENT CONTROL

Job ID: J003250  
 Job Name: FNQ Growers Agricultural Workforce Study  
 Client: FNQ Growers  
 Client Contact: Kelly Hogkinson  
 Project Manager: Holly Marson  
 Email: [holly.marson@aecgrouppltd.com](mailto:holly.marson@aecgrouppltd.com)  
 Telephone: (07) 4771 5550  
 Document Name: FNQ Agricultural Employment Draft v1  
 Last Saved: 20/4/2026 11:38 AM

Version	Date	Reviewed	Approved
Draft v1	10/12/25	HM	AP
Draft v2	21/01/25	HM	HM

Disclaimer:

Whilst all care and diligence have been exercised in the preparation of this report, AEC Group Pty Ltd does not warrant the accuracy of the information contained within and accepts no liability for any loss or damage that may be suffered as a result of reliance on this information, whether or not there has been any error, omission or negligence on the part of AEC Group Pty Ltd or their employees. Any forecasts or projections used in the analysis can be affected by a number of unforeseen variables, and as such no warranty is given that a particular set of results will in fact be achieved.



## EXECUTIVE SUMMARY

---

### BACKGROUND

The Far North Queensland (FNQ) agricultural sector is a major contributor to the regional economy, supporting a diverse mix of crops and livestock across Cassowary Coast, Mareeba, Tablelands, Cook, Douglas and Etheridge local government areas. It relies on a combination of local Australian workers and a substantial international workforce engaged through structured migration and seasonal labour programs. FNQ Growers commissioned this study to build a clearer evidence base on agricultural employment across the region and to provide estimates that can be used in advocacy, workforce planning and industry development.

### PURPOSE

The primary objective is to quantify agricultural employment across the FNQ region and to identify the contributions made by key employment schemes, including the Pacific Australia Labour Mobility (PALM) scheme, the Far North Queensland Designated Area Migration Agreement (FNQ DAMA) and the Working Holiday Maker visa program, and compare these to the local Australian workforce.

### KEY FINDINGS

The findings highlight the scale of the region's reliance on international labour programs. Across the FNQ LGAs:

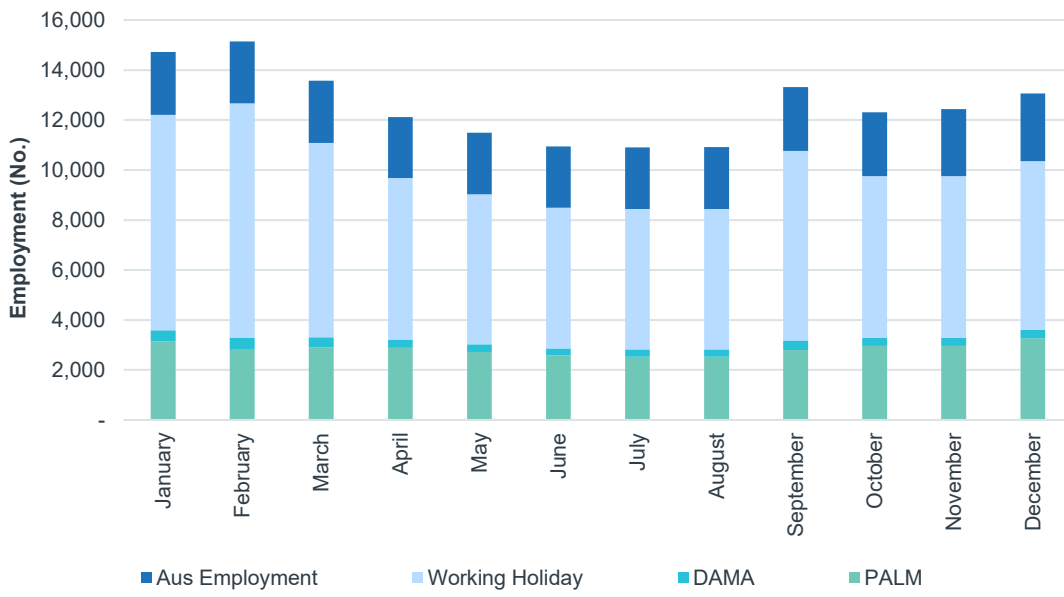
- **PALM:** More than 2,500 PALM workers are associated with agricultural activity. The vast majority are in short-term placements and are estimated to be concentrated in the Cassowary Coast, Mareeba and Tablelands.
- **DAMA:** The FNQ DAMA contributes a further cohort of around 285 visa holders linked to agriculture in the region. After accounting for these programs, the remaining Australian resident employment in agriculture is estimated at roughly 2,500 jobs across the six LGAs, underscoring that international labour now accounts for a substantial share of on-farm employment.
- **Working holiday makers:** Represent an additional, highly seasonal component of the regional workforce. Drawing on national and Queensland data, the study estimates that around 5,600 working holiday makers are engaged in agricultural employment across the FNQ LGAs, again estimated to be heavily concentrated in Cassowary Coast, Mareeba and Tablelands.
- **Australian employment:** More than 2,400 Australian workers are employed within the agricultural industry in the FNQ region. The majority are employed within the horticultural industry, particularly within the Cassowary Coast.

Seasonal analysis shows that total agricultural employment in FNQ fluctuates markedly over the year, from around 11,000 workers in the winter trough to more than 15,000 during summer, driven largely by horticultural activity.

Overall, the assessment confirms that FNQ's agricultural sector is both a significant employer and heavily dependent on international labour programs to meet its workforce needs, particularly during peak seasons.



**Figure ES. 1. Total Employment Estimates**



Source: AEC, various sources.



# TABLE OF CONTENTS

---

<b>DOCUMENT CONTROL</b> .....	<b>I</b>
<b>EXECUTIVE SUMMARY</b> .....	<b>II</b>
<b>TABLE OF CONTENTS</b> .....	<b>IV</b>
<b>1. INTRODUCTION</b> .....	<b>1</b>
1.1 BACKGROUND AND PURPOSE.....	1
1.2 APPROACH AND METHODOLOGY .....	1
1.3 FNQ REGION.....	2
<b>2. AGRICULTURAL EMPLOYMENT</b> .....	<b>3</b>
2.1 PALM SCHEME.....	3
2.2 DAMA .....	5
2.3 WORKING HOLIDAY VISAS .....	7
2.4 AUSTRALIAN EMPLOYMENT.....	9
2.5 SEASONALITY.....	11
2.6 AGRICULTURAL JOB VACANCIES.....	14
<b>REFERENCES</b> .....	<b>15</b>
<b>APPENDIX A POSTCODE TO LGA</b> .....	<b>16</b>
<b>APPENDIX B AGRICULTURAL EMPLOYMENT BREAKDOWN</b> .....	<b>18</b>



# 1. INTRODUCTION

---

## 1.1 BACKGROUND AND PURPOSE

Agriculture is a cornerstone of the Far North Queensland (FNQ) economy, supporting a diverse mix of horticulture, livestock grazing, aquaculture, broadacre cropping and sugar production across the local government areas (LGAs) of Cassowary Coast, Mareeba, Tablelands, Cook, Douglas and Etheridge and forming 17.6% of economic activity of the region<sup>1</sup>. This production base relies on a combination of local Australian workers and a substantial number of international workers engaged through temporary migration and seasonal labour programs.

FNQ Growers engaged AEC Group Pty Ltd (AEC) to develop an estimate on the size and composition of the FNQ agricultural workforce. The primary objective is to quantify agricultural employment across the FNQ region and to identify the contributions made by key employment schemes, including the Pacific Australia Labour Mobility (PALM) scheme, the Far North Queensland Designated Area Migration Agreement (FNQ DAMA) and the Working Holiday Maker visa program, and compare these to the local Australian workforce. This analysis is intended to support FNQ Growers' advocacy activities, inform workforce planning and initiatives, and provide inputs to future materials such as industry career booklets and promotional resources.

## 1.2 APPROACH AND METHODOLOGY

The assessment brings together multiple data sources and AEC's in-house modelling to estimate agricultural employment at LGA level and, where possible, by key commodity groupings (horticulture, livestock grazing, dairy farming, aquaculture, broadacre cropping and sugar). The core elements of the approach are as follows:

- **Baseline agricultural employment:** AEC's 2023-24 employment model was used to derive baseline estimates of total agricultural employment by LGA and commodity. The model maps four-digit ANZSIC industry classifications to Input-Output commodity classifications and is underpinned by Census place of work employment data.
- **PALM scheme employment:** Data from the Department of Employment and Workplace Relations (DEWR) on available placements and signed offers of employment (OOEs) under the PALM scheme are compiled at postcode level for both long-term and short-term streams. These are then converted to LGA-level estimates using a postcode to LGA concordance weighted by each LGA's share of agricultural employment within the postcode.
- **DAMA employment:** Information from the Department of Home Affairs' Business, Industry and Regional Outreach (BIRO) database on visa holders under the FNQ DAMA (subclasses 186, 482 and 494) is treated as a representative number of workers for any given period. These workers were listed under the horticultural and agricultural industries and have been allocated to LGAs within the FNQ region in proportion to each LGA's share of agricultural employment within the broader FNQ DAMA catchment.
- **Working Holiday Maker employment:** National Working Holiday Maker (417 and 462) visa statistics and industry breakdowns for second and third visas are used to estimate the share of working holiday makers employed in agriculture. Tourism Research Australia data on the distribution of working holiday makers across Australia and Queensland provide a basis for estimating the Queensland agricultural workforce, which is then allocated to the FNQ LGAs according to their share of Queensland agricultural employment.
- **Adjustment for overlap with census employment:** Because census-based employment already includes some international workers, PALM and DAMA worker estimates are subtracted from the total agricultural employment estimates from AEC's 2023-24 employment model to avoid double-counting. Given uncertainties around the precise commodity distribution of these workers, the subtraction is applied proportionately across commodities within each LGA. Working holiday makers are not deducted, reflecting substantial changes in visa numbers since the census reference period.

---

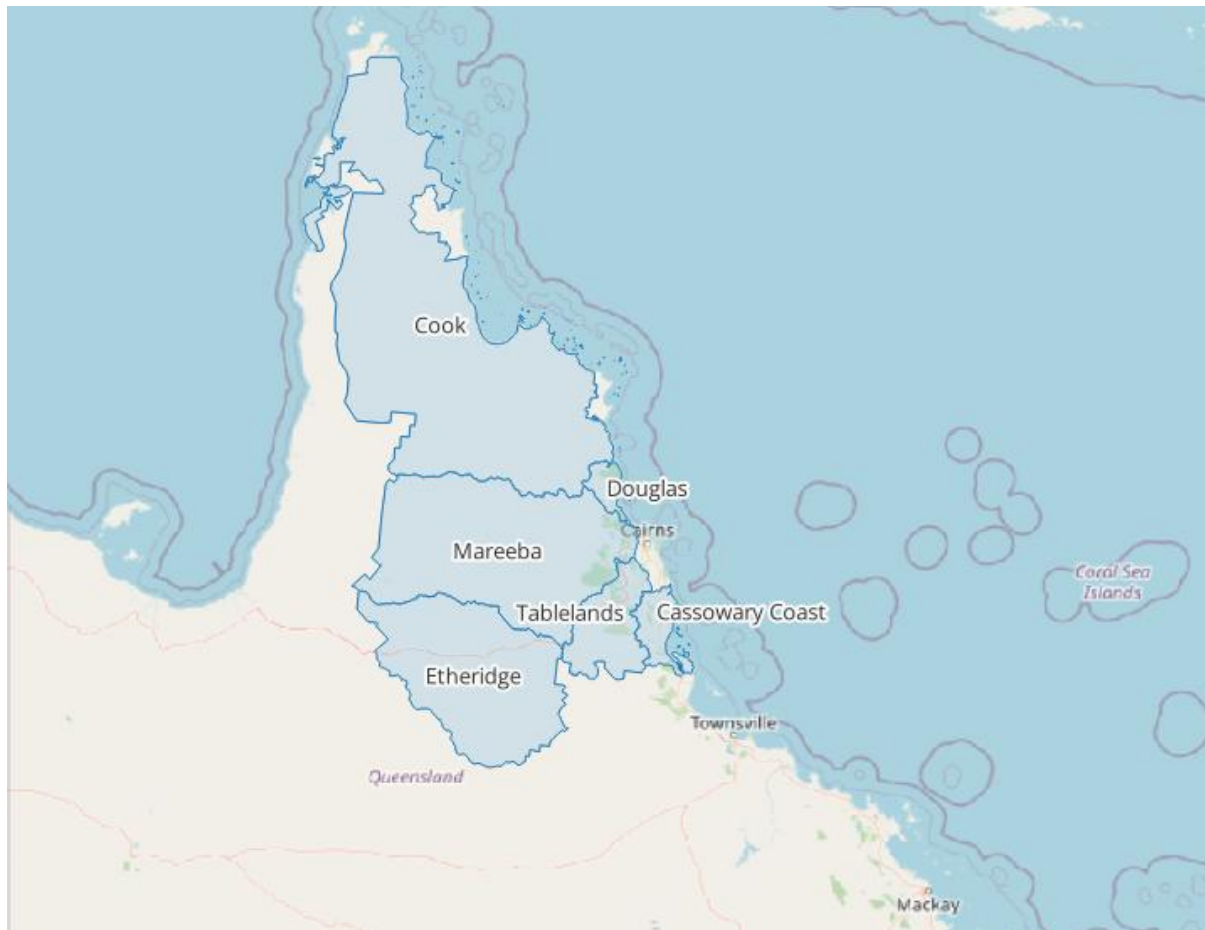
<sup>1</sup> In terms of 2023-24 Gross Value Add (AEC, unpublished b).

- **Seasonality:** To capture seasonal labour dynamics, ABARES horticultural employment profiles for the Cairns SA4 are applied to annual employment estimates. Seasonal factors are applied to horticulture only, with other agricultural industries treated as relatively non-seasonal. This yields indicative monthly employment estimates by LGA and workforce type across the year.

### 1.3 FNQ REGION

As highlighted in section 1.1 above, there are six LGAs within the FNQ study region, including Cassowary Coast, Mareeba, Tablelands, Cook, Douglas and Etheridge.

Figure 1.1. FNQ Region



Source: AEC.

## 2. AGRICULTURAL EMPLOYMENT

This chapter presents estimates of the size and composition of the agricultural workforce across the Far North Queensland (FNQ) region. It quantifies total agricultural employment by Local Government Area (LGA) and industry and then identifies the contribution of key workforce programs, including the Pacific Australia Labour Mobility (PALM) scheme, the FNQ Designated Area Migration Agreement (DAMA) and working holiday maker visas. Results are reflective of the latest available data and presented as annual employment estimates. Where possible, broken down by commodity groups and seasonality.

### 2.1 PALM SCHEME

#### 2.1.1 APPROACH

The PALM scheme is a critical source of seasonal and longer-term labour for horticulture and other agricultural industries in FNQ, allowing approved employers and labour-hire providers to access workers from participating Pacific and Timor-Leste countries. Within the FNQ region, employers have indicated strong demand for PALM workers across both the long-term and short-term streams, with the vast majority of requested placements linked to agricultural enterprises rather than other industries. This section summarises PALM demand and estimated employment at postcode level and then converts these to local government area estimates aligned with the FNQ region.

#### 2.1.2 WORKINGS

Within the FNQ region across all industries, it is estimated that there are 360 long-term available placements<sup>2</sup> and 3,170 short-term available placements<sup>3</sup>. Most of this demand is within the agricultural industry, including 96% of the demand for long-term placements and 99% of the short-term placements.

To understand the potential employment of PALM workers within the region, it is assumed that the signed offers of employment (OOE) are an appropriate measure of placements. However, it is important to note that a signed OOE does not mean that the worker is in the country and working in the position yet.

Within the FNQ region, it is estimated that there are 140 agricultural workers in long-term placement and 2,435 workers in short-term placement, totalling 2,575.

**Table 2.1. PALM scheme - Available placements & signed offers of employment (OOE) in requested post codes (All industries)**

Worksite postcode	Long-term stream		Short-term stream	
	Available placements	Signed OOE	Available placements	Signed OOE
4852	0	0	45	60
4854	20	5	325	435
4855	0	0	15	5
4856	15	5	10	5
4858	0	0	10	10
4859	0	0	5	5
4860	20	5	515	180
4871	115	40	635	475
4872	80	45	895	705
4877	10	5	0	0
4880	30	5	455	355

<sup>2</sup> A placement with long-term PALM scheme workers who hold the relevant visa and are employed in a contract of work for up to 4 years (non-seasonal).

<sup>3</sup> A placement with short-term PALM scheme workers who hold the relevant visa and are employed in a contract of work for up to 9 months.



Worksite postcode	Long-term stream		Short-term stream	
	Available placements	Signed OOE	Available placements	Signed OOE
4882	35	15	155	160
4883	25	15	100	70
4885	5	5	0	5
4886	5	0	5	5
4895	5	5	0	0
<b>Total</b>	<b>365</b>	<b>150</b>	<b>3,170</b>	<b>2,475</b>

Source: DEWR (2025a).

**Table 2.2. PALM scheme - Available placements & signed offers of employment (OOE) in requested post codes (Agriculture)**

Worksite postcode	Long-term stream		Short-term stream	
	Available placements	Signed OOE	Available placements	Signed OOE
4852	0	0	35	55
4854	20	5	325	435
4855	0	0	15	5
4856	15	5	10	5
4858	0	0	10	10
4859	0	0	5	5
4860	20	5	515	180
4871	115	40	620	460
4872	80	45	895	705
4880	30	5	455	350
4882	35	15	155	160
4883	25	15	90	70
4885	5	5	0	5
4886	5	0	5	5
<b>Total</b>	<b>350</b>	<b>140</b>	<b>3,135</b>	<b>2,450</b>

Note: Table 2.1 has data for 16 postcodes, while Table 2.2 has data for 14 postcodes. If the postcode is not included in Table 2.2 above, there is no information available.  
 Source: DEWR (2025a).

### 2.1.3 PALM SCHEME EMPLOYMENT ESTIMATES

A conversion from postcode to Local Government Area (LGA) was developed for the PALM estimates, based on the LGA's share of the 2023-24 agricultural employment within the postcode. For an overview of this breakdown, refer to Appendix A. Some of the above postcode data includes LGAs that fall outside of the FNQ region (Cairns and Croydon).

A summary of the PALM Scheme estimated employees is provided in the table below.

**Table 2.3. PALM Scheme Estimated Employees**

FNQ LGAs	Long-Term	Short-Term	Total
<b>FNQ Region</b>			
Cassowary Coast	36	896	<b>932</b>
Cook	2	28	<b>31</b>
Douglas	-	-	<b>0</b>
Etheridge	2	20	<b>22</b>
Mareeba	39	832	<b>872</b>
Tablelands	59	613	<b>671</b>
<b>Sub-Total</b>	<b>138</b>	<b>2,390</b>	<b>2,528</b>
<b>Other LGAs Outside FNQ Region</b>			



FNQ LGAs	Long-Term	Short-Term	Total
Croydon	0	2	2
Cairns	2	58	60
<b>Sub-Total</b>	<b>2</b>	<b>60</b>	<b>62</b>
<b>Combined Total</b>	<b>140</b>	<b>2,450</b>	<b>2,590</b>

Source: DEWR (2025a), AEC (unpublished a).

Official PALM scheme reporting distinguishes between direct employers and labour hire companies, and in November 2025 reported 530 approved employers nationally, including 420 direct employers and 110 labour hire companies, highlighting that labour hire is a material access pathway (DEWR, 2025b). PALM scheme guidance also makes clear that approved employers carry specific obligations and operational responsibilities for worker support, including accommodation standards and travel cost arrangements, which can be logistically demanding to manage directly (DEWR, undated). The PALM scheme itself explicitly distinguishes direct employers (who source workers for their own organisation) from labour hire companies and contractor businesses (who can source workers to support another business), reinforcing that labour hire exists as a mechanism for businesses to access PALM workers without being the direct employer.

Based on the above, it could be reasonable to conclude that larger enterprises with longer seasons and greater HR, accommodation, and compliance capacity are more likely to be direct scheme employers under PALM while also using local labour, working holiday makers and DAMA to manage peaks, whereas smaller growers with shorter, more variable seasons may rely more heavily on local labour, working holiday makers and DAMA and access PALM through labour hire arrangements when direct employment settings are difficult to sustain.

## 2.2 DAMA

### 2.2.1 APPROACH

The Far North Queensland Designated Area Migration Agreement (FNQ DAMA) provides a mechanism for employers in the region to sponsor overseas workers into longer term, often more skilled roles than those typically filled under seasonal schemes.

The Department of Home Affairs Business, Industry and Regional Outreach (BIRO) data on visa holders for the relevant DAMA visa subclasses over the agreement period are treated as an indicative stock of DAMA workers present in the region at any point in time. Because the FNQ DAMA catchment extends beyond the six local government areas considered in this project, these workers are apportioned to the project LGAs based on each area's share of agricultural employment in 2023-24 within the broader DAMA region. This ensures that the DAMA employment estimates are consistent with the overall agricultural employment profile used elsewhere in the analysis.

### 2.2.2 WORKINGS

Within the FNQ DAMA region, BIRO data indicate a total of 342 people (172 primary and 170 secondary visa holders) across three DAMA-linked visa subclasses (186 Employer Nomination Scheme, 482 Skills in Demand and 494 Skilled Employer Sponsored Regional (Provisional)) over the period 1 July 2020 to 31 October 2025.

Individual labour agreements made under the DAMA also generally run for up to five years (Department of Home Affairs, 2025a). Over this period, some workers will leave the region or transition to other visas, while new workers are sponsored into the same DAMA positions. As a result, the observed stock of 342 DAMA-related visa holders is treated in this analysis as a reasonable estimate of the number of people present under the FNQ DAMA at any given point in time during the agreement period.

The FNQ DAMA region is significantly larger than the FNQ region considered in this analysis, encompassing the following LGA's:

- LGA's included in the FNQ Region:
  - Cassowary Coast
  - Cook



- Douglas
- Etheridge
- Mareeba
- Tablelands.
- Additional LGA's included in the FNQ DAMA region:
  - Croydon
  - Weipa
  - Northern Peninsula Area
  - Cairns
  - Torres Strait Island.

**Table 2.4. Far North Queensland DAMA Area, Horticulture and Agriculture, 1<sup>st</sup> July 2020 to 31<sup>st</sup> October 2025**

Visa Subclass	Primary	Secondary
186 Employer Nomination Scheme	8	11
482 Skills in Demand	22	21
494 Skilled Employer Sponsored Regional (Provisional)	142	138
<b>Total</b>	<b>172</b>	<b>170</b>

Source: BIRO (2025).

A breakdown of DAMA employment by LGA has been developed based on the 2023-24 agricultural employment breakdown across LGAs within the FNQ DAMA region. The proportions in Table 2.5 have been applied to the estimates in Table 2.4 for both Primary and Secondary visas.

**Table 2.5. Agricultural Employment, 2023-24**

LGA	2023-24 Employment	Proportion	Primary DAMA Estimates	Secondary DAMA Estimates
<b>FNQ Region</b>				
Cassowary Coast	2,112	33.3%	57	57
Cook	229	3.6%	6	6
Douglas	199	3.1%	5	5
Etheridge	166	2.6%	5	4
Mareeba	1,221	19.2%	33	33
Tablelands	1,368	21.6%	37	37
<b>Sub-Total</b>	<b>5,295</b>	<b>83.5%</b>	<b>144</b>	<b>142</b>
<b>Additional FNQ DAMA Region</b>				
Croydon	18	0.3%	0	0
Weipa	3	0.0%	0	0
Northern Peninsula Area	0	0.0%	0	0
Cairns	1,006	15.8%	27	27
Torres Strait Island	23	0.4%	1	1
<b>Sub-Total</b>	<b>1,049</b>	<b>16.5%</b>	<b>28</b>	<b>28</b>
<b>Total</b>	<b>6,345</b>	<b>100.0%</b>	<b>172</b>	<b>170</b>

Source: AEC (unpublished a).

### 2.2.3 DAMA EMPLOYMENT ESTIMATES

It is estimated that at any given time, there are approximately 285 DAMA workers within the agricultural industry in the FNQ region.

**Table 2.6. DAMA Estimated Employees**

FNQ Region	Primary	Secondary	Total
Cassowary Coast	57	57	114
Cook	6	6	12
Douglas	5	5	11
Etheridge	5	4	9
Mareeba	33	33	66
Tablelands	37	37	74
<b>Total</b>	<b>144</b>	<b>142</b>	<b>285</b>

Source: DEWR (2025a), AEC (unpublished a).

## 2.3 WORKING HOLIDAY VISAS

### 2.3.1 APPROACH

The Working Holiday Maker program provides young visitors on subclass 417 and 462 visas with the opportunity to live, travel and work in Australia, and has become a major source of flexible labour for regional industries, especially horticulture and other seasonal agricultural activities. Many working holiday makers undertake specified regional work in agriculture to become eligible for a second or third year visa, making the program an important part of the farm workforce supply system.

The analysis below first draws on national visa statistics by industry to determine the share of second and third working holiday visas associated with agriculture, and applies this proportion to total Working Holiday visas to derive an estimate of agricultural employment across Australia. Tourism Research Australia data on the distribution of working holiday makers are then used to infer the share of these agricultural workers located in Queensland. Finally, the Queensland estimate is allocated to the FNQ region, and then to individual local government areas, in proportion to their share of agricultural employment in 2023-24. This provides an indicative set of working holiday visa employment estimates that align with the broader employment model and commodity breakdowns.

### 2.3.2 WORKINGS

Unlike both PALM and DAMA, there is no publicly available information on the working holiday visas at an LGA level. The only available information is at a national level, across visa 417 and visa 462.

The number of working holiday visas granted has fluctuated significantly in recent years, largely due to the COVID-19 pandemic. In 2019-20, the total number of visas granted was approximately 149,250. This dropped to a low of 39,586 in 2020-21 with international border closures. There has since been a strong growth in working holiday visas, rising to a total of 321,116 visas granted in 2024-25.

**Table 2.7. Working Holiday Visas, Granted, 2019-20 to 20<sup>th</sup> September 2025**

Year	First	Second	Third	Offshore Nil VAC Visa	Total	Change (%)
<b>417 Visa Granted</b>						
2019-20	92,282	28,316	2,075	0	122,673	-
2020-21	1,749	20,982	8,476	0	31,207	-75%
2021-22	61,546	3,690	6,416	8,244	79,896	156%
2022-23	141,135	14,987	3,749	18,435	178,306	123%
2023-24	154,704	34,494	4,712	12	193,922	9%
2024-25	158,574	71,979	24,350	2	254,905	31%
To 30 September 2025	45,421	15,545	9,295	2	70,263	-72%
<b>462 Visa Granted</b>						
2019-20	19,845	6,128	603	0	26,576	-
2020-21	397	5,585	2,397	0	8,379	-68%



Year	First	Second	Third	Offshore Nil VAC Visa	Total	Change (%)
2021-22	11,598	711	1,826	3,328	17,463	108%
2022-23	34,464	5,938	1,747	3,976	46,125	164%
2023-24	24,939	12,844	2,849	2	40,634	-12%
2024-25	37,888	18,775	9,548	0	66,211	63%
To 30 September 2025	8,494	3,925	3,233	0	15,652	-76%

Source: Department of Home Affairs (2024), Department of Home Affairs (2025b).

Table 2.7 provides an estimate of the number of granted visas, but it does not reflect the number of granted visas that are working within the agricultural industry. The latest information available for visas granted by industry was 2023-24, and this is only recorded for the second and third visas. For first visas there is no industry requirement, so applicants are not asked to report their industry in a consistent way, and Home Affairs therefore is not able to publish first-year working holiday maker data by industry.

To be granted a second or third Working Holiday visa, applicants must complete a minimum period of specified work in certain eligible industries (such as agriculture). For the purposes of this analysis, it is assumed that the proportion of first-year visa holders working in agriculture is similar to the average share observed among second and third visa holders.

**Table 2.8. Working Holiday Visas, Granted by Industry, 2023-24**

Year	Second (No.)	Third (No.)	Second (Proportion of Total)	Third (Proportion of Total)	Average
<b>417 Visa Granted</b>					
Agriculture, Forestry and Fishing	16,298	2,139	47%	45%	46%
Accommodation and Food Services	7,518	779	22%	17%	19%
Construction	6,072	666	18%	14%	16%
Not Classified	4,192	741	12%	16%	14%
Mining	1,414	387	4%	8%	6%
<b>462 Visa Granted</b>					
Agriculture, Forestry and Fishing	7,248	1,567	56%	55%	56%
Accommodation and Food Services	4,104	1,012	32%	36%	34%
Construction	535	82	4%	3%	4%
Not Classified	957	188	7%	7%	7%
Mining	-	-	-	-	-

Note: Mining for 462 visa not reported.  
Source: Department of Home Affairs (2024).

Based on the above, it is assumed that 155,473 working holiday visa employees work within the agricultural industry in Australia.

**Table 2.9. Working Holiday Visas, Granted, Agriculture, 2024-25 (Australia)**

Visa	First	Second	Third	Total
417	73,454	34,009	11,054	<b>118,517</b>
462	21,110	10,595	5,252	<b>36,956</b>
<b>Total</b>	<b>94,564</b>	<b>44,604</b>	<b>16,305</b>	<b>155,473</b>

Source: Department of Home Affairs (2024), Department of Home Affairs (2025b).

Visa statistics are not available at a State or LGA level. Tourism Research Australia (TRA, 2025) data was used to approximate the State share using the number of working holiday makers as a guide. While TRA totals do not align exactly with those published by Home Affairs, they provide a reasonable indication of the distribution of working holiday makers in Australia and subsequently Queensland. On this basis, it has been assumed that approximately



40% of Australia’s working holiday visas in 2024-25 are held in Queensland, and based on this, there are 61,524 working holiday visas estimated for agriculture within Queensland.

**Table 2.10. Working Holiday Visas, Granted, Agriculture, 2024-25 (Queensland)**

Visa	First	Second	Third	Total
417	29,067	13,458	4,374	<b>46,899</b>
462	8,354	4,193	2,078	<b>14,624</b>
<b>Total</b>	<b>37,421</b>	<b>17,651</b>	<b>6,452</b>	<b>61,524</b>

Source: Department of Home Affairs (2024), Department of Home Affairs (2025b).

To estimate potential employment at the LGA level, AEC applied the share of agricultural employment in the FNQ Region relative to Queensland in 2023-24 (Table 2.11 below). This regional proportion was used as a proxy to allocate Queensland-level working holiday employment to the FNQ LGAs.

**Table 2.11. FNQ Region Agricultural Employment vs Queensland**

FNQ LGAs	2023-24 Agricultural Employment	% of Queensland
Cassowary Coast	2,112	3.6%
Cook	229	0.4%
Douglas	199	0.3%
Etheridge	166	0.3%
Mareeba	1,221	2.1%
Tablelands	1,368	2.4%
Queensland	57,902	-

Source: AEC (unpublished a).

### 2.3.3 WORKING HOLIDAY VISAS EMPLOYMENT ESTIMATES

Based on the above assumptions, it is estimated that the FNQ region accounts for 5,626 working holiday visas within the agricultural industry in 2024-25. It is important to recognise that this is not full-time equivalent employment as those on working holiday visas have short-term employment to fund their trip, allowing an extended holiday.

**Table 2.12. FNQ Region Estimated Working Holiday Visas**

LGA	417	462	Total
Cassowary Coast	1,711	533	<b>2,244</b>
Cook	185	58	<b>243</b>
Douglas	161	50	<b>212</b>
Etheridge	135	42	<b>177</b>
Mareeba	989	308	<b>1,297</b>
Tablelands	1,108	346	<b>1,454</b>
<b>Total</b>	<b>4,289</b>	<b>1,337</b>	<b>5,626</b>

Source: Department of Home Affairs (2024), Department of Home Affairs (2025b), AEC (unpublished a).

## 2.4 AUSTRALIAN EMPLOYMENT

### 2.4.1 APPROACH

Alongside international schemes, the FNQ agricultural sector is underpinned by a substantial Australian workforce made up of local residents

AEC’s 2023-24 employment model uses Census place of work data to estimate employment by local government area, mapping four digit ANZSIC industries to agricultural commodity groupings.

Because Census employment already includes many temporary migrants who were in Australia on Census night, the PALM and DAMA workers estimated in the preceding sections are removed from these totals to avoid double



counting, with the subtraction applied proportionately across all agricultural commodities so that relative industry shares are preserved.

Working holiday visa holders are not deducted from the baseline, reflecting a substantial change in visa numbers between the Census reference period and 2023-24.

## 2.4.2 WORKINGS

AEC's 2023-24 employment model has been used to estimate the ratio between local and international employment. In this model, four-digit ANZSIC industry classifications are mapped to Input-Output commodity classifications to derive employment estimates for agricultural industries at a commodity level.

The model is underpinned by Census data, which counts all workers who were in Australia on Census night, including those on eligible temporary visas, but excludes short-term visitors. Consequently, some international workers are already embedded within the employment totals reported in Table 2.13 below.

**Table 2.13. Employment Estimates, Place of Work, 2023-24 (Including PALM and DAMA)**

LGA	Livestock Grazing	Dairy Farming	Broadacre	Sugar Cane	Horticulture	Aquaculture	Other	Total
Cassowary Coast	78	-	4	401	1,322	84	224	<b>2,112</b>
Cook	93	-	-	-	108	-	27	<b>229</b>
Douglas	17	-	6	72	45	12	48	<b>199</b>
Etheridge	157	-	3	-	0	-	7	<b>166</b>
Mareeba	131	-	49	63	780	11	186	<b>1,221</b>
Tablelands	309	162	53	26	665	6	147	<b>1,368</b>
<b>Total</b>	<b>785</b>	<b>162</b>	<b>115</b>	<b>562</b>	<b>2,919</b>	<b>113</b>	<b>639</b>	<b>5,295</b>

Note: Other includes forestry and logging, agriculture, forestry and fishing support services, and fishing, hunting and trapping.  
Source: AEC (unpublished a).

## 2.4.3 AUSTRALIAN EMPLOYMENT ESTIMATES

Both PALM and DAMA estimates, as highlighted in section 0 and section 2.2 have been subtracted from the total 2023-24 employment estimates. While these international workers are likely to be concentrated in horticulture, particularly during peak seasons, their precise distribution across agricultural industries is unknown. Accordingly, PALM and DAMA worker estimates have been subtracted proportionately across all agricultural commodities, maintaining the existing commodity employment shares.

**Table 2.14. Employment Estimates Excluding PALM and DAMA, Place of Work, 2023-24**

LGA	Livestock Grazing	Dairy Farming	Broadacre	Sugar Cane	Horticulture	Aquaculture	Other	Total
Cassowary Coast	40	-	2	202	667	42	113	<b>1,066</b>
Cook	75	-	-	-	88	-	22	<b>186</b>
Douglas	16	-	6	68	42	11	45	<b>188</b>
Etheridge	128	-	2	-	0	-	5	<b>135</b>
Mareeba	30	-	11	15	181	3	43	<b>284</b>



LGA	Livestock Grazing	Dairy Farming	Broadacre	Sugar Cane	Horticulture	Aquaculture	Other	Total
Tablelands	141	74	24	12	303	3	67	<b>623</b>
<b>Total</b>	<b>430</b>	<b>74</b>	<b>46</b>	<b>297</b>	<b>1,281</b>	<b>59</b>	<b>296</b>	<b>2,482</b>

Note: Other includes forestry and logging, agriculture, forestry and fishing support services, and fishing, hunting and trapping.  
Source: AEC (unpublished a).

Working holiday visa holders have not been deducted from the total employment estimates, as there has been a structural change in the number of visas issued since the Census reference period. This means Census-based employment already reflects a different visa settings environment than that observed in 2023-24.

## 2.5 SEASONALITY

### 2.5.1 APPROACH

The analysis uses monthly horticultural employment data published by ABARES for the Cairns Statistical Area 4, which reports separate series for Australian workers, PALM workers and other overseas workers. These data are used to derive seasonal factors for each month, with August treated as the baseline to align with the Census reference month.

The seasonal factors are then applied to the FNQ horticultural employment estimates for PALM, DAMA, working holiday visas and Australian employment to generate indicative monthly profiles by local government area, while non horticultural agricultural employment is assumed to remain relatively stable through the year.

### 2.5.2 WORKINGS

The Australian Bureau of Agricultural and Resource Economics (ABARES) publish annual information at a Statistical Area 4 (SA4) for horticulture seasonality considerations.

**Table 2.15. Cairns Statistical Area 4 (SA4) 2022-23 Seasonality**

Month	Australian Employment	PALM Employment	Contact Overseas Other Employment
July	2,690	1,070	600
August	2,730	1,070	600
September	2,870	1,180	810
October	2,900	1,250	690
November	3,180	1,250	690
December	3,230	1,380	720
January	2,810	1,330	920
February	2,740	1,190	1,000
March	2,760	1,230	830
April	2,650	1,220	690
May	2,720	1,150	640
June	2,690	1,090	600

Note: Australian employment includes permanent, family, and contract Australia.  
Source: ABARES (2023).

### 2.5.3 SEASONALITY EMPLOYMENT ESTIMATES

The seasonality change has been compared to August as the baseline, noting that employment estimates for the census are captured in August. This highlights that employment for horticulture peaks over the months of November to February. The seasonality trends are listed in the table below.



**Table 2.16. Cairns Statistical Area 4 (SA4) 2022-23 Seasonality, Index**

Month	Total Aus	PALM	Contract Overseas
July	98.5%	100.0%	100.0%
<b>August</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>
September	105.1%	110.3%	135.0%
October	106.2%	116.8%	115.0%
November	116.5%	116.8%	115.0%
December	118.3%	129.0%	120.0%
January	102.9%	124.3%	153.3%
February	100.4%	111.2%	166.7%
March	101.1%	115.0%	138.3%
April	97.1%	114.0%	115.0%
May	99.6%	107.5%	106.7%
June	98.5%	101.9%	100.0%

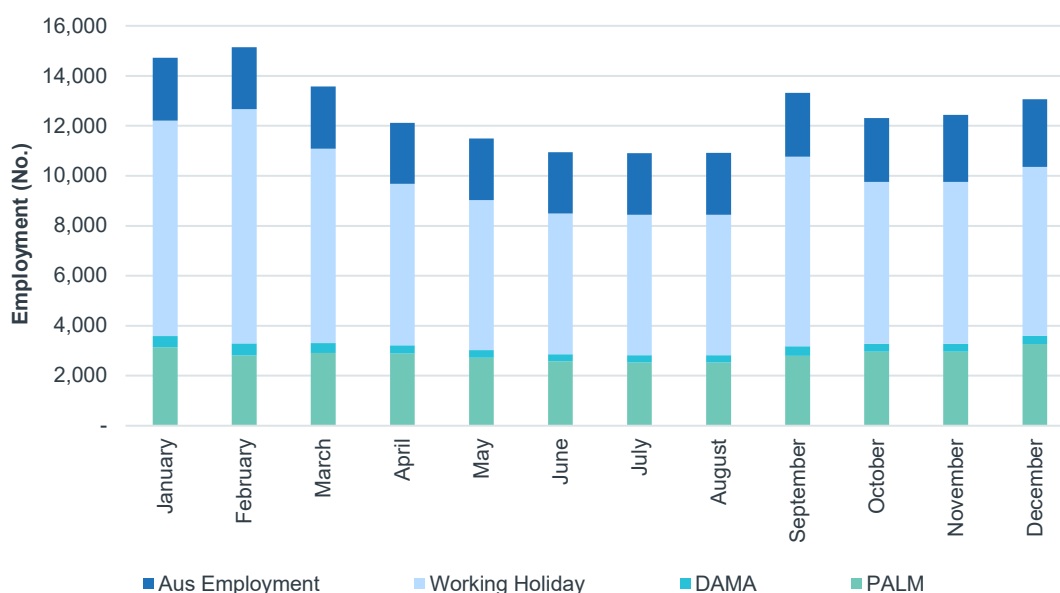
Source: ABARES (2023).

These seasonality trends have been applied to the estimates of PALM (2.1), DAMA (2.2), working holiday visas (2.3) and Australian employment (2.4) to understand the potential labour movement across a given year. It is important to note that for Australian employment, seasonality was only applied to horticultural employment. It has been assumed that other agricultural employment is not so seasonally affected as horticulture.

For a breakdown of employment by LGA, refer to Appendix B.

Evidence from national horticulture workforce research identifies that employers typically draw on a mix of workforce sources, rather than relying on a single labour stream. Hort Innovation’s Seasonal Horticulture Workforce Study (EY, 2020) reports that Working Holiday Makers comprised around 49% of casual workers in the surveyed horticulture workforce, alongside Australian casual workers (25%), seasonal workers (17%), PALM (4%), and other sources, indicating a blended labour model in practice. The survey indicated that smaller businesses could typically employ a larger local workforce (Australian casual workers) (FY, 2020).

**Figure 2.1. Total Employment Estimates**



Source: AEC, various sources.



**Table 2.17. Employment Estimates by Month**

LGA	January	February	March	April	May	June	July	August	September	October	November	December
Cassowary Coast	5,860	6,035	5,407	4,821	4,580	4,364	4,346	4,356	5,311	4,908	4,976	5,220
Cook	618	646	575	512	491	471	470	472	569	521	530	548
Douglas	531	559	497	443	426	410	410	411	491	447	451	463
Etheridge	448	469	418	374	357	343	343	343	410	375	375	387
Mareeba	3,463	3,526	3,173	2,840	2,674	2,532	2,516	2,518	3,094	2,881	2,899	3,077
Tablelands	3,808	3,916	3,511	3,136	2,973	2,830	2,817	2,822	3,441	3,183	3,214	3,377
<b>Total</b>	<b>14,726</b>	<b>15,151</b>	<b>13,580</b>	<b>12,125</b>	<b>11,500</b>	<b>10,950</b>	<b>10,903</b>	<b>10,922</b>	<b>13,316</b>	<b>12,313</b>	<b>12,445</b>	<b>13,071</b>

Source: AEC, Various.

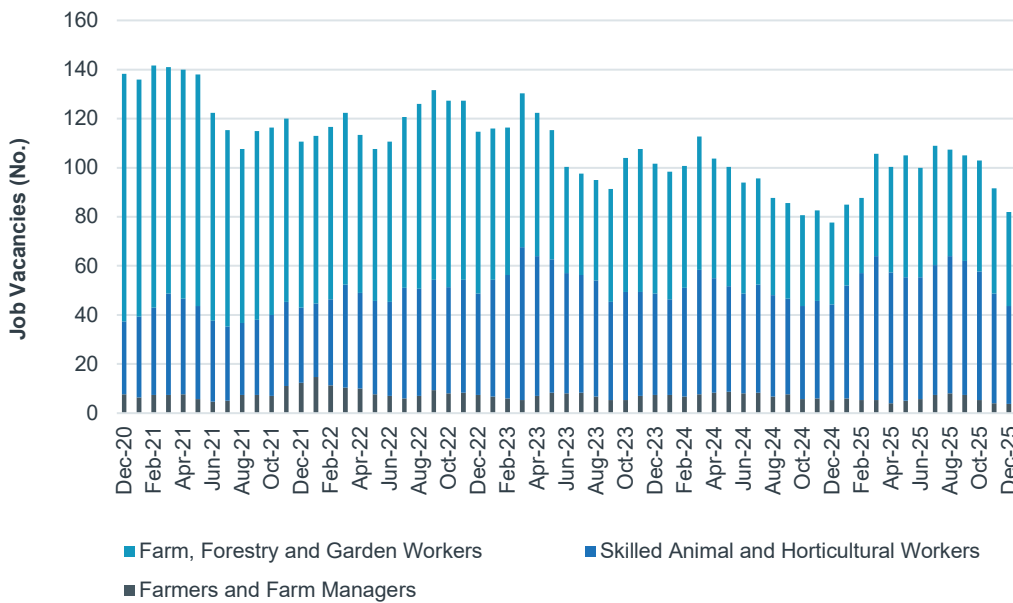


## 2.6 AGRICULTURAL JOB VACANCIES

The figure below provides a monthly count of online job advertisements compiled by Jobs and Skills Australia. The vacancies are highlighted by occupation, and the figure below provides an overview of occupations directly related to agriculture. There are likely other occupations relevant to agriculture, but these cannot be disaggregated from other industries.

Based on the identified agricultural occupations, the most jobs advertised were for skilled animal and horticultural workers and farm, forestry and garden workers. Overall, job vacancies have declined over time, largely driven by the decrease in jobs advertised for farm, forestry and garden workers.

**Figure 2.2. Far North Queensland Job Vacancies, December 2020 to December 2025**



Source: JSA (2025).



## REFERENCES

---

- ABARES (2023). Labour use in Australian horticulture: Analysis of survey results, 2022-23. Retrieved from <https://www.agriculture.gov.au/abares/research-topics/agricultural-workforce/labour-use/2023#previous-reports>
- AEC (unpublished a). Employment Estimates Model 2023-24. AEC Group, Brisbane.
- AEC (unpublished b). Gross Regional Product Model 2023-24. AEC Group, Brisbane.
- BIRO (2025). FNQ DAMA horticultural and agricultural industry employment. Business, Industry and Regional Outreach. Unpublished.
- Department of Home Affairs (2024). Working Holiday Maker visa program report. Retrieved from <https://www.homeaffairs.gov.au/research-and-stats/files/working-holiday-report-June-24.pdf>
- Department of Home Affairs (2025a). Designated area migration agreements. Retrieved from [https://immi.homeaffairs.gov.au/visas/employing-and-sponsoring-someone/labour-agreements/types-of-labour-agreements/designated-area-migration-agreements-\(dama\)](https://immi.homeaffairs.gov.au/visas/employing-and-sponsoring-someone/labour-agreements/types-of-labour-agreements/designated-area-migration-agreements-(dama))
- Department of Home Affairs (2025b). Working Holiday Maker visa program. Retrieved from <https://data.gov.au/data/dataset/visa-working-holiday-maker>
- DEWR (undated). Retrieved from [https://www.palmscheme.gov.au/node/132?utm\\_source=chatgpt.com](https://www.palmscheme.gov.au/node/132?utm_source=chatgpt.com)
- DEWR (2025 a). PALM scheme - Available placements & signed offers of employment (OOE) in requested post codes - 21 November 2025. Unpublished.
- DEWR (2025 b). PALM Scheme Data. Retrieved from <https://www.palmscheme.gov.au/palm-scheme-data>
- EY (2020). Seasonal horticulture labour demand and workforce study. Retrieved from [https://www.horticulture.com.au/globalassets/laserfiche/assets/project-reports/st19040/seasonal-horticulture-workforce-study\\_2020.pdf?utm\\_source=chatgpt.com](https://www.horticulture.com.au/globalassets/laserfiche/assets/project-reports/st19040/seasonal-horticulture-workforce-study_2020.pdf?utm_source=chatgpt.com)
- JSA (2025). Internet Vacancy Index. Retrieved from <https://www.jobsandskills.gov.au/data/internet-vacancy-index>
- TRA (2025). International Visitors. Working Holiday Makers, Tourism Research Australia Online. Retrieved from <https://www.tra.gov.au/>



## APPENDIX A POSTCODE TO LGA

**Table A. 1. Postcode and Associated LGA**

Post Code	LGA 1	LGA 2	LGA 3	LGA 4	LGA 5
4849	32260 Cassowary Coast	-	-	-	-
4852	32260 Cassowary Coast	-	-	-	-
4854	32260 Cassowary Coast	-	-	-	-
4855	32260 Cassowary Coast	-	-	-	-
4856	32260 Cassowary Coast	-	-	-	-
4858	32260 Cassowary Coast	-	-	-	-
4859	32260 Cassowary Coast	-	-	-	-
4860	32260 Cassowary Coast	32080 Cairns			
4871	32260 Cassowary Coast	34880 Mareeba	33100 Etheridge	32600 Croydon	32500 Cook
4872	36820 Tablelands	34880 Mareeba	-	-	-
4873	32810 Douglas	-	-	-	-
4874	32500 Cook	37300 Weipa	-	-	-
4877	32810 Douglas	-	-	-	-
4880	34880 Mareeba	-	-	-	-
4881	34880 Mareeba	-	-	-	-
4882	36820 Tablelands	-	-	-	-
4883	36820 Tablelands	-	-	-	-
4884	36820 Tablelands	-	-	-	-
4885	36820 Tablelands	-	-	-	-
4886	36820 Tablelands	-	-	-	-
4887	36820 Tablelands	34880 Mareeba	-	-	-
4888	36820 Tablelands	-	-	-	-
4892	33100 Etheridge	34880 Mareeba	32500 Cook	32250 Carpentaria	-
4895	32810 Douglas	32500 Cook	33830 Hope Vale	-	-

Note: If there is only one LGA listed against the postcode, then that postcode is only associated with one LGA.  
Source: AEC.

The table below should be read in conjunction with Table A. 1. For example, in postcode 4849 is only located within the Cassowary Coast LGA. In the Cassowary Coast LGA, there were 2,112 agricultural employees recorded in 2023-24.

This agricultural employment is based on AEC's 2023-24 employment model, which was used to derive baseline estimates of total agricultural employment by LGA and commodity. The model maps four-digit ANZSIC industry classifications to Input-Output commodity classifications and is underpinned by Census place of work employment data.

**Table A. 2. Agricultural Employment x LGA, 2023-24**

Post Code	LGA 1	LGA 2	LGA 3	LGA 4	LGA 5
4849	2,112	-	-	-	-
4852	2,112	-	-	-	-
4854	2,112	-	-	-	-
4855	2,112	-	-	-	-
4856	2,112	-	-	-	-
4858	2,112	-	-	-	-
4859	2,112	-	-	-	-
4860	2,112	1,006	-	-	-
4871	2,112	1,221	166	18	229
4872	1,368	1,221	-	-	-



Post Code	LGA 1	LGA 2	LGA 3	LGA 4	LGA 5
4873	199	-	-	-	-
4874	229	3	-	-	-
4877	199	-	-	-	-
4880	1,221	-	-	-	-
4881	1,221	-	-	-	-
4882	1,368	-	-	-	-
4883	1,368	-	-	-	-
4884	1,368	-	-	-	-
4885	1,368	-	-	-	-
4886	1,368	-	-	-	-
4887	1,368	1,221	-	-	-
4888	1,368	-	-	-	-
4892	166	1,221	229	189	-
4895	199	229	3	-	-

Source: AEC.

**Table A. 3. Proportion of Agricultural Employment x LGA, 2023-24**

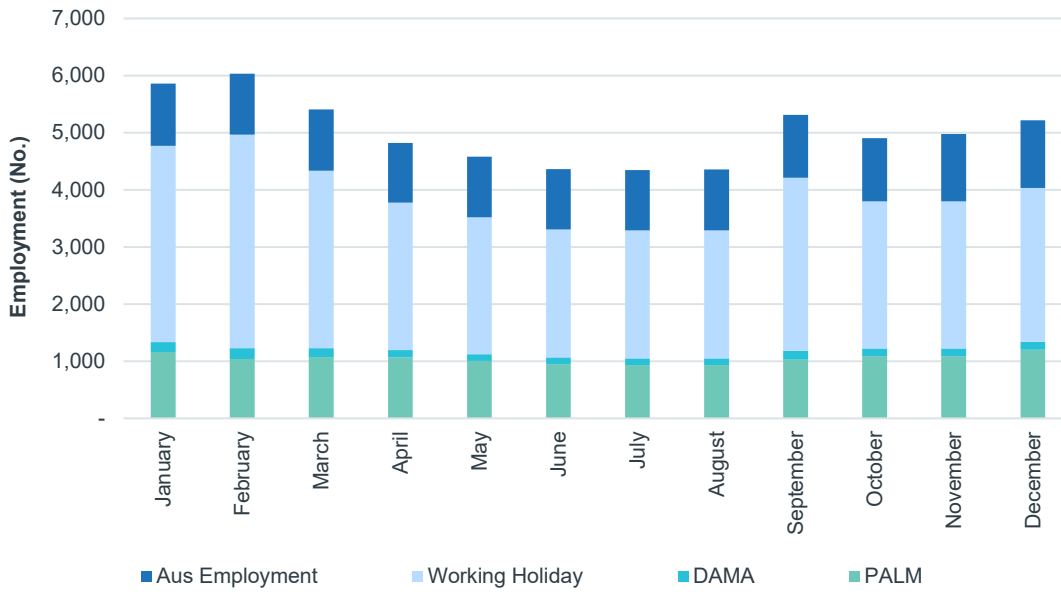
Post Code	LGA 1	LGA 2	LGA 3	LGA 4	LGA 5
4849	100.0%	-%	-%	-%	-%
4852	100.0%	-%	-%	-%	-%
4854	100.0%	-%	-%	-%	-%
4855	100.0%	-%	-%	-%	-%
4856	100.0%	-%	-%	-%	-%
4858	100.0%	-%	-%	-%	-%
4859	100.0%	-%	-%	-%	-%
4860	67.7%	32.3%	-%	-%	-%
4871	56.4%	32.6%	4.4%	0.5%	6.1%
4872	52.8%	47.2%	-%	-%	-%
4873	100.0%	-%	-%	-%	-%
4874	98.8%	1.2%	-%	-%	-%
4877	100.0%	-%	-%	-%	-%
4880	100.0%	-%	-%	-%	-%
4881	100.0%	-%	-%	-%	-%
4882	100.0%	-%	-%	-%	-%
4883	100.0%	-%	-%	-%	-%
4884	100.0%	-%	-%	-%	-%
4885	100.0%	-%	-%	-%	-%
4886	100.0%	-%	-%	-%	-%
4887	52.8%	47.2%	-%	-%	-%
4888	100.0%	-%	-%	-%	-%
4892	9.2%	67.7%	12.7%	10.4%	-%
4895	46.2%	53.1%	0.7%	-%	-%

Source: AEC.



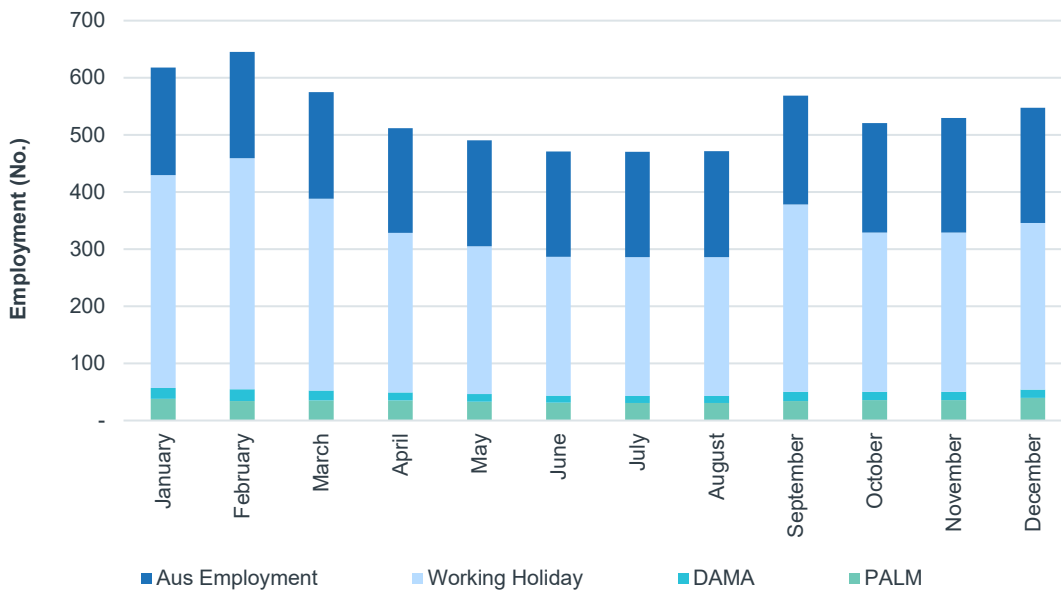
## APPENDIX B AGRICULTURAL EMPLOYMENT BREAKDOWN

Figure B. 1. Cassowary Coast Agricultural Employment Estimates



Source: AEC, various sources.

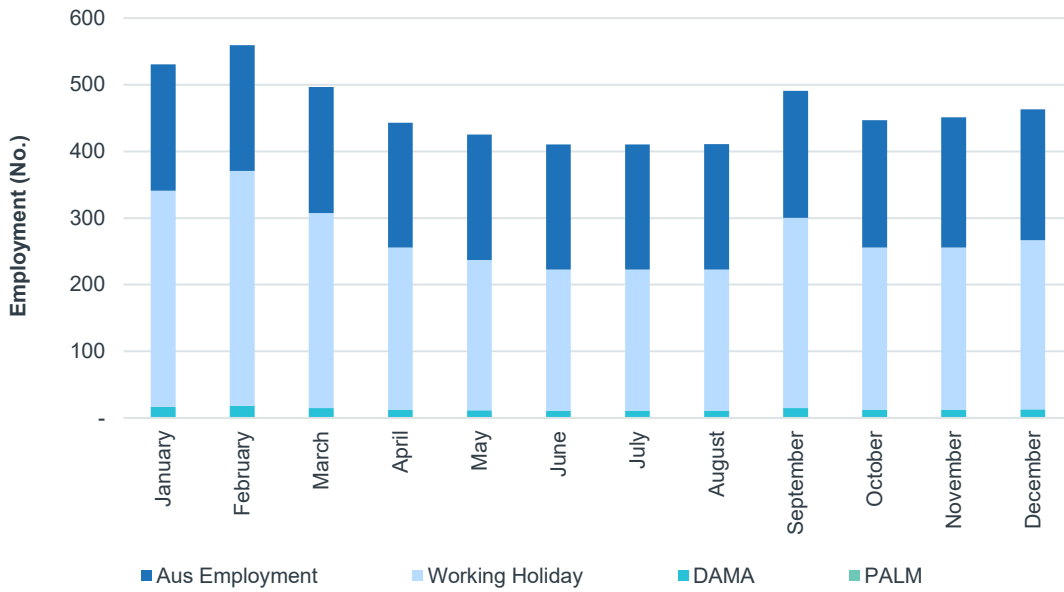
Figure B. 2. Cook Agricultural Employment Estimates



Source: AEC, various sources.

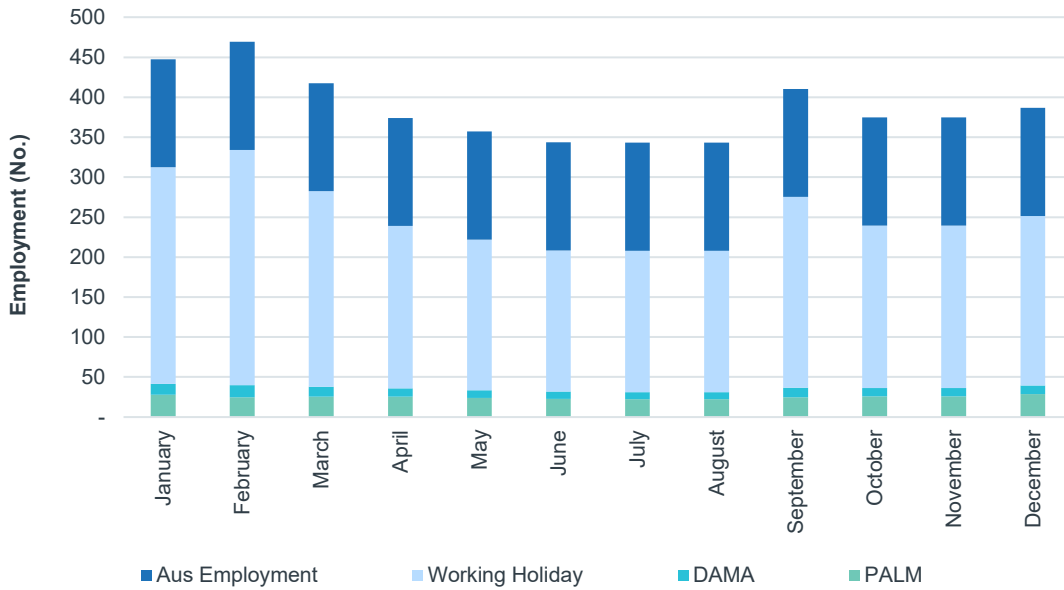


**Figure B. 3. Douglas Agricultural Employment Estimates**



Source: AEC, various sources.

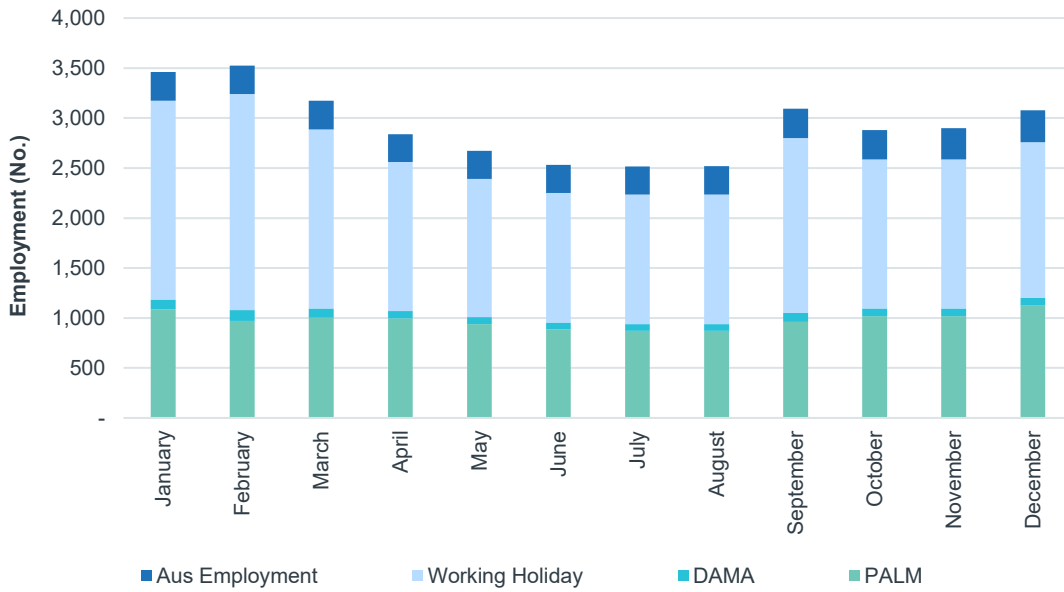
**Figure B. 4. Etheridge Agricultural Employment Estimates**



Source: AEC, various sources.

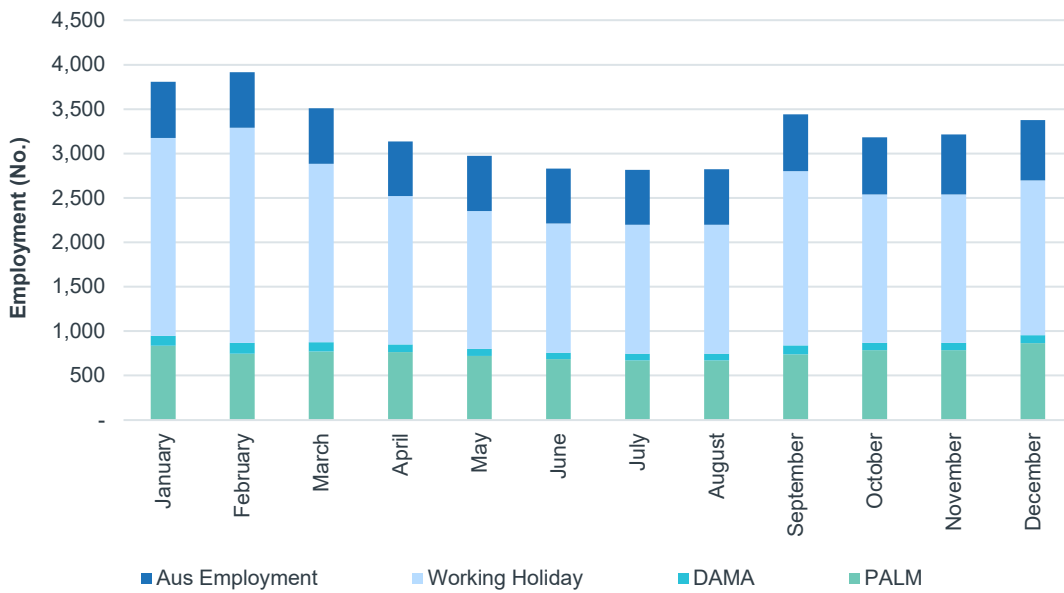


**Figure B. 5. Mareeba Agricultural Employment Estimates**



Source: AEC, various sources.

**Figure B. 6. Tablelands Agricultural Employment Estimates**



Source: AEC, various sources.



THIS PAGE INTENTIONALLY LEFT BLANK



 1300 799 343  [reception@aecgrouppltd.com](mailto:reception@aecgrouppltd.com)

**Brisbane**

Level 5, 131 Leichhardt Street  
Spring Hill QLD 4000  
Australia

**Bangkok**

158 Soi Sukhumvit 54  
Prakhanong, Bangkok  
Thailand 10260

**Townsville**

233 Flinders Street East  
Townsville QLD 4810  
Australia

**Shanghai**

1609, 1st Building, Kangjian  
Shangwu Square  
1228 Zhennan Road, Putuo,  
Shanghai  
China 200333

**Sydney**

Level 14, 25 Bligh Street,  
Sydney NSW 2000  
Australia