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Introduction

GDP growth lost due to bushfires in 2019-20

0.2%

Approximate number of houses destroyed

3,000

Acres of land burnt

46 million

The bushfires that blazed across Australia from September 2019 until early February 2020 are expected to have burnt over 46 million acres of land across the country – equivalent to over two-thirds of the area of France. All states were affected, but the most significant damage occurred in New South Wales, which accounts for about 33% of Australia’s economy. The bushfires are expected to negatively affect short-term economic growth, particularly over the remainder of the current financial year. IBISWorld has downgraded its GDP forecast for 2019-20 from 2.2% to 2.0% as a result of the bushfires.

IBISWorld estimates the bushfires caused losses of up to $4.1 billion in the agricultural sector. Over 100,000 sheep and cattle are expected to have perished. Major viticulture regions in New South Wales and South Australia were also heavily affected by the fires. Furthermore, the fires devastated substantial areas of fruit and vegetable crops in Victoria, South Australia and New South Wales. However, this is expected to result in prices for these commodities rising by up to 50% in the near future. These increases are anticipated to partly offset revenue declines caused by lost production.

The tourism sector is also expected to suffer as a result of the fires, losing a significant portion of revenue from both domestic and overseas holiday-makers. As news of the bushfires spread, overseas travellers cancelled trips and tourists in or near affected areas cut their holidays short. The impact was felt deeply in coastal towns in New South Wales that rely on summer holiday traffic. Casinos, international airlines, and hotels and resorts are among the most affected tourism-related industries.

The bushfires also affected road and rail freight transport operators. Major interstate and intrastate highways were closed across the country, which led to significant delays for trucks already in transit. Many rural areas were cut off entirely, preventing the transport of goods for weeks at a time in many cases. Rail lines were also affected, leading to similar delays.

However, the bushfires are expected to provide a boost to economic growth through rebuilding efforts, which is expected to last until 2024-25, and total $3.9 billion. Over 3,000 houses were destroyed, and hundreds of schools, businesses and community buildings were damaged. In parts of the country, road and rail infrastructure was also affected. Rebuilding efforts will likely increase revenue for industries in the construction sector in the short-to-medium term. While financing and regulation-related issues are expected to delay rebuilding efforts, most significant work will likely be completed over the next five years.

General insurance and reinsurance providers are projected to record significant losses due to damage caused by the bushfires. IBISWorld expects total insurance claims to rise by almost 2%, leading to losses of at least $1.8 billion. Insurance providers may increase insurance premiums in the future in an attempt to stabilise profit margins.

Overall, damage from the 2019-20 bushfire season provides a glimpse of the destructive impact of climate change on Australia and its economy. Consumers, businesses and government must remain conscious of the potential risks of a changing climate in future years.
Agriculture

The 2019-20 bushfire season has had a devastating effect on the Australian agricultural sector, causing projected losses of up to $4.1 billion in 2019-20. Most agricultural sectors have been affected, but the livestock, grape growing, and fruit and vegetable growing sectors are anticipated to suffer the most. Some major problems have included burnt crops, perished livestock, destroyed infrastructure, road blockages, quality issues and low air quality. Employment and enterprise numbers across the agricultural sector are anticipated to decline in 2019-20. Harvest volumes will be significantly lower and will therefore require less labour, causing severe declines in employment. Exports are also anticipated to decline, but this is partly due to the coronavirus, COVID-19, causing major global uncertainty.

Livestock

The bushfires are expected to significantly affect the meat and dairy sectors. Approximately 9% of Australia’s cattle herd lives in areas significantly affected by bushfires, and a further 11% in partially affected regions. For sheep, 13% live in significantly affected areas and 17% in partially affected areas. Stock losses are anticipated exceed 100,000, as farmers continue to assess the devastating effect of fires on their properties and livestock. The full extent will not be known for months. Many of the surviving livestock may need to be euthanised if they have been severely injured, further increasing livestock losses.

The bushfires will have other significant impacts on the industry. The quality of livestock produce will likely decline as the animals have experienced strenuous conditions. The ongoing drought has also contributed to this factor. Access to fodder and clean drinking water has become increasingly difficult as road closures have reduced transport options. Fodder lost to the fires has been a significant cost to farmers, who have been paying to bring in feed to sustain their animals.

The economic influence of the bushfires is complex due to a range of factors. Livestock losses cause the national supply of meat and dairy to decline, which causes prices to rise. However, maintaining herd sizes in difficult climate conditions is costly for farmers. The cost of feed and access to clean drinking water makes it more difficult to maintain paddocks, which encourages farmers to have smaller herd sizes. Turn-off rates then increase, which causes national supply of meat to rise and lowers prices.

Due to the widespread and significant impact of the bushfires in prominent sheep and cattle producing regions, the national supply of livestock for slaughter is forecast to fall, placing downwards pressure on supply. As supply moves further away from demand, prices are anticipated to increase. These increases will be exacerbated by African swine fever, which has increased demand for Australian meat. The ABS has reported a 2.9% increase in the price of beef and veal across the December quarter. However, this does not fully capture the impact of the bushfires and prices will likely rise further. Despite rising prices, which will
positively affect farmers’ earnings, the industry is anticipated to suffer losses in the short term. IBISWorld estimates that the aftermath of the bushfires will cause sheep and cattle farmers to face revenue declines of up to 5.3% and 2.2%, respectively, in 2019-20. Wool production is also anticipated to decline due to falling sheep numbers.

The Dairy Cattle Farming industry will likely suffer significant short-term negative effects, with revenue anticipated to decline by up to 2.2% in 2019-20 due to the bushfires. Farmers were unable to milk their animals for multiple days, which negatively affects the quality of milk and animal health. Power outages in affected regions, such as Bega, significantly affected dairy operations due to the perishable nature of dairy products. A significant portion of milk supply has been left to waste, as trucks could not pick up stock due to road closures. Over 800,000 litres of milk have been wasted due to these issues. Major supermarkets, such as Coles and Woolworths, are being urged to increase the price of milk to aid farmers.

Viticulture

The bushfires are set to significantly affect the Grape Growing industry. Grapes are mainly grown in South Australia, Victoria and New South Wales, which were all affected by bushfires. Approximately 95% of Australia’s grapes are grown in these regions. In South Australia, the Adelaide Hills wine region was devastated, as up to one-third of its produce was burned. The Hunter Valley, one of Australia’s major wine regions located in New South Wales, was also severely affected by the fires. Many grapes in the region were ruined by smoke taint, which occurs when vineyards are exposed to smoke that can result in unfavourable characteristics in wines, such as smoky, burnt, ashy and medicinal tastes. The entire 2020 crop has been lost in some parts of the Hunter Valley, while some growers could only salvage 20% of their usual harvest. Grapes are also susceptible to radiant heat, which causes them to shrivel.

The economic impact on the Grape Growing industry will likely be profound. IBISWorld projects revenue for the industry to decline by 10.9% in 2019-20 due to the bushfires, as a significant portion of grape vineyards have been ruined from direct and indirect effects. Due to the unprecedented intensity of these fires, these effects may be felt over the long term, as it is too early to fully understand the damage to the soil and area.

<table>
<thead>
<tr>
<th>Industry</th>
<th>Revenue* prior to bushfires in 2019-20 ($m)</th>
<th>Revenue* following bushfires in 2019-20 ($m)</th>
<th>% change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Under cover vegetable growing</td>
<td>757.7</td>
<td>702.0</td>
<td>-7.4</td>
</tr>
<tr>
<td>Outdoor vegetable growing</td>
<td>4,313.1</td>
<td>3,996.1</td>
<td>-7.4</td>
</tr>
<tr>
<td>Apple, pear and stone fruit growing</td>
<td>954.1</td>
<td>928.6</td>
<td>-2.7</td>
</tr>
<tr>
<td>Grape growing</td>
<td>1,559.8</td>
<td>1,438.8</td>
<td>-7.8</td>
</tr>
<tr>
<td>Citrus fruit, nut and other fruit growing</td>
<td>4,119.8</td>
<td>4,009.7</td>
<td>-2.7</td>
</tr>
<tr>
<td>Sheep farming</td>
<td>4,561.1</td>
<td>4,317.9</td>
<td>-5.3</td>
</tr>
<tr>
<td>Beef cattle farming</td>
<td>16,623.8</td>
<td>16,250.6</td>
<td>-2.2</td>
</tr>
<tr>
<td>Beef cattle feedlots</td>
<td>4,676.5</td>
<td>4,571.5</td>
<td>-2.2</td>
</tr>
<tr>
<td>Sheep-beef cattle farming</td>
<td>6,184.2</td>
<td>5,998.0</td>
<td>-3.0</td>
</tr>
<tr>
<td>Grain-sheep or grain-beef cattle farming</td>
<td>11,595.3</td>
<td>11,246.1</td>
<td>-3.0</td>
</tr>
<tr>
<td>Dairy cattle farming</td>
<td>4,427.1</td>
<td>4,330.2</td>
<td>-2.2</td>
</tr>
</tbody>
</table>

*IBISWorld estimate
Fruit and vegetables

The bushfires will likely have a substantial effect on fruit and vegetable growing industries. Burned crops, road blockages, power outages and poor production quality are all likely to significantly hamper the fruit and vegetable sector. Victoria accounts for nearly one-third of all vegetable production in Australia. Transporting fruit out of Victoria has been difficult and has affected food supply in states such as Queensland, which receives vegetables from Victoria. The closure of the Princes Highway caused trucks to take a longer route, increasing travel times and transport costs. Power outages have caused cold storage facilities to lose power and products have therefore perished. AUSVEG expects these factors to cause price increases and declines in quality. Prices for nearly all vegetables are anticipated to rise, with potential increases of up to 50% in the short term. The vegetables most likely to be affected by price increases include cauliflower, broccoli, spinach, rocket, potato and pumpkin.

The economic impact on fruit and vegetable growers is difficult to project due to uncertainty regarding how much land was burnt and the number of crops indirectly affected by the fires. However, IBISWorld projects that the fruit and nut growing sector (excluding grapes) could experience revenue losses of up to 2.7% in 2019-20 due to the bushfires. Similarly, the vegetable growing sector is projected to undergo revenue losses of up to 7.4% in 2019-20. Despite rising prices for vegetables and fruit, which will generate more revenue for farmers, the loss of crops, lower quality produce, poor climate conditions and the drought are anticipated to cause revenue declines.
Construction

As at March 2020, the 2019-20 bushfire season had destroyed approximately 3,000 homes across Australia, and damaged schools, businesses and infrastructure. Consequently, construction activity is projected to increase over the five years through 2024-25. Rebuilding efforts are forecast to contribute approximately $3.9 billion to the Construction division over the period, with the majority centring on house construction and infrastructure repairs. However, this represents only a 0.1% increase from the revenue growth previously projected for the Construction division over the next five years, as most of the rebuilding work will likely focus on rural houses and small businesses, along with infrastructure repairs.

Despite increased activity, rebuilding efforts are unlikely to significantly increase permanent employment for the Construction division. Many construction firms rely heavily on subcontractors to complete work, so as not to have excess staff when projects are completed. The Federal Government adjusted visa requirements to include bushfire reconstruction efforts in the specified work that working holidaymakers can undertake to extend their visas. Consequently, construction firms are anticipated to increasingly hire backpackers as temporary workers over the next five years.

House construction

Rebuilding activity is forecast to largely depend on the financial situations of the affected homeowners. Those who did not have adequate insurance or were otherwise financially affected by the bushfires will likely delay rebuilding. These people are projected to move into temporary or permanent residences, such as family members’ homes. Because the fires mainly affected rural areas, reconstruction efforts are not anticipated to strongly affect the Multi-Unit Apartment and Townhouse Construction industry.

Homeowners who decide to rebuild are likely to face significant delays, as properties in bushfire-prone areas require a Bushfire Attack Level (BAL) designation, which regulates construction safety requirements. Homes with a high BAL designation are more expensive to rebuild due to their stringent safety needs. However, a home that had a high BAL before a bushfire may require re-designation after the fire due to changes in landscape. Consequently, the need for new BAL ratings has the potential to delay home rebuilding activity. An anticipated slight increase in interest rates over the next five years may also reduce bushfire victims’ ability to invest in rebuilding. These delays are likely to boost house construction over the next five years. Rebuilding efforts are projected to increase revenue for the House Construction industry by approximately $280.0 million over the next 12 months. The efforts are also forecast to contribute a total of $530.1 million to the industry’s revenue over the next five years, due to homeowners facing delays relating to regulations and financing.
Non-residential building construction

The 2019-20 bushfire season also damaged businesses, schools and community buildings across Australia. The NSW Government has already undertaken repair work in over 170 schools across the state, ranging from rebuilding to removing damaged equipment. Unlike house reconstruction efforts, construction on institutional buildings such as schools is anticipated to occur with minimal lag, due to the availability of government funding.

The bushfires also damaged many businesses, especially in rural areas. Business rebuilding efforts are forecast to be dictated by interest rates and the ability to build to the standards of a designated BAL. Interest rates are projected to increase slightly but remain low over the next five years, enabling some businesses to invest in rebuilding. A business’s ability to invest in reconstruction is also anticipated to depend on the building’s insurance.

Infrastructure construction

Roads, rail networks and power lines have also been damaged by the bushfires. Signalling equipment has been damaged on several train lines, including the historic Zig Zag railway in the Blue Mountains, NSW. Engineers Australia has stated that roads may need to be rebuilt to stricter requirements to withstand future fires. Unlike residential and commercial building construction, road, bridge and infrastructure building is anticipated to be completed with minimal delays. Consequently, revenue for the Road and Bridge Construction and the Heavy Industry and Other Non-Building Construction industries is forecast to grow in the current year, and subsequently return to normal trends. In addition, maintenance and repair services are anticipated to increase to account for 19.4% of Road and Bridge Construction industry’s revenue in 2019-20, falling to approximately 15.5% once the urgent rebuilding work has been completed.

<table>
<thead>
<tr>
<th>Products and services segmentation (2019-20)</th>
<th>Estimate prior to bushfires</th>
<th>Estimate following bushfires</th>
</tr>
</thead>
<tbody>
<tr>
<td>Maintenance and repairs to infrastructure</td>
<td>15.5%</td>
<td>12.4%</td>
</tr>
<tr>
<td>Alterations and additions to existing infrastructure</td>
<td>13.0%</td>
<td>19.4%</td>
</tr>
<tr>
<td>Road and tunnel construction</td>
<td>66.6%</td>
<td>63.5%</td>
</tr>
<tr>
<td>Bridge, overpass and other construction</td>
<td>4.9%</td>
<td>4.7%</td>
</tr>
</tbody>
</table>
General insurers in Australia underwrite insurance policies to cover individual and business losses associated with property, casualty and other risks and liabilities. This includes damages relating to insured events such as bushfires, floods and other natural disasters. Total insurance claims and related losses tend to be volatile each year, depending on the number of natural disasters and the extent of the damages. Insurance underwriters use reinsurers to reduce their exposure to areas in Australia that are more likely to be affected by natural disasters. By passing on the risk to reinsurers that do not have similar exposure in their portfolio, it allows insurers to diversify their portfolio and mitigate risk. Australian insurers have capped their liabilities associated with the 2019-20 bushfire season by passing on a large portion of insurance claims to reinsurers.

The Australian bushfires have caused significant damage to regional communities and wildlife. Insurance claims from both businesses and households will continue to climb over the coming months as more damages are assessed and lodged. As of 10 February, the Insurance Council of Australia (ICA) stated that over 20,000 insurance claims worth $1.65 billion have been lodged for the associated bushfires. This is expected to constrain profit margins for insurers as losses mount from bushfire claims. However, Australian insurers have limited losses through reinsurance protection strategies. For example, on 30 January 2020, Suncorp Group Limited announced losses after reinsurance recovery for natural disaster claims, which also included recent floods and hailstorms in Australia, were limited to $300 million. Although insurers have limited losses through reinsurers, IBISWorld expects the profitability of the General Insurance industry to decline from 12.7% to 12.3% during 2019-20, due to the bushfires.

From a coverage perspective, Suncorp Group Limited estimates that the gross cost from claims associated with the bushfires will total around $220 to $250 million. Similarly, Insurance Australia Group Ltd (IAG) has had over $180 million claims relating to the bushfires in the first half of 2020. According to IAG this is $80 million over their allowance, which is expected to constrain profit for the company as claims continue to mount over the coming months. Allianz Australia Ltd also released an update in early January, stating that the company had received 1,040 claims in relation to the bushfires, valued at over $115 million.

<table>
<thead>
<tr>
<th>Year</th>
<th>Total claims ($m)</th>
<th>% change</th>
</tr>
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<tbody>
<tr>
<td>2015</td>
<td>35,473</td>
<td>N/A</td>
</tr>
<tr>
<td>2016</td>
<td>34,578</td>
<td>-2.5</td>
</tr>
<tr>
<td>2017</td>
<td>35,477</td>
<td>2.6</td>
</tr>
<tr>
<td>2018</td>
<td>31,340</td>
<td>-11.7</td>
</tr>
<tr>
<td>2019</td>
<td>38,359</td>
<td>22.4</td>
</tr>
<tr>
<td>2020*</td>
<td>39,053</td>
<td>1.8</td>
</tr>
</tbody>
</table>

*IBISWorld estimate
IBISWorld expects QBE Insurance Group Ltd and Zurich Financial Services Australia Ltd to have similar exposure to the Australian bushfires, with bushfire claims expected to exceed $100 million.

IBISWorld expects general insurers and reinsurers to have losses upward of $1.8 billion associated with the Australian bushfires. Furthermore, total insurance claims are expected to increase by 1.8% in 2019-20, which also includes recent flood and hailstorm related claims. Reinsurers are likely to increase premiums for underwriting in higher risk areas in Australia, which will affect the bottom lines of Australian insurers. Ultimately, this has the potential to create upward pressure on insurance premiums as insurers seek to pass on these costs to maintain their profit margins. The increased frequency and greater severity of natural disasters and extreme weather events over the past decade have affected the General Insurance industry. IBISWorld anticipates these trends to continue over the next five years, which will continue to challenge insurance underwriters.
The recent bushfires that engulfed much of Australia’s east coast represent a major additional challenge for the Tourism industry. Relative to the robust results of previous years, 2018-19 was a weak year for Australian tourism. Over the five years through 2017-18, inbound international tourist visitor numbers grew at an annualised 7.5%. In 2018-19, this growth rate slowed to 2.8%. The unprecedented severity of the 2019-20 Australian bushfire season is projected to pose a threat to many already struggling tourism-related businesses and industries. Victoria and New South Wales account for more than half Australia’s total visitor nights, and many of the hardest-hit areas are located in these two states. During the crisis, Victoria issued a state of disaster and New South Wales declared a state of emergency, which granted extraordinary powers and additional government resources to battle the fires. The severity of these declarations, along with fear surrounding the bushfires and extended periods of hazardous air quality in major tourist hotspots, likely reduced tourist numbers significantly.

IBISWorld expects the bushfires to cause revenue declines for the Tourism industry in 2019-20. International visitors represent a considerable source of revenue for the Australian Tourism industry. Industry operators have experienced a high number of cancellations from international visitors, as a result of the bushfires and ongoing travel bans which aim to limit the global spread of COVID-19. The travel ban on visitors from mainland China will continue to affect tourism firms. China is Australia’s largest overseas tourism market and accounts for more than one-quarter of annual industry revenue. The Hotels and Resorts industry, Casinos industry and International Airlines industry are forecast to exhibit slower growth rates than previously anticipated in 2019-20, largely due to the bushfire crisis and the challenges COVID-19 poses to the Tourism industry. International airlines are expected to suffer the most as a result of declining international visitor numbers, as hotels and casinos can still benefit from domestic visitors.

The recent bushfires will likely have less of an impact on domestic tourism compared with international tourism. Behind New South Wales and Victoria, Queensland represents just under one-quarter of Australia’s total visitor nights. Infrastructure in key tourism areas of Queensland, such as Cairns, the Whitsundays and the Gold Coast, was largely unaffected by the bushfires. However, local governments and tourism boards will need to communicate that these regions are open for business and safe to visit. Tourists that would have visited bushfire-affected areas may holiday elsewhere in Australia, including areas in Queensland. Additionally, campaigns by locals and tourism bodies promoting travel to bushfire-affected regions will likely encourage tourists to visit these areas in the coming months as a gesture of solidarity to struggling operators. However, the Tourism industry is still forecast to lose revenue as a result of the bushfires, despite these campaigns.
The industry is expected to recover in 2020-21, as repercussions related to the bushfires fade, prospective visitors regain confidence in the safety and appeal of traveling to Australia, and affected areas recover. International visitor numbers are expected to continue growing over the five years through 2024-25, but at a more moderate rate compared with the past five years. Over 10 million international tourists are anticipated to visit Australia in 2020-21. The Australian Government has announced a $76 million industry-specific package as part of bushfire recovery operations. The package includes a $20 million allocation for marketing to domestic travellers, and $25 million for a global tourism campaign. This campaign aims to inform prospective international visitors that it is safe to visit Australia and tourism operators are open for business. The government has also allocated $10 million to creating new attractions in bushfire-affected regions.

<table>
<thead>
<tr>
<th></th>
<th>Growth rate* prior to bushfires in 2019-20 (%)</th>
<th>Growth rate* following bushfires in 2019-20 (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hotels</td>
<td>1.4</td>
<td>1.1</td>
</tr>
<tr>
<td>Casinos</td>
<td>-3.9</td>
<td>-4.1</td>
</tr>
<tr>
<td>International airlines</td>
<td>3.3</td>
<td>1.9</td>
</tr>
</tbody>
</table>

*IBISWorld estimate
The transport sector is expected to endure losses of $229.8 million during 2019-20 due to bushfires across Australia. Roads and railway lines across the country were closed for extended periods of time. These closures significantly delayed the transport of some goods and prevented some goods from being transported at all.

During December 2019 and January 2020, over 100 roads were closed in New South Wales, Victoria, South Australia and Western Australia. Major closures included the Snowy Mountain Highway, New England Highway and the Pacific Highway in New South Wales. In Victoria, parts of major routes such as the Princes Highway, the Monaro Highway and the Great Alpine Road were also closed for extended periods. In Western Australia, the Eyre and Coolgardie-Esperance highways were shut down. These closures significantly limited the ability of road transport operators to pick up and deliver goods.

Trucks already in transit with cargo were either unable to leave their current location for days or weeks at a time, or diverted along less efficient routes. Furthermore, new deliveries of goods such as fruit, vegetables and other agricultural products were unable to be fulfilled, with many farms in bushfire zones blocked from access. The Road Freight Transport industry is expected to have lost $201.8 million in revenue during these months. As a result, current year growth for the industry is expected to slow from an already low 0.8% to 0.4% during 2019-20 due to the bushfires. These closures affected both freight movements in these states and also restricted interstate transport services.

Rail freight transport operators were also affected, although to a lesser extent than road freight firms. Railway infrastructure, including signalling systems along the Blue Mountains rail line between Lithgow and Mount Victoria in New South Wales, was destroyed in the Gospers Mountain bushfire in December. Limited freight services resumed in late January. However, full services are yet to resume, further complicated by a landslip at Leura in early February. In Western Australia, bushfires near Norseman led to closures of the line from Kalgoorlie to the port of Esperance for several days. This line is mainly used to transport iron ore. Prior to the bushfires, revenue from the Rail Freight Transport industry was already anticipated to decline by 3.9% during 2019-20, to $7.51 billion. This was largely the result of a significant drop in demand for black coal mining. The bushfires are expected to cause approximately $28 million in further revenue declines, or 0.3%. This decline is primarily expected to come from the east coast, with strong growth in mining output in Western Australia set to largely offset the effects of transit delays in the state.

<table>
<thead>
<tr>
<th>Lost revenue* due to bushfires in 2019-20 ($m)</th>
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</thead>
<tbody>
<tr>
<td>Road freight</td>
</tr>
<tr>
<td>Rail freight</td>
</tr>
<tr>
<td>Total transport sector</td>
</tr>
</tbody>
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*IBISWorld estimate
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