

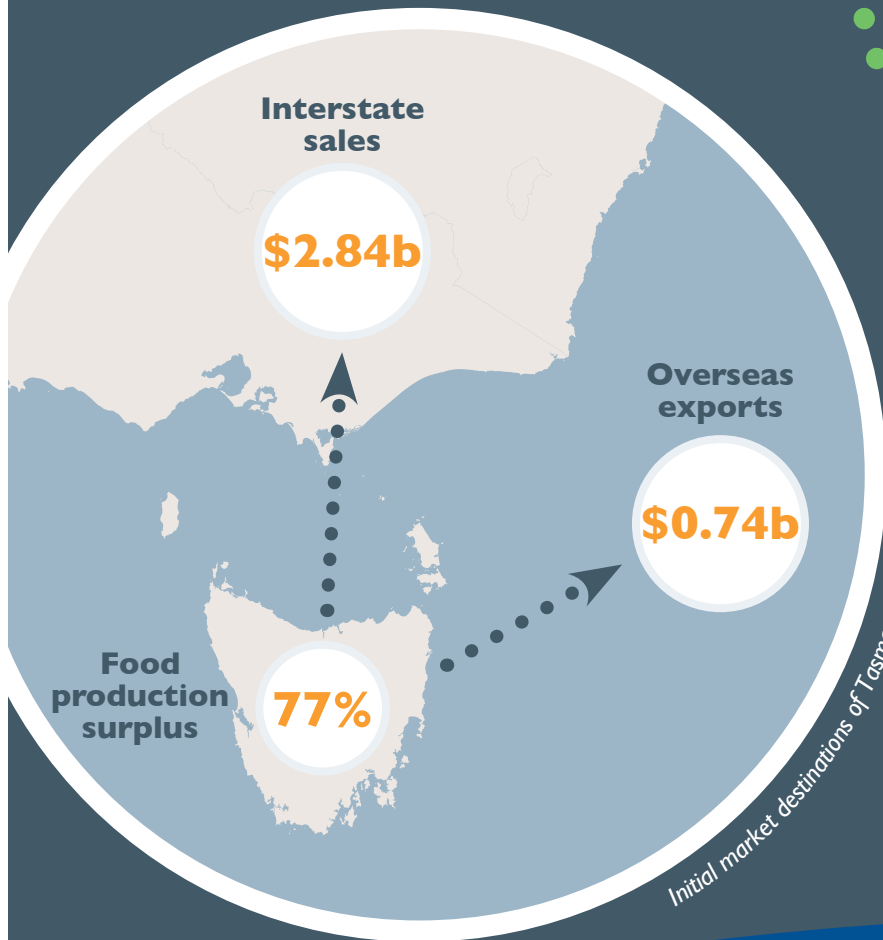
Tasmanian Agri-Food ScoreCard

SNAPSHOT 2017-18

Agriculture, seafood and food value adding are major contributors to the Tasmanian economy.

2017-18 was an exceptional year for Tasmanian agri-food production, which grew in value by 10.6%. Performance was strong across the majority of industries, with favourable seasonal conditions, good production, and high prices for most commodities. A dramatic increase in the value of salmon and beef exports saw the State post its best ever export result.

The **Tasmanian Agri-Food ScoreCard** measures and reports on the value and final market destinations of the State's agriculture, food and beverage production.



Agri-food gross value
\$2.7 billion **10.6%**

Processed food value
\$4.6 billion **11.2%**

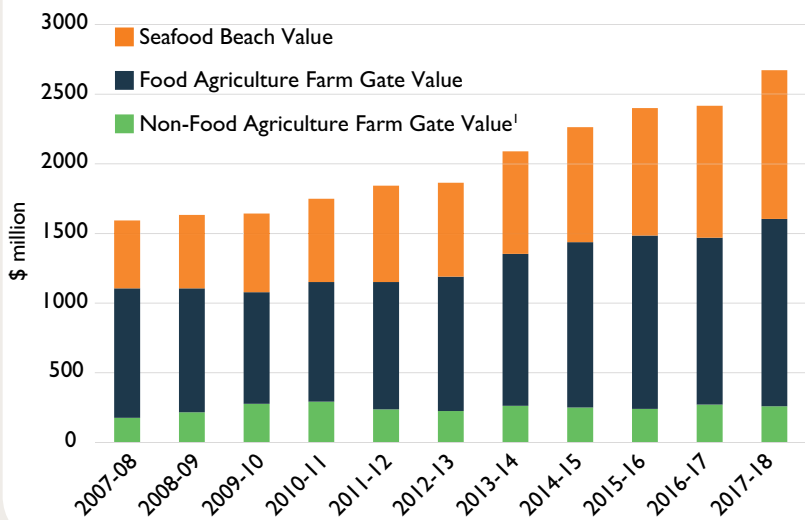
Record overseas food exports
\$740 million **22.5%**



In 2017-18

- The total gross value of agriculture was **\$1.60 billion**, of which food agriculture comprised **83.8%**
- The gross value of seafood production was **\$1.07 billion**
- The gross value of agricultural production grew by **9.1%** and seafood production grew by **12.8%**
- Net sales of Tasmanian food to overseas and interstate markets totalled **\$3.58 billion**
- Gross food revenue to Tasmania was **\$7.42 billion** and net food revenue was **\$6.48 billion**

Growth in value of agriculture & seafood production



2017-18 saw excellent growth in the Tasmanian agri-food sector,

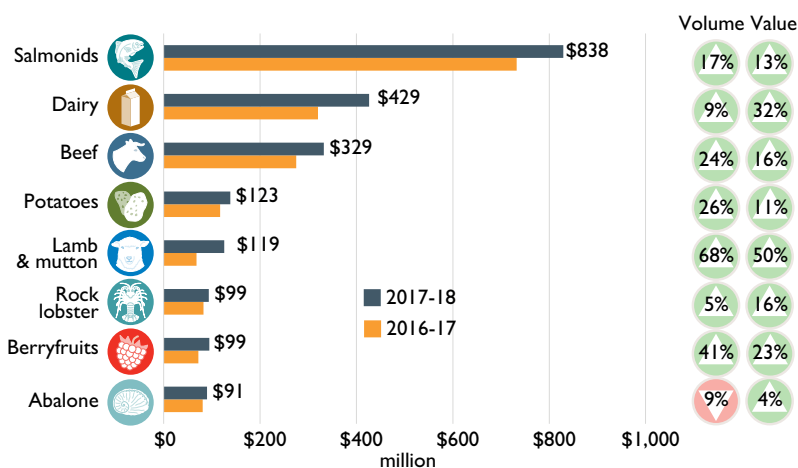
underpinned by the strong performance of pasture-based livestock industries.

Despite extended warm and dry periods, availability of irrigation water and favourable prices at the farm gate saw the dairy industry rebound from difficulties in the previous 12 months to set a production record in 2017-18. As a result, dairy returned to being the highest value agricultural industry, worth \$429 million at the farm gate. Beef, the second highest value product, also increased in value to be worth \$329 million at the farm gate and hit a record export value of \$210 million. High lamb and mutton prices, coupled with increased output, saw the value of sheep meat increase by \$40 million.

The value of fruit production rose by 27.8%, driven by increased berry and cherry production, each of which benefitted from the warm and dry conditions. Irrigation for vegetable crop production was essential in most regions, with a substantial increase in the value of major crops such as potatoes and salad greens.

Salmon farming continued to be the single most valuable agri-food industry, growing by \$100 million in 2017-18, with the value of international exports of salmonids² up by 118.8% from last year.

Key contributors to gross food value



Primary Production 2017-18	Gross value	Nominal growth in 2017-18	10 year average real growth rate [y-o-y]
Total Agriculture ³	\$1.60 billion	9.1%	1.1%
Seafood	\$1.07 billion	12.8%	5.8%
Agri-Food (total agriculture + seafood)	\$2.67 billion	10.6%	2.7%

¹ Commodities not sold as or manufactured into food for human consumption, such as wool, poppies and fodder crops.

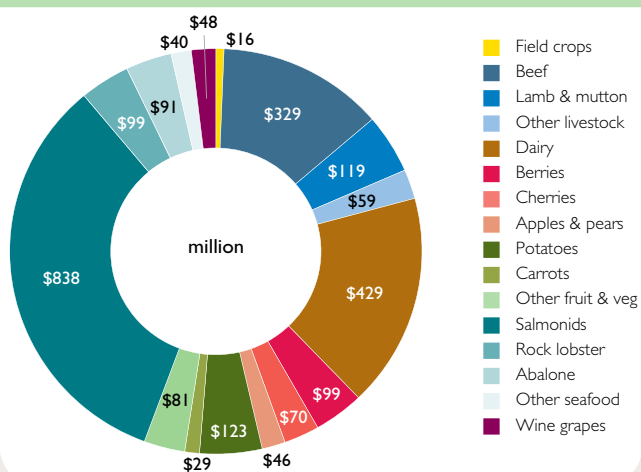
² Salmonids include Atlantic salmon and ocean trout.

³ A numerical breakdown of the ABS-reported total into food and non-food is no longer reported due to the ABS total value being less than the sum of values reported for individual industries when data from other reliable sources is included. Refer to page 37 for discussion of data differences.

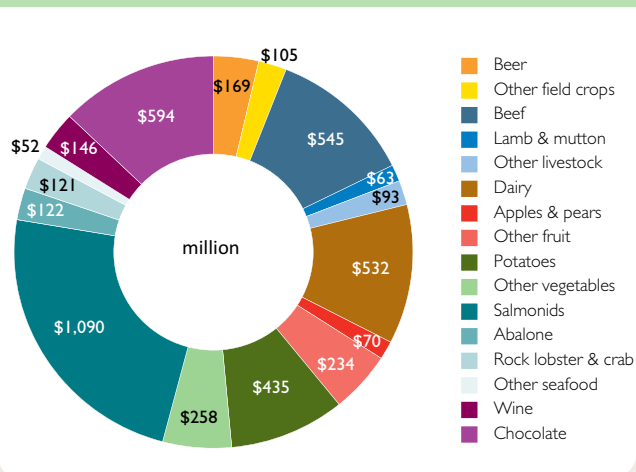
Key Food Facts 2017-18

Gross value of food at farm gate and beach	\$2.52 billion	▲ 16.1%
Value of food after processing and packing	\$4.63 billion	▲ 11.2%
Gross food revenue (domestic, interstate and overseas sales)	\$7.42 billion	▲ 13.0%
Net food revenue (gross food revenue less imports)	\$6.48 billion	▲ 12.0%
International food exports ⁴	\$0.74 billion	▲ 22.5%
Net interstate food sales	\$2.84 billion	▲ 16.4%
Retail and food service food and beverage sales in Tasmania	\$3.73 billion	▲ 7.5%
Tasmanian food production surplus ⁵	76.7%	▲ 4.1%

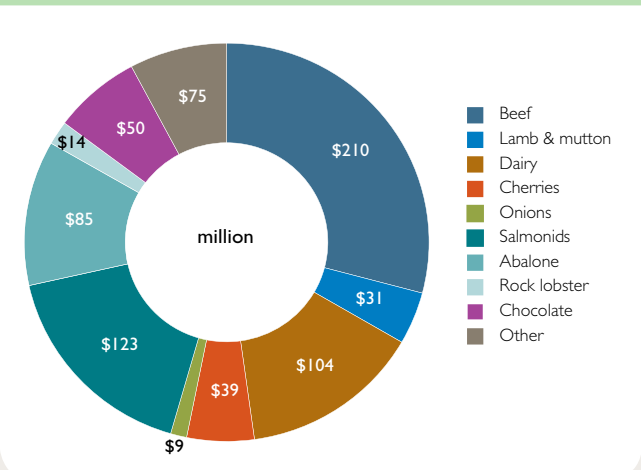
Gross food value at farm gate or beach - **\$2.52 billion**



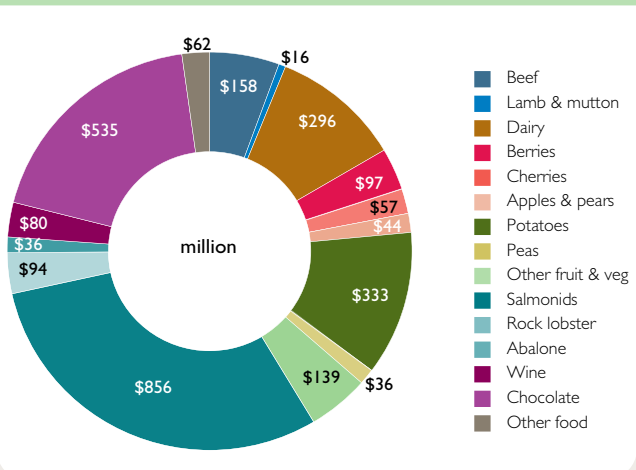
Processed food value - **\$4.63 billion**



International food exports - **\$740 million**



Net interstate food sales - **\$2.84 billion**



The value of food after processing and packing grew to \$4.63 billion, with substantial increases in major value-added industries including salmonids, chocolate, beef, dairy and potatoes.

Tasmanian international food exports increased in value by 22.5% to a record \$740 million. The growth in exports did not come at the expense of domestic trade, with net interstate food sales increasing by 16.4% to \$2.84 billion.

Overseas and interstate food imports were worth \$14 million and \$760 million, respectively.

⁴ Includes international food commodity exports.

⁵ The percentage of Tasmanian food production in excess of that required to meet Tasmanian consumption.

ScoreCard Summary 2017-18 (\$ million)

	Field Crops	Livestock	Dairy	Fruit	Vegetables	Seafood	Wine	Chocolate	Total ⁶
Food - farm gate/beach value	15.7	507.1	429.5	196.7	250.7	1067.9	48.5		2516.0
Total farm gate/beach value	152.2	642.0	429.5	196.7	250.7	1067.9	48.5		2672.1 ⁷
Food - processed & packed value	274.7	701.9	532.2	303.8	692.4	1385.0	145.5	593.9	4629.4
Overseas Trade									
Commodity exports	27.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	27.3
Commodity imports	0.0	0.0	0.0	0.0	0.0	0.0	0.0	4.0	4.0
Food exports	0.7	243.2	104.2	39.6	17.9	241.8	3.6	50.4	712.6
Food imports	1.2	0.0	0.0	0.1	5.5	0.5	0.2	0.1	14.4
Net Interstate Trade									
Net commodity exports	1.2	110.9	0.0	0.0	0.0	0.0	0.5	0.0	112.5
Net commodity imports	23.1	68.1	0.0	0.0	0.0	0.0	0.0	68.7	159.9
Net food exports	18.4	178.7	295.7	203.0	503.1	1025.6	79.8	535.2	2839.6
Net food imports	78.2	141.1	0.0	84.7	18.4	85.9	76.7	0.0	760.0
Tasmanian Food Sales									
Retail sales	365.2	521.1	252.4	215.7	359.1	185.1	197.9	50.9	2818.6
Food service sales	220.7	86.0	5.1	47.4	99.8	180.0	174.0	8.5	912.7
Net food revenue	540.6	930.7	657.4	421.0	955.8	1546.2	378.9	572.3	6485.0
Gross food revenue	643.1	1139.9	657.4	505.8	979.8	1632.5	455.8	645.0	7423.4

⁶ Totals may include items that do not fall into one of the eight categories listed (e.g. frozen meals, soft drinks, cooking ingredients).

⁷ The total farm gate/beach value is the sum of fisheries data reported by ABARES and gross value of agriculture as reported by the ABS. The sum of the contributors exceeds the total because the wine value sourced from Wine Tasmania is higher than the value reported by the ABS.



GROW



MAKE



PROTECT



EXPERIENCE

DISCLAIMER: The information contained in this document provides general information relating to the State's agricultural sector and food production. The Crown in Right of the State of Tasmania, its officers, employees and agents do not accept liability, however arising, including liability for negligence, for any loss arising from the use or reliance upon the content of this document. No liability or responsibility is accepted for the consequences of any inaccuracy in this document, and persons relying upon it do so at their own risk absolutely.

CONTACT:

AgriGrowth Tasmania
Department of Primary Industries, Parks, Water and Environment
GPO Box 44 Hobart TAS 7001

P: 1300 292 292

E: agrigrowth@dpiwwe.tas.gov.au

W: www.dpiwwe.tas.gov.au

