

# Tasmanian Agri-Food ScoreCard

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**2023-24**



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*Cover photograph:*  
*Nick Hanson | Harvesting wine grapes*

# Highlights

## Key facts

<b>\$2.83 billion</b>		<b>15%</b> agriculture farm-gate value
<b>\$4.28 billion</b>		<b>7%</b> agri-food gross value
<b>\$6.39 billion</b>		<b>6%</b> packed and processed food value
<b>\$906 million</b>		<b>5%</b> overseas food exports

**5.9 times** more food 'produced' than 'consumed' by resident Tasmanians

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

**Tasmanian agriculture experienced a solid 2023–24 despite dry conditions.** The farm-gate value of agriculture rose to \$2.83 billion, underpinned by major industries including dairy, red meat, potatoes and berries, while the State's overall agri-food value, which includes the \$1.45 billion seafood sector, grew to \$4.28 billion.

Dry and drought conditions were a feature of 2023-24. Favourable conditions for irrigated horticulture and wine production saw lower disease pressure and strong yields, while cattle and sheep producers destocked in some regions. Food exports were \$906 million, down from \$957 million in 2022-23 with moderating export prices and lower demand for some commodities.

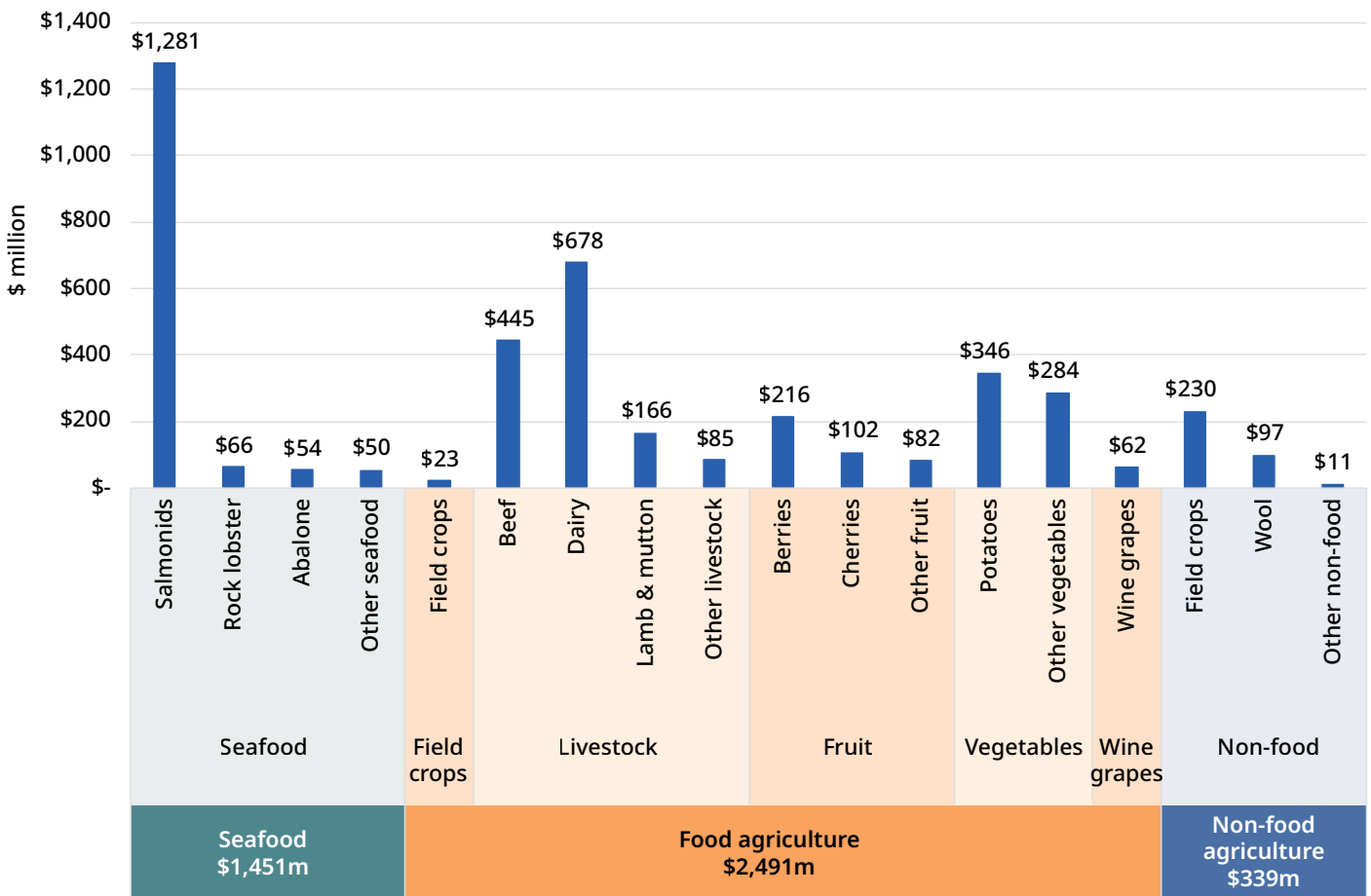
The *Tasmanian Agri-Food ScoreCard* measures and reports on the value and final market destinations of the State's agriculture, seafood, food, and beverage production. It uses various data sources to estimate the gross value of agriculture. In 2023-24, several data sources changed to address data gaps, with greater use of verifiable information supplied from industry. This has improved the reliability of the values presented in the ScoreCard, particularly for the fruit industry.

Because of this, caution is required when making direct comparisons with the 2022-23 ScoreCard, and the gross values reported differ from those published by the Australian Bureau of Statistics (ABS). The ABS is modernising its own approach, shifting from farmer surveys to greater use of industry data and publicly available data.

# Gross farm-gate value of agri-food

Tasmania's agri-food sector consists of various industries which produce vastly different products including meat, dairy, seafood, fruit, wine, vegetables, field crops, livestock products, agroforestry, and non-food products (e.g. pasture seeds, animal feed, wool, poppies and non-food grade seaweed).

Gross value of primary production at the farm-gate or beach - \$4,281 million



Tasmania's agri-food sector achieves further value beyond the farm-gate through processing and retailing. The value generated across the food value chain is shown on page 5.

# Value chain


Agri-food gross value

**\$4.28 billion<sup>1</sup>**  **7%**


## AQUATIC

Seafood  
**\$1.45 billion**  
 **7%**

## LAND-BASED

Total agriculture gross value  
**\$2.83 billion**  **15%**

Food agriculture  
**\$2.49 billion**  
 **14%**

Non-food agriculture  
**\$0.34 billion**  
 **21%**

## Agroforestry

Agroforestry  
**\$0.01 billion**  
 **80%**

# Value adding

Food value after packing and processing  
**\$6.39 billion**  **6%**

# Initial market destinations and revenue


International direct exports  
**\$906 million**  **5%**

Net interstate sales  
**\$4.42 billion**  **2%**

Retail & food service sales in Tas  
**\$5.48 billion**  **2%**

Gross food revenue  
**\$11.07 billion**  **<1%**

LESS FOOD IMPORTS

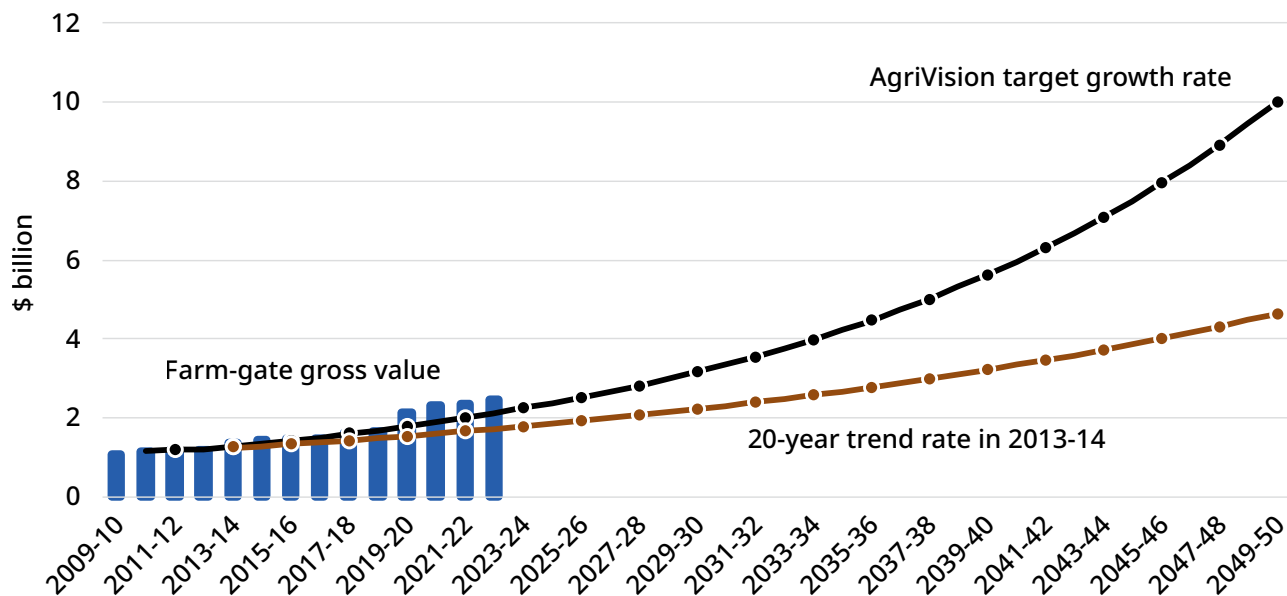
Net food revenue  
**\$9.48 billion**  **7%**

<sup>1</sup> Percentage changes are compared against 2022–23. “Agri-food production” includes fisheries and food and non-food agricultural production, but excludes agroforestry.

# AgriVision Target 2050

The Tasmanian Government and the State's agricultural industries have a target to grow the annual farm-gate value of Tasmanian agriculture to \$10 billion by 2050. Strong progress towards this target continues, with the gross value of agriculture reaching \$2.83 billion during 2023–24. Seafood and agroforestry are not included in the AgriVision 2050 target. These sectors contributed a further \$1.45 billion to the value of the overall Tasmanian agri-food sector.

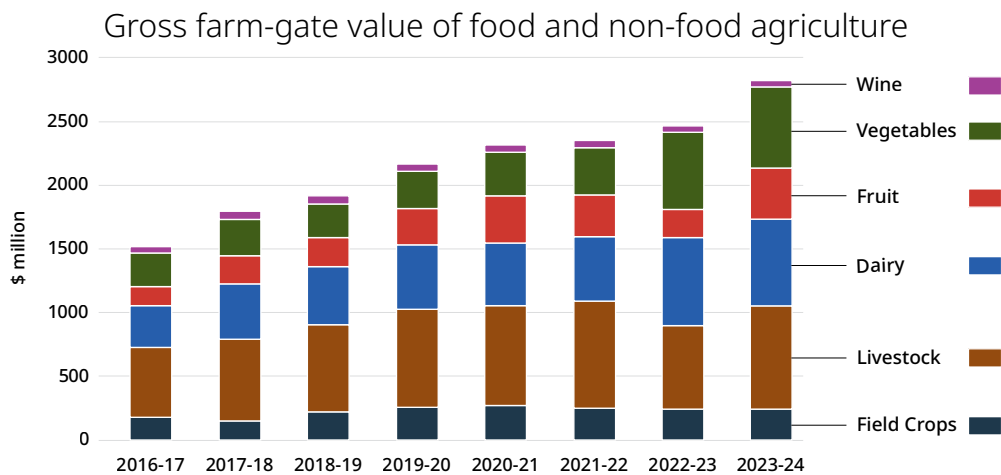
Gross farm-gate value of food and non-food agriculture



Reaching the 2050 target will require the sector to grow by 5.9 per cent per year on a compound basis. Over the last five years, the sector has achieved an average compound growth rate of 6 per cent. This exceeds the target rate and broader economic benchmarks, including the average national inflation rate over the period (3.7 per cent), and Tasmania's nominal Gross State Product growth in 2023–24 (1.4 per cent). Strong commodity prices and favourable seasonal conditions for several key products have supported this performance.

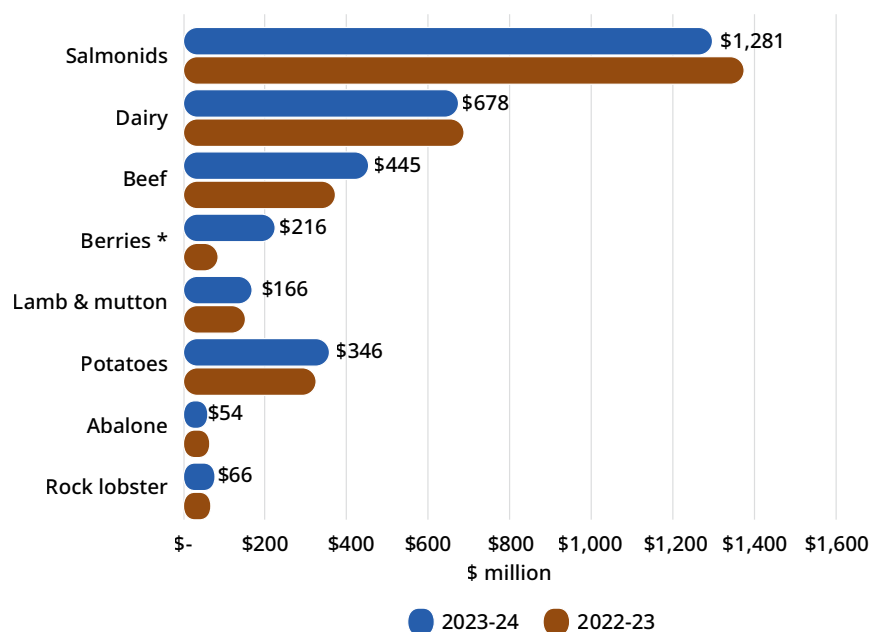
# Agricultural Production

Agricultural production comprises outputs from food agriculture (products intended for human consumption) and non-food agriculture (e.g. wool, poppies and animal feeds). The gross farm-gate value of Tasmania's agricultural production in 2023-24 is \$2.83 billion.



Salmonids continued to be Tasmania's most valuable food product, with a beach value of \$1.281 billion. Dairy remained the highest agricultural category, contributing \$678 million in farm-gate value. Red meat was the next highest contributor (\$445 million for beef and \$166 million for lamb and mutton), with strong processing volumes during a period of destocking and generally stable prices. The wine sector recorded a substantial increase in value, driven by favourable growing conditions that resulted in significantly higher yields, while average prices remained high compared to the national average.

## Key contributors to gross food value



\* The 2022-23 data for berries is provided for reference only and is not directly comparable to 2023-24, reflecting a shift to more accurate data sources.

# Seasonal Conditions

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Photograph:  
Moon Cheese Studio | Hemp Field

The 2023–24 season brought dry, drought and warmer conditions across mainland Tasmania and the Bass Strait Islands - with below-average rainfall and above-average temperatures shaping the year. Spring rainfall in 2023 was 33 per cent below the long-term average, ranking as the fifth lowest on record, while spring mean maximum temperatures were the fourth highest on record, at 1.37°C above average. King Island, along with areas of the north-west and south, recorded lowest-on-

record rainfall, and temperatures remained warmer than average for much of the year. Flinders Island also experienced reduced rainfall and elevated temperatures, which placed pressure on agricultural production. Despite these conditions, many producers adapted their management during drought to maintain production. This was, however, a precursor to the more intense drought conditions to come in late 2024.

## Spring and summer months

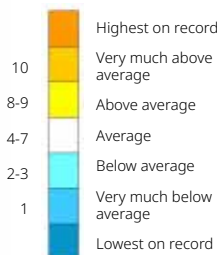
**Jul-Aug:** July rainfall was 5 per cent below average and recorded the warmest mean minimum temperature on record. August rainfall was 28 per cent below average, with minimum temperatures ranging from above to well above average.

**Sep-Nov:** September rainfall was 35 per cent below average, the lowest since 2015, and temperatures were very much above average. October rainfall was 18 per cent below average. November rainfall was 51 per cent below average, with temperatures warmer than average; the mean maximum temperature was 1.77°C above average, making it the 10th warmest on record.

**Dec-Feb:** December rainfall was 25 per cent below average, and the mean maximum temperature ranked as the 5th warmest on record. January rainfall was 21 per cent above average, with temperatures being warmer than average. February rainfall was 54 per cent below average, and temperatures remained warmer than average.

### Mean temperature deciles

1 July to 30 September 2023

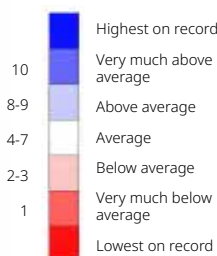
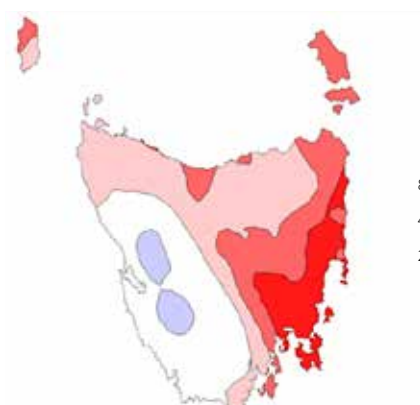


1 October to 31 December 2023



### Tasmanian rainfall deciles

1 July to 30 September 2023



1 October to 31 December 2023



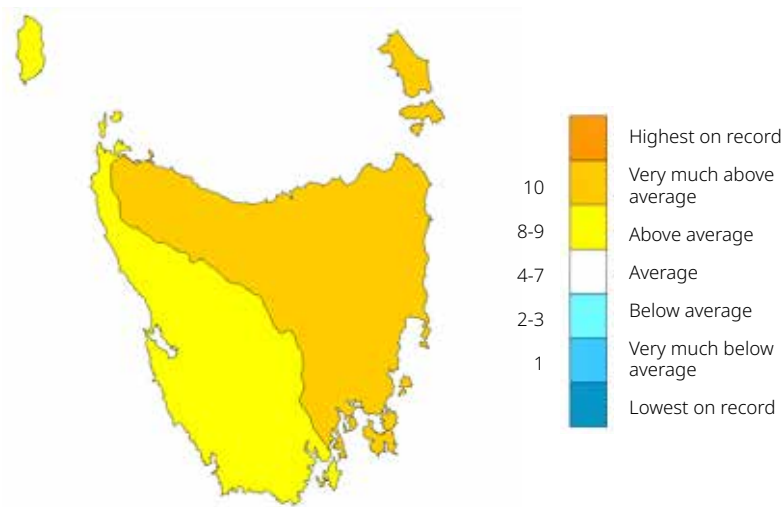
## Autumn and winter months

**Mar-May:** Rainfall was below average, with very much below average rainfall in parts of the east and north. Maximum temperatures were 1.56°C warmer than average, making it the 7th warmest on record. Overall, rainfall was 25 per cent below average, and temperatures were warmer than average in the north. In May, rainfall was close to average on the east coast.

**June:** Rainfall was below average for the western region, north-west coast, King Island, and east coast, while temperatures were close to average.

### Mean temperature deciles

1 January to 31 March 2024

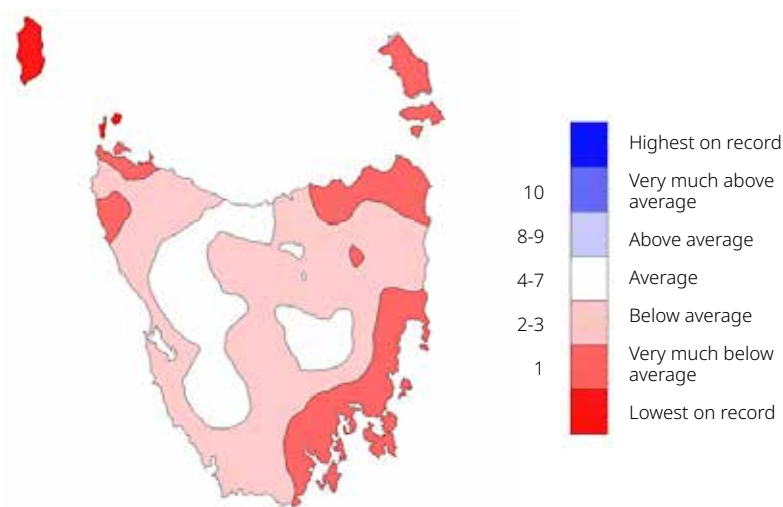


1 April to 30 June 2024

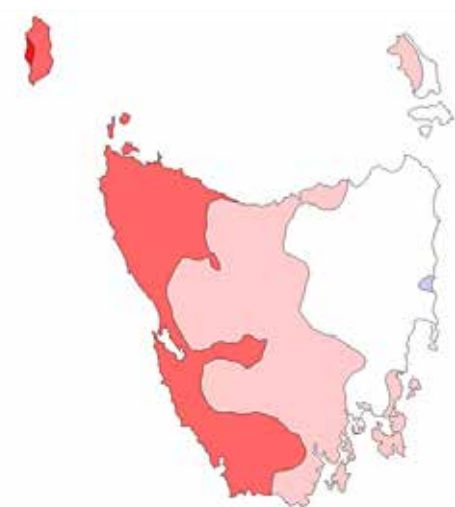


### Tasmanian rainfall deciles

1 January to 31 March 2024



1 April to 30 June 2024



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# Economic Overview

In 2023-24, the global economy slowed due to a range of pressures. High inflation continued to affect many countries and central banks lifted interest rates to bring prices under control. These conditions contributed to lower export prices for commodities such as seafood, and dairy. Despite these challenges, there were positive developments. Higher grain prices supported cereal producers and international freight costs returned to pre-COVID levels, easing cost pressures for exporters.

The AUD/USD exchange rate fell by 2 per cent from 2022-23 averaging \$0.66 in 2023-24 and the Trade Weighted Index averaged 61.65 for the year, remaining largely unchanged from 2022-23. Ongoing high inflation also contributed to a weaker dollar<sup>2</sup>. The lower Australian Dollar and stable Trade Weighted Index helped keep Tasmanian products competitive in key export markets.

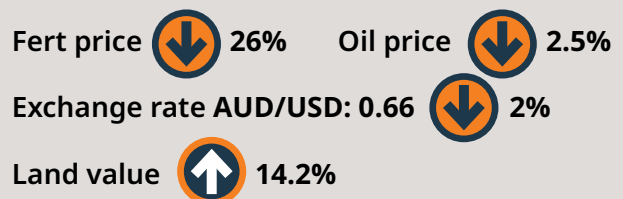
Inflation and cost-of-living pressures that started in 2022-23 persisted in 2023-24. Inflation peaked at 5.4 per cent in the September 2023 quarter. To manage these pressures, the Reserve Bank of Australia increased the cash rate from 4.10 per cent to 4.35 per cent on 5 July 2023 and this rate remained in place for the rest of the financial year. Growth in food retailing and food services turnover did not keep up with inflation. Food retail turnover rose by 2.9 per cent and food services turnover increased by only 0.1 per cent compared with the previous June<sup>3</sup>. Total retail turnover grew 2.8 per cent, also below the inflation rate<sup>4</sup>.

Business confidence in Tasmania's agricultural sector softened in 2023-24 due to lower commodity prices, inflation pressures and challenging seasonal conditions. The Rabobank Rural Confidence Survey reported subdued confidence levels in the September, December,

and June quarters, with the June 2024 result marking a survey-record low<sup>5</sup>. Dry seasonal conditions played a major role, affecting local commodity prices for some commodities putting pressure on farm incomes. While prices for some inputs such as fertiliser and oil eased, the overall costs of doing business continued to rise as other inputs and services became more expensive, tightening margins. Despite these short-term challenges, Rabobank noted that producers remained optimistic about the long-term profitability of Tasmanian agriculture. This underlying confidence was reflected in continued investment in land, with the median price per hectare of farmland rising by 14.2 per cent, driven mainly by strong demand in northern Tasmania<sup>6</sup>.

The labour market remained tight across the broader economy and the agricultural sector continued to face challenges in sourcing skilled workers. High job vacancy levels and a low average unemployment rate of 3.9 per cent reflected ongoing strong demand for labour. Migration data showed an increase in working holiday visa holders in Australia rising to 79,600 from 73,700 people in the previous year<sup>7</sup>. The Australian Government's Pacific Australia Labour Mobility (PALM) Scheme also remained a key and reliable source of labour for Tasmanian producers, particularly the horticulture sector, helping to support seasonal workforce needs.

## Key stats



<sup>2</sup> Reserve Bank of Australia <https://www.rba.gov.au/statistics/>

<sup>3</sup> Based on ABS Retail Trade data seasonally adjusted statistics.

<sup>4</sup> Ibid.

<sup>5</sup> Rabobank Rural Confidence Survey <https://www.rabobank.com.au/knowledge/rural-confidence-survey/>

<sup>6</sup> Bendigo Bank Farmland Values Report <https://www.bendigobank.com.au/business/industries/agribusiness/agriculture-insights/>

<sup>7</sup> <https://www.abs.gov.au/statistics/people/population/overseas-migration/latest-release>

# Processed value

**Value is added** to food agriculture and seafood production through processing and packing. Processing can involve minimal transformation of food, such as producing premium cuts of meat, packaging honey, or grading and packing fresh cherries for export. Processing may also involve greater transformation through fermentation or other food manufacturing processes to produce, for example, cheese or chocolate from milk, beer or whisky from barley, or wine from grapes.

Processing increased the worth of agri-food gross value to a wholesale value of \$6.39 billion during 2023-24. Before the food was sold through retail and food service outlets, further

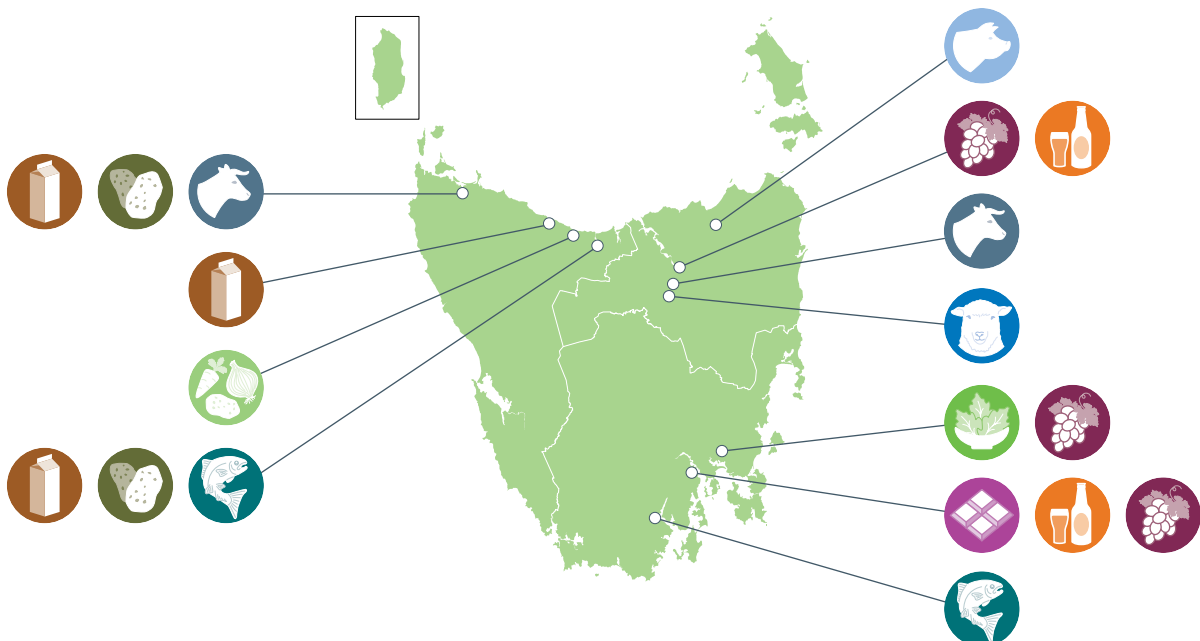
value was added. This resulted in the net food revenue reaching \$9.46 billion in 2023-24.

The volume of frozen potato products increased, although nationally, demand exceeded supply. There was lower demand for dairy products globally, reflected in lower prices and a reduction from the historically high processed values for dairy in recent years. Increases in global beef supply and easing international prices saw a decline in processed prices for beef, but this was largely offset by higher volumes associated with destocking. Salmonids continued to be the highest-value processed food category.

Key contributors to processed value

	2023-24 (\$ millions)	2022-23 (\$ millions)	Change in value (%)	Change in volume (%)	Change in price (%)
Potatoes <sup>8</sup>	\$868	\$463	-	5%	-
Beef	\$571	\$583	-2%	19%	-18%
Chocolate	\$772	\$828	-7%	-2%	-5%
Dairy	\$778	\$876	-11%	4%	-14%
Salmonids	\$1,665	\$1,776	-6%	-6%	0%

Major food processing locations



<sup>8</sup> The potato processing price was adjusted based on industry insights, hence, the change in processed value and price for 2023-24 cannot be compared to 2022-23.

## International exports

The reported value of Tasmania's agri-food exports totalled \$906 million in 2023-24. Processed products made up the majority of this value at \$887 million (\$824 million in food products and \$63 million in non-food products), while unprocessed commodity exports contributed \$19 million. Overall export value was 5 per cent lower than in 2022-23, mainly due to softer export prices for dairy and red meat (despite strong volumes) and lower seafood export volumes. Higher export values for fruit and vegetables compared to 2022-23 also helped counter the reductions in other areas. Over the past five years, Tasmania's food export value has eased an average 2 per cent per year in nominal terms, and 5 per cent in real terms.

Tasmanian exports went to 79 countries. The top 5 key food export markets were China (\$218 million), the United States of America (\$198 million), Japan (\$120 million), Indonesia (\$43 million) and Vietnam (\$35 million). China accounted for 24 per cent of Tasmania's food export value. Red meat was Tasmania's highest value food export, with exports of \$235 million. Salmonids were the next highest value food export totalling \$199 million, followed by dairy reaching \$188 million.

A detailed breakdown of the export sector is provided in Data Appendix Table A4.

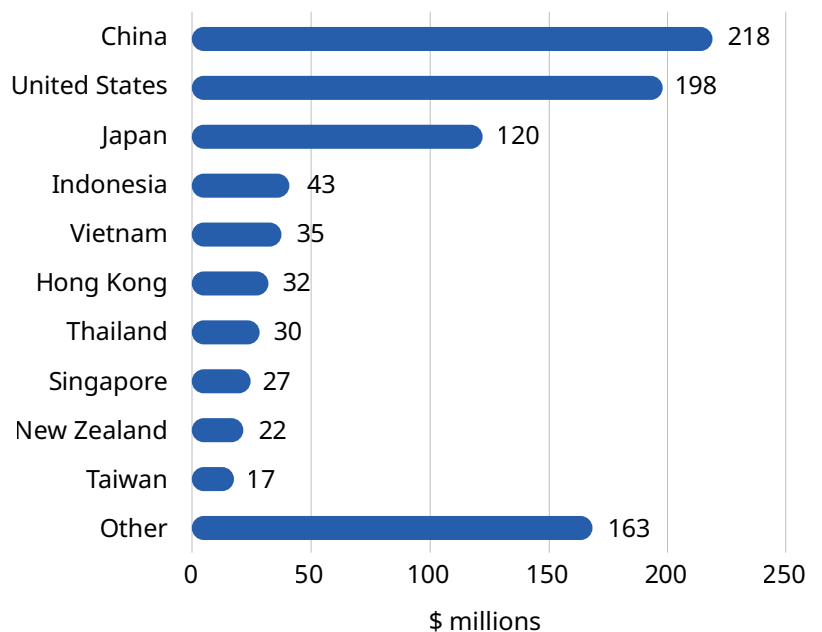
### Key stats

**79 countries**

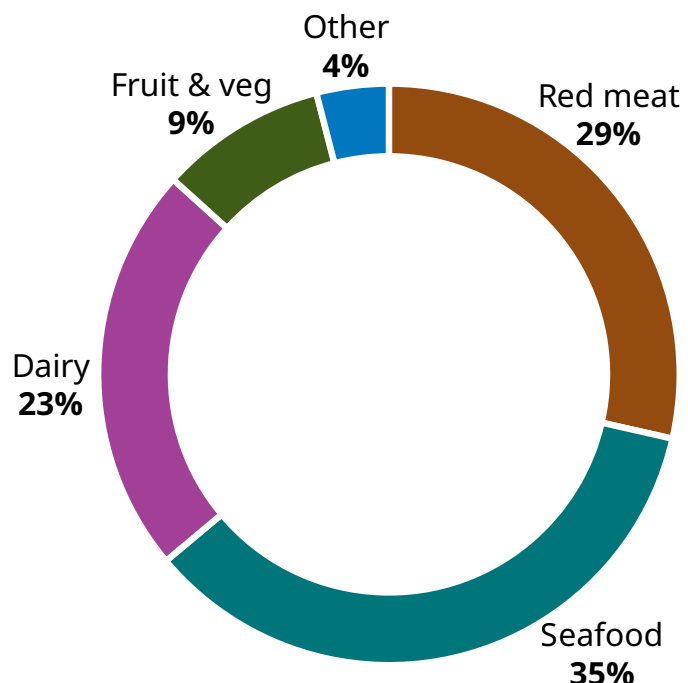
**Value: \$906 million**

**5-year trend**  **5%**

Tasmanian food export destinations



Export commodities share



## Interstate trade

Tasmania not only exports food overseas but has strong interstate trade for most major food categories. The ScoreCard reports the *net* value of this interstate trade: the value of Tasmanian-produced food sold interstate minus the value of food purchased from interstate.

Salmonids were the highest-value interstate trade category in 2023-24, worth \$1.274 billion, accounting for 29 per cent of interstate sales. Despite lower prices, dairy products continued to make a strong contribution, accounting for 11 per cent of net interstate sales, while chocolate products contributed 19 per cent, highlighting the strength and diversity of Tasmania's food manufacturing sector.

### Key contributors to net interstate food sales

	2023-24 (\$ millions)	2022-23 (\$ millions)	Change in value (%)	Change in volume (%)	Change in price (%)
Beef	\$277	\$261	6%	30%	-18%
Potatoes*	\$700	n/a	n/a	5%	n/a
Dairy	\$486	\$545	-11%	7%	-17%
Chocolate	\$844	\$878	-4%	-4%	<1%
Salmonids	\$1,274	\$1,279	<1%	<1%	<1%

\* The potato processing price was adjusted based on industry insights, hence, the change in interstate value and price for 2023-24 cannot be compared to 2022-23.

## Key stats

**Net commodities to interstate: \$259 million**

**Net commodities from interstate: \$107 million**

**Net food purchases from interstate: \$1,441 million**

## Productivity and sustainability

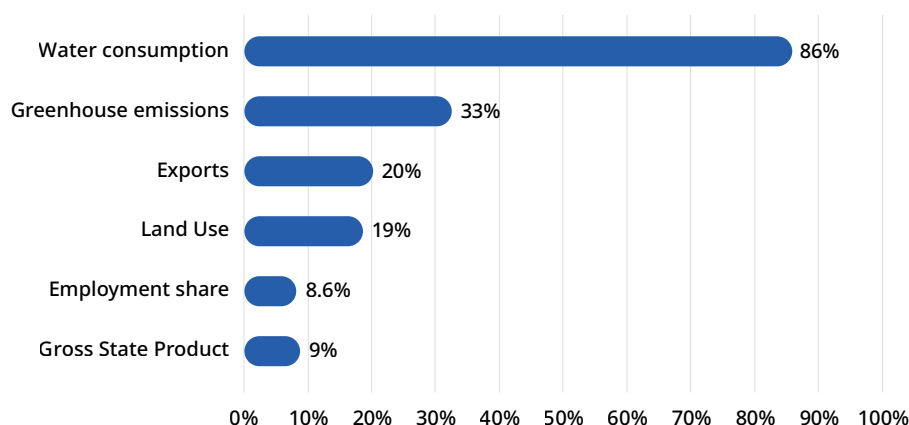
Tasmanian agriculture contributed around 9 per cent to the State's Gross State Product (GSP) in 2023-24<sup>9</sup>, placing it among the top five sectors in the Tasmanian economy. Food and agricultural international exports made up 20 per cent of the state's total international export value, highlighting the industry's importance to trade.

Agriculture also remained a major employer, providing jobs for 20,800 people or 8.6 per cent of the State's workforce. Regional Development

Australia (RDA) Tasmania reported that Tasmania's agriculture, fisheries, and forestry sector continues to outperform the national average, with a productivity advantage of \$20,960 per worker<sup>10</sup>.

Water is a vital input for Tasmanian agriculture, and the sector accounted for 81 per cent of the State's total water consumption in 2023-24<sup>11</sup>. By comparison, agriculture accounts for 68 per cent of water used nationally.

Selected contributions of Tasmanian agriculture



Sources: ABS Water Account 4610, Department of Treasury and Finance State Accounts, ABS Balance of Payments, ReCFIT Tasmanian Greenhouse Gas Emissions Report 2024, ABARES Catchment scale land use – updated December 2023, ABS Australian Industry 2023-24

Producers used 101 GL of irrigated water supplied by Tasmanian Irrigation in 2023-24, a 77 per cent increase on the previous year<sup>12</sup>. This additional irrigation played a crucial role in supporting production during the dry and drought conditions experienced across the State, helping many enterprises maintain output through a challenging season.

Farmers are also key land managers, caring for 19 per cent of Tasmania's land area. This represents significant amounts of carbon stored in soils and vegetation, making an important contribution to the State's carbon emissions profile. At the same time, emissions from livestock, manure management and the use of soil conditioners and fertilisers contribute to agriculture being Tasmania's largest emitting sector. Excluding the 'Land Use' and, Land Use Change and Forestry (LULUCF), sector, agriculture is responsible for around one-third of the State's total emissions<sup>13</sup>. The Tasmanian Government's Agriculture Emissions Reduction and Resilience Plan sets out how the sector is being supported by Government to reduce emissions<sup>14</sup>.

<sup>9</sup> Includes agriculture, fisheries, and forestry.

<sup>10</sup> <https://rdatasmania.org.au/volumes/documents/RDAT-Tasmania-Economic-Review-2025-v2.pdf>

<sup>11</sup> Includes agriculture, aquaculture, forestry and logging, fishing, hunting and trapping; and agriculture, forestry and fishing support services.

<sup>12</sup> <https://www.tasmanianirrigation.com.au/source-assets/documents/publications/TI-Annual-Report-2023-24.pdf>

<sup>13</sup> Emissions associated with the use of electricity, fuel consumption from operating agricultural equipment, and fuel consumption in transport, are accounted for in the energy sector. Under the United Nations Framework Convention on Climate Change (UNFCCC) emissions reporting framework, agricultural emissions come from livestock digestive systems, release of nitrous oxide from cropping and pasture management, and manure management. Emissions associated with land use change, including the clearing and re-clearing of vegetation, are accounted for in the LULUCF sector.

<sup>14</sup> [https://www.recfit.tas.gov.au/policies\\_strategies\\_plans/climate-change/emissions\\_reduction/agriculture](https://www.recfit.tas.gov.au/policies_strategies_plans/climate-change/emissions_reduction/agriculture)

# ScoreCard summary

ScoreCard summary 2023–24 (\$ million)

	Field crops	Livestock	Dairy	Fruit	Vegetables	Seafood	Wine	Chocolate	Total <sup>15</sup>
<b>Food (farm-gate/beach value)</b>	22.8	695.9	678.4	401.2	630.2	1451.6	61.7	0.0	<b>3,941.8</b>
Total farm-gate/beach value	253.3	804.8	678.4	401.2	630.2	1451.6	61.7	0.0	<b>4,281.2</b>
<b>Food (processed and packed value)</b>	271.1	834.3	777.7	463.4	1155.0	1875.0	238.2	772.3	<b>6,387.0</b>
<b>Overseas trade</b>									
Commodity exports	37.8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	<b>18.7</b>
Commodity imports	0.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	<b>0.5</b>
Agri-food exports	4.6	252.6	187.8	50.2	26.6	291.5	4.0	10.1	<b>887.0</b>
Food imports	3.9	0.1	0.0	1.2	5.2	33.3	0.5	0.1	<b>43.8</b>
<b>Net interstate trade</b>									
Net commodity exports	3.4	255.3	0.0	0.0	0.0	0.0	0.6	0.0	<b>259.3</b>
Net commodity imports	8.8	29.5	0.0	0.0	0.0	0.0	0.0	68.7	<b>107.0</b>
Net food exports	8.3	306.9	486.2	345.8	904.2	1393.4	135.2	844.0	<b>4,424.0</b>
Net food imports	135.9	207.8	0.0	77.4	10.1	28.4	85.3	0.0	<b>1,440.7</b>
<b>Tasmanian food sales</b>									
Retail sales									<b>3,990.2</b>
Food service sales									<b>1,489.9</b>
<b>Net food revenue</b>									<b>9,477.2</b>
<b>Gross food revenue</b>									<b>11,069.2</b>

<sup>15</sup> Totals may include items that do not fall into one of the eight categories listed (e.g. frozen meals, soft drinks, cooking ingredients).

# Sector Summaries

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*Photograph:  
Moon Cheese Studio | Dairy Cow*

# Meat

The farm-gate value of beef increased by 20 per cent to \$445 million in 2023-24, reflecting higher turn-off and more cattle entering the market. Beef export value decreased 5 per cent to \$181 million in 2023-24, with beef accounting for 80 per cent of the total meat export value.

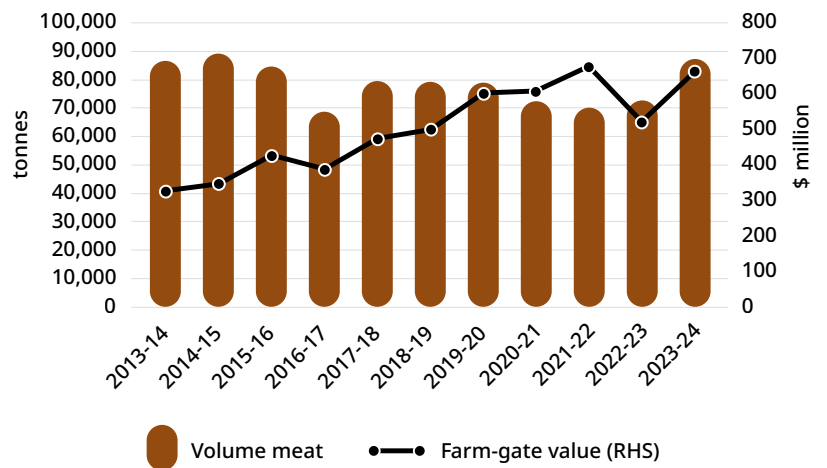
Sheep and lamb farm-gate value rose 16 per cent to \$166 million in 2023-24 driven by higher processing volumes. Over the same period, sheep and lamb prices were broadly stable, increasing slightly as national markets stabilised. The farm-gate value of chicken meat and pig meat was \$48 million and \$8.2 million, respectively.

Cattle and sheep movements are vital for the meat sector. In 2023-24, \$27.9 million worth of cattle and \$1.6 million worth of sheep were moved to Tasmania, while \$167 million worth of cattle and \$88.3 million worth of sheep were moved from Tasmania.

The five-year trend of the farm-gate value of the red meat sector has seen a nominal growth rate of 2 per cent, with volume changing seasonally, rather than a clear trend. Strong red meat prices over this time and on-farm investment have contributed to the sector's medium-term performance. Increased production in 2023-24 reflects destocking in response to dry and drought conditions.

Meat ScoreCard	\$ million
<b>Food farm-gate value</b>	<b>667.0</b>
<b>Processed food value</b>	<b>783.6</b>
<b>Overseas Trade</b>	
Food exports	235.4
Food imports	0.0
<b>Net Interstate Trade</b>	
Net commodity exports	255.3
Net commodity imports	29.5
Net food exports	297.1
Net food imports	189.2

Red meat



# Dairy

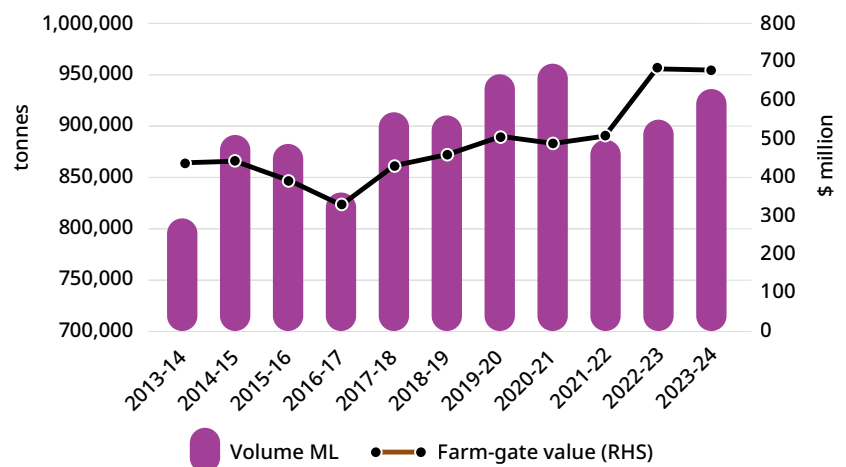
In 2023-24 the dairy sector average milk price was \$9.21 per kg of milk solids (the equivalent of \$0.726 per litre of milk), a 3 per cent decrease from 2022-23. Milk production increased from 906 megalitres to 934 megalitres, a 3.1 per cent increase. The farm-gate value of milk was \$678.4 million, which was 1 per cent lower in value than in 2022-23, due to the moderation in the farm gate milk price.

The export value of Tasmanian dairy products fell to \$187.8 million due to weaker global demand. Milk powders (\$82 million) and cheese (\$88 million) were the highest contributors to the value of Tasmanian dairy exports. Japan (\$75 million), Indonesia (\$19 million), Thailand (\$16 million), China (\$14 million), and Bangladesh (\$13 million) were the top destinations for Tasmania's dairy products.

Over the past five years the dairy sector has recorded a nominal compound annual growth rate of 6 per cent, supported by strong milk prices even as national production has declined. Improvements in milk yield and in the fat and protein content of milk have strengthened Tasmania's competitiveness compared with other States. Long-term investment across dairy businesses has also helped drive this sustained growth.

Dairy ScoreCard	\$ million
<b>Food farm-gate value</b>	<b>678.4</b>
<b>Processed food value</b>	<b>777.7</b>
Overseas Trade	
Food exports	187.8
Food imports	0.0
Net Interstate Trade	
Net food exports	486.2
Net food imports	0.0

Milk produced



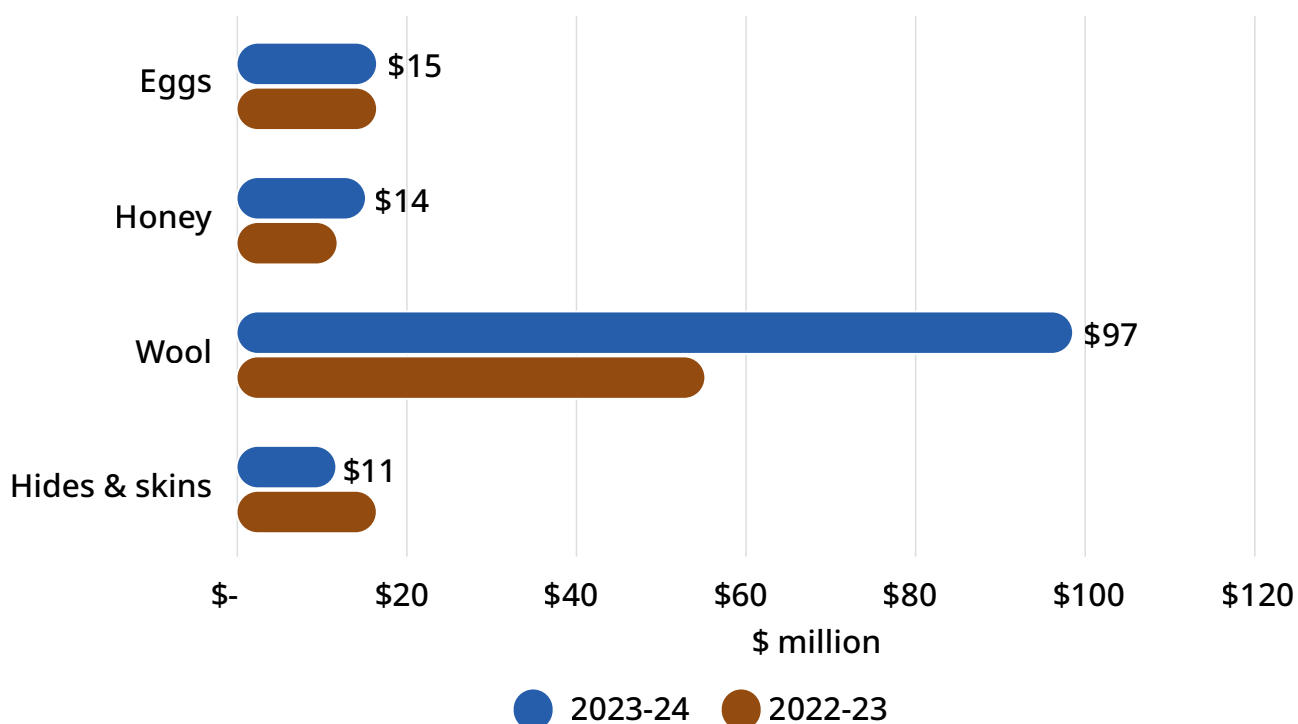
## Other livestock products

The farm-gate value of wool was \$97 million in 2023-24<sup>16</sup>. The substantial increase in value, compared to 2022-23, was due to the updated methodology by ABS for measuring the volume of wool produced. Market conditions were challenging, with prices relatively subdued. The export value of wool was \$16.3 million, with China (\$11.3 million), Italy (\$3.6 million) and India (\$1 million) being the main export destinations.

The farm-gate value of eggs was \$15 million. Tasmanian eggs are not exported overseas but rather used in the domestic market. The estimated retail sales value of Tasmanian eggs was \$65.4 million.

Tasmanian honey had an estimated farm-gate value of \$14 million<sup>17</sup>, and exports were \$0.7 million.

Livestock products gross farm-gate value



<sup>16</sup> The ABS has updated its data collection of agricultural products, and this has impacted the farm-gate value of wool causing a marked increase compared to 2022-23.

<sup>17</sup> The honey value is based on survey data for 2023-24 from the 2025 Tasmanian Bee survey.

# Fruit

The estimated total farm-gate value of fruit was \$401 million in 2023-24, a nominal increase of 80 per cent from 2022-23. It is important to note that data for 2022-23 was not fully reflective of the sector’s true value because the ABS methodology for calculating agricultural commodity values changed in that year. As a result, farm-gate values from 2022-23 onwards are not directly comparable with earlier years. The reported values for berries and apples were affected by this change. Recognising the challenges this presents to Tasmania’s fruit industry, NRE Tas is working with Fruit Growers Tasmania to develop a consistent method for assessing the value of berry and pome fruit for future ScoreCard editions. The 2023-24 figures reflect this collaborative work with industry, with

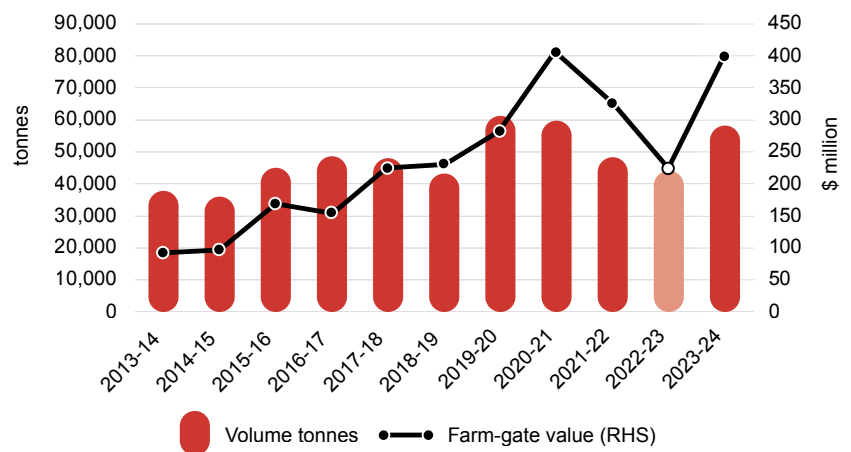
industry-sourced data used for berries, pome fruit and cherries.

Berries had an estimated farm-gate value of \$216 million, accounting for over half of the value of the fruit industry. Cherries had an estimated farm-gate value of \$102 million, pome fruit had an estimated farm-gate value of \$70 million, and the farm-gate value of nuts was \$10 million.

Over 95 per cent of cherries, 81 per cent of apples, and 87 per cent of berries produced in the State are exported to interstate and international markets.

Fruit ScoreCard	\$ million
<b>Food farm-gate value</b>	<b>401.2</b>
<b>Processed food value</b>	<b>463.4</b>
<b>Overseas Trade</b>	
Food exports	50.2
Food imports	1.2
<b>Net Interstate Trade</b>	
Net food exports	345.8
Net food imports	77.4

Fruit and nuts



Note: The 2022-23 data shown is provisional and will be updated once verified industry figures are available.

# Vegetables

The vegetable sector had another strong year, with the farm-gate value rising by 3.4 per cent to \$630 million, driven by a 7 per cent increase in the value of potatoes to \$346 million, more than half the farm-gate value of the total vegetable industry and 75 per cent of its processed value.

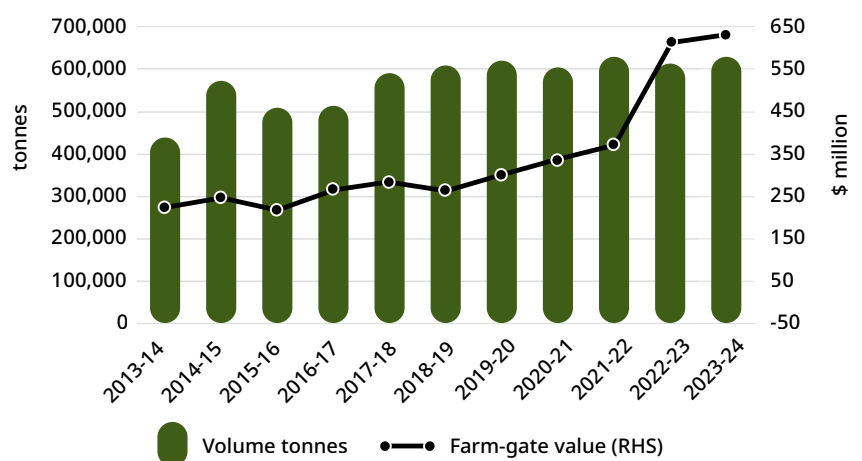
Higher production volumes saw small increases in the farm-gate value of beans (\$28.5 million), broccoli (\$12.1 million) and cucumbers and capsicums (\$12.7 million). Onions recorded a farm-gate value of \$65 million, a 13 per cent decrease due to lower farm-gate prices, while carrots declined in value by 8 per cent to \$39 million.

Onions exports were valued at \$24 million in 2023-24, accounting for 90 per cent of Tasmania's vegetable export value. Key markets included Thailand (\$6.7 million), Japan (\$2.6 million), Belgium (\$2.2 million), the Netherlands (\$2.1 million), and Germany (\$1.6 million).

The majority of vegetables produced are directed to interstate and export markets, with 88 per cent of potatoes, 91 per cent of carrots, and 93 per cent of onions produced in excess of local demand.

Vegetable ScoreCard		\$ million
Food farm-gate value	630.2	
Processed food value	1155.0	
Overseas Trade		
Food exports	26.6	
Food imports	5.2	
Net Interstate Trade		
Net commodity exports	904.2	
Net commodity imports	10.1	

Vegetables



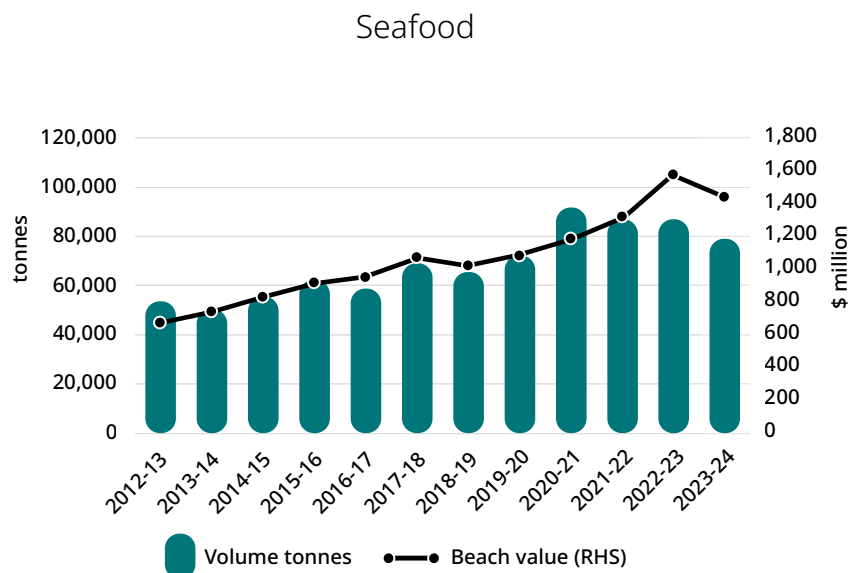
# Seafood

Salmonid production had a beach value of \$1,281 million, easing from \$1,366 million due to lower production. Salmonid exports were valued at \$199 million. Overall, salmonids accounted for 88 per cent of the seafood sector's total beach value and 67 per cent of the sector's export value. Major export destinations were China (\$167 million), Japan (\$27 million), Vietnam (\$22 million), Indonesia (\$19 million) and the United States of America (\$17 million).

Rock lobster and crab recorded a 20 per cent increase in beach value. Their combined export value reached \$11.3 million, an 8.7 per cent rise from 2022-23. Overall, the rock lobster and crab sector were the second highest in beach value within the seafood sector.

Wild caught and farmed abalone had a combined beach value of \$54 million, ranking third in the seafood sector. Oysters contributed \$37 million, representing 2.5 per cent of the seafood sector. The beach value of scallops decreased 33 per cent to \$3.26 million in 2023-24.

Seafood ScoreCard	\$ million
<b>Food beach value</b>	<b>1,451.6</b>
<b>Processed food value</b>	<b>1,875.0</b>
Overseas Trade	
Food exports	291.5
Food imports	33.3
Net Interstate Trade	
Net food exports	1,393.4
Net food imports	28.4

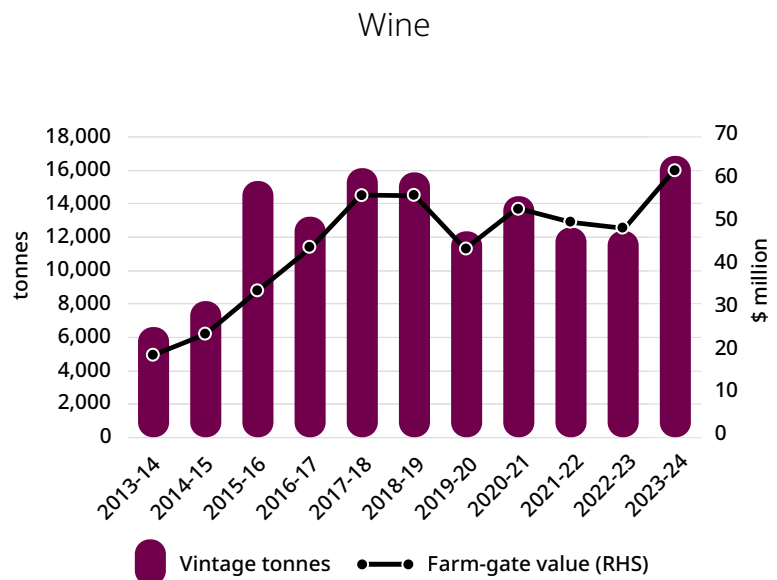


# Wine

The farm-gate value of grape production reached \$62 million in 2023-24, a 48 per cent increase from 2022-23. This growth was driven by favourable growing conditions that lifted yields along with continued strong demand and higher grape prices. The volume of grapes crushed rose 36 per cent to 16,805 tonnes and the average price increased 9 per cent to \$3,674 per tonne. In contrast, the national average price of wine grapes decreased 5 per cent to \$613 per tonne.

Because all wine grapes are processed into wine, the farm-gate value represents only part of the sector’s contribution. The processed value, such as bottled wine, totalled \$238 million in 2023-24, highlighting the broader economic significance of the industry<sup>18</sup>. International exports remain a smaller and more variable revenue source, influenced by wine availability, and totalled \$4 million, a 4 per cent decrease in value from 2022-23. The top export destinations were the United States of America (\$1.3 million), United Kingdom (\$0.8 million), Japan (\$0.3 million), and the Netherlands (\$0.2 million).

Wine ScoreCard	\$ million
<b>Food farm-gate value</b>	<b>61.7</b>
<b>Processed food value</b>	<b>238.2</b>
Overseas Trade	
Food exports	4.0
Food imports	0.5
Net Interstate Trade	
Net commodity exports	0.6
Net commodity imports	0.0
Net food exports	135.2
Net food imports	85.3



<sup>18</sup> Processed value is the value taken at a point in the production cycle. Independent modelling commissioned by Wine Tasmania reports that the overall economic contribution of Tasmania’s wine production is \$374.2 million per annum (plus wine tourism).

## Field crops

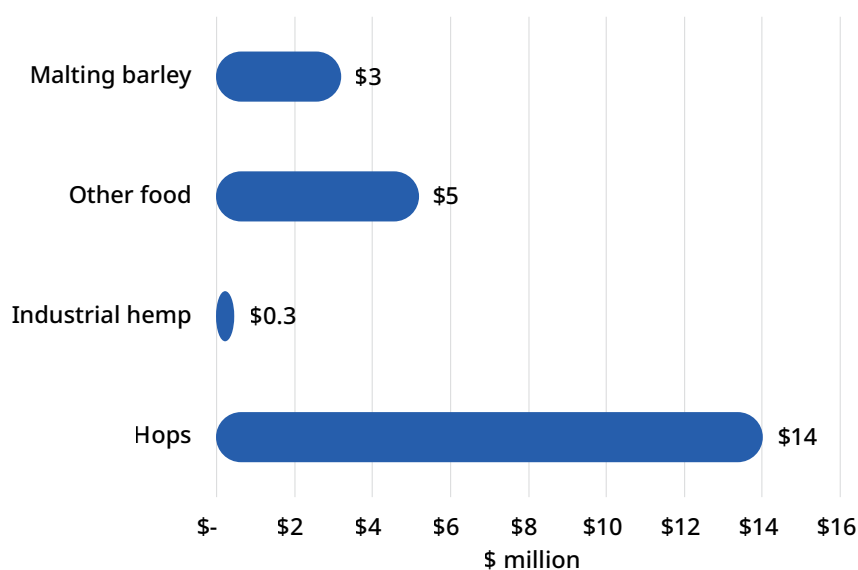
The field crops category covers all crops not included in the fruit, vegetable, or wine categories. It includes food products such as hops and industrial hemp, as well as non-food products such as poppies, fodder crops (including wheat), seed crops, cut flowers, pyrethrum, and essential oil crops. Some crops such as wheat, barley, industrial hemp, and canola are sold into both food and non-food markets.

Food field crops had a farm-gate value of \$22.8 million. Hops had a farm-gate value of \$14 million. Malting barley recorded a farm-gate value of \$3 million, reflecting a decrease driven mainly by lower farm-gate prices. The industrial hemp sector's farm gate value rose to \$0.3 million (\$0.2 million from food products and \$0.1 million from non-food products) with an increase in planting area.

The value of spirits reached \$39.5 million in 2023-24. Spirits also remained an important contributor to Tasmania's export performance, with \$4 million in exports for the year. Other field crops are primarily grown for the domestic market and therefore only make a modest contribution to Tasmania's total export value.

Field Crops ScoreCard		\$ million
<b>Food farm-gate value</b>		<b>22.8</b>
<b>Total farm-gate value</b>		<b>253.3</b>
<b>Processed food value</b>		<b>271.1</b>
Overseas Trade		
Food & commodity exports		42.3
Food & commodity imports		4.4
Net Interstate Trade		
Food & commodity exports		11.6
Food & commodity imports		144.7

Gross farm-gate value of food field crops  
- \$23 million



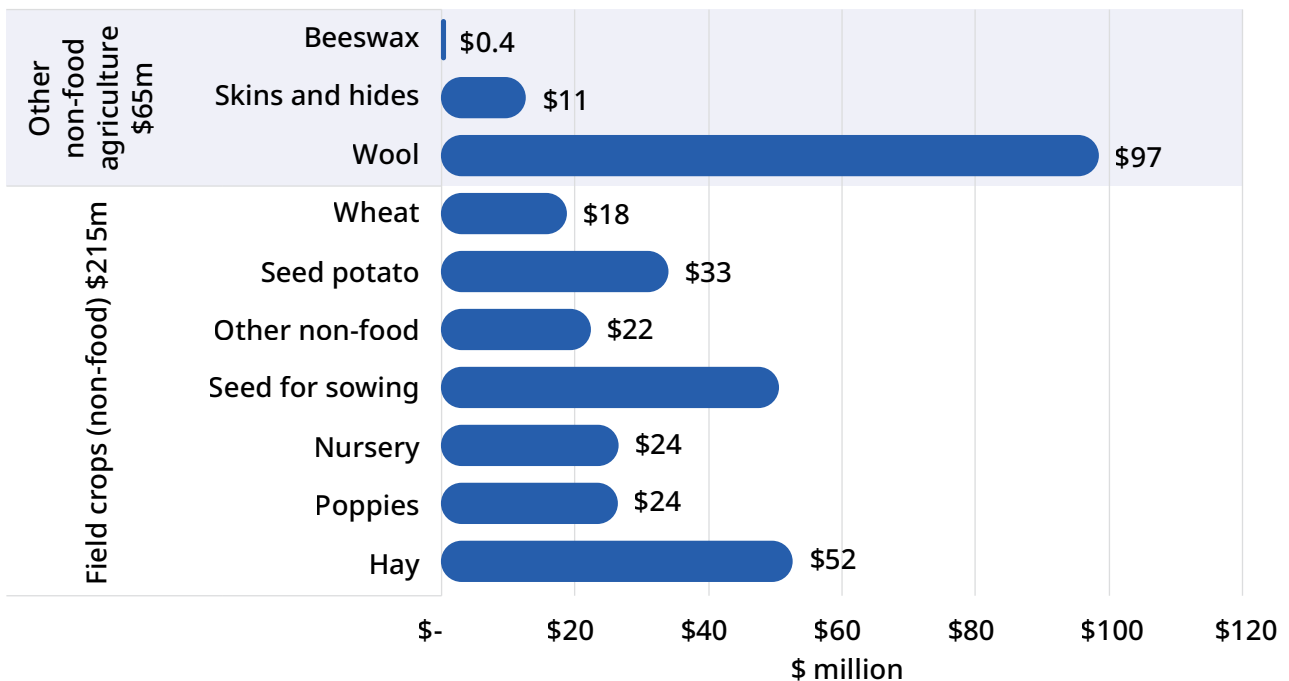
# Non-food agriculture

Non-food agriculture’s farm-gate value for 2023-24 was \$339 million, a 21 per cent increase from 2022-23. Non-food field crops had a farm-gate value of \$230 million, which included poppies (\$24 million), seed for sowing (\$48 million), seed potato (\$33 million), and wheat (\$18 million).

Poppies recorded an 84 per cent increase in farm-gate value from 2022-23, supported by a significant expansion in planting area and a modest rise in price as demand strengthened. The sector also benefitted from the International Narcotics Control Board increasing Australia’s allocation in response to higher global demand for alkaloid material.

Other non-food agriculture had a farm-gate value of \$109 million. Wool, skins and hides, and beeswax are included in other non-food agriculture. Wool had a farm-gate value of \$97 million in 2023-24. The substantial increase in reported value reflects the updated ABS methodology for estimating wool production volumes across the industry. The farm-gate value for beeswax was estimated at \$0.4 million, and skins and hides had a farm-gate value of \$11 million.

Gross farm-gate value of non-food agriculture - \$339 million



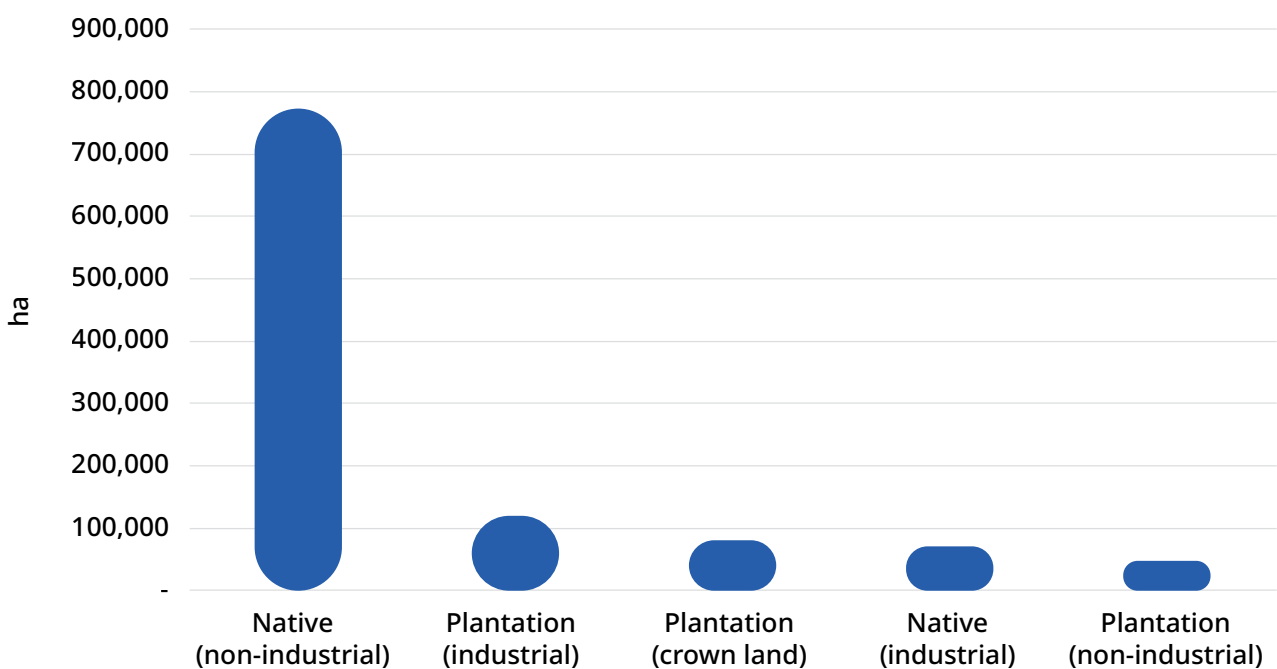
# Agroforestry

The total area of the private forest estate, which includes all the native forest and plantation forest on private land and on privately managed Crown Land, is 1.09 million hectares. There are 43,000 hectares of privately-owned, non-industrial plantation forest estate in Tasmania, the vast majority of which consists of agroforestry — trees that have been integrated into the farming landscape for enhanced productivity, profit, and conservation. The value of agroforestry at stumpage was estimated at \$6.9 million for 2023–24, with a mill-door value of \$14.8 million compared to \$75.8 million

in 2022-23. The moderation in value from previous years reflects a general reduction in private sector activity, particularly in farm forestry, which is influenced by the sector’s production cycle.

In 2023-24, agroforestry processed value was \$7 million, with an export value of \$62.8 million.

Privately owned or managed forest in Tasmania - 1.09 million hectares



# About the Scorecard

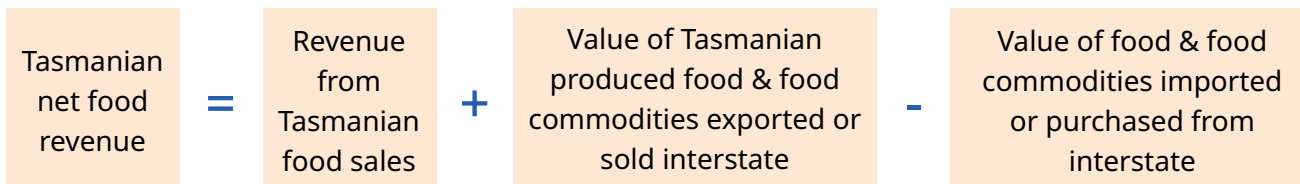
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Photograph:  
Studio Hubert | Grilling seafood

What is the net revenue of Tasmania's food, food agriculture and fishing industries? Given the importance of the sector to the State's economy, it might be expected there would be a precise answer.

Gross food revenue is the sum of food retailed and sold through food service in Tasmania, plus the value of Tasmanian produced food and food commodities sold interstate and overseas. Food and food commodities imported from interstate and overseas are subtracted from this figure to derive net food revenue:



Net food revenue cannot be readily calculated because two key pieces of data are not reported:

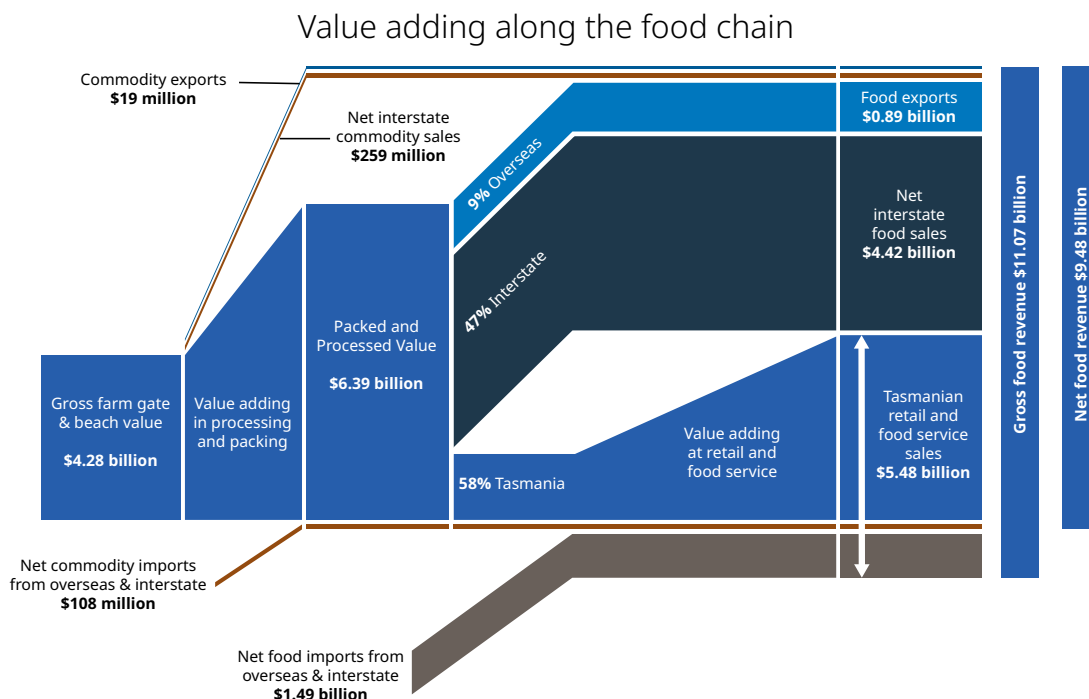
- the value of food processed and packed in Tasmania; and
- the value of interstate trade.

The ScoreCard uses the Food Industry ScoreCard methodology developed by the South Australian Department of Primary Industries and Regions, South Australia (PIRSA) to estimate packed and processed food value and the value of interstate trade allowing net food revenue to be calculated.

From 2023-24 changes to ABS agricultural data collection methods required closer collaboration with industry to ensure accurate value and volume estimates. Using ABS and ABARES gross value and volume data, supplemented with industry-supplied information and average wholesale prices, processed food value is calculated for around 60 food categories to derive the total packed and processed value of Tasmanian produced food.

Using this information along with export and import data, food retail and food service sales, food consumption data and the Tasmanian population statistics reported by ABS, along with data sourced from industry, it is possible to calculate:

**Net interstate trade = (Tasmanian production + imports) - (Tasmanian consumption + exports)**



These calculations are undertaken for more than 60 individual food categories and are combined with retail data to derive the ScoreCard summary table on page 16. The values shown in the right hand 'Total' column of the table on page 16 are depicted in the figure above.

Starting at the left-hand side of the figure, the gross value of primary food production at the farm-gate and beach is shown as \$4.28 billion. \$278 million worth of this production is sold interstate or overseas as commodities.<sup>19</sup> For example, sheep and cattle are sold interstate and hops are exported internationally. An estimated net \$108 million worth of food commodities are also purchased from interstate and overseas as inputs to food processing.

Moving across the figure to the right, the processed and packed value is calculated to be \$6.39 billion. This is the wholesale value of food or beverage products when they leave the Tasmanian processor.

The next step involves determining the market destinations of the processed food. The quantity of food required to meet local (Tasmanian) demand is estimated using per capita food consumption statistics from ABS and ABARES. It is important to remember this is not the actual quantity of Tasmanian produced food sold in Tasmania — it provides an estimate of the magnitude of the production surplus in order to calculate net interstate sales.

The quantity and value of international food exports is derived from international trade data purchased from ABS and the value is shown in the figure as \$0.86 billion. The net quantity and wholesale value of interstate trade is calculated using the equation above. The value of net interstate food sales is \$4.42 billion.

Retail and food service sales data reported by ABS provide the value of Tasmanian food sales of \$5.48 billion. The quantity of food sourced from Tasmania is used to determine the quantity sourced from outside the State. These calculations are reconciled with a variety of data sources, including household consumption statistics and quantities of freight shipped across Bass Strait.

At the right of the figure, gross food revenue is the sum of Tasmanian food sales, net interstate sales of food and commodities and international food and commodity exports. This gives a gross food revenue of \$11.07 billion.

Commodity and food purchases from interstate and overseas are shown in grey at the bottom of the figure. The quantity and value of overseas imports derived from ABS trade data are known to be worth \$44 million. The remaining shortfall in food purchased in Tasmania is sourced from interstate, the net value of which is calculated to be \$1.44 billion. The combined value of net interstate food purchases and overseas imports is shown as \$1.49 billion. Commodity and food imports are subtracted from the gross net revenue to give an estimated net revenue of \$9.48 billion.

Net food revenue is not the same as the value-added contribution to gross state product (i.e. to the economy). In particular, the value of intermediate inputs to production purchased from elsewhere (e.g. fuel, energy, plant, and equipment etc.) have not been subtracted from this value. However, the ScoreCard does provide an indication of trends in food production and provides metrics that are key performance indicators for the Tasmanian Government and measure progress against the Tasmanian Agri-Food Plan.

<sup>19</sup> Contributing values may not sum to totals due to rounding.

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.

# Glossary

**Agri-food** production means combined fisheries and food and non-food agricultural production.

**Agroforestry** describes the use of trees in the farming landscape, and for the purposes of the ScoreCard is defined as private, non-industrial, plantation forests.

**Beach value** means the gross value of fisheries and aquaculture products at the point of production. It is determined by the price of the product realised in a wholesale market.

**Commodity** means an unprocessed or partially processed good that is traded in a market.

**EVAO** is estimated value of agricultural operations.

**Food** means a product that is ready for human consumption. It may be fresh or processed and includes beverages.

**Food agricultural production** is agricultural production consumed as or manufactured into food and beverage products for human consumption.

**Food farm-gate value** means the gross farm gate value of agricultural production that is consumed as or manufactured into food and beverages for human consumption. For example, in beef production the farm gate value of hides is excluded from the total farm-gate value of production to obtain the food farm-gate value.

**Farm business** means a business with an estimated value of agricultural operations (EVAO) of \$40,000 or more in relation to ABS data.

**Farm-gate value** means the gross value of agricultural products (food or non-food) at the point of production. It is determined by the price of the product realised in a wholesale market.

**Gross food revenue** is the sum of food retailed and sold through food service in Tasmania and the value of Tasmania produced food and food commodities sold interstate and overseas.

**Mill-door value** refers to the value of harvested wood products at the point of delivery to the mill for processing.

**NRE Tas** is the Tasmanian Department of Natural Resources and Environment Tasmania.

**Net food revenue** is the gross food revenue less the value of food commodities and foods purchased from interstate and overseas.

**Non-food agricultural production** is all agricultural production other than that consumed as or manufactured into food and beverage products for human consumption. It includes crops for stock-feed, wool, hides and skins, crops for oil extraction, pyrethrum, and poppies.

**Non-industrial** private forest owners include farmers, individuals and family or investment companies who own native or plantation forests and usually sell their wood for processing by other parties. By contrast, 'industrial' private forest owners are companies that own native or plantation forestry and arrange for the processing of their own timber.

**Nominal value** means the number value. In the context of monetary values, it is the historical dollar value which has not been adjusted for inflation. Nominal growth refers to the increase in value without any adjustment for inflation.

**Production surplus** is the quantity (or percentage) of Tasmanian production in excess of the total amount required to meet Tasmanian consumption.

**Real growth** refers to the change in value after adjustment for inflation. Real growth only occurs (is positive) if the increase in nominal value is greater than any increase due to inflation.

**Real value** is the dollar value adjusted to allow for inflation. Real values in this publication refer to values expressed in 2022–23 dollars.

**Stumpage** refers to the net price received by the farmer for standing trees after transport and harvest costs are subtracted from the mill-door price (see *Mill-door value*).

## Reference and sources

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ABS, Value of Agricultural Commodities

Produced, cat. No. 7503.0

ABS, Apparent consumption of Foodstuffs,  
cat. no. 4306.0

ABS, Household expenditure survey,  
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ABS, Australian Demographic Statistics,  
cat. no. 3101.0

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Australia, cat no. 4307.0

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Broadacre Crops](#)

ABS (2023-24), [Australian Agriculture:  
Horticulture](#)

ABS (June 2024), [Livestock Products, Australia](#)

ABS (2022-23), previously cat. no. 4610.0 [Water  
Account, Australia](#)

Trade data (international food exports and  
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[Department of State Growth website](#)  
[www.abs.gov.au](http://www.abs.gov.au)

### **Australian Bureau of Agricultural and Resource Economics and Sciences (ABARES)**

Australian Commodity Statistics

Australian Fisheries Statistics

[www.agriculture.gov.au/abares](http://www.agriculture.gov.au/abares)

### **Australian Bureau of Meteorology**

[www.bom.gov.au](http://www.bom.gov.au)

### **Australian Department of Agriculture**

Australian Food Statistics (now discontinued)

[www.agriculture.gov.au](http://www.agriculture.gov.au)

### **Australian Taxation Office**

Taxation Statistics Branch

[www.ato.gov.au](http://www.ato.gov.au)

### **Australian Wool Innovation**

Weekly price reports

[www.wool.com](http://www.wool.com)

### **Horticulture Innovation Australia (Hort Innovation))**

Australian Horticulture Statistics Handbook

[www.horticulture.com.au](http://www.horticulture.com.au)

### **Meat & Livestock Australia (MLA)**

MLA Market Information Statistics Database

[www.mla.com.au](http://www.mla.com.au)

### **Reserve Bank of Australia (RBA)**

[www.rba.gov.au](http://www.rba.gov.au)

### **Rural Industries Research and Development Corporation**

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[www.agrifutures.com.au](http://www.agrifutures.com.au)

### **Sprout Tasmania**

Small producer survey

[www.sprout.org.au](http://www.sprout.org.au)

### **Tourism Tasmania**

Tasmanian Visitor Survey

[www.tourismtasmania.com.au](http://www.tourismtasmania.com.au)

### **Wine Tasmania**

2024 Tasmanian wine grape vintage results

Infographic – Tasmania's wine sector

[www.winetasmania.com.au](http://www.winetasmania.com.au)

### **Wine Australia**

National Vintage Report 2024

[www.wineaustralia.com](http://www.wineaustralia.com)

# Data Appendix

Table A1: Farm-gate value, volume and price change of key commodities;  
2023-24 vs 2022-23

	2023-24 (\$ millions)	2022-23 (millions)	Change in value (%)	Change in volume (%)	Change in price (%)
Chicken & pork	56	55	10%	25%	-13%
Lamb & mutton	166	143	16%	15%	1%
Beef	445	373	20%	19%	<1%
Total meat	667	573	17%	18%	-2%
Hides & skins	12	11	5%	18%	-11%
Wool*	97	n/a	n/a	n/a	n/a
Honey	14	11	28%	15%	11%
Eggs	15	15	0%	-2%	2%
Dairy	678	684	-1%	3%	-4%
Nuts	10	6	76%	24%	42%
Cherries	102	66	55%	71%	-9%
Apples	70	68	2%	0%	2%
Berries*	216	n/a	n/a	n/a	n/a
Total fruit	401	223	80%	31%	37%
Carrots	39	43	-8%	-1%	-8%
Onions	65	74	-13%	7%	-19%
Salads	70	75	-7%	4%	-10%
Potatoes	346	324	7%	5%	2%
Total vegetables	630	609	3%	4%	-1%
Total wild fisheries	125	137	-9%	-30%	31%
Total aquaculture	1327	1419	-7%	-6%	<1%
Oysters	37	43	-14%	-6%	-8%
Rock lobster	66	55	20%	1%	19%
Abalone	54	55	-1%	8%	-8%
Salmonids	1281	1366	-6%	-6%	0%
Total seafood	1452	1556	-7%	-9%	2%
Wine	62	42	48%	36%	9%

\*Due to updates in the data 2023-24 cannot be compared to 2022-23

Table A2: Production surplus of key commodities  
and market destinations 2023-24

	Production surplus (%)	Interstate sales (\$ million)	Export value (\$ million)
Beef	51	277	181
Lamb	60	20	33
Mutton	95	0	20
Milk powders	97	196	82
Cheese	83	204	88
Milk, cream & yoghurt	24	15	7
Cherries	95	63	48
Apples	81	50	0
Berries	87	221	0.1
Potatoes	88	700	<1
Carrots	91	38	2
Onions	93	33	24
Salmonids	98	1274	199
Abalone	98	30	47
Rock lobster	89	46	13
Oysters	91	43	0.2
Premium wine	82	135	4

Table A3: Interstate livestock import and export value and volume 2023-24

	Cattle	Sheep
Value to Tas (\$ m)	27.9	1.6
Value from Tas (\$ m)	167.0	88.3
Volume to Tas (000s head)	15.1	10.0
Volume from Tas (000s head)	90.6	721.3

Table A4: Breakdown of contributors to export value 2023-24

	Value (\$ million)	Nominal growth 2023-24 (%)	Real 5-year growth rate (%)
Seafood exports	292	-25.1	-18.6
Food agriculture and processed food exports	532	-6.1	-31
Total food exports	824	-13.9	-27.2
Non-food agricultural exports	81	55.8	-46
Total agri-food exports	906	-5.3	-29.2

# Contact

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BL12520

Photograph:  
Moon Cheese Studio | Onion harvest