

Tasmanian Agri-Food ScoreCard

2022-23



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Cover Photograph:
Samuel Shelley | Potatoes

Highlights

Key facts

- \$2.46 billion**  **5% agriculture farm-gate value**
- \$4.02 billion**  **10% agri-food gross value**
- \$6.02 billion**  **7% packed and processed food value**
- \$957 million**  **1% overseas food exports**

11 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 an exceptional 2022–23. The farm-gate value of the sector rose to \$2.46 billion, a 5 per cent increase on the previous year. The State's gross agri-food value increased to \$4.02 billion during 2022–23. Favourable seasonal conditions during spring and cool temperatures leading into the summer enabled ample feed which were crucial to the continued strong performance of pasture-based industries, which accounted for about half the farm-gate value.

High milk, salmonids, and vegetable prices underpinned the growth in farm-gate value of agriculture and total packed and processed food value (\$6.02 billion). Moderation of export prices and reduced demand for select commodities decreased food exports to \$957

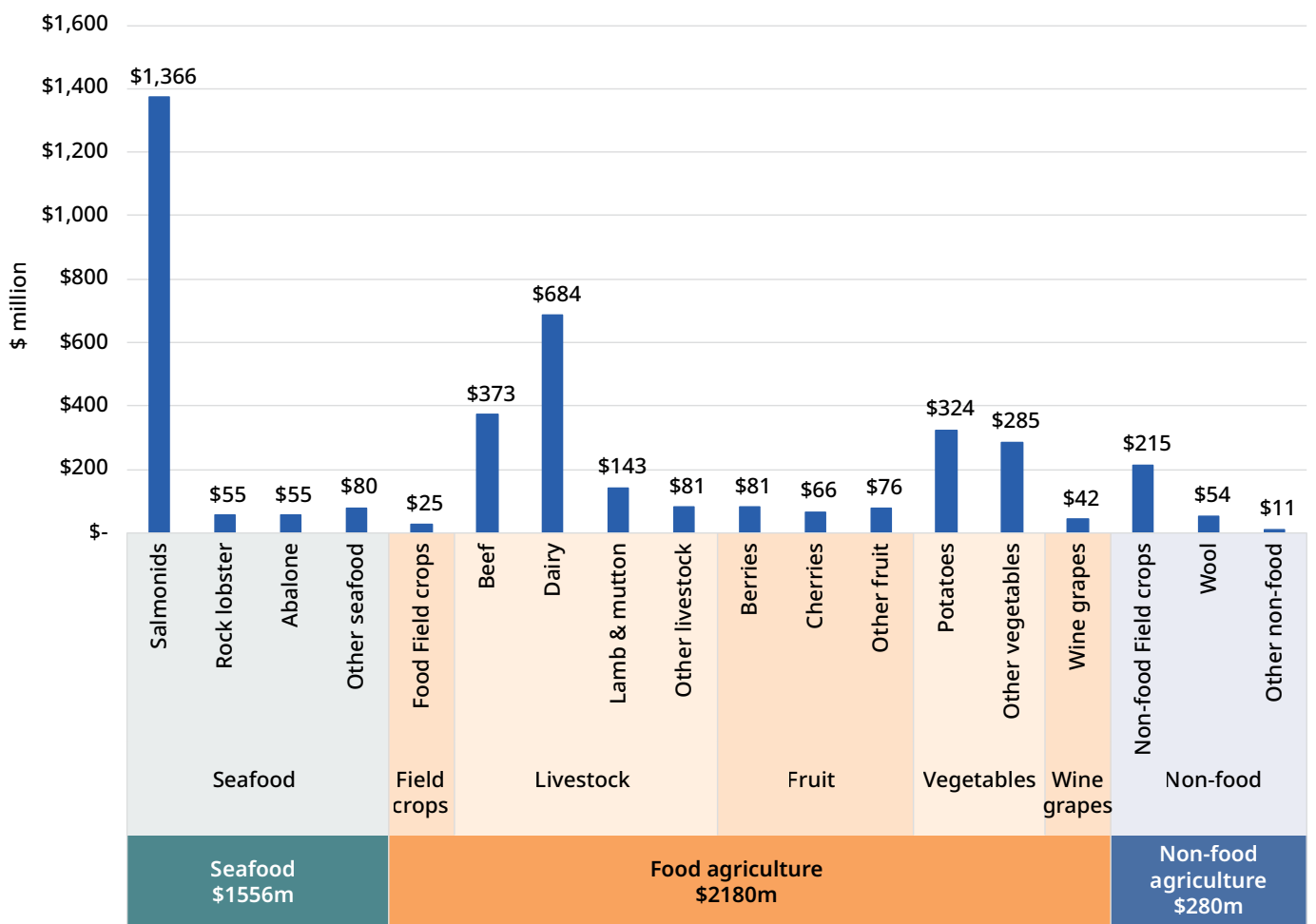
million from \$968 million in 2021–22. During 2022-23, the beach value of aquaculture continued its strong growth reaching \$1.56 billion up by 19 per cent.

The **Tasmanian Agri-Food ScoreCard** measures and reports on the value and final market destinations of the State's agriculture, food, and beverage production. The approach used to estimate the gross value of agriculture was updated and improved in 2018–19 to utilise the best available data, meaning the gross value of agriculture reported in the ScoreCard is not equal to the value reported by the Australian Bureau of Statistics (ABS). The ABS is in the process of updating its methodology of generating agricultural statistics with greater use of industry data. This change is explained further on page 4.

Gross Farm Gate Value of Agri-food

Tasmania's agri-food industry consists of several sectors which produce vastly different agri-food products. Meat, dairy, seafood, fruit, wine, vegetables, field crops, livestock products, agroforestry and agriculturally produced non-food products sectors (e.g. pasture seeds, animal feed and non-food grade seaweed) make up the agri-food industry.

Gross value of primary production at the farm gate or beach - \$4017 million



Changes to the ABS Agricultural Statistics Methodology

The ABS has changed its methodology from surveying farmers to using public and private data to create agri-food statistics.

Primary Production


Agri-food gross value


\$4.02 billion¹  **10%**


AQUATIC

Seafood
\$1.56 billion
 **19%**

LAND-BASED

Total agriculture gross value
\$2.46 billion  **5%**

Food agriculture
\$2.18 billion
 **8%**

Non-food agriculture
\$0.28 billion
 **9%**

Agroforestry

Agroforestry
\$0.08 billion
 **1%**

Value Adding


Food value after packing and processing
\$6.02 billion  **7%**

Initial Market Destinations and Revenue

International direct exports
\$0.96 billion  **1%**

Net interstate sales
\$4.56 billion  **27%**

Retail & food service sales in Tas
\$5.39 billion  **19%**

Gross food revenue
\$11.04 billion  **18%**

LESS FOOD IMPORTS

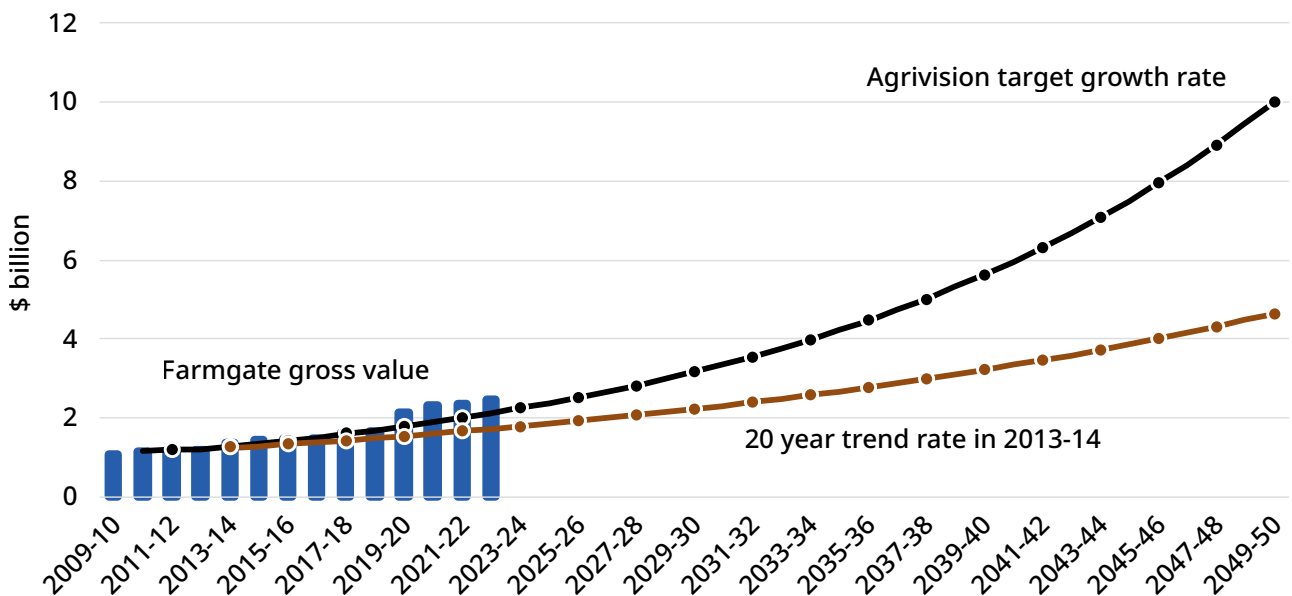
Net food revenue
\$8.88 billion  **11%**

¹ Percentage changes are compared against 2021–22. Agri-food production means combined fisheries and food and non-food agricultural production.

AgriVision Target 2050

The Tasmanian Government and the State's agricultural industries have a target to grow the farm-gate value of Tasmanian agriculture to \$10 billion by 2050. Strong progress towards this target continues, with the gross value of agriculture reaching \$2.46 billion during 2022–23. Seafood and Agroforestry are not included in the AgriVision 2050 Target, but these sectors contributed a further \$1.6 billion to the Tasmanian agri-food sector.

Gross farm gate value of food and non food agriculture

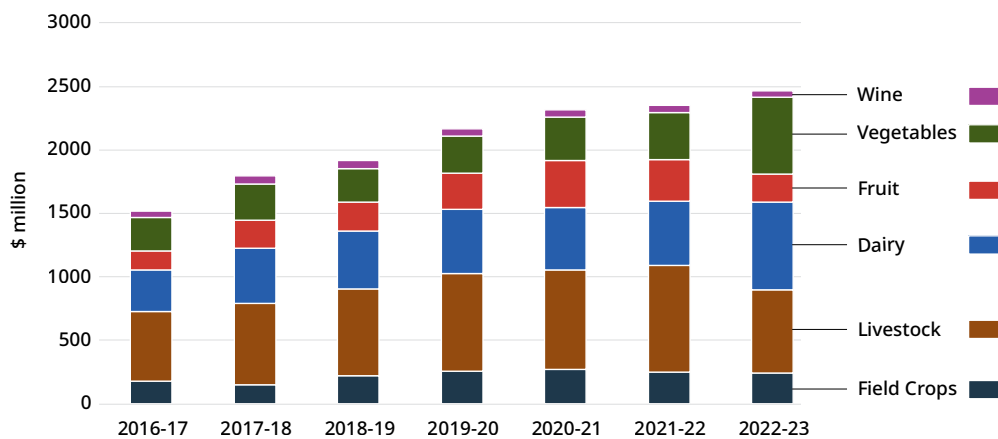


Reaching the 2050 target will require the sector to grow 5.9 per cent per annum compounded. Over the last five years the sector has grown by 8 per cent per annum compounded. This is well above the average national inflation rate of the last five years of 3.2 per cent, and Tasmania's nominal GSP for 2022-23 growth rate of 1.1 per cent. Access to irrigation water, increasing market access, appealing to the premium market, good domestic and international prices, and on-farm productivity improvements have supported the agri-food industry's strong performance.

Agricultural Production

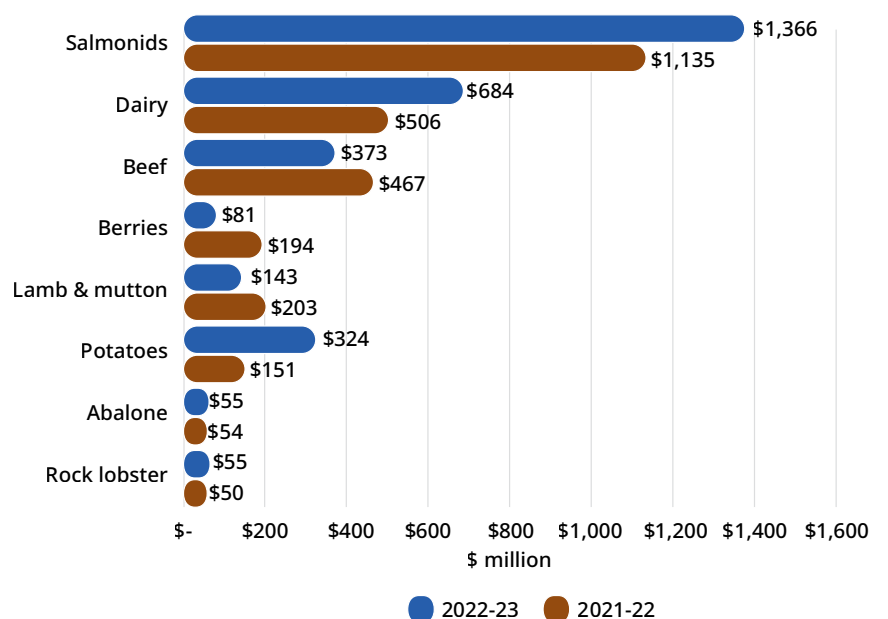
Agricultural production comprises outputs from food agriculture (products intended for human consumption) and non-food agriculture (e.g. wool, poppies and animal feeds). During 2022-23, the gross farm gate value of Tasmania's agricultural production rose by 5 per cent over the previous 12 months to a total of \$2.46 billion.

Gross farm gate value of food and non food agriculture



Salmonids remained the highest-value food product, with a beach value of \$1.4 billion. Dairy remained the highest-value agricultural category increasing to \$684 million at the farm gate due to higher farm-gate milk price supported by a modest increase in volume. Red meat was the next highest agricultural category despite a reduction in sheep and beef prices. Potatoes had a substantial increase in value due to undersupply in the market having a positive effect on price.

Key contributors to gross food value



Seasonal conditions



*Photograph:
Jess Oakenfull | Cheese Wheel*

A drier than usual winter was followed by good rains in August and significant flooding in October. Spring rainfall was above average across the north and the wettest on record for much of the East Coast. Floods in northern Tasmania in October were the most significant in the region since June 2016. In contrast, rainfall was below average for the south-west of the State. Summer rainfall was 31 per cent below average for Tasmania overall but also the

highest since 2020-21. Autumn rainfall was 7 per cent below average for Tasmania. Daytime and nighttime temperatures were warmer than average, 1.05C above average, across the State and the 2022-23 summer was among the driest 10 per cent of all summers since 1900 for the western half of Tasmania. The summer months saw hot and windy conditions, with crops requiring additional sustained moisture from irrigation.

Spring and Summer months

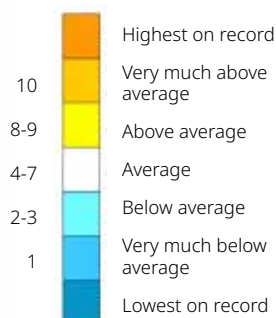
Jul-Aug: July was below average for the whole State. August rainfall was 28 per cent above average.

Sep-Nov: North coast had below average rainfall with warm temperatures. October had warm and wet conditions with wet conditions in November causing flooding in select areas.

Dec-Feb: Dry and hot conditions were experienced during summer with February rainfalls being average.

Mean temperature deciles

1 July to 30 September 2022

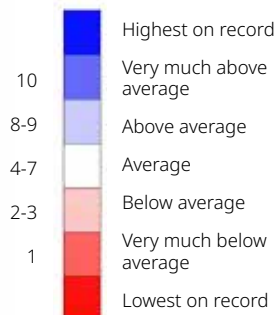
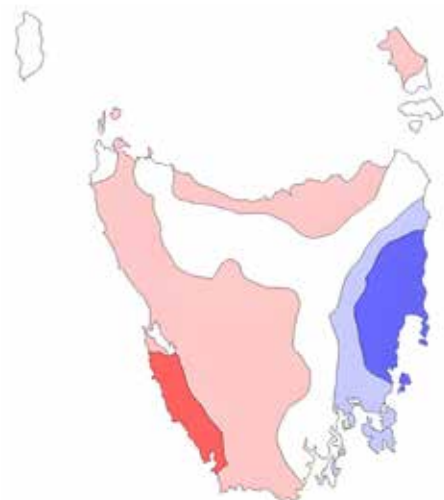


1 October to 31 December 2022

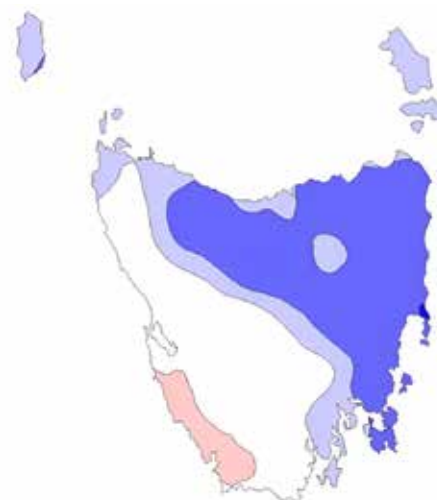


Tasmanian rainfall deciles

1 July to 30 September 2022



1 October to 31 December 2022



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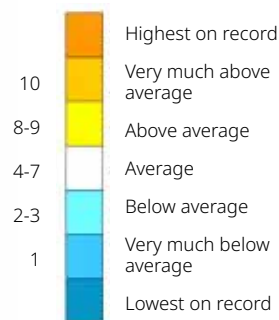
Autumn and Winter months

Mar-May: Average rainfall in March. Below average rainfall across the north-east for May. Western and Southern Tasmania were drier in April.

June: Above average rainfall in the north-west and north-east. Rainfall was 45 per cent above average across Tasmania.

Mean temperature deciles

1 January to 31 March 2023

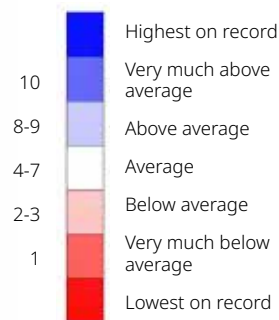


1 April to 30 June 2023



Tasmanian rainfall deciles

1 January to 31 March 2023



1 April to 30 June 2023



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Economic overview

In 2022-23, the global economy was dominated by headwinds (factors that lead to a decrease in value or growth of the economy). Geo-political tensions kept prices of key inputs, particularly diesel, relatively high. Inflation across the global economy also weighed heavily on global GDP as central banks raised interest rates to tame inflationary pressures. Despite economic headwinds, there were positives. Increased prices for grains helped support cereal producer bottom lines and international freight costs returned to pre-COVID levels.

In 2022-23, the exchange rate was favourable for Tasmanian producers who are exporters. The AUD/USD exchange rate average for 2022-23 was \$0.67 and declined by 8 per cent compared to 2021-22, due to a weaker global economy and geopolitical tensions pushing investors to put their money in 'safer currencies' like the US dollar. The weaker Australian dollar kept Tasmanian exports competitive in our main export markets with the Trade Weighted Index averaging 61.59 over the year, a small decline of 0.2 per cent compared to 2021-22. Terms of Trade were not positive with the price paid for inputs increasing whilst prices of outputs decreased, which put cost pressures on Tasmanian producers.

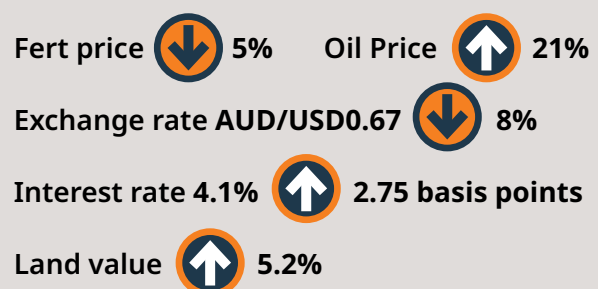
Inflation and cost-of-living played a large role in shaping the Australian economy. Peak inflation in 2022-23 was 7.8 per cent in the December 2022 quarter. The Reserve Bank of Australia increased the cash rate from 1.35 per cent to 4.10 per cent over the course of the 2022-23 financial year. Inflationary pressures and higher interest rates did not negatively impact retail turnover in food retailing and food services,

which rose 6.1 per cent and 10.2 per cent compared to the previous June. Overall, retail turnover rose 3 per cent on the back of the food retailing and food services sector. In summary, the domestic market was robust for Tasmanian producers who depend on the domestic market to generate revenue from their produce.

Business confidence was generally stronger in 2022-23, with the Rabobank Rural Confidence Survey showing high levels of confidence by Tasmanian producers in all four quarters of 2022-23. Agricultural land prices also increased by 5.2 per cent year-on-year in 2023 which also supported business confidence and the willingness to invest in Tasmanian agriculture.

Access to labour eased as COVID travel restrictions were fully wound back not only in Australia but globally as well. Migration data showed the number of working holiday visa holders increased to 49,100 people in 2022-23². The PALM scheme continued to be a vital source of labour for Tasmanian producers, particularly the horticulture sector. High job vacancy numbers and a low unemployment rate of 4.0 per cent showed 2022-23 had a tight labour market which continued to create challenges for sourcing local workers.

Key Stats



² <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 also may 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.

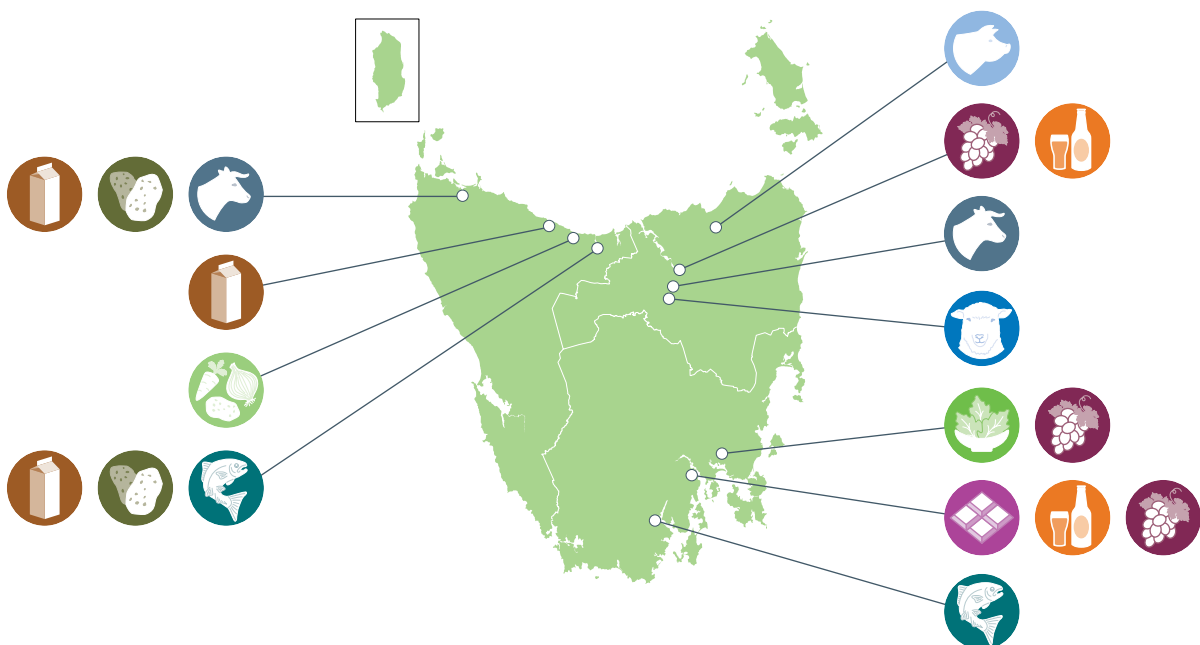
Processing increased the value of agri-food gross value to a wholesale value of \$6.02 billion during 2022-23. Before the food was sold through retail and food service outlets, further value was added. The value added resulted in the net food revenue reaching \$8.88 billion in 2022-23.

Frozen potato product volume increased on the back of increased production; however, undersupply was still significant nationally. Strong demand for cattle increased the processed value of beef by 10 per cent. Salmonids continued to be the highest processed food with a 20 per cent increase in value.

Key contributors to processed value

	2022-23 (\$ millions)	2021-22 (\$ millions)	Change in value (%)	Change in volume (%)	Change in price (%)
Beer	\$168	\$179	-6%	-1%	-6%
Potatoes	\$463	\$430	8%	8%	0%
Beef	\$583	\$532	10%	3%	7%
Chocolate	\$828	\$679	22%	22%	0%
Dairy	\$876	\$892	-2%	0%	-2%
Salmonids	\$1,776	\$1,475	20%	-4%	26%

Major food processing locations



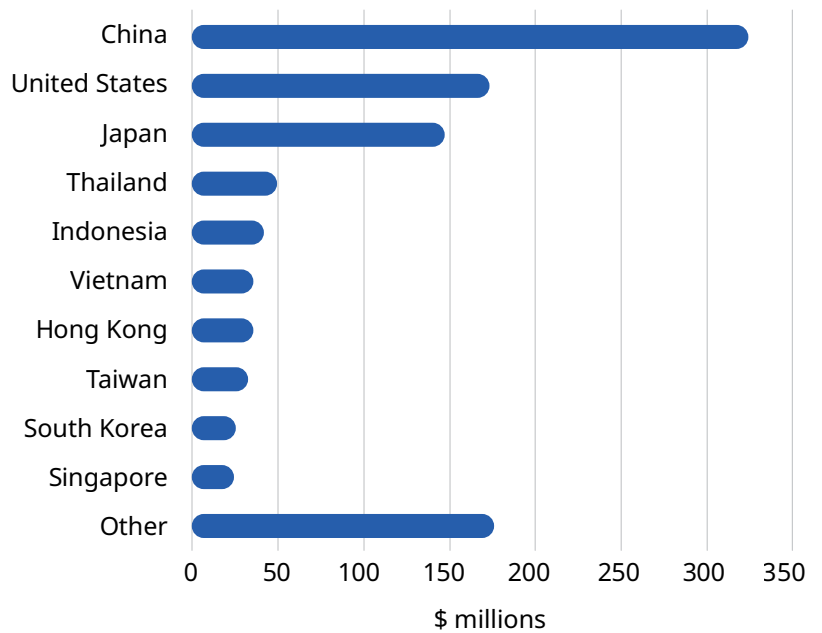
Exports

Tasmanian agri-food exports for 2022-23 totalled \$957 million, a decrease of 1 per cent from 2021-22 due to reduced export value of seafood and dairy. Limited national surplus milk caused the exportable volume to fall. Increased cost-of-living reduced seafood demand. Higher export value of fruit and vegetables supported Tasmanian agri-food exports. Over the last five years, Tasmania's food exports have grown by 5.6 per cent per annum, nominally, and 2 per cent in real terms.

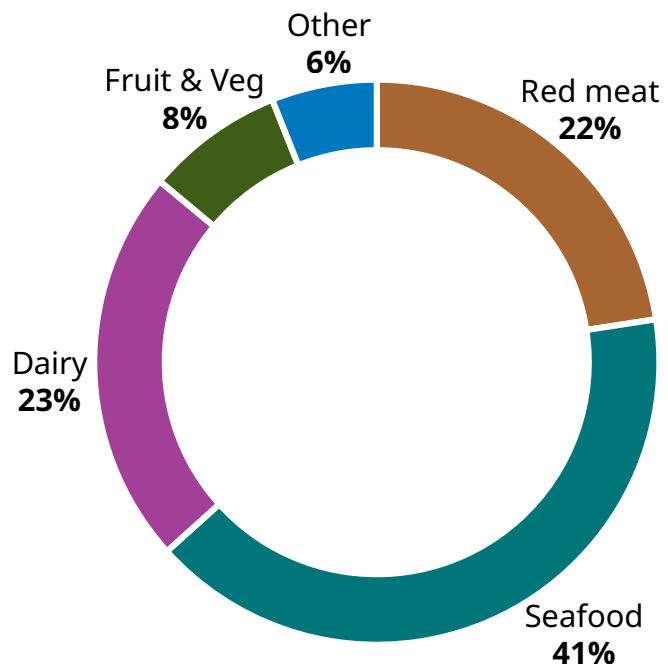
Tasmanian exports went to 81 countries. The top 5 key export markets were China (\$321 million), the United States of America (\$170 million), Japan (\$144 million), Thailand (\$46 million) and Indonesia (\$38 million). China accounted for 34 per cent of Tasmania's food exports. Salmonids was Tasmania's top food export totalling \$295 million. Dairy was next highest, with exports totalling \$218 million and followed by red meat reaching \$216 million.

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

Tasmanian Food Export Destinations



Export Commodities Share



Key stats

81 countries

Value \$957 million

5-year trend  **2%**

Interstate trade

As well as exporting overseas, for most categories of food produced in Tasmania, there is significant interstate trade into and out of Tasmania. The ScoreCard reports the net value of interstate food trade, which is the value of Tasmanian produced food sold interstate less the value of food purchased from interstate.

Salmonids are the highest value interstate trade category worth \$1.3 billion in 2022-23. Tasmanian dairy products account for more than 12 per cent of net interstate sales. The volume of interstate beef increased 10 per cent which resulted in a change of 16 per cent in the interstate sales value. Undersupply of potatoes resulted in a 10 per cent change in interstate sales.

Key contributors to net interstate food sales

	2022-23 (\$ millions)	2021-22 (\$ millions)	Change in value (%)	Change in volume (%)	Change in price (%)
Beef	\$261	\$225	16%	10%	5%
Berries	\$104	\$201	-48%	-61%	34%
Potatoes	\$354	\$320	10%	10%	1%
Dairy	\$545	\$537	2%	18%	-14%
Chocolate	\$878	\$714	23%	23%	0%
Salmonids	\$1,279	\$1,059	21%	-4%	26%

Key stats

Net commodities to interstate \$166 million

Net commodities from interstate \$226 million

Net food purchases from interstate \$1,800 million

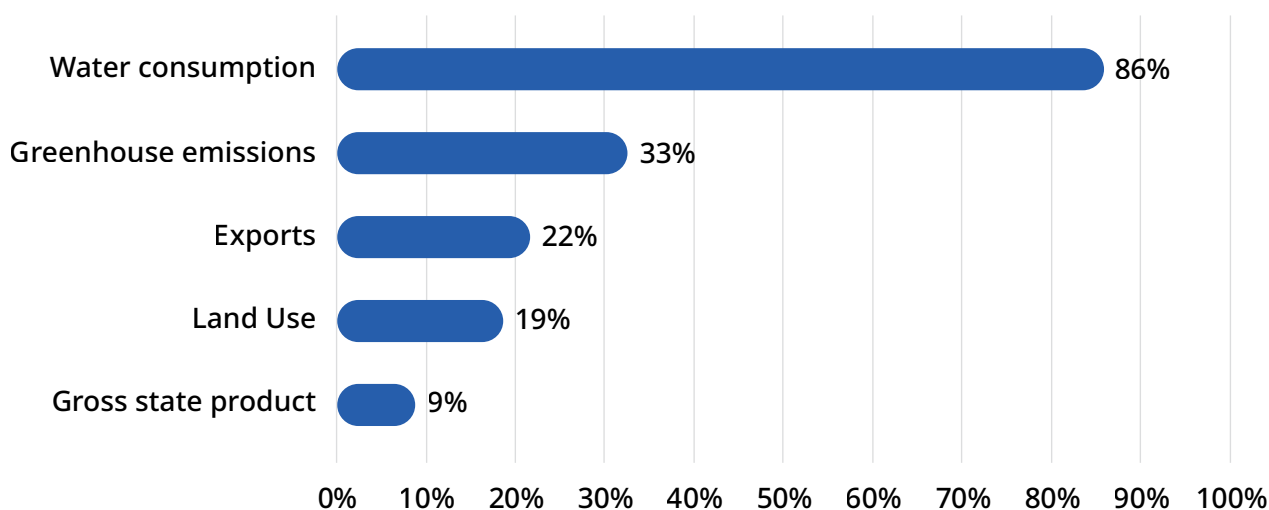
Productivity and Sustainability

Tasmanian agriculture contributed approximately 9 per cent to the State's Gross State Product (GSP)³, making it one of the top five contributors to the Tasmanian economy. The value of food agricultural exports made up 22 per cent of the state's total exports.

Water is an essential input, and the Tasmanian agricultural sector accounted for 86 per cent of Tasmania's water consumption in 2021-22 (the latest available data⁴). Comparatively,

Australian agriculture consumes 74 per cent of water supplied. Farmers are important land managers, responsible for significant carbon stores in soils and vegetation. However, the emissions from livestock, manure management and the application of soil conditioners and fertilisers make agriculture Tasmania's largest emitting sector. The agriculture sector currently makes up one third of our total emissions, excluding the Land Use, Land Use Change and Forestry (LULUCF) sector⁵.

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 2020

Producers used 57GL of irrigated water delivered by Tasmanian Irrigation during the 2022-23, a 7 per cent decrease from 2021-22. Irrigated water complemented rainfall water during key stages of crop and pasture growth which supported the yields and productivity of the agricultural sector.

³ Includes agriculture, fisheries, and forestry.

⁴ Includes agriculture, aquaculture, forestry and logging, fishing, hunting and trapping; and agriculture, forestry and fishing support services.

⁵ 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.

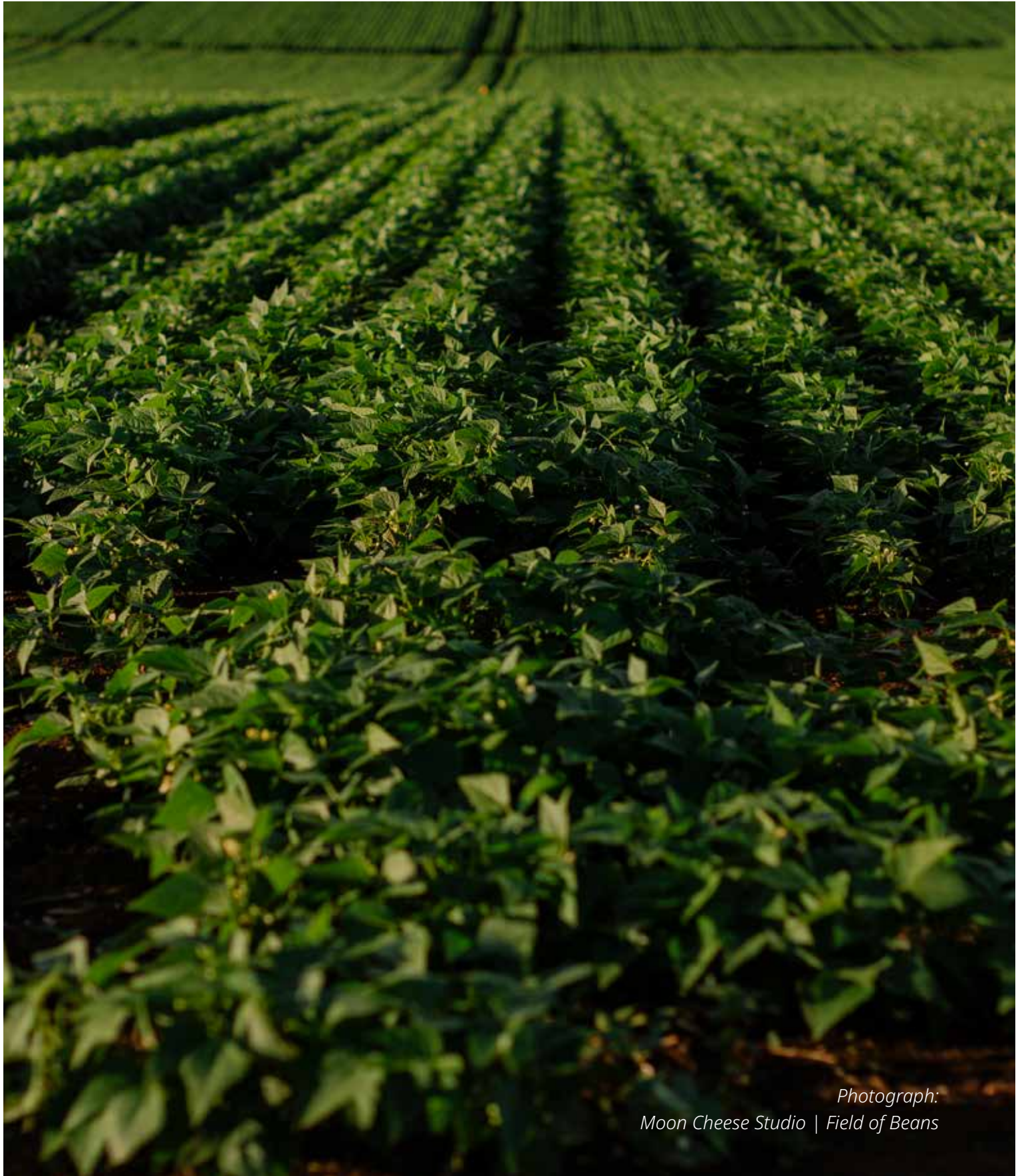
Scorecard Summary

ScoreCard Summary 2022–23 (\$ million)

	Field crops	Livestock	Dairy	Fruit	Vegetables	Seafood	Wine	Chocolate	Total ⁶
Food (farm-gate/beach value)	25.4	596.2	684.4	222.9	609.2	1,556.2	41.8	0.0	3,736.1
Total farm-gate/beach value	240.2	661.6	684.4	222.9	609.2	1,556.2	41.8	0.0	4,016.3
Food (processed and packed value)	278.5	819.8	876.0	295.0	783.7	2,017.4	118.7	828.0	6,016.9
Overseas trade									
Commodity exports	37.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	37.5
Commodity imports	0.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.5
Food exports	2.7	219.3	217.6	50.5	25.9	394.0	4.2	0.5	919.2
Food imports	44.4	0.2	0.0	7.2	8.0	73.5	0.5	0.0	133.8
Net interstate trade									
Net commodity exports	0.0	165.1	0.0	0.0	0.0	0.0	0.4	0.0	165.6
Net commodity imports	129.1	28.0	0.0	0.0	0.0	0.0	0.0	68.7	225.7
Net food exports	10.5	287.2	545.0	181.4	558.7	2005.6	67.2	878.2	4,533.8
Net food imports	64.8	140.3	0.0	105.2	17.3	26.0	83.5	0.0	1,800.2
Tasmanian food sales									
Retail sales									3,893.2
Food service sales									1,495.1
Net food revenue									8,884.2
Gross food revenue									11,044.4

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

Sector summaries



*Photograph:
Moon Cheese Studio | Field of Beans*

Meat

The farm gate value of the beef sector decreased by 20 per cent to \$375 million in 2022-23 due to softening prices. Beef exports, however, increased 2 per cent to reach a value of \$189 million in 2022-23. Beef exports accounted for 87 per cent of the total meat export value. Higher global prices supported the export value despite Tasmanian producers sending less beef overseas. A supply gap created by reduced beef supply from the USA and Brazil caused export prices to increase.

Sheep and lamb farm gate value decreased 30 per cent to \$143 million in 2022/23 because of reduced prices. Over 2022-23, sheep and lamb prices decreased by 15 per cent due to weaker demand and a high level of stock available at a national level. Though the volume of Tasmanian sheep and lamb processed was 17 per cent lower in 2022-23, higher national stock levels drove saleyard prices down.

Pig meat had a farm gate value of \$7.4 million, a 5 per cent increase in 2022-23. Chicken meat's farm gate value was \$48 million, which reflects a less than 1 per cent decrease in value from 2021-22.

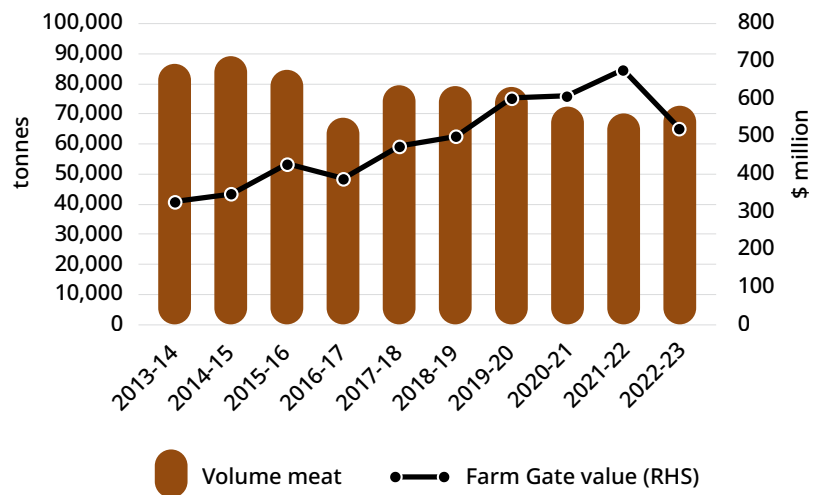
Cattle and sheep movements are vital for the meat sector. \$25 million in cattle and \$3 million in sheep were moved to Tasmania and \$78 million in cattle and \$87 million in sheep were moved from Tasmania.

Production surplus supplies the interstate and international markets with 55 per cent of beef, 50 per cent of lamb, and 88 per cent of mutton produced.

The five-year trend of the red meat sector has been a nominal growth rate of 2 per cent. Strong livestock prices, and investment have been contributors to the sector's medium-term performance.

Meat ScoreCard	\$ million
Food farm gate value	598.3
Processed food value	819.8
Overseas Trade	
Food exports	219.3
Food imports	0.2
Net Interstate Trade	
Net commodity exports	165.1
Net commodity imports	28.0
Net food exports	287.2
Net food imports	140.3

Red meat



Dairy

2022-23 was an exceptional year for the Dairy sector with high milk prices at \$9.46 per kg of milk solids (the equivalent of \$0.755 per litre of milk), a 32 per cent increase from 2021-22, driving the farm gate value of milk to \$684 million. Milk production increased from 887 megalitres to 906 megalitres, a 2.2 per cent increase. Price was the main driver for the farm gate value of dairy. An undersupply of milk nationally, lead to competition within the processing sector and was the main cause of the 32 per cent increase in milk prices.

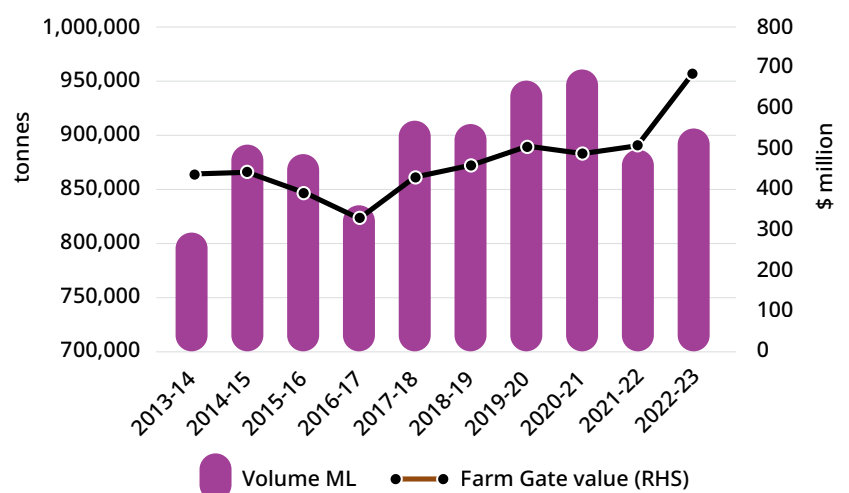
Global dairy prices reached a 15 year high, however, the Tasmanian export value decreased to \$218 million due to a weaker

dollar and strong demand from the domestic market. Milk powders (\$114 million) and Cheese (\$82 million) were the highest contributors to the value of Tasmanian dairy exports. Japan, China, Thailand, Indonesia, and South Korea were the top destinations for Tasmania's dairy products.

The five-year trend of the dairy sector was a nominal compound growth rate of 10 per cent per annum driven by strong milk prices despite volume declining nationally. Improved yield and quality in milk fat and protein content has made Tasmanian milk competitive compared to other States. Long term investment in dairy businesses has supported this growth.

Dairy ScoreCard	\$ million
Food farm gate value	684.4
Processed food value	876.0
Overseas Trade	
Food exports	217.6
Food imports	0.0
Net Interstate Trade	
Net food exports	545.0
Net food imports	0.0

Milk produced



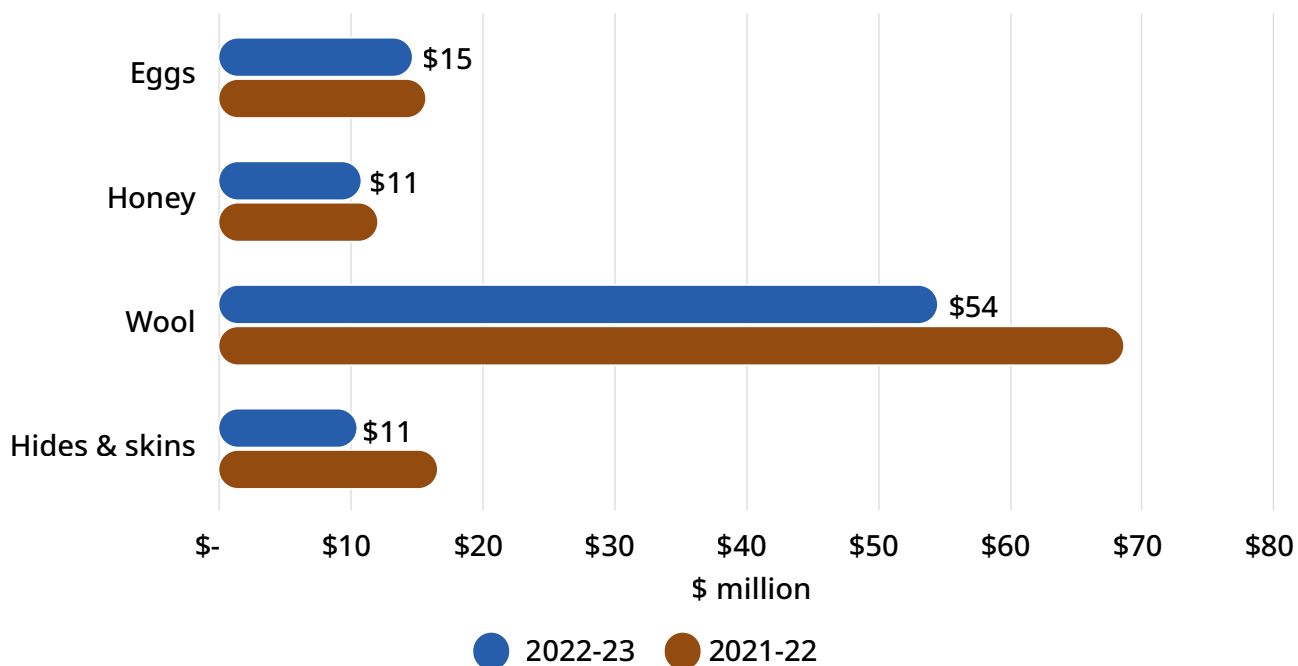
Other Livestock products

Wool had a farm gate value of \$54 million in 2022-23, a decrease of 21 per cent. Declining demand and oversupply of wool at a global level negatively impacted price. The export value of wool was \$28 million. China, Italy and India were the key export destinations for Tasmanian wool.

Eggs had a farm gate value of \$15 million. Tasmanian eggs are not exported overseas but rather used in the domestic market. The estimated retail sales value of Tasmania's eggs is \$65.4 million.

Tasmanian honey saw a decline in its farm gate value as oversupply, both locally and internationally weighed down prices. Honey had a farm gate value of \$11 million, but exports were lower at \$1 million

Livestock products gross farm gate value



Fruit

The estimated total farm gate value of the fruit sector in 2022-23 was \$222.9 million, a 31 per cent decrease from 2021-22. Localised weather events impacted production volumes which in turn impacted the farm gate value.

Prices were good for select products. Apples and pears saw prices increase by 24 per cent, and prices for cherries increased by 56 per cent.

Berries experienced a pullback in value of 58 per cent due to a 54 per cent decrease in production volume, which resulted in the farm gate value of berries being \$81 million. Despite the lower farm gate value, berries were still the highest value product in the fruit sector, accounting for a third of the fruit sector's value.

Cherries' farm gate value increased to \$66 million, a 6 per cent uplift from 2021-22. In

addition, the export value of cherries was \$48 million, a 12 per cent increase, driven by increased export volumes.

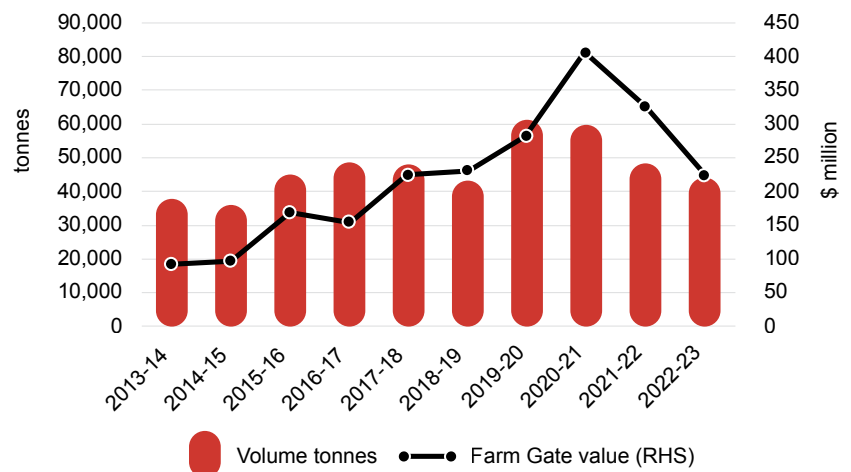
Apples and pears saw their farm gate value increase to \$68 million, a 36 per cent increase from 2021-22. Good seasonal conditions saw production volumes increase 9.7 per cent and prices rose by 24 per cent.

Nuts had a farm gate value of \$5.7 million in 2022-23. Lower prices and production volumes saw the farm gate value decrease significantly from \$15.2 million in 2021-22. Nuts accounted for 2.5 per cent of the fruit sector's farm gate value.

Over 93 per cent cherries, 81 per cent of apples, and 73 per cent of berries produced in the state supply interstate and international markets

Fruit ScoreCard	\$ million
Food farm gate value	222.9
Processed food value	295.0
Overseas Trade	
Food exports	50.5
Food imports	0.0
Net Interstate Trade	
Net food exports	181.4
Net food imports	105.2

Fruit and nuts



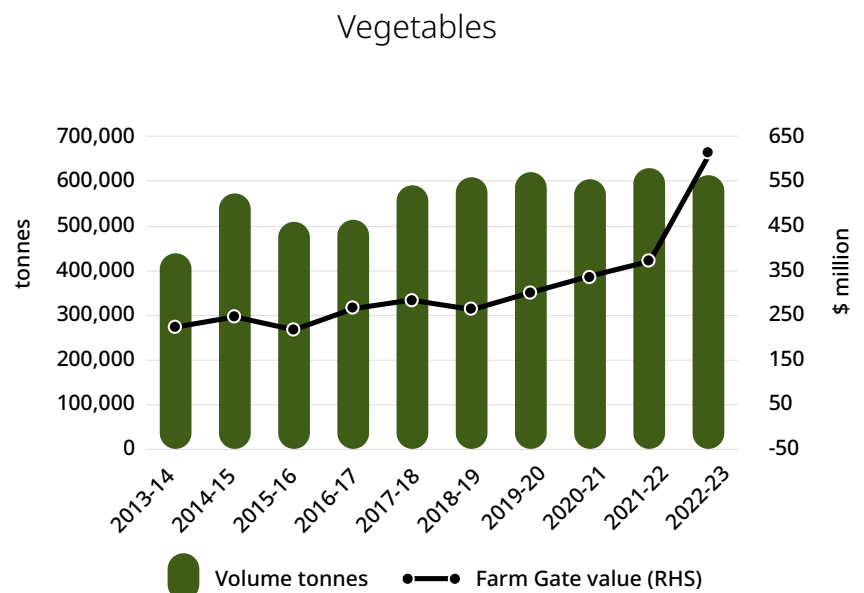
Vegetables

The Vegetables sector had an outstanding year with the farm gate value increasing 65 per cent to \$609 million due to strong prices for potatoes, onions, beans, cucumbers, capsicums, and carrots. The Potato farm gate value was \$374 million, a 114 per cent increase, with volume only increasing by 8 per cent. Undersupply in the domestic market propelled the exceptional result. Onions saw their farm gate value rise to \$74 million, a 78 per cent lift from 2021/22. Farm gate value for carrots was \$43 million, an increase of 33 per cent. Beans had an 82 per cent increase in farm gate value bringing it to \$28 million. Cucumbers and Capsicums had a 45 per cent increase in farm gate value bringing the 2022-23 figure to \$12 million. Broccoli saw the biggest percentage increase in value, a 119 per cent rise to \$12 million due to undersupply.

Onions continued as Tasmania's highest export value vegetable worth \$22 million being shipped overseas, achieving a 51 per cent increase in value due to rising demand. Key export markets were Thailand, Netherlands, Spain, Japan, and Hong Kong. Broccoli also saw a strong result in exports with the value achieving 2.7 times increase to \$0.7 million from \$0.2 million.

Production surplus supplies the interstate and international markets with 87 per cent of potato, 91 per cent of carrot, and 92 per cent of onion production being surplus.

Vegetable ScoreCard		\$ million
Food farm gate value	609.2	
Processed food value	4282.4	
Overseas Trade		
Food exports	25.9	
Food imports	5.5	
Net Interstate Trade		
Net commodity exports	548.3	
Net commodity imports	14.8	



Seafood

Salmonid production had the highest farm gate value at \$1,366 million and an export value of \$295 million in the seafood sector. Salmonids accounted for 88 per cent of the seafood sector's beach value and 75 per cent of the sector's export value. Top export destinations were China, United States, Japan, Vietnam, and Indonesia.

The beach value of scallops was 3 times that of 2021-22 at \$4.83 million in 2022-23. Increase of the total allowable catch for the season caused the increase in tonnage, driving the rise in beach value.

Despite continued trade restrictions on lobster, rock lobster and crab, these commodities saw an 11 per cent increase in beach value, because of higher costs. The export value of lobsters

and crabs was \$10.5 million, a 10 per cent decrease from 2021-22.

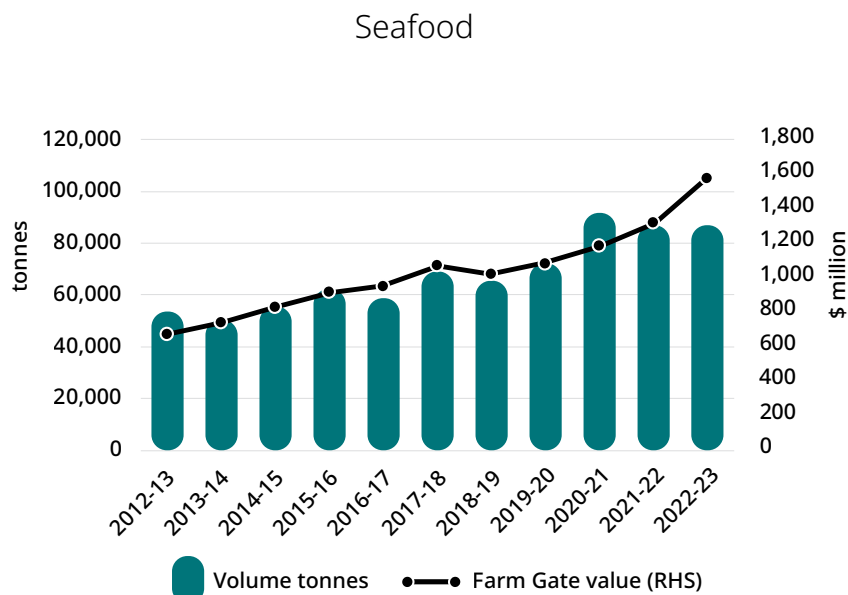
Overall, the rock lobster and crab sector were the second highest in beach value within the seafood sector.

Mussels had a major business shut its operations; however, the beach value increased 5 per cent off the back of prices increasing by 1.7 times, whilst production fell 61 per cent.

Oysters represented 3 per cent of the seafood sector with a beach value of \$43 million. Abalone had a beach value of \$55 million, the third highest in the seafood sector.

The Abalone sector had a 2.5 per cent increase in value driven by a 6.6 per cent increase in price.

Seafood ScoreCard	\$ million
Food farm gate value	1,556.2
Processed food value	2,017.4
Overseas Trade	
Food exports	394.0
Food imports	73.5
Net Interstate Trade	
Net food exports	2,005.6
Net food imports	26.0

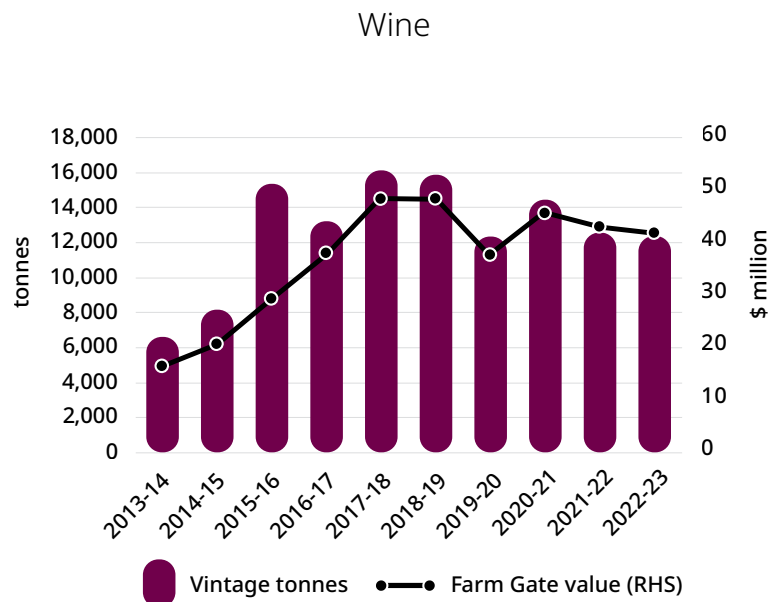


Wine

The value of grape production reached \$42 million in 2022-23, a 3 per cent decrease from 2021-22. Though the weight crushed decreased 7 per cent to 12,390 tonnes, the price of grapes crushed increased 4 per cent to \$3,377 per tonne. In comparison, the national average for the price of grapes crushed increased 2 per cent to \$642 per tonne. The processed food value, such as bottled product, was \$119 million. Key economic drivers for Tasmania's wine sector in 2022-23 were the

continued recovery of the tourism sector, and robust demand within the food services sector despite the cost-of-living pressures. Though international exports are a smaller source of revenue for Tasmanian wine producers, it totalled \$4.2 million, a negative 20 per cent change from 2021-22. The top export destinations for Tasmanian wine were the United States, United Kingdom, Japan, and Singapore.

Wine ScoreCard	\$ million
Food farm gate value	41.8
Processed food value	118.7
Overseas Trade	
Food exports	4.2
Food imports	0.5
Net Interstate Trade	
Net commodity exports	0.4
Net commodity imports	0.0
Net food exports	67.2
Net food imports	83.5



Field Crops

The field crops category covers all food crops not included in the fruit, vegetables, 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 \$25 million. Malting barley saw an increase in farm gate value to \$3.4 million, a 55 per cent increase from 2021-22 due to an increase in the price of barley. The industrial hemp sector saw its farm gate reach \$0.2 million due to reduced planting area.

Spirits production value for 2022-23 was \$38.4 million. Spirits are a significant contributor in export value achieving \$2.5 million in exports in 2022-23, 1.8 times increase on the previous year. Other fields crops are largely grown to service the needs of the domestic market and therefore exports only make up a small amount of Tasmania's total export value.

Field Crops ScoreCard \$ million

Food farm gate value 25.4

Total farm gate value 240.2

Processed food value 278.5

Overseas Trade

Food & commodity exports 40.2

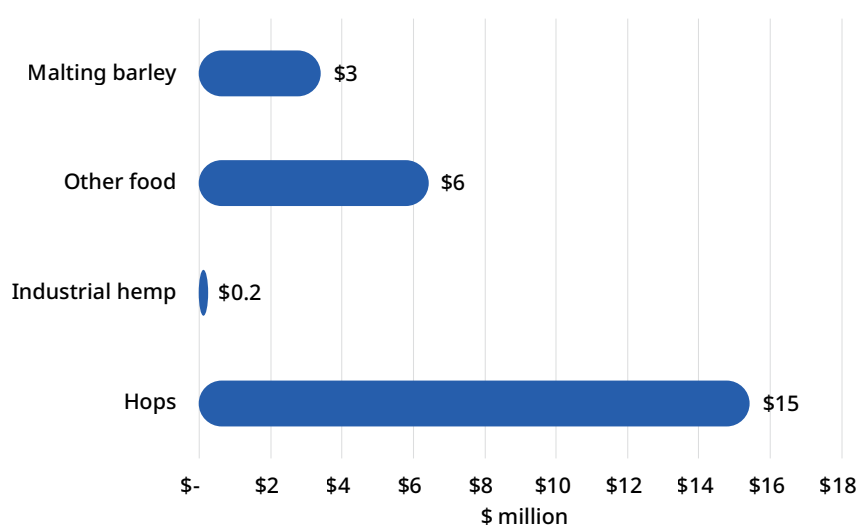
Food & commodity imports 44.9

Net Interstate Trade

Food & commodity exports 10.5

Food & commodity imports 193.9

Gross farm gate value of food field crops
- \$25 million



Non-food Agriculture

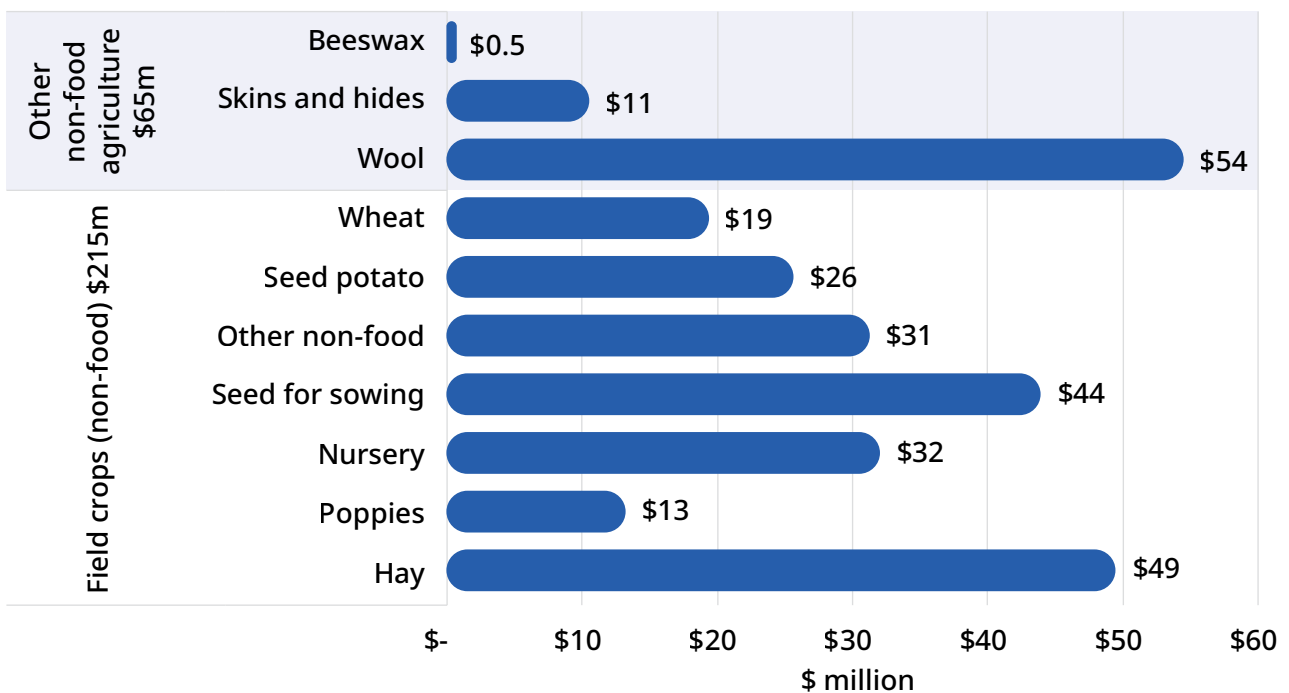
Non-food agriculture's farm gate value for 2022-23 was \$280 million, a 10 per cent decrease from 2021-22. Non-food field crops had a farm gate value of \$215 million, which included poppies (\$13 million), seed for sowing (\$44 million), seed potato (\$26 million), and wheat for feed and seed (\$19 million).

Poppies saw a 17 per cent decrease in farm gate value from 2021-22. Poppy production is subject to global market control by the International Narcotics Control Board, which during recent years reduced Australia's poppy cultivation allocation in response to a global oversupply and reduced demand for narcotic raw material.

Wheat saw a 17 per cent decrease in its farm gate value to \$19 million.

Other non-food agriculture had a farm gate value of \$65 million. Wool, skins and hides, and beeswax are what is included in other non-food agriculture. Wool had a farm gate value \$54.5 million, beeswax was \$0.5 million, and skins and hides had a farm gate value of \$11 million.

Gross farm gate value of non-food agriculture - \$280 million

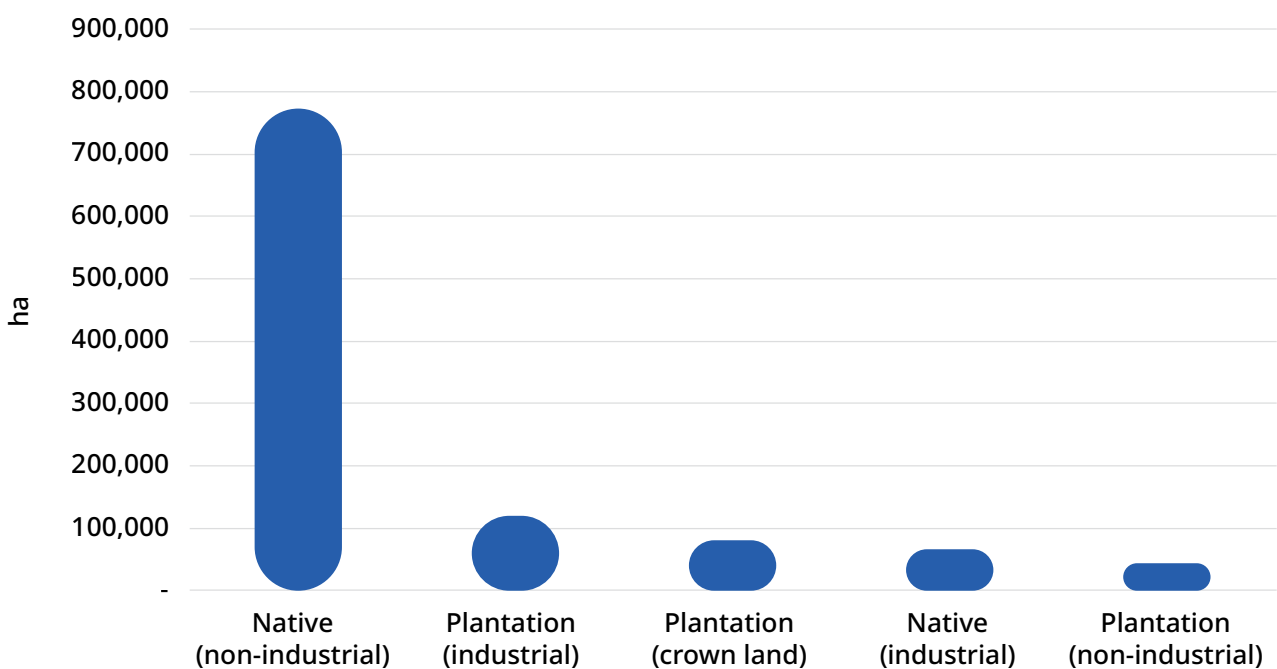


Agroforestry

There are 1.09 million 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 \$31.1 million for 2022–23, with a mill-door value of \$75.8 million. Agroforestry exports were \$88.5 million in 2022-23.



Privately owned or managed forest in Tasmania - 1.09 million hectares



About the Scorecard



Photograph:
Moon Cheese Studio | Preparing Tomatoes

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:

$$\begin{array}{ccccccc}
 \text{Tasmanian net food revenue} & = & \text{Revenue from Tasmanian food sales} & + & \text{Value of Tasmanian produced food \& food commodities exported or sold interstate} & - & \text{Value of food \& food commodities imported or purchased from interstate}
 \end{array}$$

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

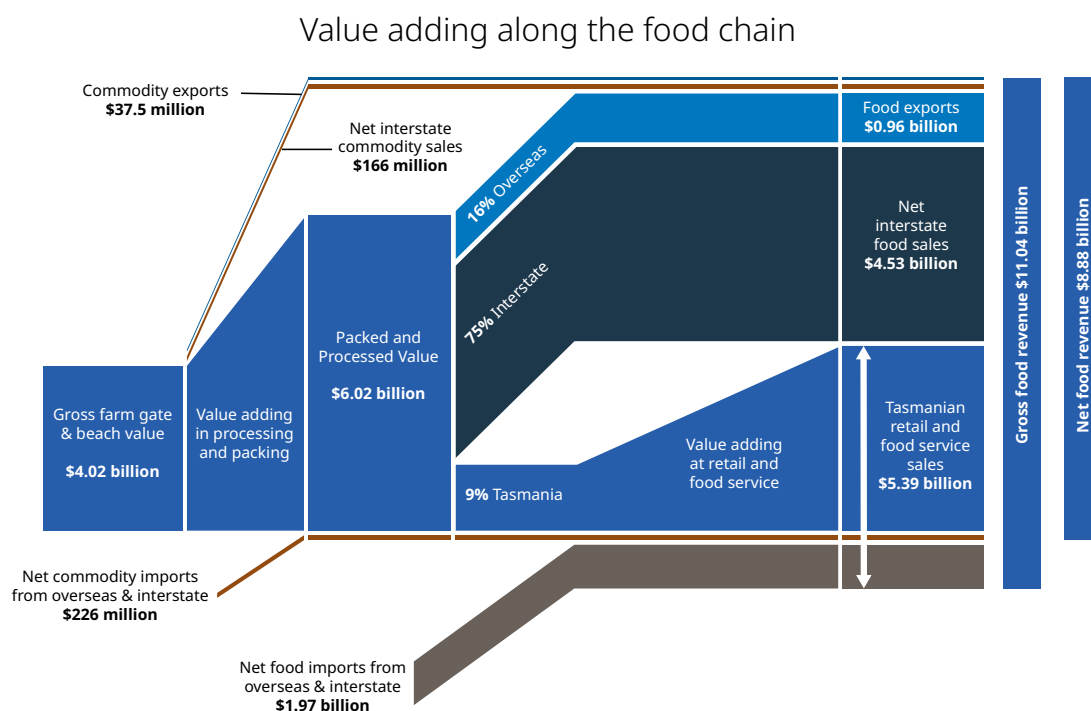
- the value of food processed and packed in Tasmania; and
- the value of interstate trade.

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 so that net food revenue can be estimated.

Using gross value and volume data reported by ABS and ABARES, along with data from industry, and average wholesale price data, the processed food value is calculated for about 60 individual categories of food 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:

$$\text{Net interstate trade} = (\text{Tasmanian production} + \text{imports}) - (\text{Tasmanian consumption} + \text{exports})$$



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 5 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 \$4.02 billion. \$37.5 million worth of this production is sold interstate or overseas as commodities.⁷ For example, sheep and cattle are sold interstate and hops are exported internationally. An estimated net \$226 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 \$6.02 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 \$0.96 billion. The net quantity and wholesale value of interstate trade is calculated using the equation above. The value of net interstate food sales is \$4.53 billion.

Retail and food service sales data reported by ABS provide the value of Tasmanian food sales of \$5.39 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 \$11.04 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 \$134 million. The remaining shortfall in food purchased in Tasmania is sourced from interstate, the net value of which is calculated to be \$1.84 billion. The combined value of net interstate food purchases and overseas imports is shown as \$1.97 billion. Commodity and food imports are subtracted from the gross net revenue to give an estimated net revenue of \$8.88 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.⁸

⁷ Contributing values may not sum to totals due to rounding.

⁸ **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.

Farmers' terms of trade is the ratio of prices received by farmers to prices paid by farmers. It is reported by ABARES as the ratio of a weighted index of prices received to a weighted index of prices paid.

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*).

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[Department of State Growth website](#)

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Data Appendix A

Table A1: Farm gate value, volume and price change of key commodities; 2022-23 vs 2021-22

	2022-23 (\$ millions)	2021-22 (millions)	Change in value (%)	Change in volume (%)	Change in price (%)
Chicken & pork	\$55	\$55	0%	1%	-1%
Lamb & mutton	\$143	\$203	-30%	-19%	-13%
Beef	\$375	\$467	-20%	4%	-23%
Total meat	\$573	\$726	-21%	-3%	-19%
Hides & skins	\$11	\$17	-37%	-14%	-26%
Wool	\$54	\$69	-21%	1%	-21%
Honey	\$11	\$12	-10%	11%	-19%
Eggs	\$15	\$16	-6%	65%	-43%
Dairy	\$684	\$506	35%	2%	32%
Nuts	\$6	\$15	-62%	-37%	-40%
Cherries	\$66	\$62	6%	-32%	56%
Apples	\$68	\$50	36%	10%	24%
Berries	\$81	\$194	-58%	-54%	-9%
Total fruit	\$223	\$325	-31%	-17%	-17%
Carrots	\$43	\$32	33%	-2%	35%
Onions	\$74	\$42	78%	-4%	86%
Salads	\$75	\$78	-4%	-3%	-2%
Potatoes	\$324	\$151	114%	8%	99%
Total vegetables	\$609	\$370	65%	5%	57%
Total wild fisheries	\$137	\$120	14%	73%	-34%
Total aquaculture	\$1419	\$1216	17%	-4%	19%
Oysters	\$43	\$43	-1%	-8%	7%
Rock lobster	\$55	\$50	11%	<1%	11%
Abalone	\$55	\$54	2%	-4%	7%
Salmonids	\$1366	\$1135	20%	-4%	26%
Total seafood	\$1556	1336	16%	>-1%	16%
Wine	\$42	\$43	-3%	-7%	4%

Table A2: Production surplus of key commodities
and market destinations 2022-23

	Production surplus (%)	Interstate sales (\$ million)	Export value (\$ million)
Beef	55	261	190
Lamb	50	21	20
Mutton	88	3	8
Milk powders	97	251	114
Cheese	81	223	82
Milk, cream & yoghurt	24	15	8
Cherries	93	21	48
Apples	81	50	0
Berries	73	104	0.2
Potatoes	87	354	<1
Carrots	91	32	2
Onions	92	42	22
Salmonids	97	1279	295
Abalone	98	41	37
Rock lobster	88	40	10
Oysters	91	51	0.3
Premium wine	76	67	4

Table A3: Interstate Livestock Import and Export Value and Volume 2022-23

	Cattle	Sheep
Value to Tas (\$ m)	24.7	3.2
Value from Tas (\$ m)	77.8	87.3
Volume to Tas (000s head)	13.4	20.0
Volume from Tas (000s head)	42.1	712.9

Table A4: Breakdown of contributors to export value 2022-23

	Value (\$ million)	Nominal growth 2022-23 (%)	Real 5-year growth rate (%)
Seafood exports	390	12.7	6.6
Food agriculture and processed food exports	567	-9	-0.5
Total food exports	957	-1	2.0
Non-food agricultural exports	52	-23.5	-15.2
Total agri-food exports	1009	-2.6	0.5

Contact

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Moon Cheese Studio | Rock Lobster Fishing Boat