

# Tasmanian Agri-Food ScoreCard

## Snapshot 2014-15

Agriculture, seafood and food value-adding are key contributors to the Tasmanian economy. 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 gross value of agricultural production grew by 6.2% in 2014-15, representing real growth of 4.6% after accounting for inflation (see chart 1 overleaf). In fact, 2013-14 and 2014-15 alone accounted for 70% of real growth in the value of production over the decade to 2014-15.

In 2014-15, the total gross value of agriculture was \$1.438 billion at the farm gate. Of this total, food agriculture accounted for \$1.194 billion and non-food agriculture contributed \$244 million.

The gross beach value of seafood production was \$825.6 million. The combined gross value of agricultural and seafood production was \$2.263 billion, with the food component comprising \$2.019 billion.

After processing and packing the value of Tasmanian food and beverage production increased to \$3.896 billion.

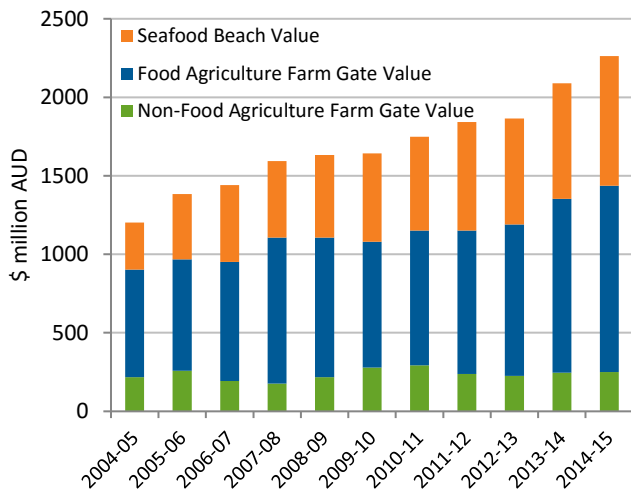
### Key Food Facts 2014-15

Value of food at farm gate and beach	\$2.02 billion
Value of food after processing and packing	\$3.90 billion
Gross food revenue (domestic, interstate and overseas sales)	\$6.00 billion
Net food revenue (gross food revenue less imports)	\$5.41 billion
Overseas food exports	\$0.61 billion
Net interstate food exports	\$2.42 billion
Retail and Food service food and beverage sales in Tasmania	\$2.90 billion
Proportion of food produced in Tasmania sold interstate and overseas	78%

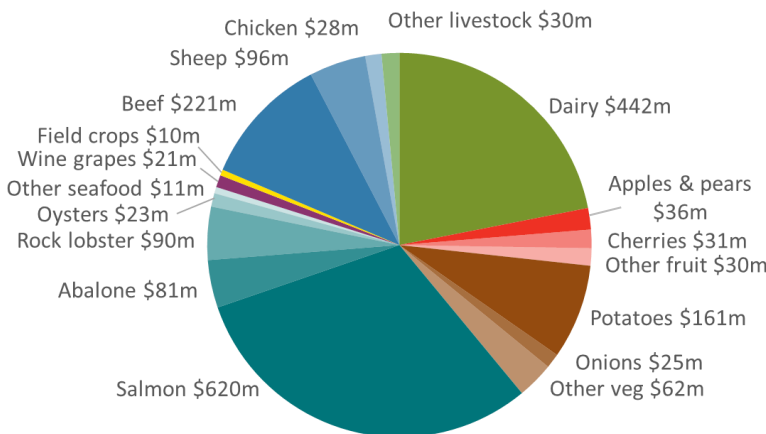
Of the food and beverages produced in Tasmania an estimated 22% is consumed by Tasmanian residents, 16% is exported overseas and the remaining 62% is sold interstate and to visitors to the state.

Net growth in food primary production has accounted for all real growth in the gross value of agriculture and fisheries over the past decade (see chart 1).

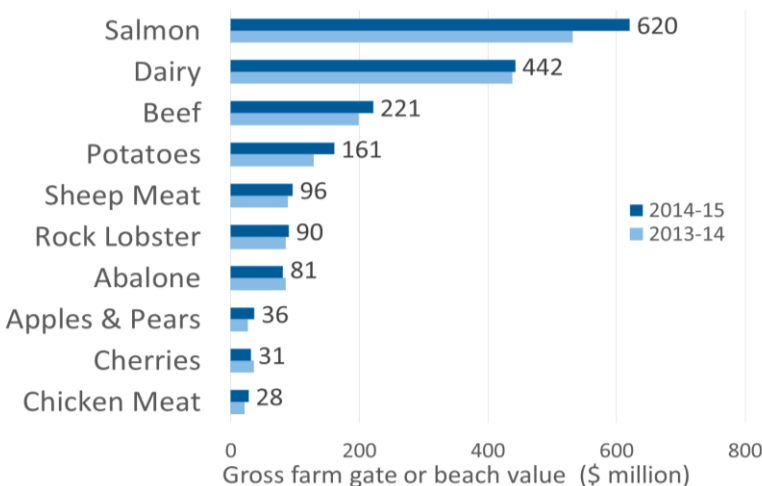
### 1 Growth in agriculture & seafood production



### 2 Food – farm gate / beach value \$2.02 billion



### 3 Key contributors to food gross value



### Primary production

In 2014-15, net growth in the value of food agriculture accounted for all of the \$84.4 million increase in the gross value of agriculture (see chart 1). The value of seafood production increased by \$89.2 million (12%) in the same period.

Non-food agricultural production included wool, livestock feed production, nursery production, animal hides, poppies, pyrethrum, seed crops and beeswax. Wool was the most valuable non-food commodity with a farm gate value of \$91 million.

The 10 largest contributors to the gross value of food agriculture and seafood accounted for \$1.808 billion (90%) of the \$2.019 billion total (see charts 2 and 3). Dairy and salmon were the two largest categories and together account for over half of gross food value.

Four categories accounted for \$155 million of growth in food gross value:

- Salmon increased in value by \$89 million to \$620 million due to growth in output;
- Potato output growth increased value by \$32 million to \$161 million;
- Beef grew in value by \$23 million to \$221 million due to strong prices; and
- An increase in price resulted in the value of apples and pears growing by over \$10 million to \$36 million.



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## Food Value adding

Value-adding to primary production yielded food worth an estimated \$3.896 billion in 2014-15, up 11.5% on the previous year. Chart 4 provides a breakdown of value by category.

Atlantic salmon, dairy, confectionery, beef, potatoes and beer were the largest processed food categories, accounting for \$2.932 billion (75%) of value. Chart 5 compares their processed value in 2014-15 to the previous year.

Processed salmon, dairy, confectionery and potatoes increased in value due to output growth. Strong prices resulted in growth in the value of processed beef.

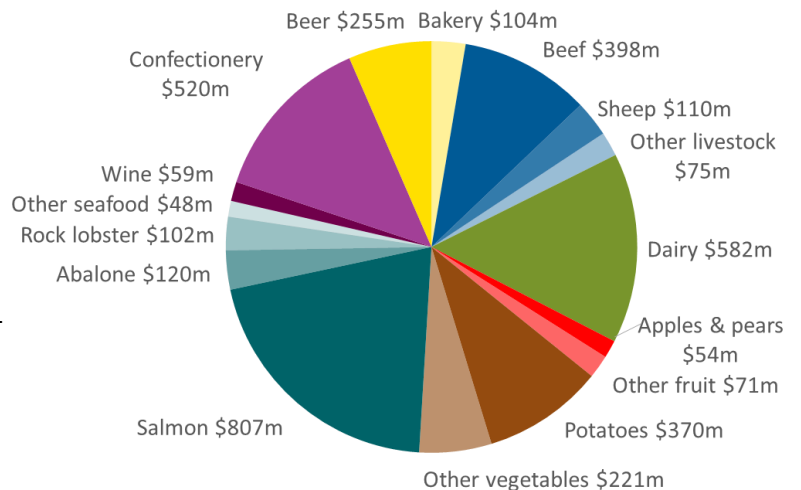
The value of beer fell due largely to the production of some national label beers being transferred interstate.

## Food Trade

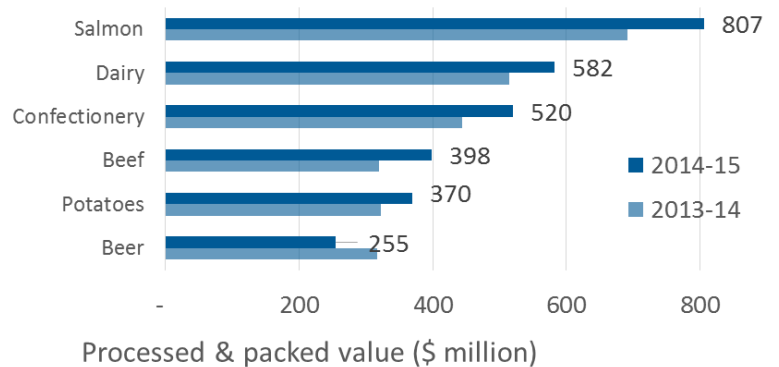
Overseas exports increased in value by \$35 million to \$612 million. A fall in the value of the Australian dollar, which averaged 84 US cents in 2014-15, supported stronger export performance.

Beef exports increased in value by 42% to \$150 million due to growth in volume with strong prices. Sheep meat exports increased by 81% to \$29 million. Total seafood export value increased by 33%.

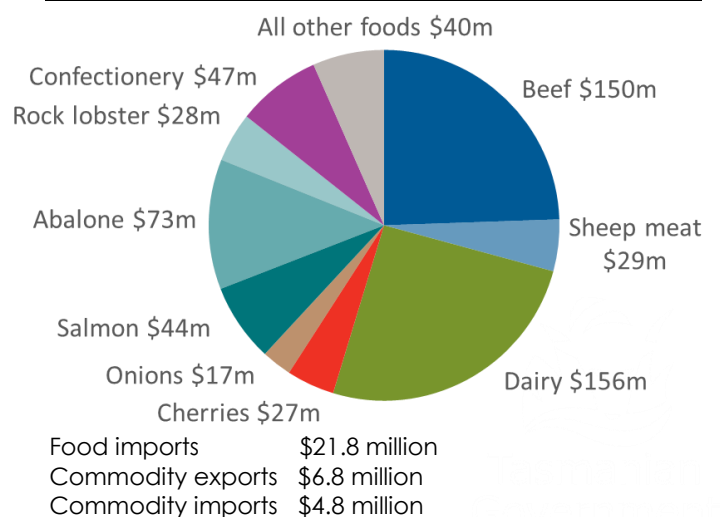
### 4 Processed & packed value \$3.90 billion



### 5 Key contributors to processed value



### 6 Overseas food exports \$612 million



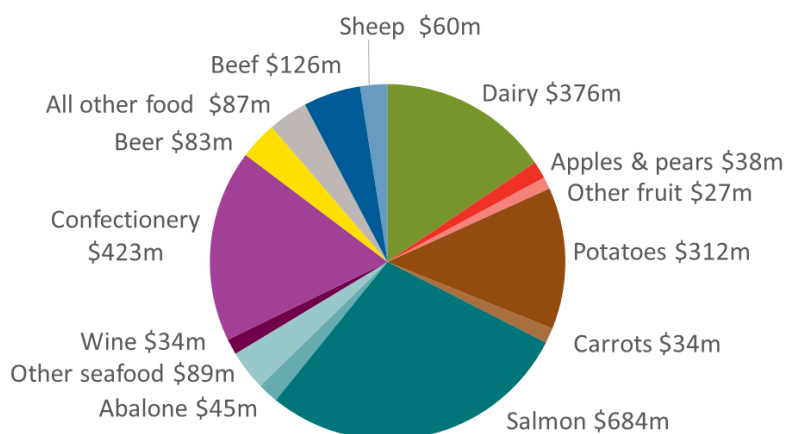
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Growth in the volume of salmon sold overseas more than tripled its export value to \$44 million.

A collapse in dairy export prices saw dairy products diverted from overseas to interstate markets. A \$35 million decline in dairy export value was offset by an \$89 million increase in interstate sales.

In 2014-15, interstate food trade revenue increased by \$252 million to \$2.417 billion. Atlantic salmon accounted for 28% of interstate trade revenue, followed by confectionery, dairy and potatoes (see chart 7). Net interstate food imports totalled \$532.8 million.

## 7 Interstate food sales \$2.42 billion



Interstate food imports	\$533 million
Interstate commodity exports	\$63 million
Interstate commodity imports	\$26 million

## ScoreCard Sector Summary 2014-15 (\$ million)

	Field Crops	Livestock	Dairy	Fruit	Vegetables	Seafood	Wine	Confect'ry	Total*
<b>Food - farm gate/beach value</b>	10.2	375.3	442.4	97.3	247.9	825.6	20.7		2,019.4
Total farm gate/beach value	148.0	489.9	442.4	97.3	247.9	825.6	20.7		2,263.3
<b>Processed &amp; packed food value</b>	358.4	583.0	582.5	125.4	591.0	1,076.8	59.1	520.2	3,896.4
<b>Overseas Trade</b>									
Commodity Exports	6.8	0.0	0.0	0.0	0.0	0.0	0.0		6.8
Commodity Imports	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.8	4.8
Food Exports	7.0	181.2	155.8	28.1	27.3	147.8	2.9	47.4	611.7
Food Imports	0.7	0.2	0.0	0.2	4.0	0.9	0.5		21.8
<b>Net Interstate Trade</b>									
Net Commodity Exports	0.7	59.4	0.0	0.0	0.0	0.0	3.1		63.2
Net Commodity Imports	9.4	16.2	0.0	0.0	0.0	0.0	0.0		25.6
Net Food Exports	97.4	192.3	376.1	64.5	411.3	818.4	34.5	422.8	2,417.3
Net Food Imports	31.7	113.0	0.0	39.7	0.0	68.0	70.0		532.8
<b>Tasmanian Food Sales</b>									
Retail Sales	327.9	590.5	223.9	136.0	376.6	117.1	131.1	46.2	2,133.0
Food Service Sales	226.5	96.6	4.5	29.1	88.9	143.5	144.5	7.7	764.0
<b>Net Food Revenue</b>	624.3	990.7	760.3	217.9	900.1	1,158.0	245.6	523.4	5,411.0
<b>Gross Food Revenue</b>	666.2	1,120.1	760.3	257.8	904.1	1,226.9	316.1	524.2	5,996.0

\* Totals may include items that do not fall into one of the 8 categories listed (eg frozen meals, soft drinks, cooking ingredients)

Data sources: ABS, ABARES, DPIPWE, industry.

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