

# Tasmanian Food and Beverage Industry ScoreCard Snapshot 2013-14

Agriculture, seafood and food value-adding are key contributors to the Tasmanian economy. The Tasmanian Food and Beverage Industry ScoreCard measures and reports on the value and final market destinations of the state's food and beverage production.

In 2013-14, the total gross value of agriculture was \$1.353 billion (including non-food products such as wool and poppies), of which food agriculture accounted for \$1.106 billion.

The gross value of seafood production was \$736.4 million. The combined gross value of agricultural and seafood production was \$2.090 billion, with the food component comprising \$1.843 billion.

After processing and packing the value of Tasmanian agrifood production (including beverages) increased to \$3.495 billion.

Of the food and beverages produced in Tasmania an estimated 21% (by value) is consumed by Tasmanian residents, 62% is sold interstate and 17% is exported overseas.

The value of agricultural production grew by 13.5% in 2013-14, representing real

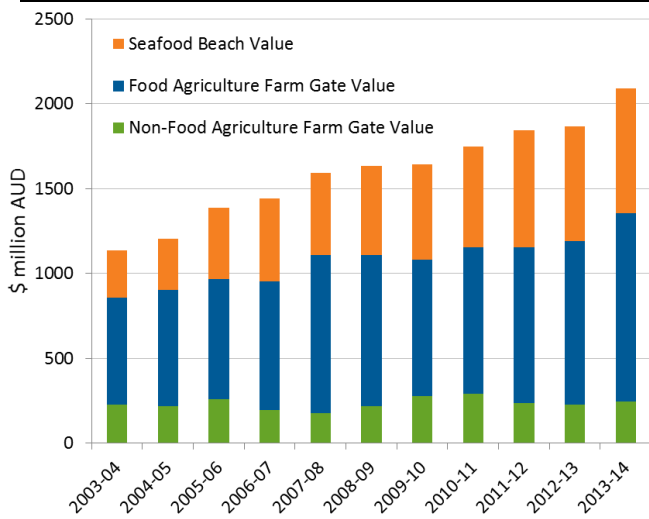
## Key Food Facts 2013-14

Value of food at farm gate/beach	\$1.84 billion
Value of food after processing and packing	\$3.49 billion
Gross food revenue (domestic, interstate and overseas sales)	\$5.55 billion
Net food revenue (gross food revenue less imports)	\$4.97 billion
Overseas food exports	\$0.58 billion
Net interstate food exports	\$2.17 billion
Retail and Food service food and beverage sales in Tasmania (to residents and visitors)	\$1.99 billion
Proportion of food produced in Tasmania sold interstate and overseas	77%

growth of 11.1% after accounting for inflation (see chart 1 overleaf). This is more than 3 times the average year on year real growth rate of 3.7% pa achieved between 2004 and 2013.

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## 1 Growth in agriculture & seafood production

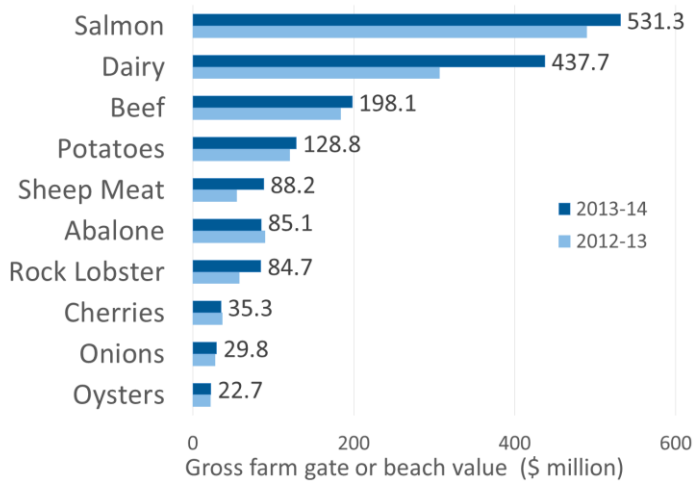


## Primary production

A \$142 million increase in the value of food agriculture accounted for 80% of growth in the gross value of agriculture in 2013-14 (see chart 1). The value of seafood production increased by \$62.7 million (9%) in the same period.

The ten largest contributors to the gross value of food agriculture and seafood account for \$1.642 billion (89%) of the \$1.843 billion total (see charts 2 and 3).

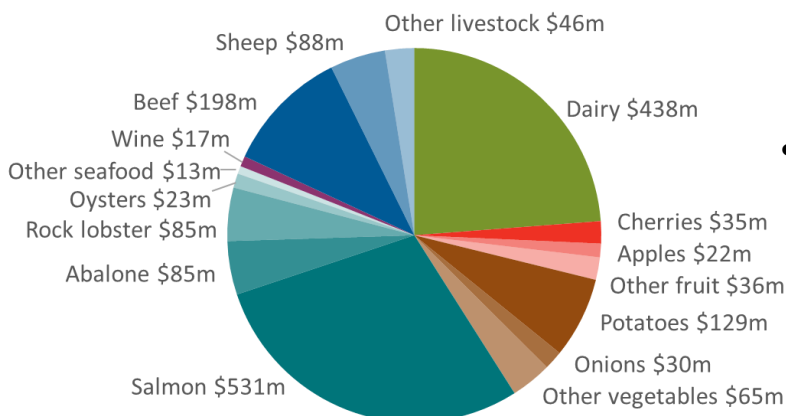
## 2 Food – farm gate / beach value \$1.84 billion



Four categories accounted for \$234 million worth of the growth in gross value:

- Dairy, growing by \$131.4 million (43%) to \$437.7 million due to strong prices and a 6.5% increase in volume;
- Salmon, increasing production to grow in value by \$42.3 million (8.7%) to \$531.3 million;
- Lamb (sheep), increasing in value by \$33.8 million (62%) to \$88.2 million due to strong prices; and
- Rock lobster, increasing by \$27.3 million to \$84.7 million due to an increase in beach price.

## 3 Key contributors to gross value



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## Value adding

Value-adding to primary production yielded food worth an estimated \$3.495 billion in 2013-14, up 9.5% on the previous year. Chart 4 provides a breakdown of processed food value by category.

Salmon, dairy, confectionery, beef, beer and potatoes are the largest processed food categories, accounting for just over \$2.6 billion (74%) of value. Chart 5 compares their processed value in 2013-14 to the previous year.

Processed dairy and beef increased in value due to increased price and output. Salmon, confectionery and beer also increased in value, mainly due to output growth.

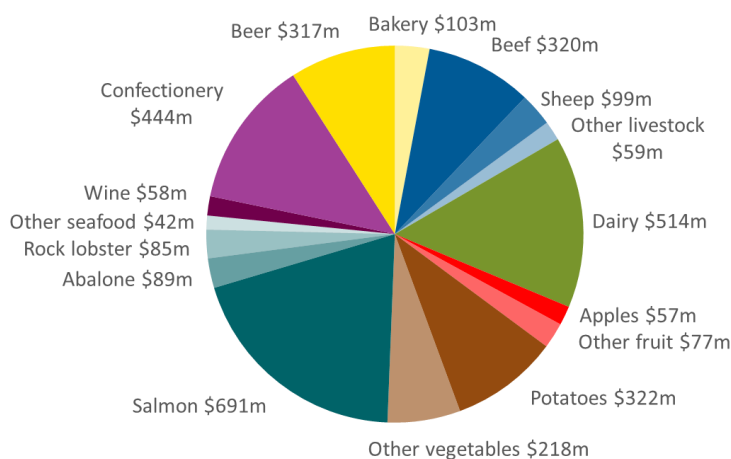
A wet growing season reduced potato yields which, in turn, limited supply for processing and resulted in a small drop in the value of processed potatoes.

## Trade

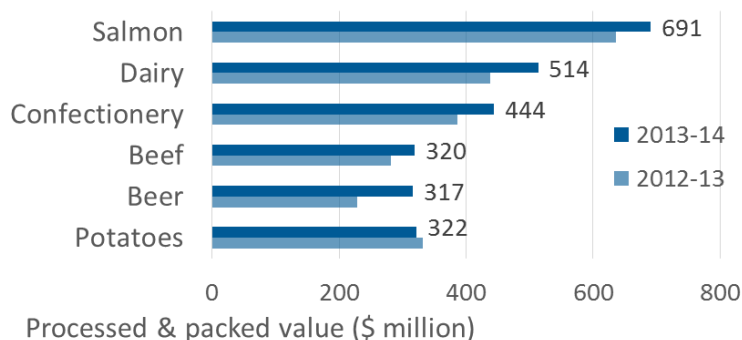
Overseas exports increased in value by \$62 million to \$577 million. Dairy, beef, abalone and confectionery accounted for over 70% of value with dairy alone comprising a third (see Chart 6).

High global prices saw dairy export value increase by \$70 million to \$190 million. Cherry exports also grew in value by \$5 million to \$24 Million.

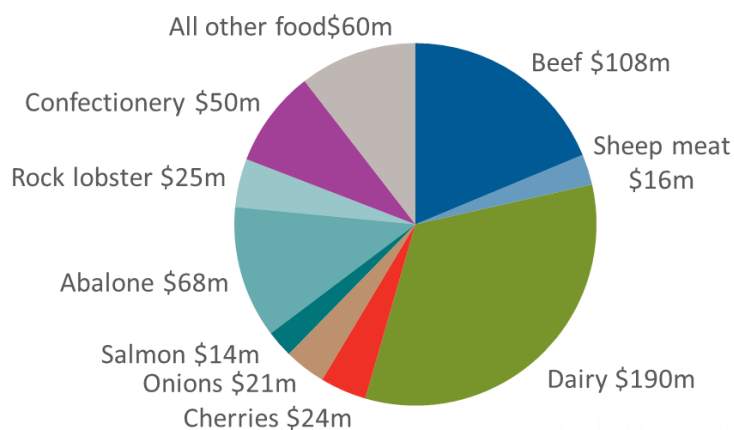
### 4 Processed & packed value \$3.49 billion



### 5 Key contributors to processed value



### 6 Overseas Exports \$577 million

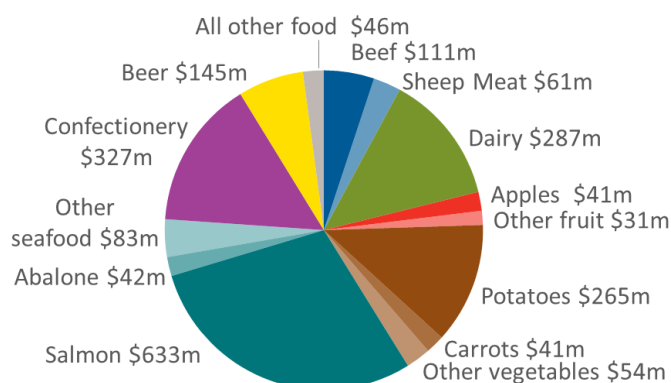


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The Australian dollar remained relatively high in 2013-14, averaging 92 US cents. The unfavourable exchange rate was a factor in the lack of growth in other export categories. Tasmania imported \$6.9 million worth of food from overseas.

In 2013-14, interstate trade revenue increased by \$285 million to \$2.166 billion. Atlantic salmon accounts for almost 30% of interstate trade revenue, followed by confectionery, dairy, potatoes and beer (see chart 7). Net food imports from interstate totalled \$545 million.

## 7 Interstate Sales \$2.17 billion



### Other interstate trade items:

Food imports	\$545 million
Commodity exports	\$45 million
Commodity imports	\$36 million

## ScoreCard Sector Summary 2013-14 (\$ million)

	Field Crops	Livestock	Dairy	Fruit	Vegetables	Seafood	Wine	Confect'ry	Total
<b>Food - farm gate/beach value</b>	3.0	329.6	437.7	92.7	223.7	736.4	16.6		1,839.7
Total farm gate/beach value	168.9	431.9	437.7	92.7	223.7	736.4	16.6		2,089.7
<b>Processed &amp; packed food value</b>	420.2	477.0	513.7	134.4	540.8	906.9	57.5	444.2	3,494.8
<b>Overseas Trade</b>									
Commodity Exports	0.2	0.0	0.0	0.0	0.0	0.0	0.0		0.2
Commodity Imports	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.1
Food Exports	28.0	126.6	190.2	25.3	29.8	111.4	2.9	49.9	576.5
Food Imports	0.7	0.0	0.0	0.2	3.2	1.3	0.2		6.9
<b>Net Interstate Trade</b>									
Net Commodity Exports	1.0	41.0	0.0	0.0	0.0	0.0	2.5		44.5
Net Commodity Imports	9.6	26.4	0.0	0.0	0.0	0.0	0.0		36.0
Net Food Exports	159.2	174.4	286.8	72.2	360.6	757.0	28.0	327.4	2,165.7
Net Food Imports	31.6	97.5	0.0	39.6	0.0	42.6	75.4		544.9*
<b>Tasmanian Food Sales</b>									
Retail Sales	327.0	468.7	222.7	135.7	363.5	119.6	136.8	46.2	1,993.2
Food Service Sales	225.9	77.4	4.5	29.0	88.4	137.8	149.5	7.7	773.3
<b>Net Food Revenue</b>	676.0	764.1	704.3	222.5	839.2	1,081.9	244.1	431.2	4,965.4
<b>Gross Food Revenue</b>	717.9	888.0	704.3	262.2	842.4	1,125.9	319.7	431.3	5,553.3

\* This figure includes food & beverages that do not fall in the 8 categories listed (eg frozen meals, soft drinks, cooking ingredients)

Data sources: ABS, ABARES, industry.

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