



Department of
Primary Industries

NSW PRIMARY INDUSTRIES

**PERFORMANCE,
DATA & INSIGHTS**

2017

PRIMED FOR GROWTH

Performance, Data and Insights 2017

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FOREWORD

Minister for Primary Industries

The NSW Government is committed to working with producers, industry and exporters to deliver our world-leading products to NSW, Australian and international consumers and drive economic growth to build a bright future for our valuable primary industries sector.

In 2015, the NSW DPI four-year strategic plan set an ambitious goal to achieve a 30% increase in the Gross Value of Production (GVP) of NSW primary industries by 2020. That ambitious target has been reached two years ahead of schedule, with the NSW primary industries sector now worth a record \$15.44 billion, which represents an increase of 32.4%.

This is a significant milestone for all of NSW, particularly for our primary producers and their rural and regional communities.

While the industry has capitalised on some favourable conditions, a combination of factors has contributed to the strong industry growth in the period since 2015, to achieve more than 30% growth in the past two years. These include high commodity prices, a run of exceptional seasonal conditions, strong biosecurity, and significant research and development programs.

The NSW primary industries sector boasts some of the country's most innovative and driven producers, and the continued growth of the sector in this state is reliant on our producers and their ability to capitalise on opportunities and manage risks.

NSW DPI supports the industry through world-leading research to deliver outcomes such as new and enhanced crop varieties and livestock genetics data to boost productivity. DPI also works with industry to manage risks to biosecurity and food safety to support market access.

Last year the new Poppy Industry Bill 2016 provided an opportunity to establish a new high-value alkaloid poppy industry in NSW, with strong prospects for future growth and a new option for a number of farmers to add to their cropping rotation.

Looking to the future, we will continue to build on our strong foundation and support our primary producers to increase the economic contribution of primary industries to NSW.



The Hon. Niall Blair

FOREWORD

Director General NSW DPI

Our Department drives economic growth through research and innovation to improve the resilience and productivity of the sector, while managing and reducing risks to industry and community confidence.

2016-17 proved to be a ground-breaking year for NSW Primary Industries, as favourable seasons and strong global demand led to significant sector growth, particularly for beef and wheat.

While our sector will always weather the cyclical nature of primary industries, the past couple of years have provided the shot in the arm that primary industries needed across the state.

However, the 2017 season has been challenging for the majority of producers, with the period from July to September the driest on record across the state.

While global demand remains strong, cattle prices have eased from the record highs of 2016 as herd numbers are forecast to begin to gradually rebuild to 2020, season permitting, from the record lows of 2016 (while remaining higher than average). The record high wheat yields of last year coincided with a surge in demand from India, which provided a buffer for prices in a year of record high global production. However the 2017 harvest is forecast to decline significantly due to a generally poor growing season.

For NSW producers, the future opportunities are being driven by economic growth in developing countries, with growing middle class populations and their increasing demand for our safe, high quality products.

There are significant opportunities to secure these markets as long-term trading partners, as we expect increasing demand to continue for our products, all underpinned by our biosecurity status and premium reputation.

NSW DPI will continue to ensure we have the right research priorities and policy settings to help industry capitalise on opportunities and deliver our ultimate goal of increasing the economic contribution of primary industries to the state.



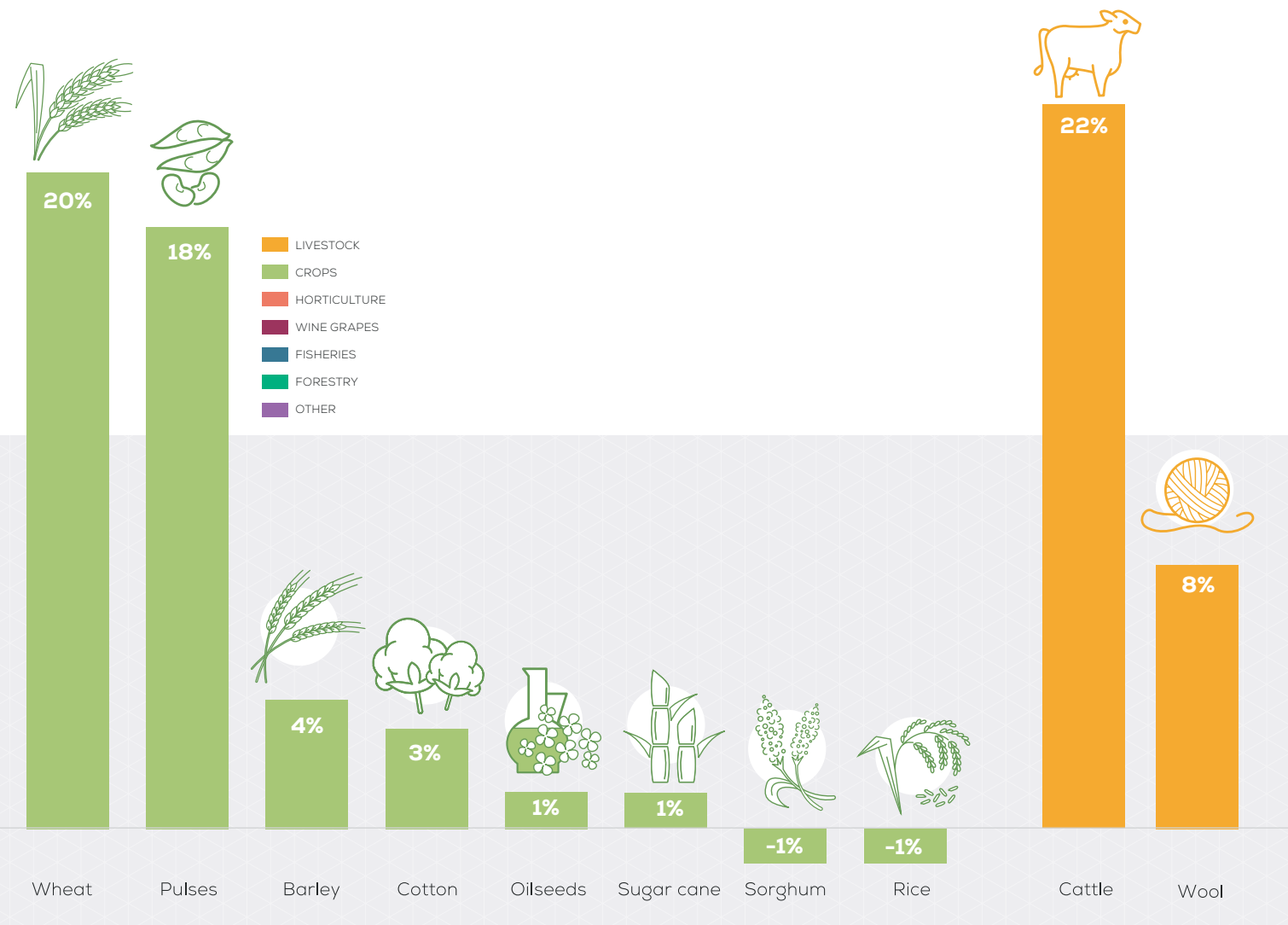
Scott Hansen

EXECUTIVE SUMMARY

NSW boasts an abundant and diverse range of primary industries. The ability to quantify, monitor and compare the total annual value of production at the state level can be measured through the Gross Value Production (GVP). Annually, GVP is measured as a unit volume of each commodity produced by the respective commodity unit price achieved at the “farm gate” or in the wholesale market.

In NSW, 2016-2017 was a record-breaking year for the value of NSW Primary Industries, reaching an estimated A\$15.4 billion, representing an increase of 32.4% on the 2013-14 GVP level. Industry performance was determined by several key factors including the price received, productive output, the macroeconomic environment, and seasonal conditions. The latter seasonal conditions was highlighted by above average rainfall from July through to November which secured livestock feed, helped finish winter crops and increased stored moisture levels into the warmer months.

PERCENTAGE CONTRIBUTION TO GVP GROWTH SINCE 2013-14

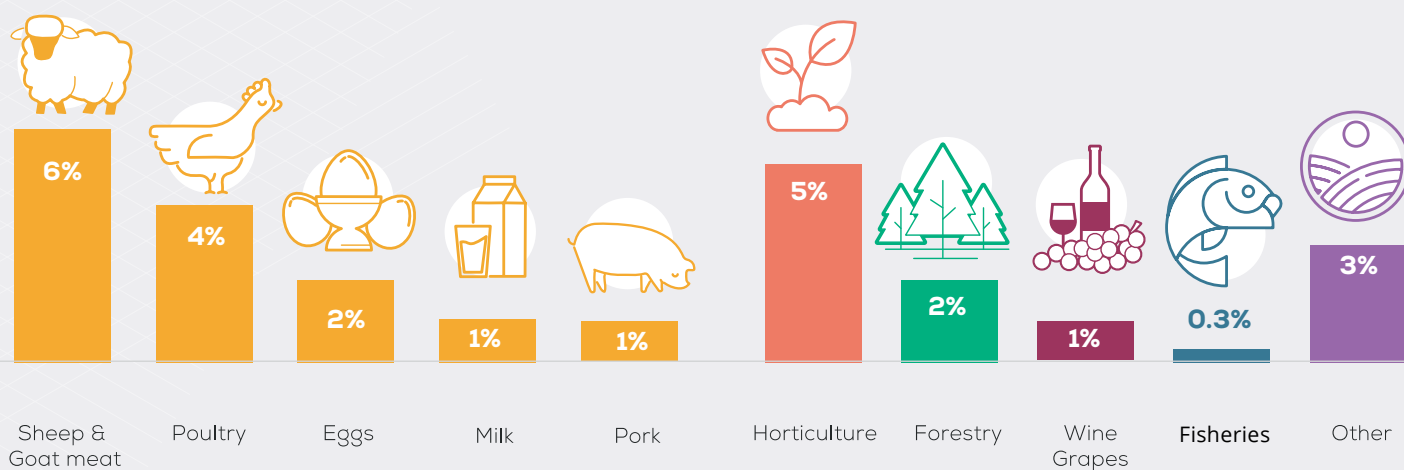
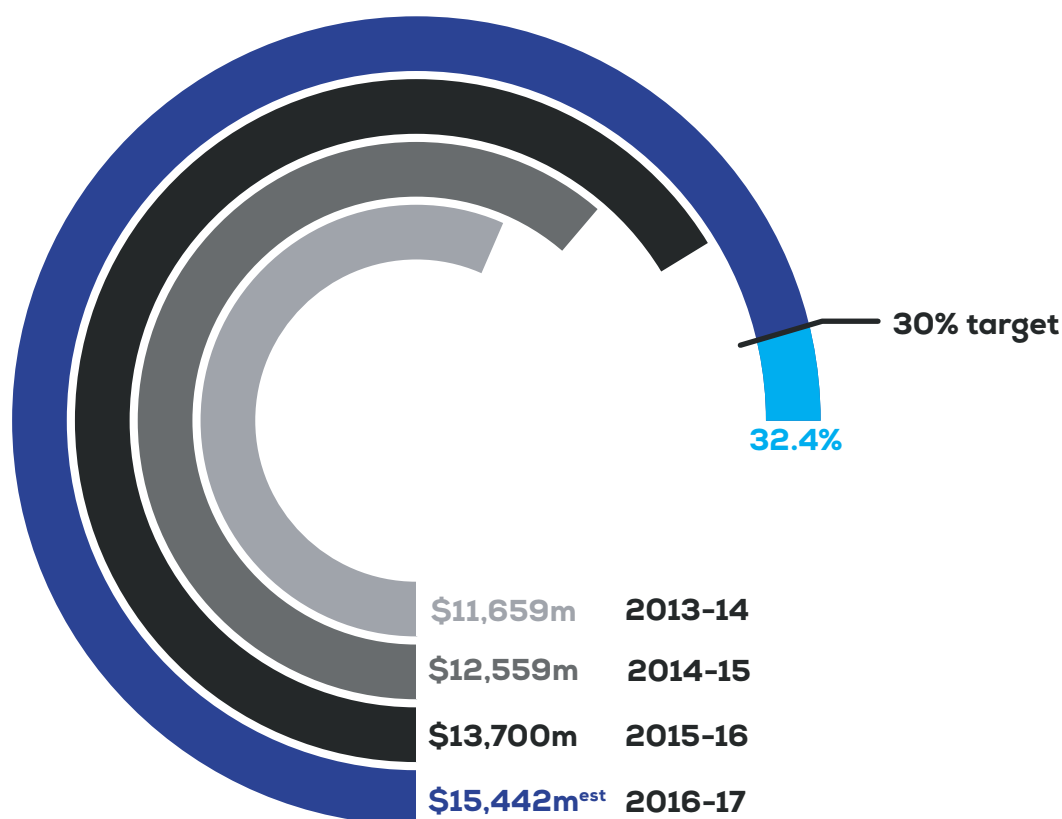


NSW DPI has continued to work with our state and federal colleagues on developing market opportunities for our export industries, with progress made in many markets alongside some key market access developments for certain industries. The NSW horticulture industry valued at \$1.6 billion managed to capitalise on market developments in 2016-17 with exports reaching a record \$325 million.

Our important forestry and fisheries sectors estimated at a combined \$661 million continue to play an important role for the state's economy.

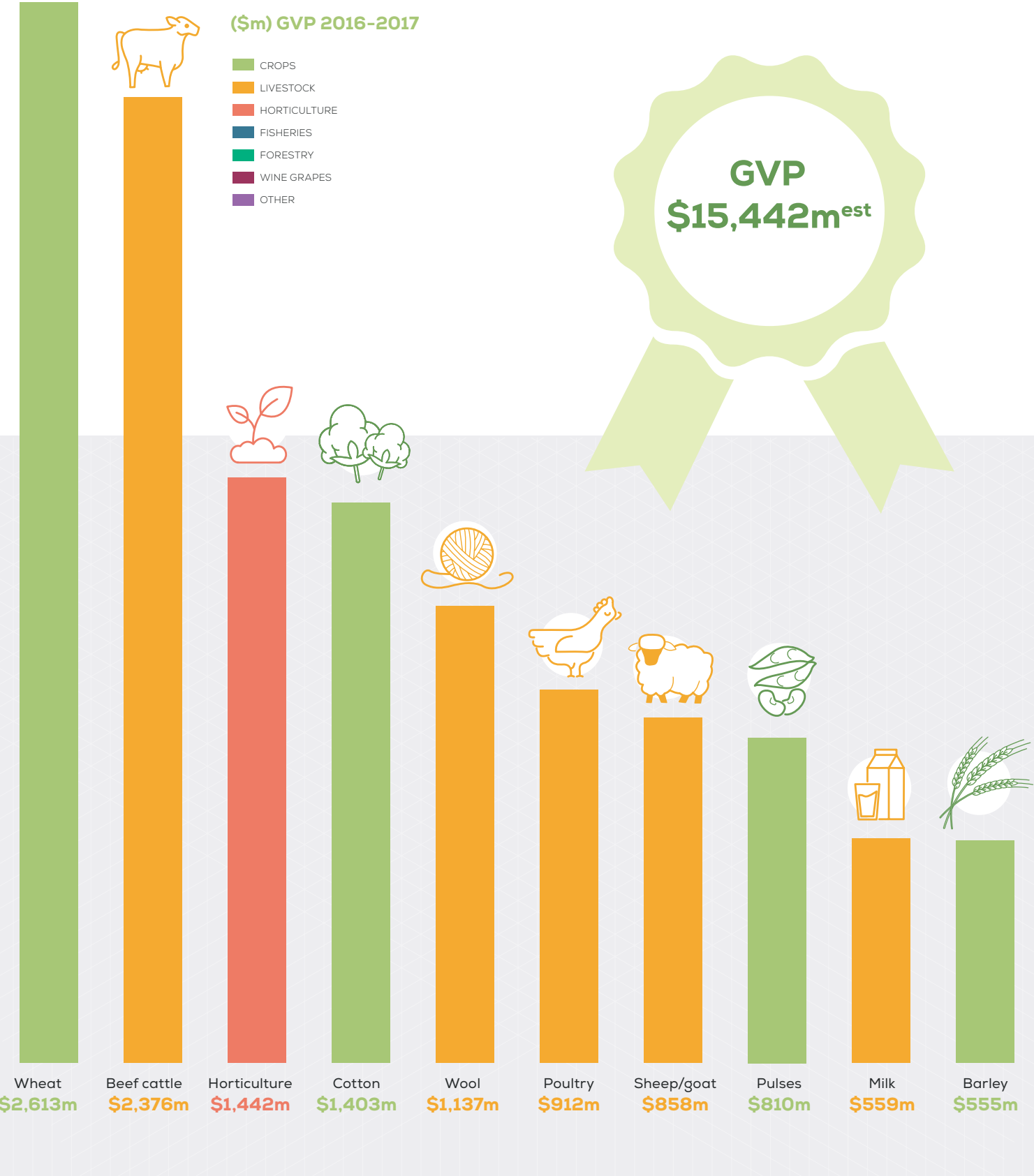
Given the diversity of production across the state, the following publication profiles the key drivers across a number of key primary industry sectors. Analysis of key factors for each industry will detail the impact on the GVP performance for each industry, while key industry statistics and drivers are contained in the appendices.

GVP TOTALS 2013-2017





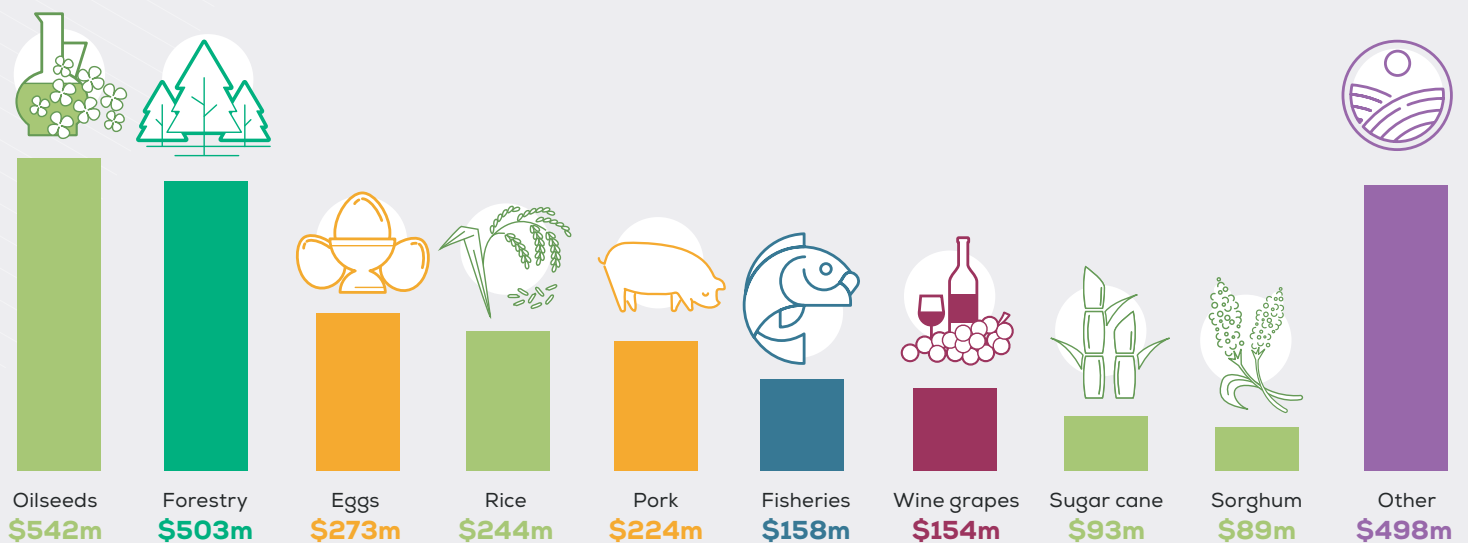
GROSS VALUE OF PRODUCTION 2016-17^{est}



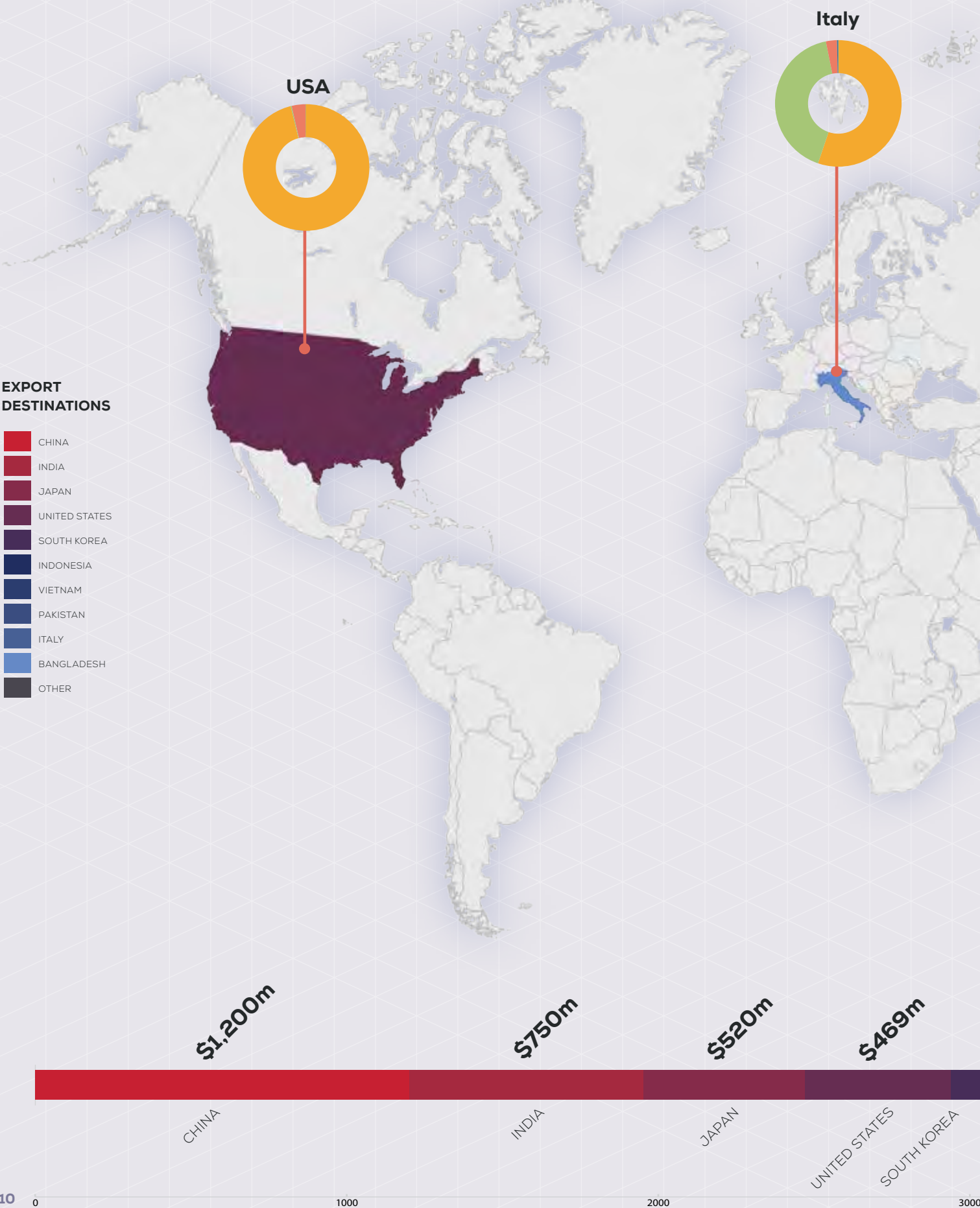
JOBS AND BUSINESSES

	 Agriculture	 Fisheries	 Forestry	 Support services	TOTAL
Directly employed ^l	67,649	1,928	479	7,719	77,775
Manufacturing jobs ^l	57,072	240	17,598	-	74,909
Direct businesses ^m	47,866	1,258	1,257	4,002	53,383
Manufacturing businesses	3,310	31	2,269	-	5,610

Source: ABS (2017f); ABS (2017g)



NSW TOP 10 EXPORT DESTINATIONS -
INDUSTRY SECTOR CONTRIBUTION BY VALUE



2016-17 EXPORTS

NSW primary industry exports earned \$6.3 billion mainly driven by substantial increases in crop production. This equates to an increase of 22% year-on-year.

The highest value exports were wheat, beef, cotton, and wool. The biggest year-on-year contributor was wheat, with the strongest percentage growth of more than 162% to \$1.2 billion.

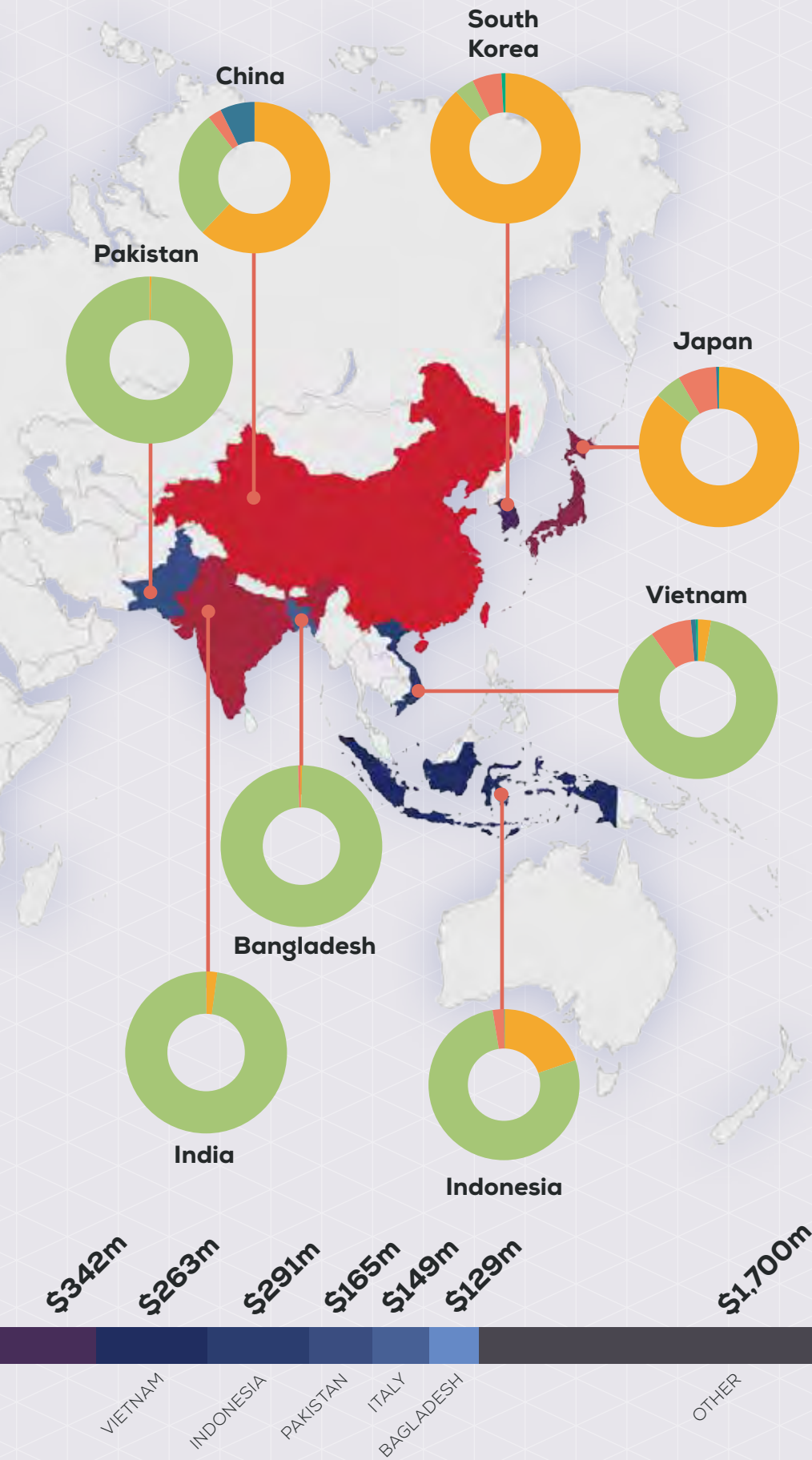
Some of the key export markets included China, India, Japan and the United States, while 6 out of the top 10 export destinations by value (63% of primary industries exports) were in the Asia region.

Livestock and livestock products contributed more than \$2.6 billion in exports, accounting for nearly 41% of the state's total primary industries export value. The United States remains a key export destination for beef and sheep meat exports but Asian and South Asian markets continue to dominate the livestock and livestock products export program.

The broadacre cropping sector contributed more than \$2.8 billion in exports, which accounted for 44% of the total primary industries export value. India replaced China as the largest export market for cropping exports primarily due to a large increase in the exported volume of pulses.

NSW PRIMARY INDUSTRY EXPORTS

- CROPS
- LIVESTOCK
- HORTICULTURE
- FISHERIES
- FORESTRY
- WINE GRAPES
- OTHER



CROPPING OVERVIEW

The estimated combined GVP of NSW broadacre cropping industries was \$6,846 million, up 28% year-on-year and 37% over three years. Wheat was the main contributor to year-on-year growth, with record yields generating the largest crop on record, while a massive increase in chickpea planted area and price resulted in an increase of 624% in pulse GVP over three years.

The winter months resulted in the majority of NSW receiving anywhere from between 150 to 300% of the median rainfall for this period.⁶⁶ This exceptional rainfall contributed to high winter cereal, oilseed and pulse production.

While the rainfall over winter hindered the efforts of some farmers to prepare paddocks prior to spring sowing, particularly in the southern region, it helped fill storages for irrigators and boosted water allocations. Periods of extreme heat over the summer months had an impact on sorghum and cotton yield and quality, in particular those cotton crops that were non-irrigated or speculative crops that did not have a full season's irrigation allowance.²

ESTIMATED COMBINED GVP OF BROADACRE CROPPING INDUSTRIES \$6,846m



28%
year-on-year



37%
over 3 years



GVP AND CONTRIBUTION TO TOTAL GVP GROWTH



Wheat
\$2,613m
▲ 20%



Cotton
\$1,403m
▲ 3%



Pulses
\$810m
▲ 18%



Barley
\$558m
▲ 4%



Oilseeds
\$542m
▲ 1%



Rice
\$244m
▲ 1%



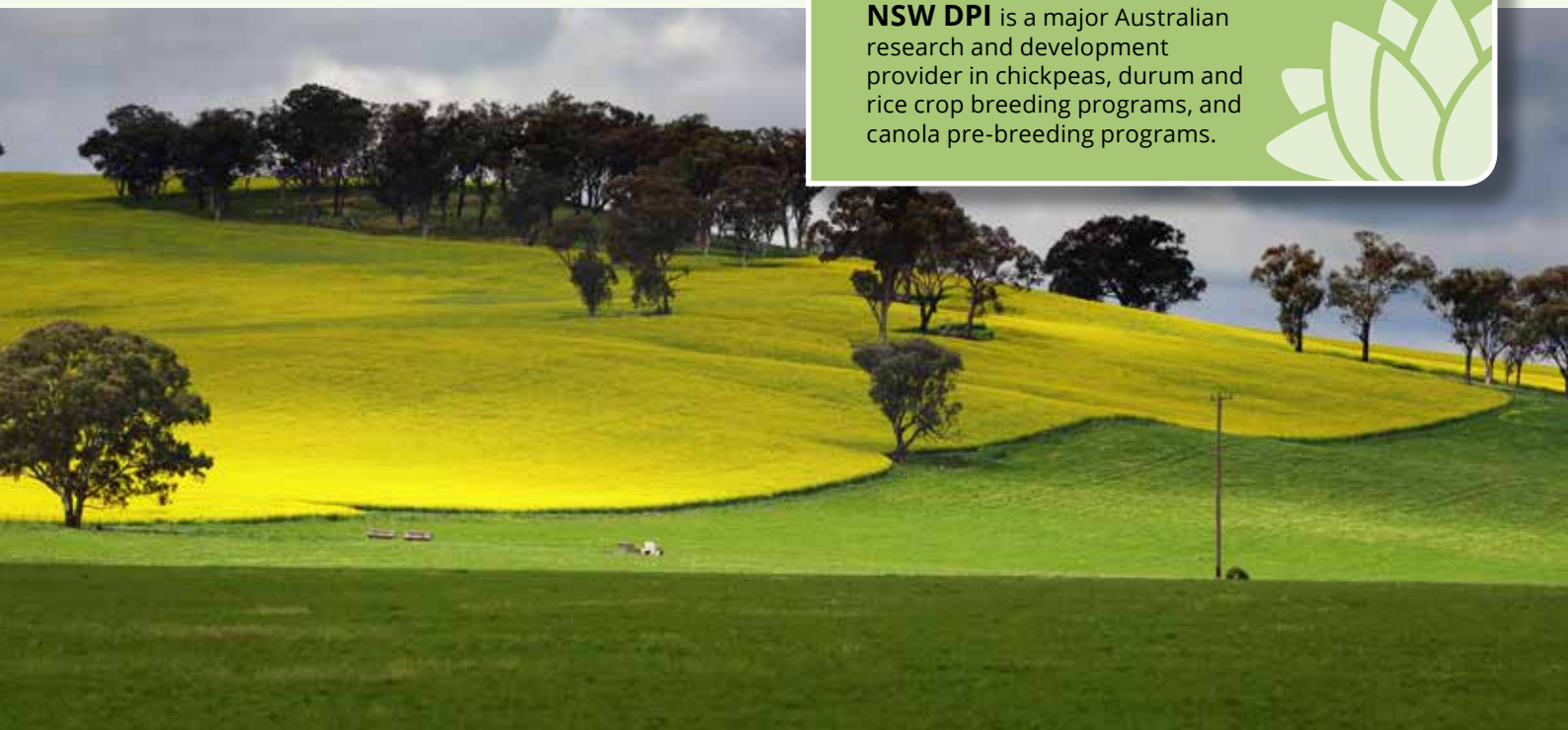
Sugar cane
\$93m
▲ 1%



Sorghum
\$89m
▲ 1%

Source:

NSW DPI is a major Australian research and development provider in chickpeas, durum and rice crop breeding programs, and canola pre-breeding programs.





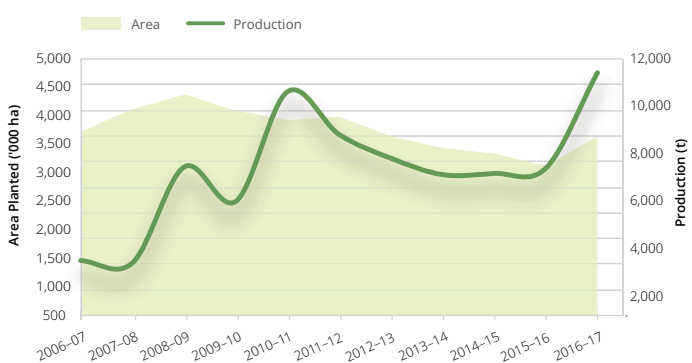
WHEAT

NSW recorded the largest state crop on record. Excess production, to usual domestic requirements, needed to be cleared through export channels. The India market rose from relative obscurity to take the largest share of NSW wheat, as a result of prolonged drought conditions experienced on the sub-continent.

PRODUCTION

Area planted was up year-on-year, but was actually down 4% on the 10-year average. Yields were at record levels, up 37% on the five-year moving average to an estimated 3.25 t/ha, which disguised some of the more exceptional yields reported across the state in the harvest². Well-timed and above average winter rainfall helped contribute to the record yield.

Area planted and production



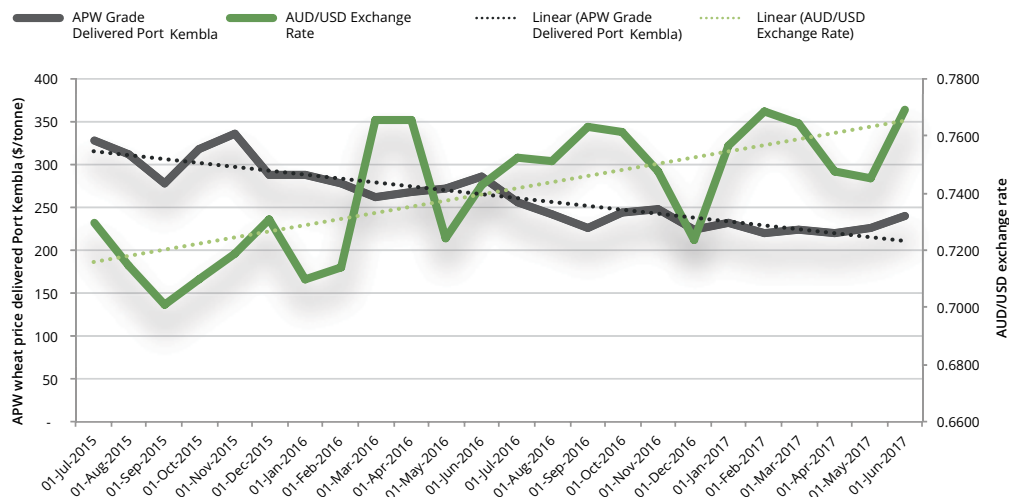
Source: ABARES (2017a)

PRICES

The US HRW futures price declined by 7% year-on-year while on a domestic basis, a more pronounced APW pool return drop of 12% was recorded. This pricing divergence is attributable to a strengthening Australian dollar and basis fluctuations.³

The crop suffered some of the lowest average prices seen since the 2011-12 bumper national crop.³ Demand for higher protein wheat resulted in increased premiums and was evident in the spread between Hard Red Spring versus the lower protein Hard Red Winter futures.

APW Port Kembla versus AUD/USD exchange rate



Source: RBA (2017a)

GVP

40% yoy
\$2,613m

20%
 contribution
 to GVP
 growth

Record global
 production and
 carryover stocks

EXPORTS

Exports have risen in value by 162% year-on-year buoyed by massive domestic production.⁴³

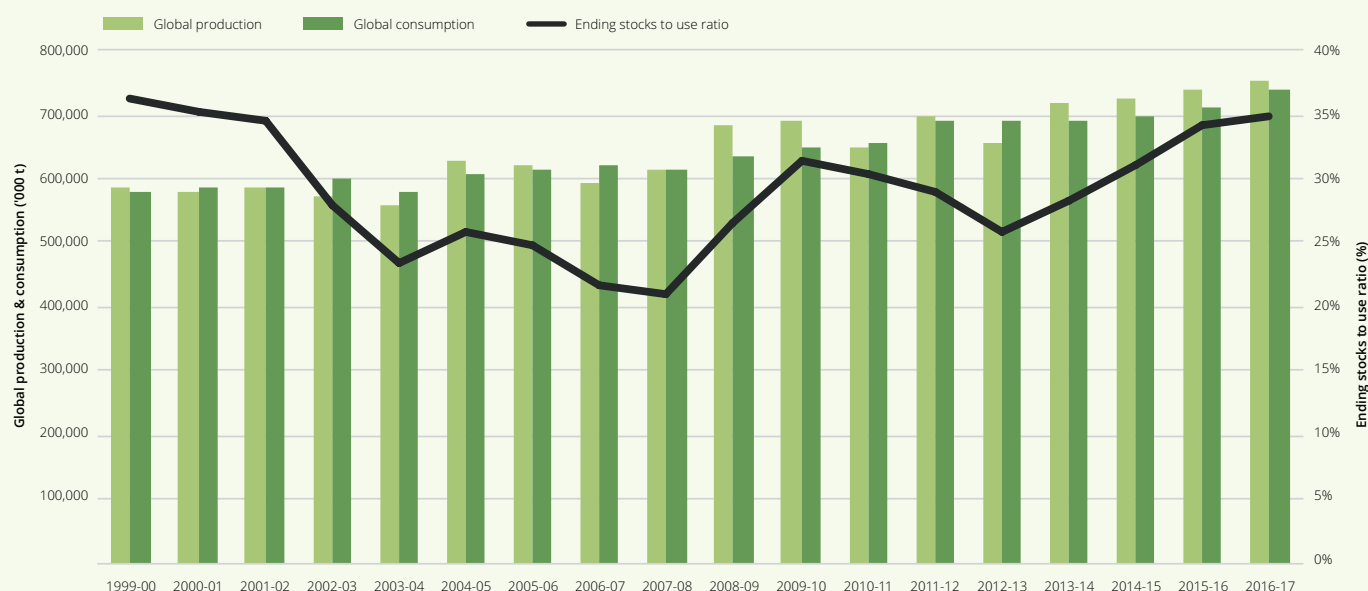
India has taken the majority share, as its drought induced supply shortfall increased import demand. The Indian government's decision to temporarily remove wheat import tariffs encouraged trade particularly with Australia and Ukraine.



MACROECONOMIC CONDITIONS

A gradually appreciating AUD/USD exchange rate over the past two years has reduced the competitiveness of Australian wheat on the international market.⁵⁵ Record global production has topped up record beginning stocks and resulted in a 5.3% year-on-year increase in carryover stocks despite a 3.8% increase in consumption.⁵⁹

Global supply and demand



Source: USDA (2017a)

NSW DPI developed DBA Lillaroi, the newest durum variety as part of Durum Breeding Australia. It was grown over approximately 10,000 hectares. DBA Lillaroi produced similar yields to DBA Caparoi, with up to 0.4% higher protein, achieving higher rates of DR1 grade grain, valued at \$50 per tonne more.





COTTON

Production was up significantly as a result of above average winter rainfall and water availability. Hot weather over summer had an impact on yield in some crops, particularly dryland crops. A combination of Chinese policy changes, below average global production, and increased global consumption has resulted in a reduction in global carryout stocks, with price responding positively to the news.

PRODUCTION

Production is expected to be up 50% to 2.6 million bales, with a significant increase in plantings in most major growing regions. Ample soil moisture increased water allocations encouraging an increase in both irrigated and dryland plantings.²

The rapidly expanding southern cotton region encountered issues planting within the optimum sowing window due to a wet winter and spring. This resulted in reduced plantings.²³

Extreme summer heat impacted yield and quality, with the dryland crops bearing the brunt of the impact. Average yield was down 22% on the five-year moving average.²

PRICES

Global consumption outstripped production 8% year-on-year for a second year, resulting in a decline in closing stocks of 19%.⁵⁹ A change in Chinese policy aimed at reducing its national stockpile is on track. Global carryouts excluding China rose but fell in total.⁶⁰ As a result the global Cotlook 'A' index has risen by 17% while the domestic average prices rose 7%, with the market factoring in the supply demand fundamentals.^{25,3}

GVP

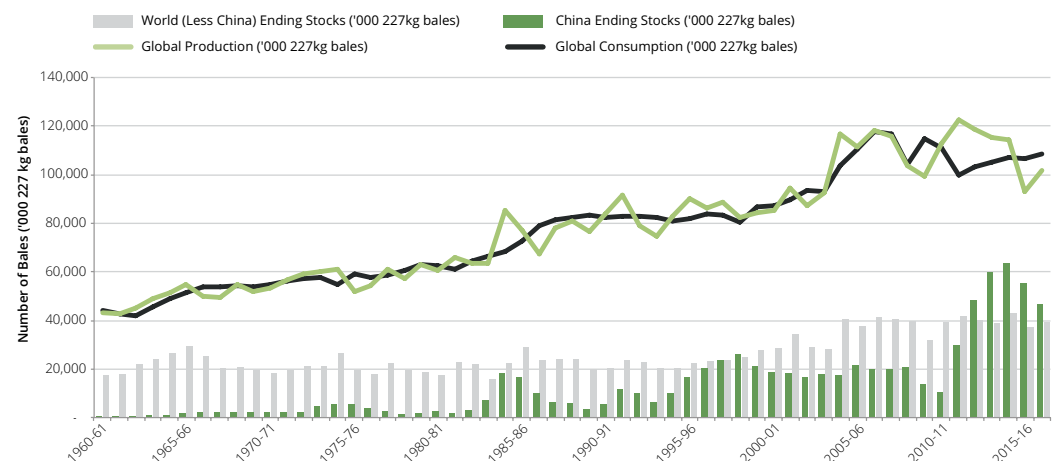
60% yoy
\$1,403m^{est}

3%
 contribution
 to GVP
 growth

NSW exports reached
\$730m

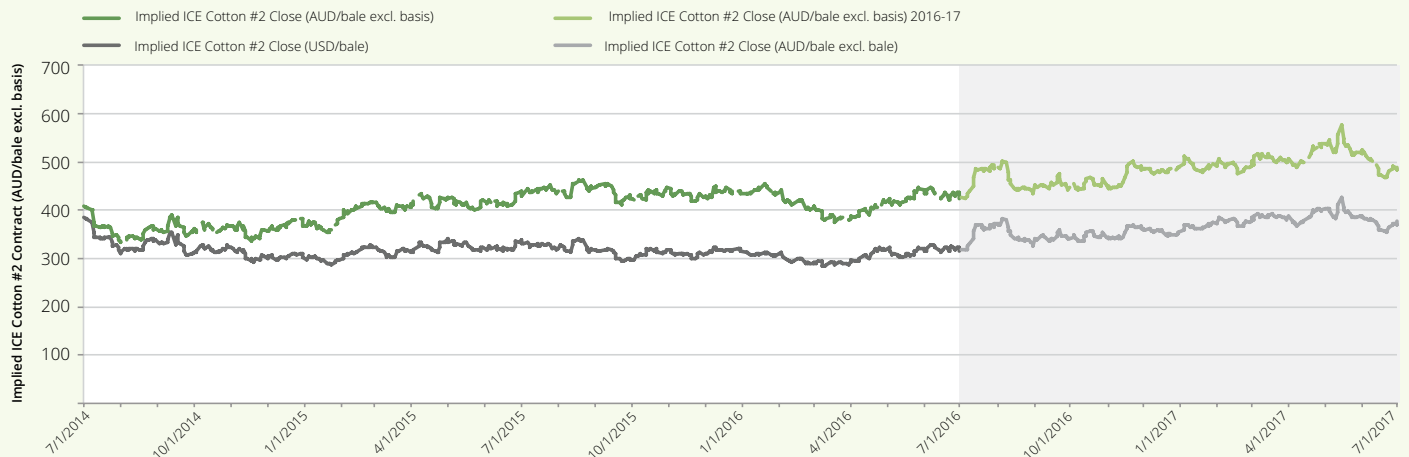
23% yoy

Global supply and demand



Source: ABARES (2017a)a

Implied futures prices

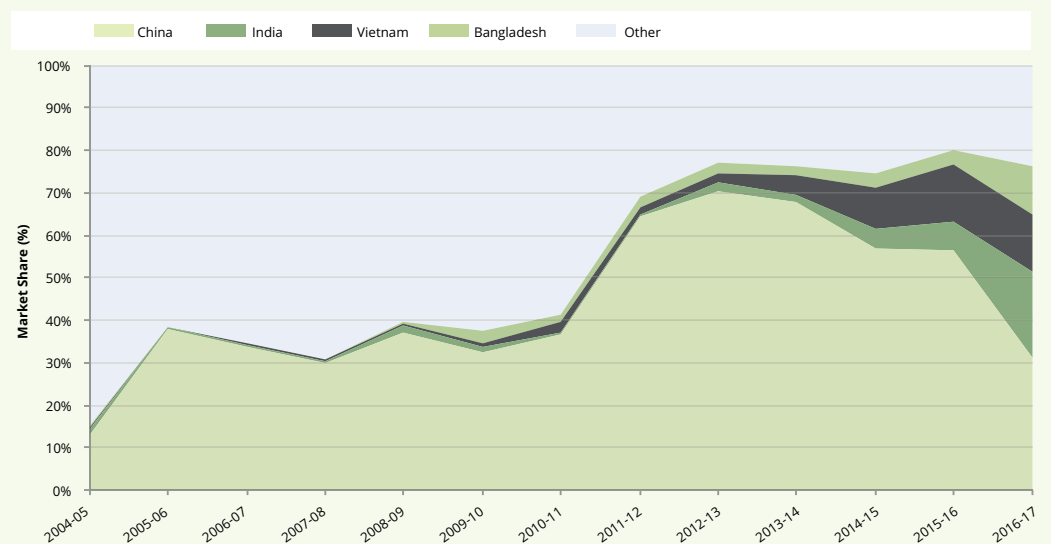


Source: QA (2017a); RBA (2017a)

EXPORT

Although China remained the largest trading partner, Chinese demand decreased as it endeavoured to address its own domestic reserves. This has led to Australian merchants seeking out other markets, in particular India, Vietnam and Bangladesh. India has jumped three positions to become our second largest export market.

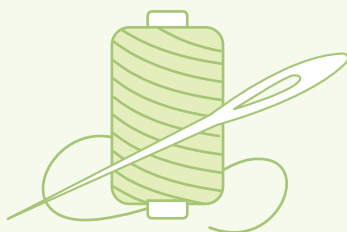
Export market share



Source: GTA (2017)

MACROECONOMIC CONDITIONS

Crude oil prices began to increase along with the price of synthetic fibres. Although this will help support cotton prices, the influence is likely to be limited as cotton yarn remains at a premium to polyester.



Primary industries in NSW Primed for growth

NSW DPI researchers are working to assist cotton growers reduce the impact of Verticillium wilt by developing a fast and accurate diagnostic test to identify strains of the pathogen that cause the disease in cotton. The test also aims to estimate pathogen levels in soil to enable growers to assess the risk of where and when to plant cotton.





PULSES

The value of the NSW pulse industry has surged while 2016 was fittingly titled 'International Year of the Pulse'. NSW Chickpea plantings hit a record-breaking high off the back of record prices and rising south-Asian demand.

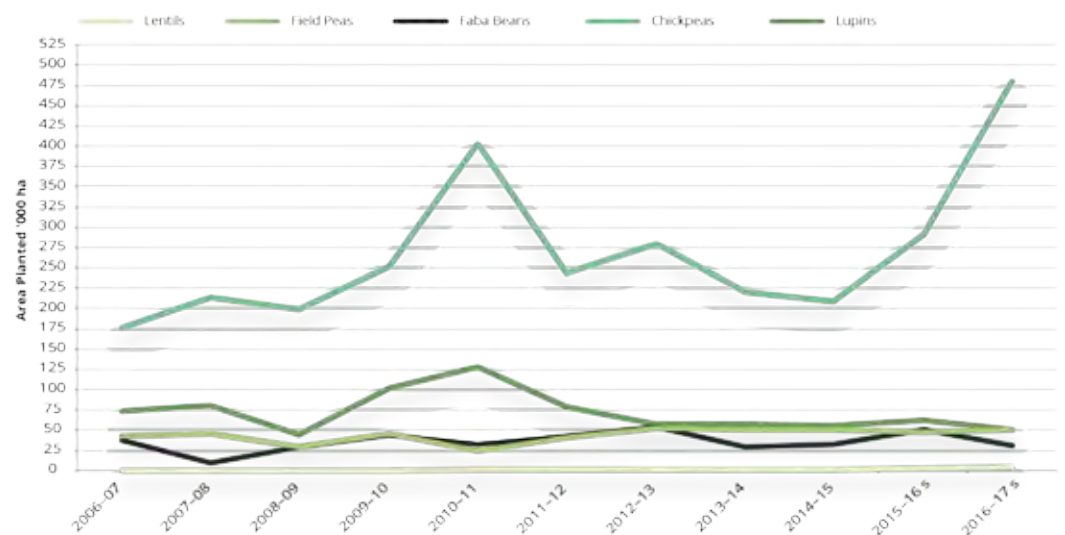
PRODUCTION

Area planted to pulses was up 2% year-on-year. A 21% surge in chickpea plantings was offset by a decline in area planted to other pulses and in particular lupins and faba beans.²

This massive increase in chickpea plantings resulted as farmers sought to take advantage of the favourable market conditions. NSW chickpea yields were up 34% year-on-year reflecting the generally favourable growing conditions.

Despite the very small size of the crop relative to other pulses grown in NSW, lupins are particularly important to the southern NSW pulse industry representing 48% by value of the pulses grown in southern NSW.⁶

Area planted to pulses



Source: ABARES (2017a)

PRICES

Strong sub-continent demand created upward pressure on chickpea prices, which reached record highs, up 15% year-on-year and 155% over three years.³

Prices rose sharply in late 2016 and continued in early 2017 due to consecutive poor seasons in India, the world's largest consumer and producer of chickpeas. Values began to ease slightly in the final quarter due to an improved Indian production outlook and high global stocks.⁵⁴

GVP



52%
yoy

\$810m^{est}

18%

contribution
to GVP
growth

India the
major export
market up

1434%

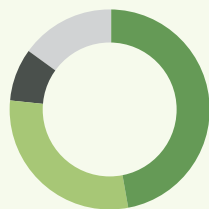
in value since
2013-14

EXPORTS

Global demand for pulses is growing, propelled by an increase in per capita consumption from developing countries.⁵⁴

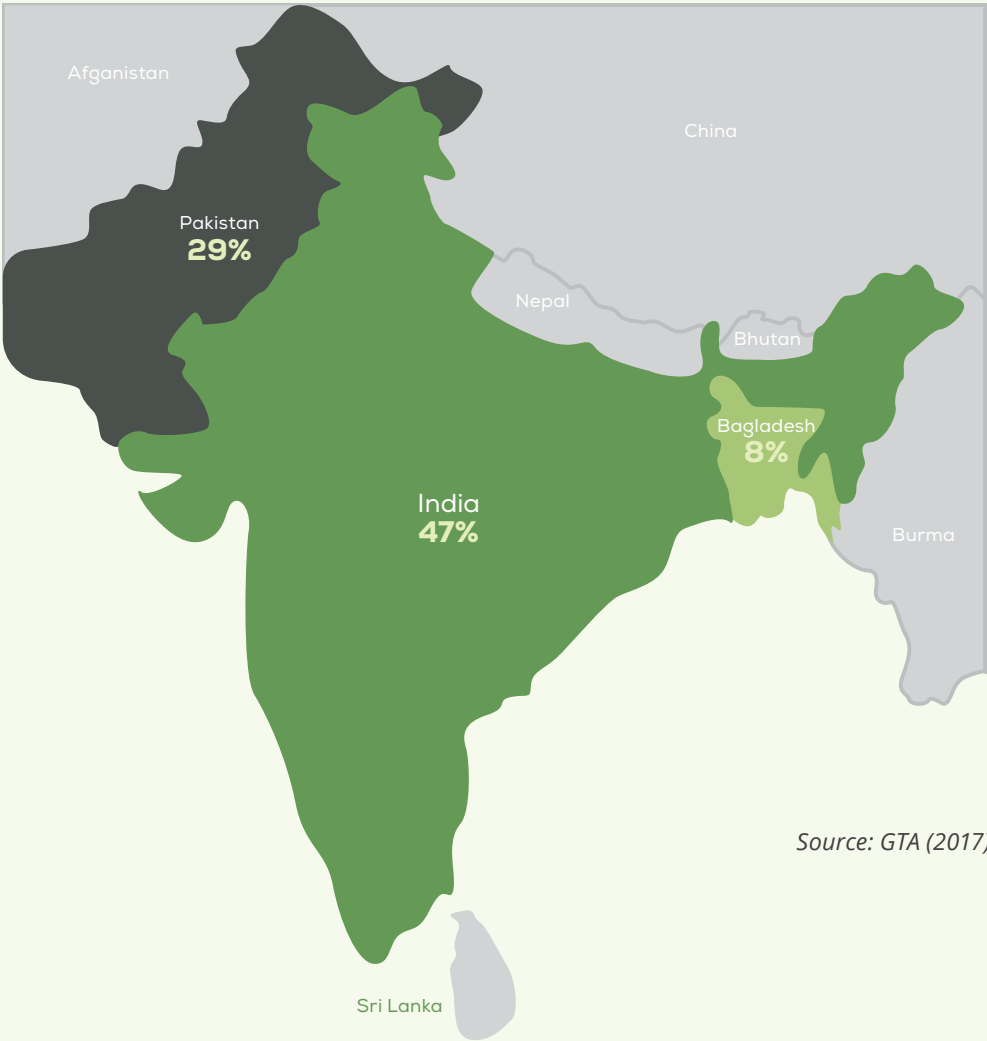
Demand for Australian exports in India has been strong with 47% per cent of total NSW pulse exports headed to India. Other subcontinent export destinations include Pakistan (29%) and Bangladesh (8%).

The total value of pulse exports increased dramatically, up 45% year-on-year and up 561% over three years.⁴³



NSW pulse export value (\$m) 2016-17

India	252
Pakistan	156
Bangladesh	44
Other	79
Total	531



Source: GTA (2017)

NSW DPI, in collaboration with GRDC as part of Pulse Breeding Australia, develop the leading chickpea varieties sown in NSW, to boost chickpea productivity by increasing yield, quality and disease resistance. In 2017, predominant varieties were PBA Hat Trick and PBA Seamer, which have the potential to increase yields by an average of 2% to 4%.





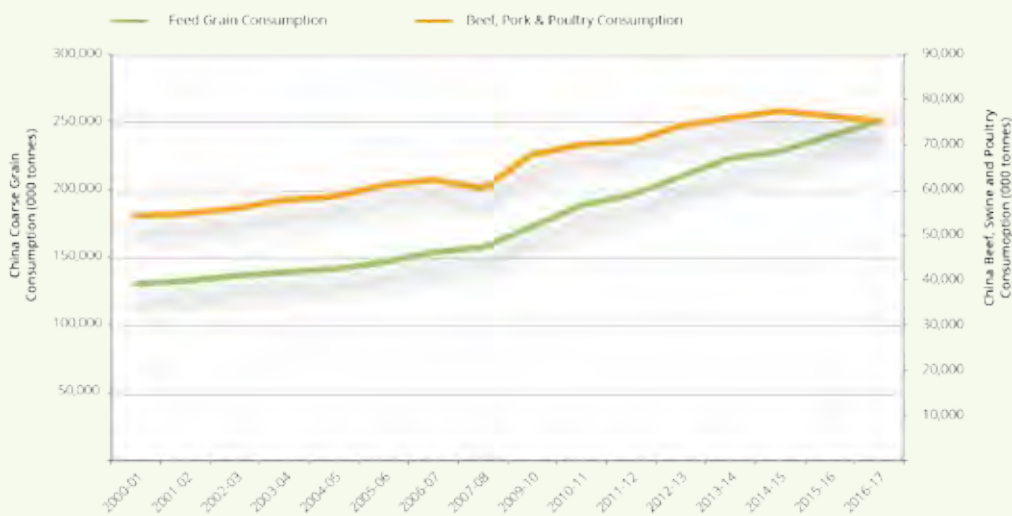
EXPORTS

Australia has overtaken the European Union as the world's largest global exporter supplying about 32% of the world's export trade or 9.3 million tonnes.⁶¹

China is the largest export destination for Australian barley. The China-Australia free trade agreement, which has eliminated tariffs on Australian barley imports, has helped give Australia a competitive export advantage.

Feed grain consumption in China hit a record at 251m tonnes, up 9% on the five-year average. China's reliance on feed grain imports has increased to 6% from the 10-year average of 4%.⁵⁹

China grain and meat consumption



Source: USDA (2017a)

MACROECONOMIC CONDITIONS

Demand is forecast to increase in line with global population growth and rising incomes in developing countries. In China, consumption of beef, pork and poultry has increased 23% in the past 10 years, resulting in an increased demand for barley and other feed grains for meat production.





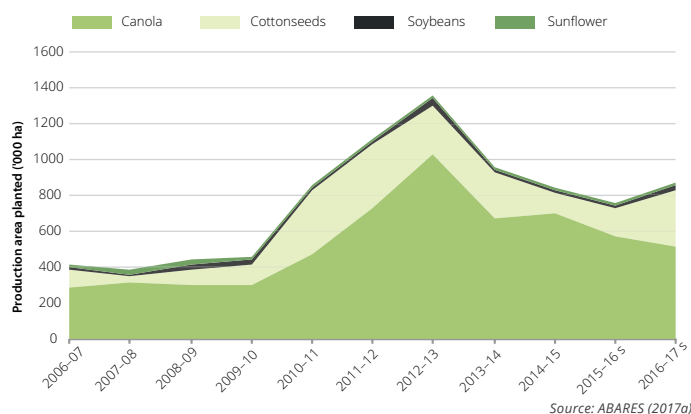
OILSEEDS

The oilseed industry in NSW is predominantly canola production. Canola yields were near record highs and prices were favourable, but the area planted was constrained by tight farm finances and crop rotations. The overall increase in oilseed production was the result of increased cotton seed on the back of higher cotton lint production.

PRODUCTION

The total volume of oilseeds produced in NSW was up slightly as cottonseed production, which is largely a by-product of cotton production, rose substantially. Canola production increased marginally, despite a reduction in area planted, driven by near record yields.

Area Planted to oilseeds



PRICES

Canola prices were historically high relative to cereals. This was expected to encourage a greater area planted.⁴⁷ However this did not eventuate as some farmers chose to plant cereals because of their lower cost of production, while some rotated into pulses.

The decision to grow canola and other broadleaf crops (e.g. pulses) is influenced not only by profitability but because they also improve soils and boost cereal yields when grown in rotation.⁵²

MACROECONOMIC CONDITIONS

Global indicator prices for canola moved slightly higher due to expectations of lower supply.³



GVP



6%
yoy

\$542m^{est}

1%

contribution
to GVP
growth

Cotton seed
production up

50%



RICE



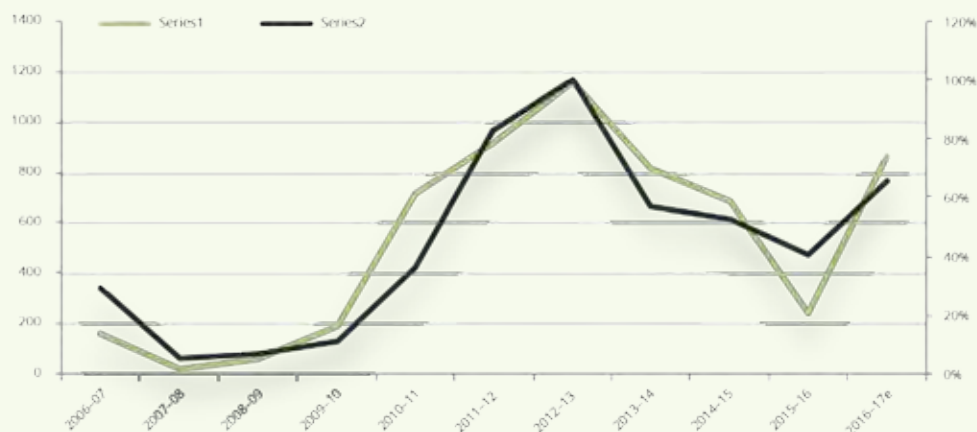
The industry made a significant recovery in 2016-17. With heavy rainfall in the Murrumbidgee, Coleambally and Murray Valley irrigation regions ahead of the sowing season, farmers confidently sowed the largest crop since record plantings in 2012/13.

PRODUCTION

Production surged 207% on the back of large increases in area planted. Yields were high as a result of generally favourable seasonal conditions, although slightly down on record levels in 2013-14.

Water allocations rose sharply with average general security around 65% of total availability. The higher allocations also reduced water prices throughout the year.

Rice production & water availability



PRICES

Prices paid to growers were down as large increases in production by medium grain growers in NSW and California increased supply.

There was a favourable response from farmers to fixed price contracts, offered much earlier in the season. This was a first for the industry and was largely seen as a response to increasing competition for irrigation water and land, particularly from the cotton industry. The limited numbers of fixed contracts offered by marketing firm SunRice were fully subscribed.⁵⁸

MACROECONOMIC CONDITIONS

Production in medium grain growing California increased 25%, with plantings recovering to typical levels after two drought-affected years. Global stocks of all types of rice are at their highest levels since 2001-02 weighing on prices.⁶²

GVP

122%_{yoy}
\$244m^{est}



NSW area planted
79,000ha
up 218%

NSW DPI Yanco Agricultural Institute has developed 95% of rice varieties grown in Australia. Our rice breeding program has developed a medium grain variety for the Middle East and Japan export markets. The variety has a shorter growing season, increases water use efficiency by around 10%, and has greater cold tolerance.

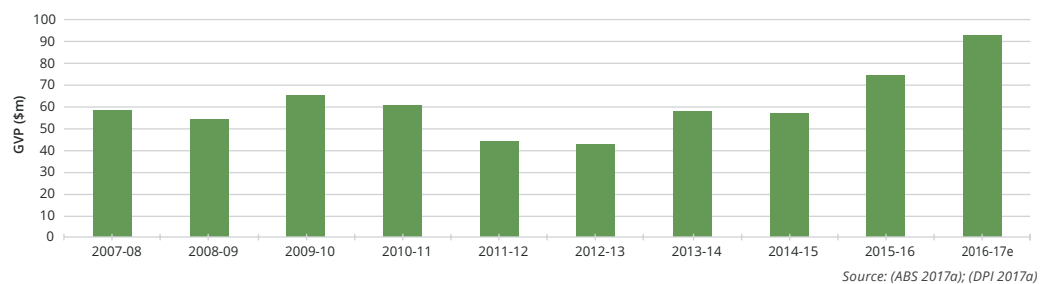




SUGAR CANE

This was a strong year for sugar cane producers. Outputs remained high and together with good prices resulted in the highest value of production for a decade.

GVP (\$m)



PRODUCTION

The amount of cane crushed fell slightly year-on-year but remained at high levels. With the area harvested largely unchanged, the drop in production came from a fall in yield. Despite the fall, yields were high and well above the decade average.²

Area harvested



Yields



PRICES

Prices increased strongly, supported by higher global spot prices and the rolling over of less favourably priced forward contracts.⁴⁸

Global stocks fell for the second consecutive year to around the six-year low. While global production continued to increase it did so more slowly than global consumption. Consumption increased on the back of demand from developing countries, where populations and income growth is causing higher demand for sugar.³

EXPORTS

NSW is not a large producer and sells most of its output into the domestic market. Exports are generally around 5% of the value of production.

The value of exports grew 5% driven by higher exports to Kiribati and Philippines. Exports are sold mainly into Asia-Pacific markets and can be quite volatile from year-to-year.

GVP



25%
yoy

\$93m^{est}

1%

contribution
to GVP
growth

NSW sugar cane
is grown over

18-24
months



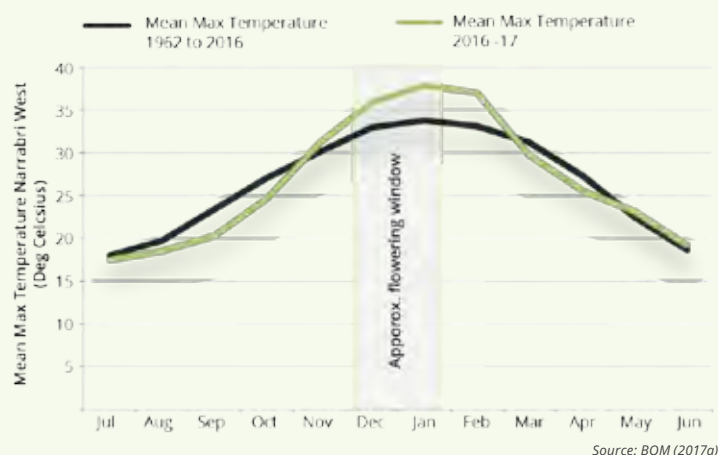
SORGHUM

Production declined year-on-year, in part due to unfavourable prices providing little incentive for planting, as well as hot weather, which had a detrimental impact on yield in some regions. Global feed grain production has led to an oversupply and depressed prices. Exports to China have reached record levels.

PRODUCTION

The area planted declined for a second year and reached an 11-year low, despite a favourable winter. Although the season started well with full moisture profiles, low prices reduced acres planted. Extreme temperatures over summer had a negative impact on crop yields, which were down 24% on the 10-year average.²²

2016-17 Extreme summer heat and sorghum flowering window



GVP

50%
 yoy
\$89m^{est}

-1%
 contribution
 to GVP
 growth



Exports to China
 reached a record
189,250
 tonnes

PRICES

Prices reflected the trend for feed grains falling 17%.³ This is a result of a glut of coarse grain on global markets, with record production resulting in large carry over inventories.⁶¹

EXPORTS

China accounts for the vast majority of exports, with most other markets being relatively small. The Chinese market has steadily increased from relative obscurity to taking 95% of NSW production.⁴³

The Chinese government's decision to drop minimum price support for grain has reduced the relative competitiveness of exports. Chinese consumers either utilise existing inventories or procure imports at discounted prices to previous years.⁴¹

MACROECONOMIC CONDITIONS

Demand for sorghum as a feed grain is expected to grow in line with expected demand for red meat in countries such as China where there is significant population and wage growth.

LIVESTOCK OVERVIEW

The estimated combined GVP of NSW livestock and livestock products was \$6,339 million, up 2% year-on-year and 35% over three years. Beef cattle remained the main contributor to growth, with high prices generating the highest fiscal year average on record. Record high prices also pushed the value of the wool industry up 20%.

2016-17 was generally a favourable year for extensive livestock industries. The exceptionally wet and mild winter afforded most with an abundance of fodder over the spring and summer months, facilitating restocking opportunities and generating strong competition between restockers and processors. While record-

breaking heat was a feature throughout summer, the benefits of the prior very wet period and subsequent feed base enabled producers to manage through the heat. High prices reflected the supply scarcity, with average farm incomes increasing further across all regions of the state.

Intensive livestock industries experienced a more varied year. Milk and pork producers were faced with falling prices, challenging farm productivity, whereas poultry and egg producers benefited from rising domestic and international demand. Input costs were generally lower as grain and water prices fell.

ESTIMATED COMBINED GVP OF BROADACRE CROPPING INDUSTRIES \$6,339m



▲ 2%
year-on-year



▲ 35%
over 3 years



GVP AND CONTRIBUTION TO TOTAL GVP GROWTH



Cattle

\$2,376m

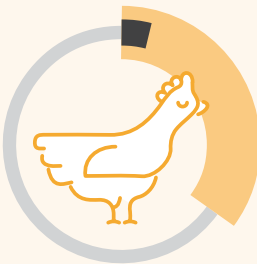
22%



Wool

\$1,137m

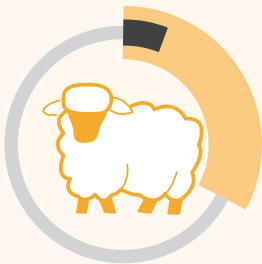
8%



Poultry

\$912m

4%



Sheep & goat meat

\$858m

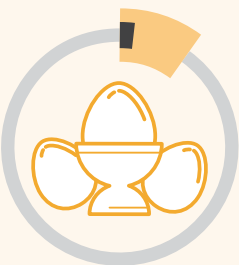
6%



Milk

\$559m

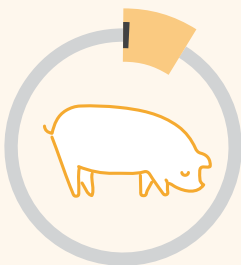
1%



Eggs

\$273m

2%



Pork

\$224m

1%

Source:

NSW DPI research delivers improvements in livestock productivity through genetics and breeding, enhancing the feedbase, feed efficiency and meat quality, and animal health and welfare.





BEEF CATTLE

2016-17 proved to be one of the most favourable in more than three decades – characterised by record high cattle prices and a very wet winter period, which contributed to high on-farm cash incomes.

PRODUCTION

While high prices for all types of cattle were warmly welcomed, this led to very hard and expensive purchasing decisions. All breeders were highly sought after, with cows and cows with calves-at-foot bringing very strong competition throughout the year.

NSW produced 450,383 tonnes carcass weight of beef. This was the lowest fiscal year total since 2005-06, and down 14% year-on-year. A combination of low herd numbers and the retention of female breeding stock, due to good seasonal conditions, contributed to the annual decline.⁵⁰

GVP



7%
yoy

\$2.376m^{est}

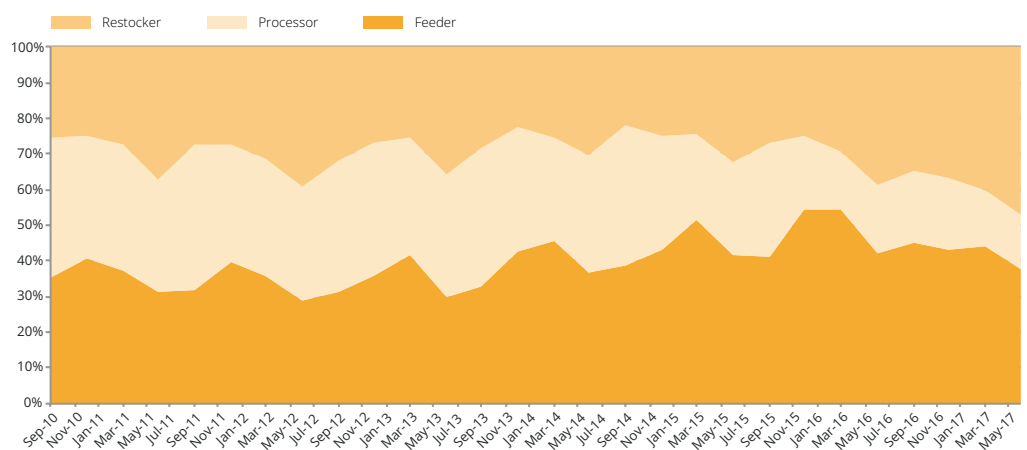
PRICES

Prices averaged only 5-12% higher year-on-year. This was the highest fiscal year average on record and consolidated the substantial year-on-year gains registered in the previous two years (19-31% 2014-15 and 37-40% 2015-16).⁵⁰

The benchmark EYCI peaked at 725.75¢/kg cwt, the highest price ever recorded.

Restockers increasingly purchased higher volumes of EYCI cattle at the expense of processors and feedlots. Of the EYCI eligible cattle purchased in 2016-17, restockers purchased 35%, feeder purchases 45%, and processors 20%.

EYCI buyer composition



Source: MLA (2017a)

22%

contribution
to GVP
growth



Beef exports
were valued at
1.3 billion

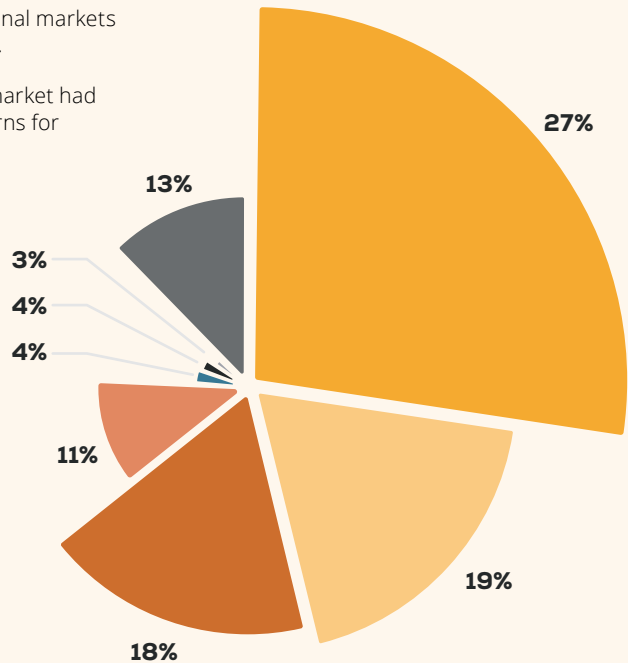
MACROECONOMIC CONDITIONS

While strong global beef demand is normally matched by robust economic growth and consumer demand, the global shortage of meat protein, especially beef, helped to sustain global beef prices. The FAO Food Price Index indicates global meat prices increased on average by 7.67%.³⁸

EXPORTS

Export demand was robust throughout the year, with NSW beef destined for its traditional markets of Japan, US and Korea.

A softening in the US market had a slight impact on returns for manufacturing beef.



Beef export value (\$m)

Japan	\$357m
United States	\$248m
South Korea	\$233m
China	\$148m
Indonesia	\$52m
Taiwan	\$50m
United Kingdom	\$39m
Other	\$173m

Source: GTA (2017)



NSW DPI research on muscling in its Angus herd has shown that increasing cow Muscle Score from D to B increased dressing percentage and retail meat in carcasses, with no adverse effects on maternal productivity or meat quality, potentially adding 20c/kg for each unit increase in Muscle Score.





WOOL

Wool producers enjoyed one of the most positive years in decades, as favourable seasonal conditions and prices signalled a return to confidence in production and inspired flock rebuilding intentions.

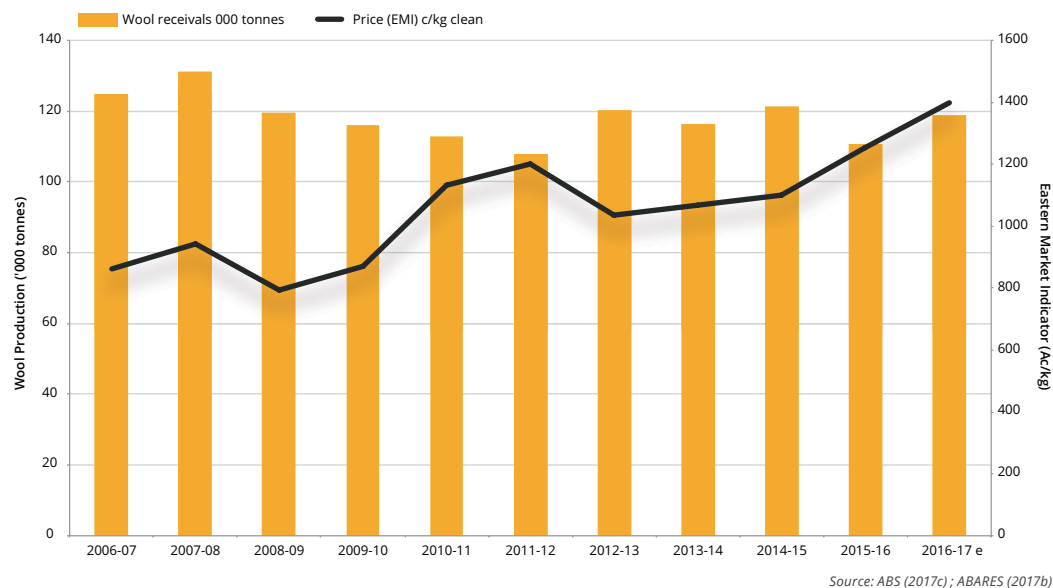
NSW WOOL PRODUCTION

Producers revealed a strong intent to retain older and replacement ewes and wethers, as they sought to capitalise on good seasonal conditions and optimistic wool and sheep meat markets.

Receivals increased, up 7% year-on-year and 2% over three years.⁸ This growth was due to an increase in average fleece weights and an increase in shorn sheep numbers.

Shorn wool production was up 2.6% to 126mkg greasy. Encouraged by buoyant prices, many producers brought shearing dates forward. The volume of wool tested was up 3.4% to 129mkg greasy, due to the release of stocks previously held on-farm and timely delivery of freshly shorn wool.²⁰

Production and price



EXPORTS

Exports increased 15% to \$673 million, reflecting higher prices, slight growth in export volumes (up 4%), and strong demand.⁴³

Export growth has been supported by a steady increase in international demand. China remains the largest export market by volume and value, followed by Italy and the Czech Republic. High rates of economic development and increasing domestic consumption of luxury textiles, rising in line with the more affluent population, are all contributing to growth in the Chinese export market.³

GVP



20%
yoy

\$1,137m^{est}

8%

contribution
to GVP
growth

Wool receivals up

7%
yoy

to 119mkg greasy

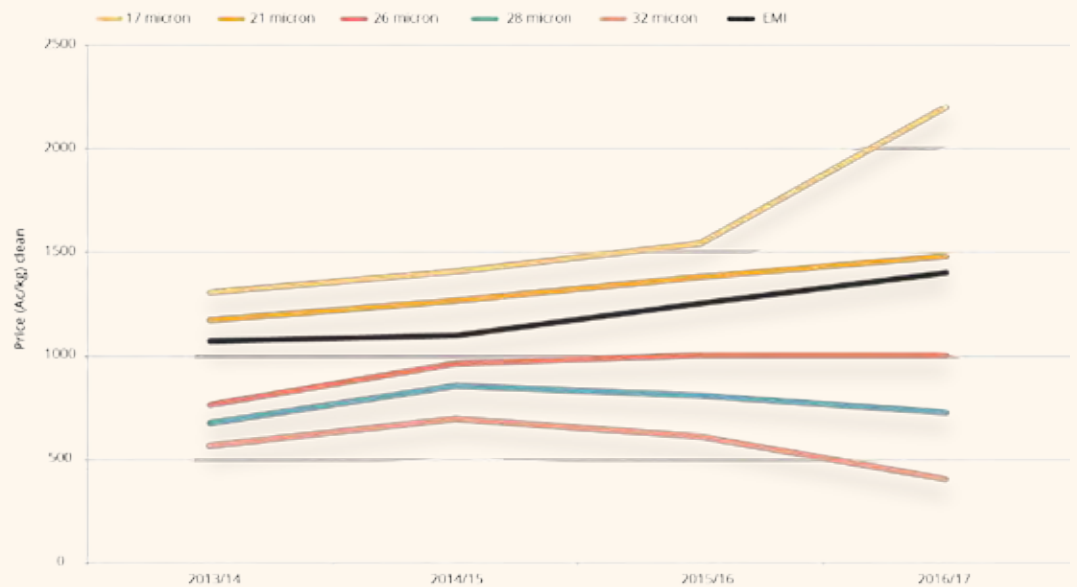
PRICES

Prices rose to decade-high levels driven by robust processing demand and limited supply, particularly for finer wools.

The annual average AWEX EMI price increased 13% to 1415c/kg (clean) year-on-year and 32% over three years³, despite limited movement in the exchange rate. In March 2017, all wool price indicators for the Merino sector registered within the 100th percentile band measured over the past five years.²¹

Increasing price divergence across the micron categories was apparent. Superfine prices climbed sharply, while broader wool prices and demand waned, reflecting the long-term decline in fine wool production.²¹

Production and price



Source: AWI (2017b)

NSW DPI, in partnership with Macquarie Sire Evaluation Association and Australian Merino Sire Evaluation Association, has evaluated Merino sires suited to the central NSW cropping and sheep zone, delivering a list of measured and visually assessed traits and selection index values for breeders and producers to use when selecting sires to improve profitability of Merino enterprises.





POULTRY

The industry value continues to grow solidly as rising domestic demand encourages higher production. While exports account for only a small share of production, Avian Influenza outbreaks across a number of markets presented opportunities for increased exports.

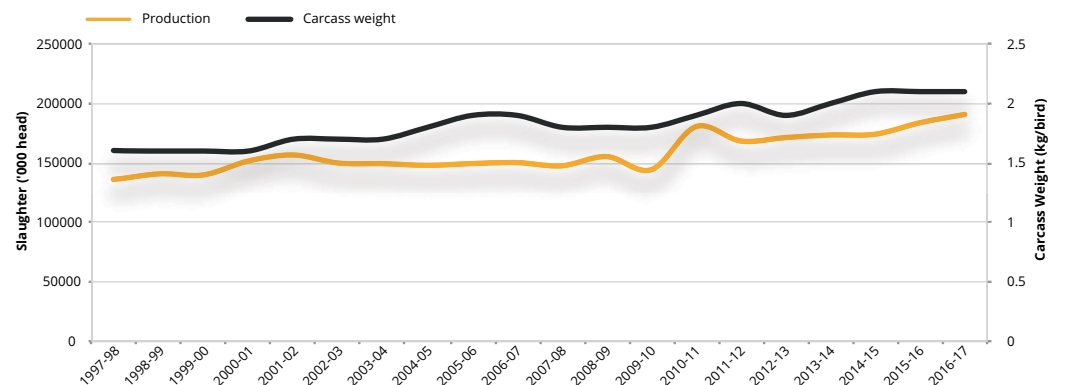
PRODUCTION AND PRICES

Production continues to be driven by steady growth in domestic demand encouraged by the relatively low cost of chicken meat compared to other proteins, such as beef, lamb and pork. Over the medium term, chicken's price competitiveness has been driven by efficiencies in production that have contained retail prices.⁸

Retail prices eased 2% as the increase in production weighed on prices.¹⁰

Improved breeding has increased average weights and reduced growing times, while the intensification and industrialisation of production have facilitated higher slaughtering.

Chicken slaughter and carcass weight



Source: ABS (2017c)

GVP



4%
yoy

\$912m^{est}

4%

contribution
to GVP
growth



Average annual
consumption
47kg per person

EXPORTS

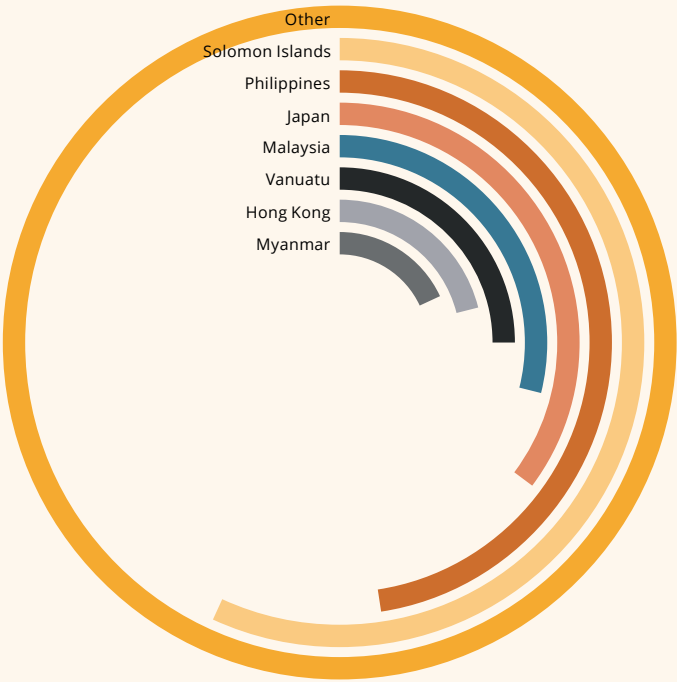
Exports are a small share of production. Exports grew steadily but were volatile and it is not uncommon to observe large increases and decreases between years for particular countries. This volatility reflects price sensitivity in overseas markets, a steady and growing domestic market, and trade restrictions on export competitors.⁴³

MACROECONOMIC CONDITIONS



Major chicken producers in Asia, Europe and the US experienced outbreaks of Avian Influenza, which led to tight global supply as affected countries destroyed large numbers of birds and other countries imposed trade restrictions on affected exporters.³⁹

POULTRY EXPORT VALUE



Poultry export value 2016-17 (\$m)

Other	\$6.5m
Solomon Islands	\$3.7m
Philippines	\$3.1m
Japan	\$2.3m
Malaysia	\$1.9m
Vanuatu	\$1.7m
Hong Kong	\$1.4m
Myanmar	\$1.2m

NSW DPI poultry manure is a highly valuable fertiliser and soil ameliorant, can increase soil nutrient levels and improve carbon levels and the water holding capacity of soils. NSW DPI and Fertcare have developed workshops for poultry meat producers to maximise the potential use and benefits of poultry manure as a low-cost fertiliser.





SHEEP & GOAT MEAT

It has been a positive year for sheep meat producers as good seasonal conditions and record prices encouraged flock rebuilding and high stock retention rates. The value of the goat meat industry is steadily increasing, underpinned by robust global demand and favourable prices.

PRODUCTION

NSW produced 119,469 tonnes carcass weight of lamb, down 2.4% year-on-year.⁹ This decrease was due to a reduction in lamb slaughter, assisted by lower spring marking rates, increased retention of ewe lambs and slightly lower carcass weights. The three-and-five-year production trends continue to remain positive, and coupled with the current market strength, indicates that growth in demand likely outstripped growth in supply.⁵⁰ Indeed, consumer demand for Australian lamb remained very positive despite pressure from high saleyard prices.

Mutton production rose moderately, up 7% year-on-year to 45,345 tonnes carcass weight.⁹ Despite the annual increase, the sheep flock continues to remain at near century-low levels, despite sustained rebuilding efforts in recent years.⁵⁰

NSW DPI estimates the NSW rangeland goat population at roughly 5.8 million head.³² Goat slaughter declined 14% year-on-year to 91,897 head, down 12% over three years.⁵⁰

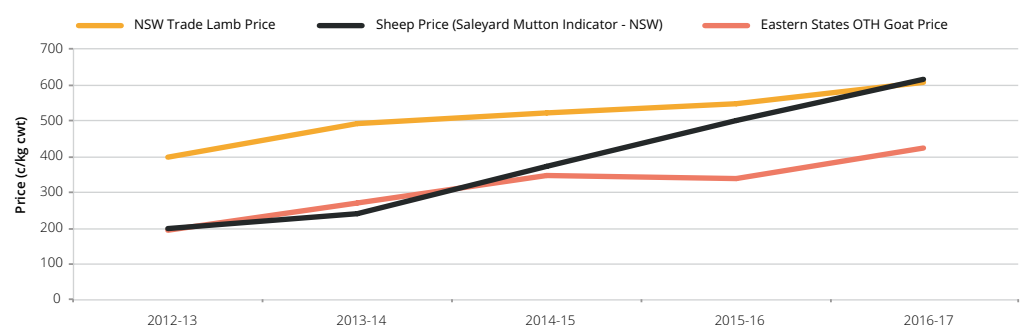
PRICES

Strong demand and tight supply drove lamb prices. OTH lamb indicator prices rose 11.8%, averaging well above year-ago levels. The average annual ESTLI price has increased for the past four consecutive years, and trended 26% higher compared to three years ago.⁵⁰

Mutton prices surged fuelled by producers intent on retaining breeding ewes and wethers in an already tight supply market. The NSW Mutton Indicator rose 17% year-on-year or 58Ac/kg cwt.⁵⁰

Average OTH goat indicators rose 23% year-on-year and 155% over three years.⁵⁰ Prices hit record highs in mid-2017 reaching 682Ac/kg, rivalling lamb prices. The majority of goat meat ends up in the export market and international demand plays a very important role in determining domestic goat meat prices. Sustained export demand and tight domestic supplies resulted in significant growth in the domestic price of goats.

Sheep, lamb and goat prices



Source: MLA (2017a)

GVP



16%
yoy

\$858m^{est}

6%

contribution
to GVP
growth

United States
remains top export
market by value up

206%

over 3 years

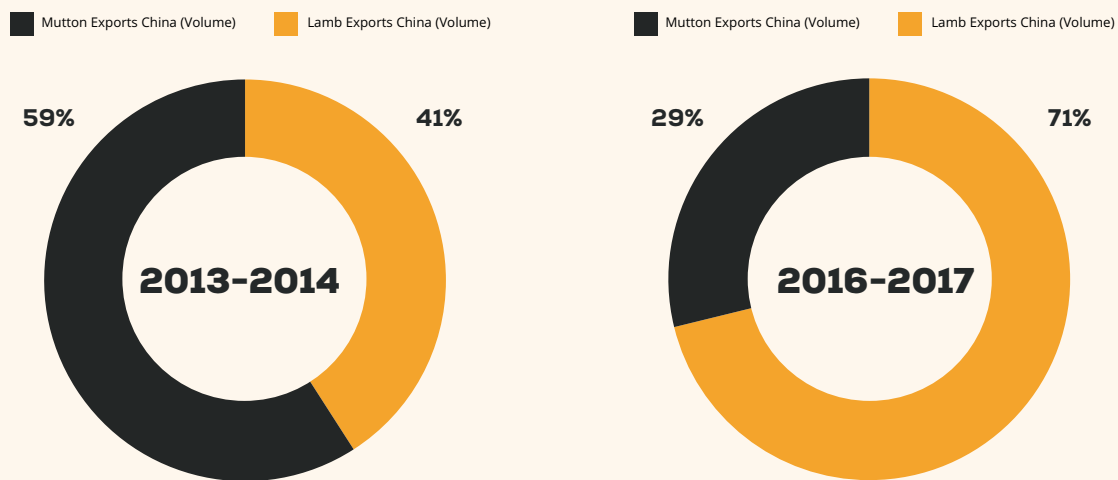
EXPORTS

Sheep meat exports have risen in value by 19% year-on-year, supported by the depreciating Australian dollar and strong global demand. China, USA and the Middle East remain the top export markets, with the Chinese market growing in value by 80% year-on-year.⁴³

National trade data indicates that there is a growing shift in Chinese preference for lamb over mutton, with mutton export volumes dropping 40% but lamb export volumes remaining relatively steady. This shift can be attributed to a rise in preference for higher value proteins and a reduction in the price divergence between lamb and mutton.⁴⁹

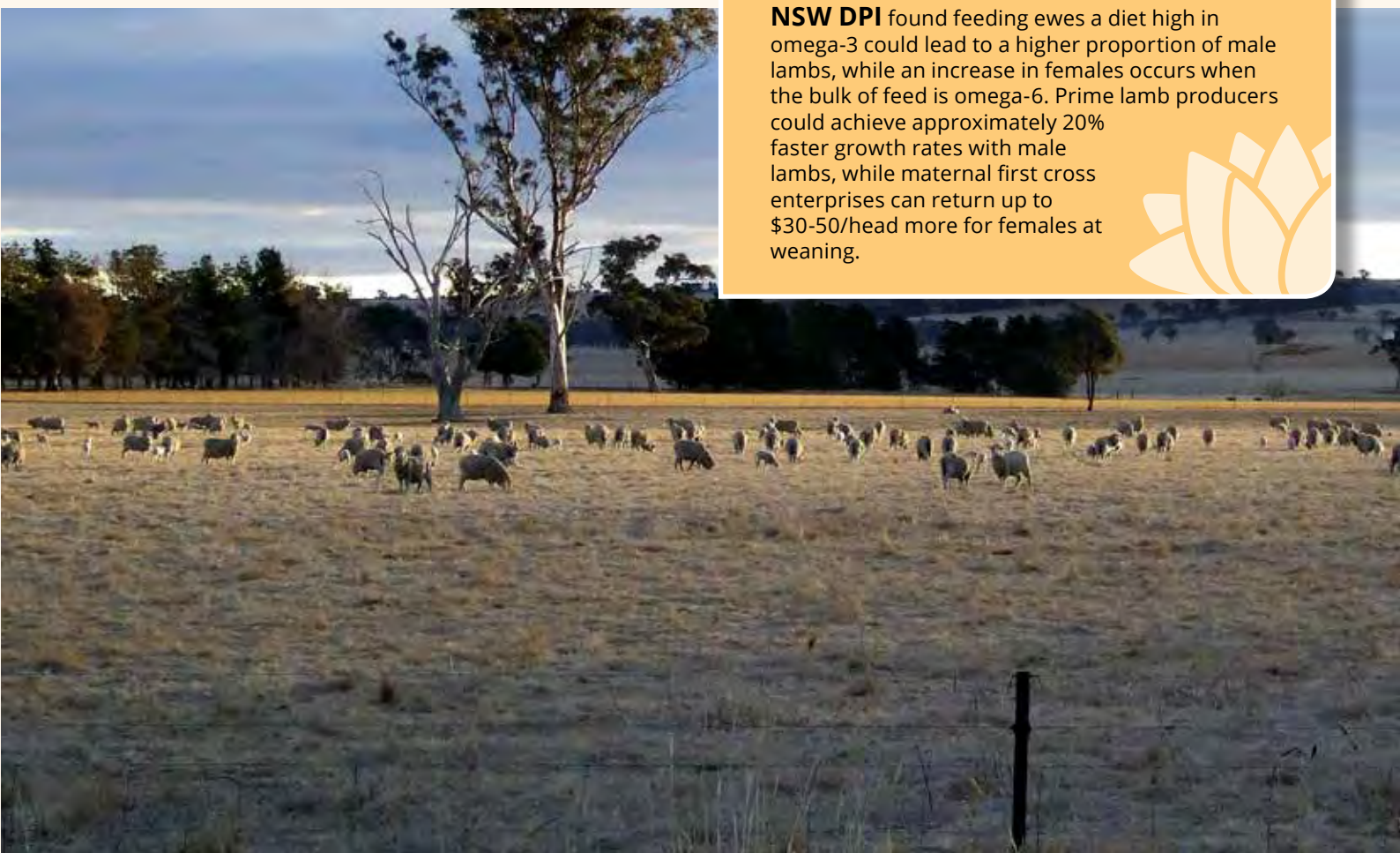
The rangeland goat industry is heavily dependent on export market demand for goat meat, given domestic demand is limited. Live goat and goat meat exports were valued at \$5.1 million representing a 19% decline on the five-year moving average (GTA 2017). Malaysia and the United Arab Emirates were the largest importers of Australian live goats whereas the US, Taiwan and South Korea were the major importers of Australian goat meat. A large portion of NSW goats are processed and exported from neighbouring states.

Sheepmeat exports to China



Source: GTA (2017)

NSW DPI found feeding ewes a diet high in omega-3 could lead to a higher proportion of male lambs, while an increase in females occurs when the bulk of feed is omega-6. Prime lamb producers could achieve approximately 20% faster growth rates with male lambs, while maternal first cross enterprises can return up to \$30-50/head more for females at weaning.





MILK

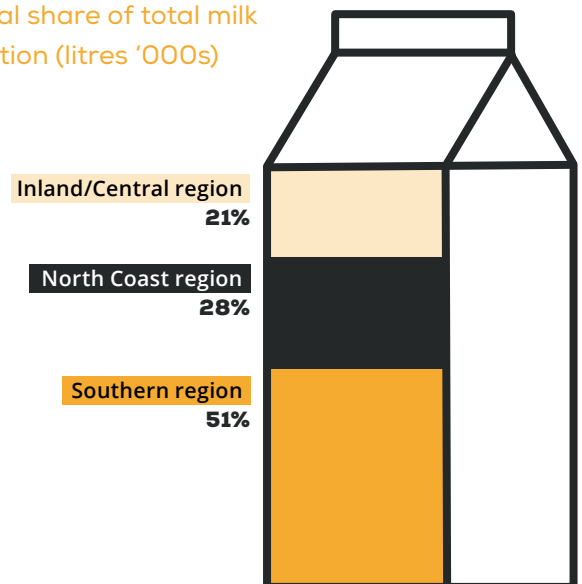
The industry is still feeling the impact of the low prices for dairy products of the past few years. As a result some dairy farmers have left the industry or downsized their operations to cut costs, resulting in reduced production.

PRODUCTION

Production declined mainly in response to reductions to farmgate prices.²⁷

The southern dairy region experienced the greatest year-on-year decline in production, down 7.3%. The influence of this region on state production levels was significant, contributing 51% of total NSW milk production.

Regional share of total milk production (litres '000s)



Source: DA (2017a)

GVP



6%
yoy

\$559m^{est}

1%

contribution
to GVP
growth

NSW production
wholemilk



**1,121m
LITRES**

-4.9%
yoy

PRICES

The drinking milk industry is domestically focused, with the majority of drinking milk sold on the domestic market sourced from farms in the central and northern dairying regions. The price paid in these regions is generally on a cents-per-litre basis as opposed to the southern region, which is based on a price-per-kilogram of milk solids.⁵⁶

In contrast, much of the milk produced in the southern dairying region is processed and turned into milk powders and other dairy products for export. Consequently, global dairy markets determine price received in the southern region. Russian-imposed sanctions on Western dairy imports in 2014 have endured, and combined with a decrease in Chinese demand, has led to a global oversupply, and prices have reacted accordingly.⁵⁷

Opening drinking milk prices offered to producers ranged from 53 to 57 cents per litre for producers supplying to northern processors, while those supplying to processors based further south were offered between \$4.31 to \$4.80 per kilogram milk solids (similar to 33 and 37 cents per litre).²⁴

Farmgate prices for milk destined for the domestic drinking milk market remained relatively stable. However, due to the influence of the southern dairy region on the total NSW milk supply, this regional price decline had a dramatic effect on total state production, value and industry sentiment.

EXPORTS

Domestic drinking milk sales volumes declined by 1.4% year-on-year to 722 million litres.²⁷

Drinking milk export volumes fell 10% in response to the global oversupply, while the value dropped 4%.⁴³ South-east Asian markets dominated the small export program, with Singapore taking over from China as our largest export market accounting for 63.4% by volume.⁴³

Global dairy prices showed a positive rise at the beginning of the year following a falling three-year trend, which may indicate some stability slowly returning to the global supply.¹³

Global Dairy Price Index



Source: GDT (2017)





EGGS

The industry continues to expand on the back of solid growth in demand. While demand increased across all egg categories, demand for free-range eggs continues to grow rapidly. Exports for eggs more than doubled this year as Avian Influenza outbreaks presented new market opportunities.

PRODUCTION AND PRICE

Production increased modestly following a couple of years of strong growth, driven by a steady increase in the size of the laying flock, greater productivity, and increasing demand, with the national average consumption per person now at 226 eggs per year.

The slight slowing in the rate of growth partly reflects an increased share of production coming from free-range farming systems as free-range output cannot be sustained across the year as days become shorter and temperatures drop.

The value of egg output has risen significantly over three years due to an increase in eggs per bird, a larger flock, and steady price rises. Average Sydney retail prices increased consistent with further increases in the share of eggs purchased from free-range systems.^{10,14}



GVP



6%
yoy

\$273m^{est}

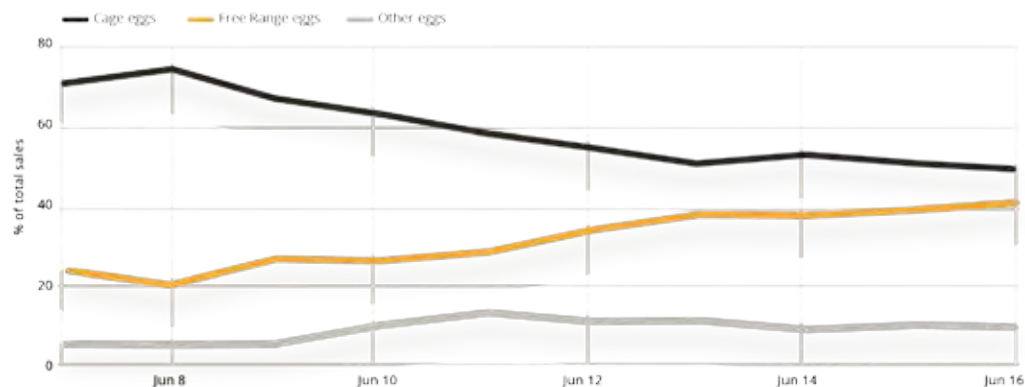
2%

contribution
to GVP
growth



226 eggs consumed
per person annually

Egg sales - number of eggs



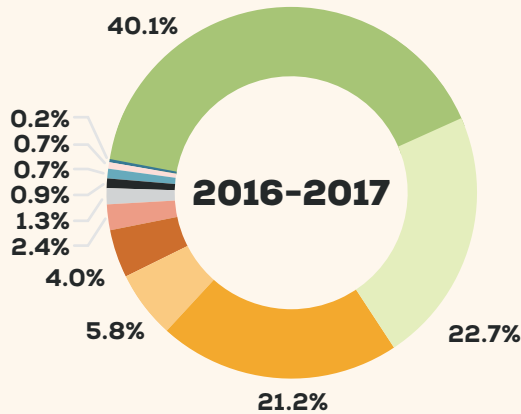
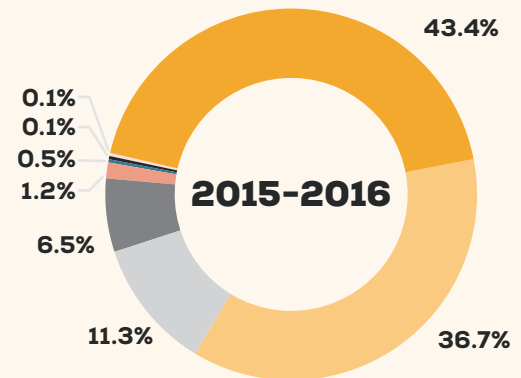
Source: AE (2017a)

EXPORTS

Exports more than doubled in value compared to the previous year, though remain a small fraction of total value of production. The growth in exports is largely the result of a number of Avian Influenza outbreaks, which began towards the end of 2016. Exports to Philippines increased from zero to \$1.5 million.⁴³

South Korea has been one of the most affected countries. The spread of the disease has wiped out a third of South Korea's laying flock (around 22 million birds) causing a drop in production of around 13 million eggs per day. South Koreans are one of the world's biggest egg consumers and have a strong preference for brown eggs, which are currently being imported from Australian producers. NSW exported \$872.341 of eggs to Korea, compared to nil dollars in 2015-16.⁴⁶

Egg export value (\$)



Hong Kong	787,997
Thailand	666,819
Nauru	205,395
Vanuatu	118,380
New Caledonia	22,680
Tonga	9,010
Solomon Islands	2,413
New Zealand	2,380

Philippines	1,542,240
South Korea	872,341
Hong Kong	814,096
Vanuatu	225,000
Myanmar	155,226
New Caledonia	90,720
Nauru	51,179
Solomon Islands	35,348
Singapore	26,061
New Zealand	25,715
Tonga	9,010

Source: GTA (2017)





PORK

Domestic oversupply along with competition from processed imports has led to falling prices for NSW pig producers. While prices have fallen, the demand for pig meat has remained strong, with pork overtaking beef as the second most consumed meat in Australia behind chicken.

PRODUCTION

Pig meat production rose by 13% to 65,000 tonnes reflecting increases in average carcass weights and increases in the supply of pigs to slaughter in response to beneficial returns in 2016.⁹

The increase in average carcass weights can be attributed to falling feed grain prices and a devastating fire at the largest pork processing plant in the southern hemisphere, which caused delays in pig deliveries over the late spring and summer period.¹⁷

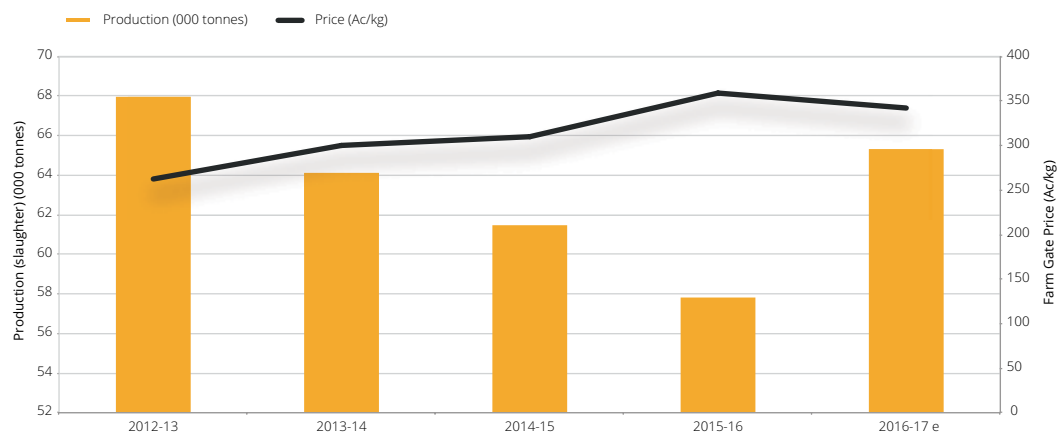
PRICES

Prices rose in 2016 due to strong consumer demand for pig meat, which greatly outweighed supply.¹⁷ Strengthening export demand for red meat and accompanying high prices led to species substitution at a consumer level. In late 2015, Pork overtook beef as the second most consumed meat in Australia behind chicken. Record Australian fresh pork sales during Christmas 2016 drove per-capita consumption over 10kg for the first time.¹⁸

Production interest increased as producers took advantage of the favourable market conditions, leading to an oversupply of pigs and a dramatic slump in prices. Increases in the import of cheap, pre-cooked pork products, namely pork bellies and ribs, further compounded the oversupply.¹⁸

Retail prices eased slightly despite the weight of growing pig supplies.⁵⁰

Production and price



Source: ABS (2017d) ; ABARES (2017b)

GVP

6% yoy

\$224m^{est}

1%

contribution to GVP growth

Pork now second most consumed meat

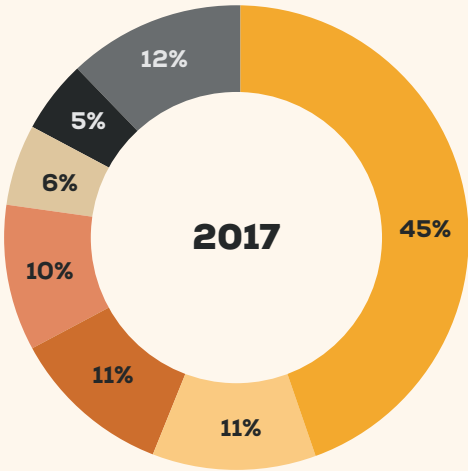
EXPORTS

Imports have been steadily increasing by both volume and value since the 1990s. In 2016-17, the value of pork imports grew by 12% to a value of \$163 million, driven by weak international pig prices.⁴³

The value of exports rose by 34% to \$27 million⁴³ This increase reflects higher average export unit values and a 3,061 tonne increase in export volumes to around 9,046 tonnes.⁴³ Exports to south-east Asia, in particular Singapore and the Philippines, showed strong growth, both increasing in value by more than 50% year-on-year. The Singapore market is dominated by high value cuts and carcasses and experienced a 96% increase in growth over the past three years.⁴³

Pork export value (\$m)

Singapore	\$12.3m
Philippines	\$3.1m
New Zealand	\$3.0m
Papua New Guinea	\$2.7m
Hong Kong	\$1.5m
Fiji	\$1.4m
Other	\$3.3m



Source: GTA (2017)





HORTICULTURE

The horticulture sector is made up of a very diverse range of fruit, vegetable, nursery, cut flowers and turf industries. This significant primary industries sector makes up 9% of total GVP and the combined horticulture value ranks as the third largest industry. The sector has grown by 16% from 2013-14 levels, which is attributed to increasing demand for NSW fresh produce both domestically and abroad. Key developing industries such as nuts and blueberries have contributed heavily to growth, while traditional NSW horticulture industries continue to provide stable support to the sector.

PRODUCTION & VALUE

GVP



3%
yoy

\$1,442m^{est}

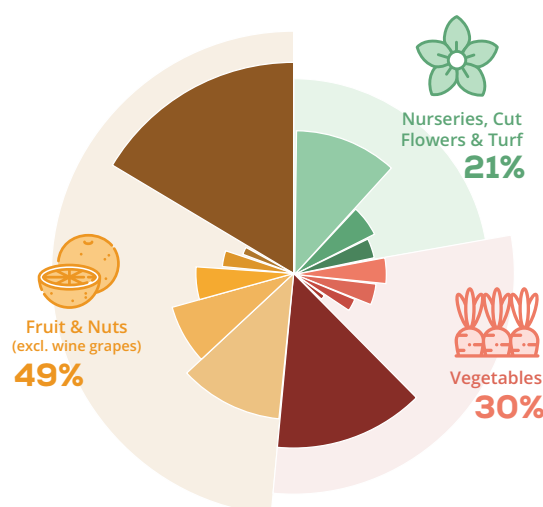
In the period from 2013-14 to 2015-16, macadamia production increased 25%, while almonds increased 65% on the back of strong international demand particularly from Asia.⁷

Demand for blueberries has encouraged rapid industry expansion, with production increasing 96% between 2010-11 to 2015-16 and an industry worth \$117m.⁶

Citrus remains the largest single industry, with oranges the main contributor. Although production was up 14% in the two years to 2015-16, lower prices resulted in GVP falling by 7%. Industry restructure from juicing to fresh fruit, and an increase in other citrus fruit plantings (e.g. mandarins), is indicative of producers seeking better returns.⁷

The vegetable industry had a moderate increase in value of 3% between 2013-14 and 2015-16.⁶ This result followed a relatively subdued year prior where declines in value for a combination of the smaller vegetable industries were offset by gains in some of the larger vegetable industries.⁶

GVP 2015-2016 (\$m)^{est}



Nurseries	\$147m
Cultivated turf	\$81m
Cut flowers	\$71m
Mushrooms	\$78m
Potatoes	\$72m
Melons	\$58m
Tomatoes	\$34m
Other Vegetables	\$176m
Oranges	\$148m
Blueberries	\$117m
Macadamias	\$86m
Grapes (excl. wine grapes)	\$64m
Apples	\$49m
other Fruits	\$212m

Source: ABS (2017e)

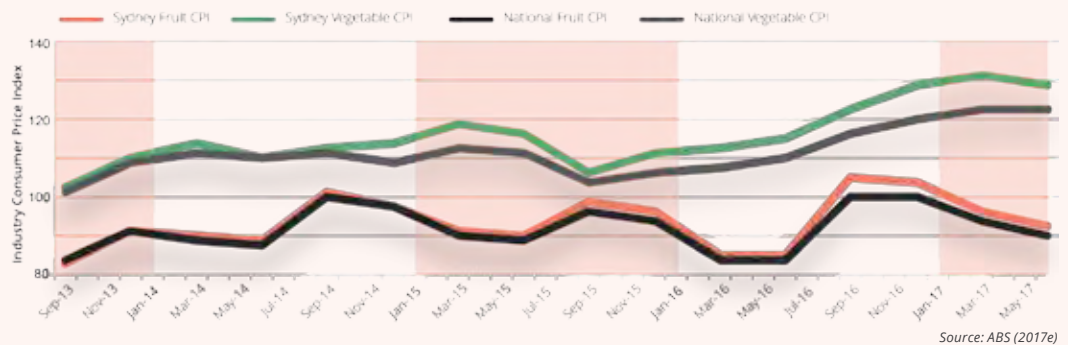
NUTS & BLUEBERRIES
Key NSW growth industries

PRICES

Sydney consumer price indices for fruit rose by an average nominal rate of 9%, while vegetables prices grew by 15% year-on-year. Both of these industries outperformed the national average consumer price index growth.¹⁰

Horticulture prices are expected to outpace inflation and grow at a faster rate than other agricultural industries in the forward estimates.³

Sydney & national fruit & veg CPI

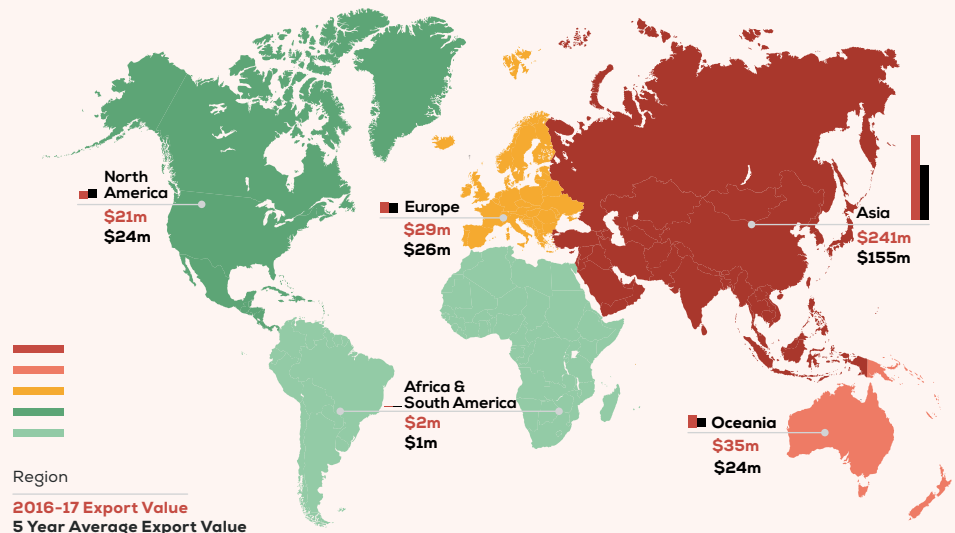


EXPORTS

NSW horticulture exports grew at a rapid pace to reach \$325 million, an increase of 41% over the five-year moving average. This growth has been steady and sustained since 2010-11. Asian markets are the major destination for NSW horticulture products, with 74% of all exports by value arriving in these markets.⁴³

Nuts are the major horticulture export making up 48% of total exports by value, with rising incomes and increasing awareness of the health benefits linked to nut consumption driving demand.¹⁶ Other significant exports included table grapes, plums, cherries and potatoes, which together made up 15% of all exports by value.⁴³

Horticulture export by region



Source: IHS GTA (2017)

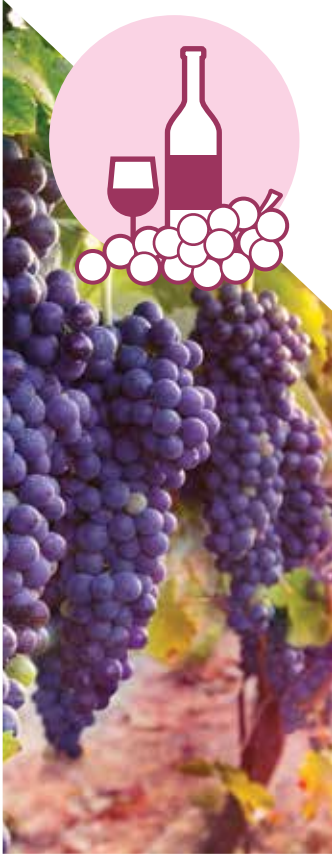
MACROECONOMIC CONDITIONS

The demand stemming from Asia for NSW produce is supported by the state's renowned food quality and safety, rigid biosecurity standards, increased living standards, changing consumer preferences, and improved international supply chain infrastructure.⁶⁵ Free Trade Agreements signed in the Asian region are expected to improve the competitiveness of NSW produce into these markets, along with continued efforts to improve market access.³

World demand for nuts is growing at around 4% per year and well above population growth. Demand from China for macadamias is expected to stabilise in coming years as local production increases. Further demand from neighbouring Asian markets is expected to offset any decline from China.

NSW DPI partnered with Horticulture Innovation, CSIRO, and the Australian Centre for International Agricultural Research to release six new Chinese citrus rootstocks in NSW to improve yield, fruit quality and tree size, and boost tolerance to different soil types, water availability and disease.





WINE GRAPES

The value of wine grapes production increased solidly driven by price. Production was largely unchanged despite an increase in output from the Riverina region. Wine export growth was also muted with strong ongoing gains in growth to emerging Chinese markets offset by falls in exports to more established markets.

PRODUCTION

The grape crush was up slightly year-on-year. The positive result mainly reflected steady production in the Riverina, which accounts for 89% of the volume of wine grapes crushed in NSW.⁶³

Roughly 71% of the grape crush was purchased from grape growers, with the rest supplied to wineries through their own vineyards.⁶³

The varieties of grapes most purchased largely mirrored production with shiraz, cabernet sauvignon and merlot purchased the most out of the red varieties and chardonnay, semillon and sauvignon blanc the most purchased of the white varieties.

GVP



4%
yoy

\$154m^{est}

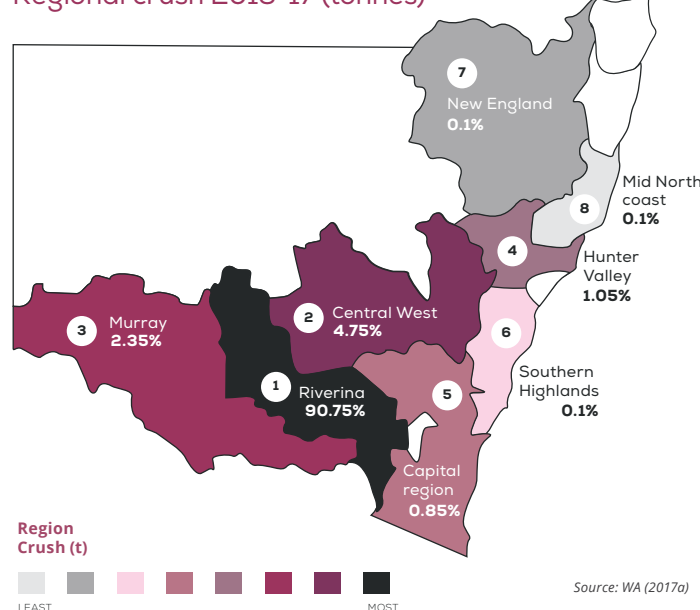
1%

contribution
to GVP
growth



Exports to China
continue to grow
strongly

Regional crush 2016-17 (tonnes)



1 Riverina	317,791t
Gundagai	
Southern NSW Zone Other	
Tumbarumba	
Riverina	

2 Central West	16,591t
Central Ranges	5,202
Cowra	4,014
Mudgee	1,319
Orange	6,056

3 Murray	8,214t
Big Rivers Zone other	7,881
Perricoota	333

4 Hunter Valley exc. Newcastle	3,664t
Hunter	3,238
Hunter Valley Zone other	426

5 Capital region	2,983t
Canberra District	352
Hilltops	2,631

6 Southern Highlands & Shoalhaven	44t
Shoalhaven Coast	0
Southern Highlands	44

7 New England & North West	31t
New England's Australia	29
Northern Slopes Zone other	2

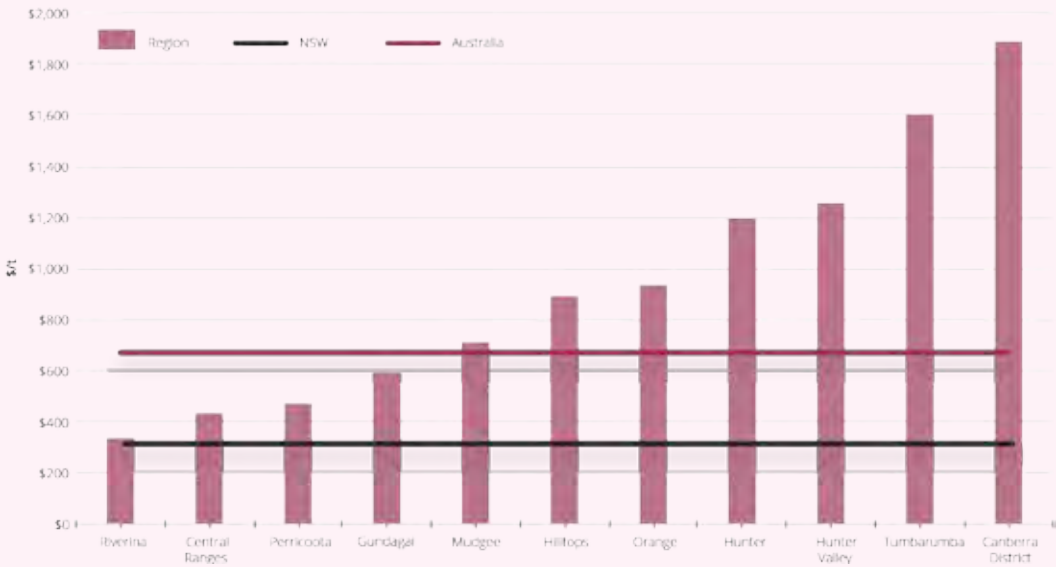
8 Mid North Coast	29t
Hastings River	29



PRICE

Prices paid are estimated to have increased by nearly 5% on average though results were mixed across the regions. The average price was \$373 per tonne. This compares with a national average of \$635 per tonne. The lower price is consistent with the large share of production coming from warmer inland regions, where average purchase prices tend to be lower. The average price of inland wine grapes averaged \$345 per tonne compared to \$856 per tonne for the cooler regions.⁶³

Wine grape prices

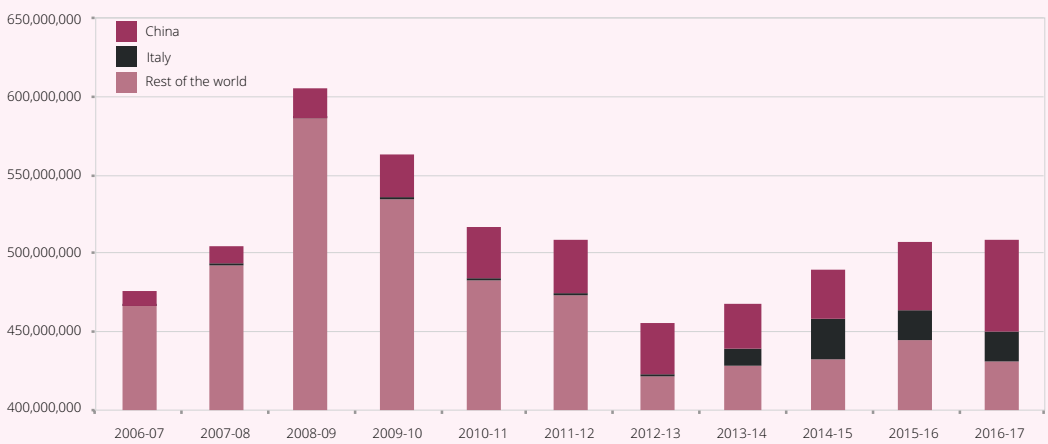


Source: WA (2017a)

EXPORTS

The value of wine exports was largely unchanged. Exports to established markets, such as the United States and the United Kingdom, were lower or unchanged, while exports to China continued to grow strongly. Over the past five years, exports have grown around 2.8%, with fast growth to emerging markets in China and Italy largely responsible for this growth.

NSW wine exports value (\$m)



Source: GTA (2017a)





FORESTRY

Production levels were estimated to hit a six-year high in 2016-17, with most of the growth in the softwood sector. A growing population, expanding construction sector, and demand for dwellings are all contributing to increasing forestry production levels. Strong demand from China has meant this is now NSW's most dominant market replacing a traditionally strong Japanese market.

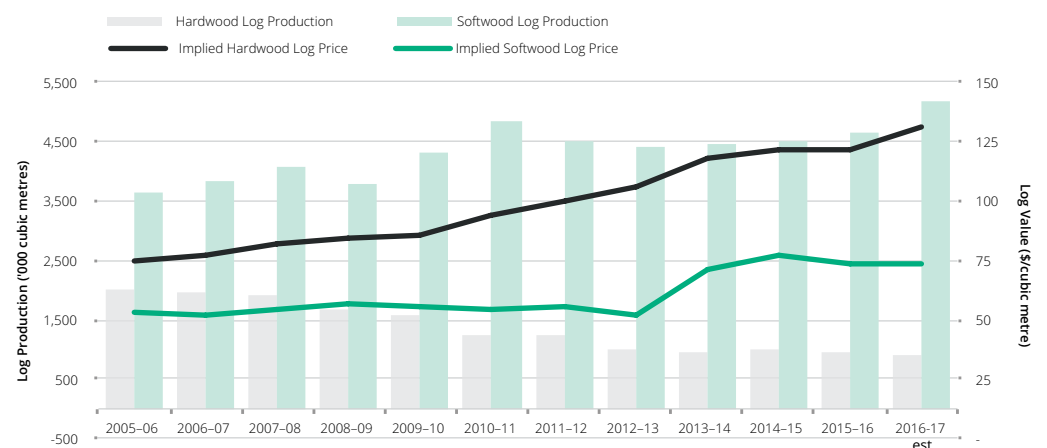
PRODUCTION

Industry growth is largely being driven by expansion of the softwood industry, with softwood plantation areas steadily increasing along with softwood log production.¹

Log production was expected to hit the highest level since 2010-11, with softwood production expected to reach record levels.⁴⁰

Hardwood production was estimated to decline by an annual rate of 1.8%. Specifically, native hardwood log production was estimated to fall 3.4%, while plantation hardwood was expected to increase by 32% year on year.⁴⁰

NSW plantation area and establishment



Source: DPI (2017a)

GVP



10%
yoy

\$503m^{est}

2%

contribution
to GVP
growth

Exports grew by



51%
yoy

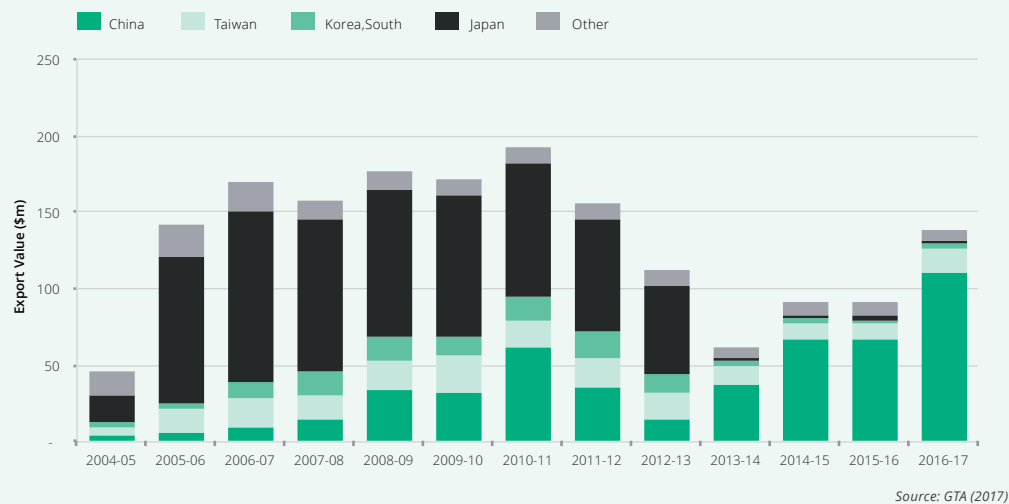
PRICES

Implied softwood prices are expected to decline marginally in 2016-17, after a period of steady increase in log value.³

Significant growth in implied hardwood prices is expected in 2016-17 with average growth reaching 8% year-on-year. Hardwood sawlogs are estimated to reach a price of \$131/cubic metre.³

Interestingly the log value of timber in NSW exceeds the national average. Hardwood in particular commands an average premium of 56% more than the national average, while the value of NSW softwood has also improved compared to the national average in recent years.¹

NSW forestry export value



EXPORTS

Exports experienced significant annual growth up 51% in value on the year prior. However, this is still down significantly on the peaks of 2010-11, where exports reached \$192 million.⁴³

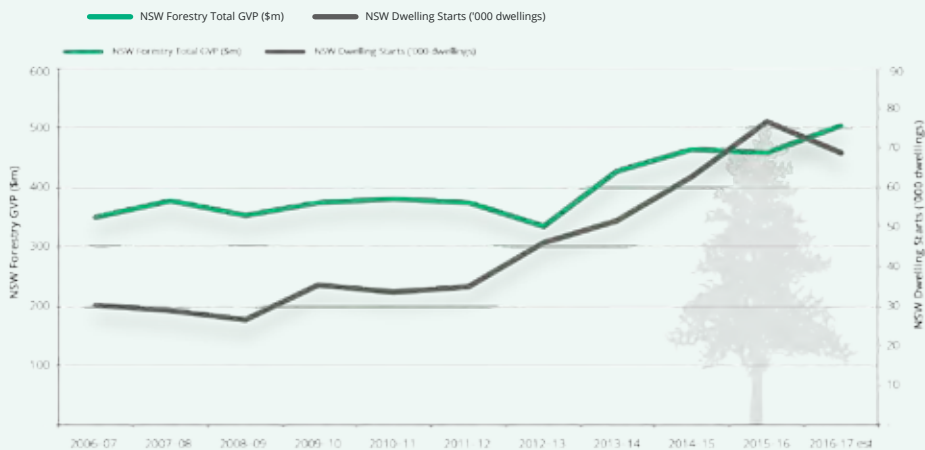
China has replaced Japan as NSW's major export market, where wood in the rough is the predominant Chinese export. Japan had previously taken large amounts of fuel wood for power generation, however a recent push to increase domestic biomass power generation has reduced NSW exports to negligible levels in recent years.^{43,45}

MACROECONOMIC CONDITIONS

Strong demand for timber and in particular coniferous softwood continues to stem from a sustained expansion of domestic dwelling commencements, which is permeating down to the forestry sector.⁴⁴

The majority of NSW timber continues to be consumed domestically, despite a slight decline to fewer than 5,000 cubic metres in 2016-17. The drop in domestic consumption is expected to be more than offset by forestry export growth.^{1,43}

Consumption & NSW exports



DID YOU KNOW?

Most of the value-add and employment derived from forest products is created after the logs are delivered to the sawmill. Below are some key statistics about the post-harvest supply chain of forest products in NSW estimated by NSW DPI.

Forestry and production manufacturing value-add and employment

		NSW hardwood (\$m)	NSW softwood (\$m)	Total value Add (\$m)	Total employment (employees)
	Forestry & logging	79	192	271	1,904
	Log sawmilling & timber dressing	105	254	358	3,214
	Other wood product manufacturing	244	591	834	9,248
	Total paper & paper product	-	973	973	5,136
TOTAL		427	2,010	2,437	19,502

DPI estimate of NSW share of national industry value add. NSW share was determined from a five-year average of NSW's share of either sales and service income or GVP to 2013-14. Value add is conceptually different to GVP. Industry manufacturing may use imported inputs. Industry value add represents the value added by an industry to the intermediate inputs used by the industry. It is the measure of the contribution by manufacturing businesses to gross domestic product. As a measure of economic activity it is not equivalent to operating profit before tax. Data was sourced from ABARES (2017c)

NSW DPI developed the NSW Forestry Industry Roadmap in consultation with industry, to ensure an economically viable and ecologically sustainable sector into the future.





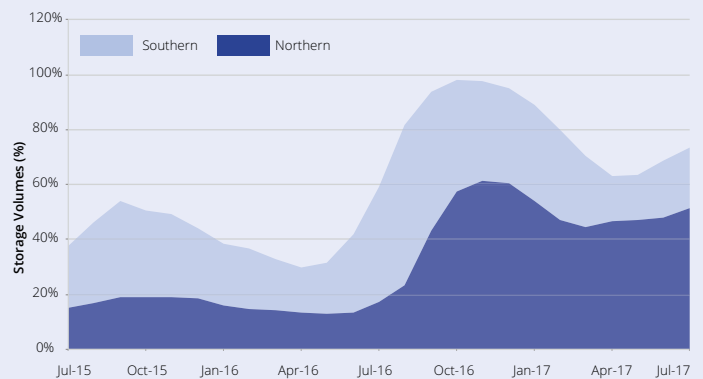
WATER

MAJOR NSW STORAGES

The major southern dam storages averaged 80% of capacity up from an average of 41% the year before, but still below the highs of 2011-12. Since November 2016 when storage levels peaked at 98%, low inflows have seen storages decline to 73% of capacity as at 1 July 2017, compared to 59% at the same time the year prior.³⁶

In northern NSW, the major dam storages averaged 46% capacity, up from a 16% average the previous year. Winter rainfall in the region has helped storage levels to recover to 52% as at 1 July 2016, compared to 17% at the same time a year earlier.³⁶

Major water storage volumes



Source: DPI (2017f)

Major southern dam storages averaged

80%
of capacity

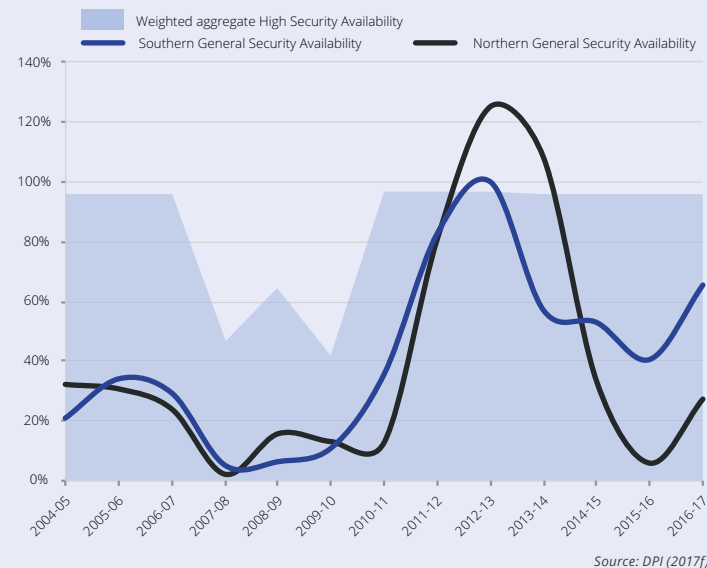
Major northern dam storages averaged

46%
capacity

Average availability across all major storages as at September '17 was

59%
of the licensed balance

Weighted average available water determinations



Source: DPI (2017f)

AVAILABILITY

As at 1 September, the availability for high security licence holders has averaged 96% of allocations in recent years across the major water sources of NSW [13].

By contrast, availability for general security licences has varied year-on-year with northern NSW particularly low. Average availability across all the major storages as at September was 59% of the licensed balance, up from 34% the year prior.³⁷

Since June 2017, lack of rainfall has seen the average availability for the general security licences decrease to 52% as at the 1 September 2017, with allocations in the Gwydir and Murrumbidgee accounting for most of the decline in allocation volumes.³⁷

NSW SOUTHERN VALLEY'S ESTIMATED MARKET VALUE

Total entitlements on issue in the southern Murray Darling Basin were estimated to comprise:

- High security entitlement 551,654 ML
- General security entitlement 3,570,093 ML

The total value of these entitlements in the southern valleys was estimated to be \$6.83 billion. The consumptive pool was valued at \$661 million and the Commonwealth environmental entitlements were valued \$6.17 billion.¹⁵



FISHERIES

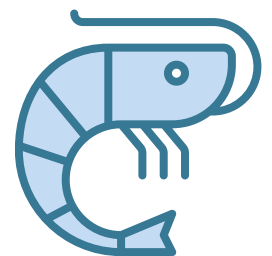
The NSW fisheries industry increased by an estimated 1% in 2016-17 to \$158 million. A strong gain was estimated in the aquaculture sector, increasing by 6% partially offset by a 2.5% decline in value of the wild caught fisheries sector.

WILD/COMMERCIAL FISHERIES

In 2015-16 the wild fisheries sector was worth \$91 million, up 54% year-on-year and making up 58% of total fisheries. Significant contributors to wild fisheries in 2015-16 were prawns, lobster, sea mullet and crab.³⁴

Wild fisheries were impacted by a decline of 3% in fish catch volume. The catch volume of crustaceans also declined in 2015-16, with a 15% decline in volume of king prawns.³⁴

There was however an increase in reported prices due to the high demand for King Prawns; School Prawns and Mud Crabs. Eastern Rock Lobster had a particularly good year, with overseas demand driving prices higher.



GVP
↑
1%
yoy
\$158m^{est}

AQUACULTURE

Aquaculture accounted for 42% of the total value of production in 2015-16, worth \$64.9 million, up 7% year-on-year.³³

Sydney Rock Oysters made up 57% of the total value of aquaculture production, which was up 6% year-on-year. This was on the back of an increase in the volume of production and an increase in the average price received by farmers.³³

A Pacific Oyster price increase of 14% and an increase in production, contributed to higher overall production values.³³

Black Tiger Prawns reduced production by 2%, while Murray Cod reported a 12% increase in value on the back of higher production.³³



0.3%
contribution
to GVP
growth

Fish and crustacean
species made up

71%
of exports

NSW DPI and Huon commenced a commercial-scale trial for farming Yellowtail Kingfish at Providence Bay. The collaboration has the potential to increase the value of aquaculture in NSW by up to 30% to \$90m, and ensure future supplies of quality, locally grown sustainable seafood.

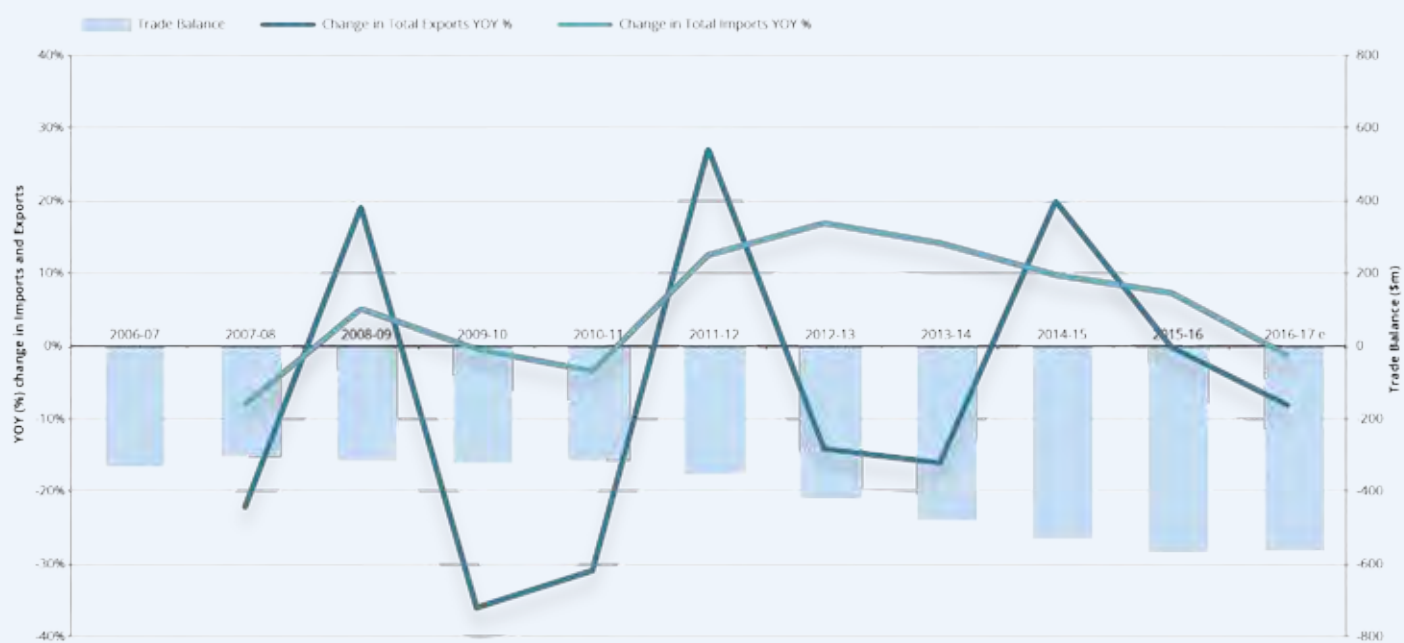


EXPORTS

NSW is a relatively small exporter of fisheries products, with shipments in 2016-17 totalling \$10.9 million, down 11% year-on-year. Fish and crustacean species made up 71% of exports by value. Our major export destinations include Taiwan, Vietnam, New Zealand and Japan.

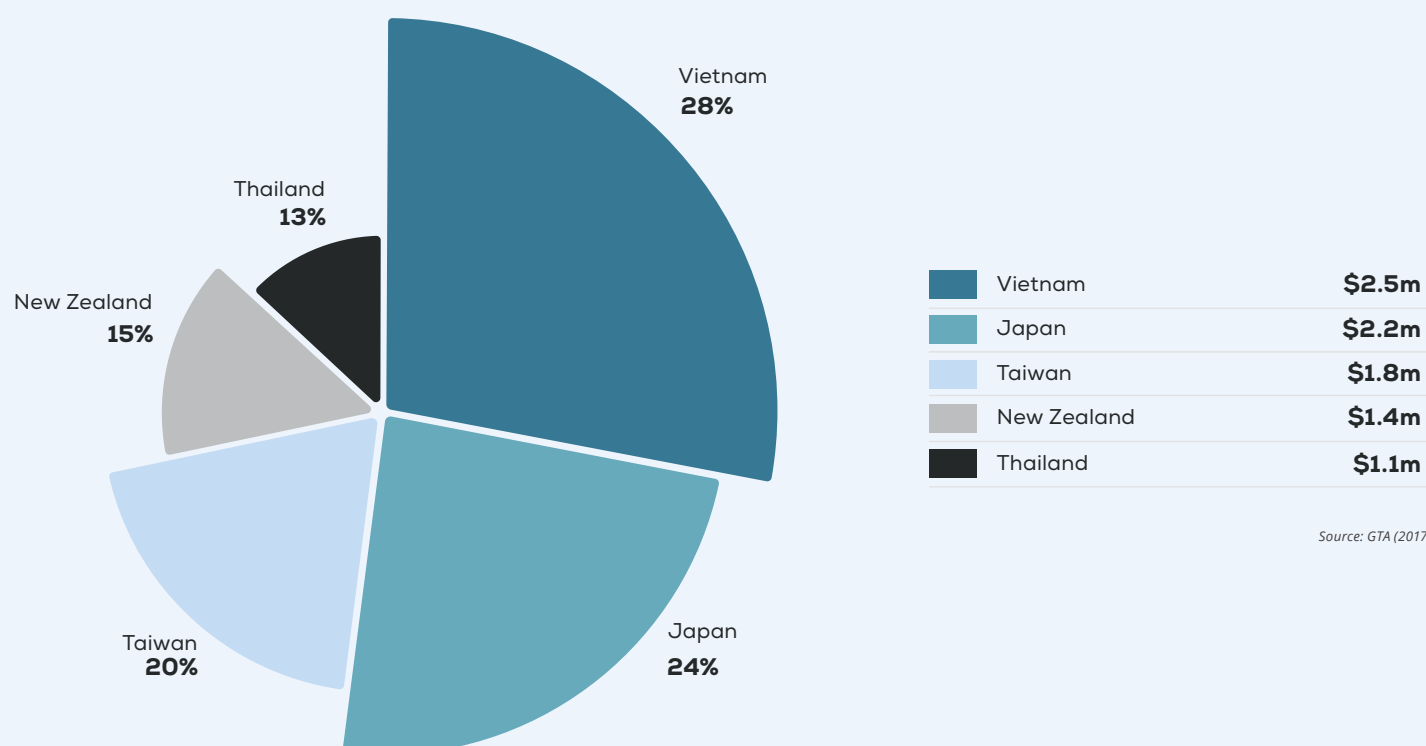
The NSW trade balance is heavily weighted in favour of imports, with \$572 million worth of fisheries products being imported in to NSW in 2016-17. The leading import origins are Thailand and China.

NSW fisheries balance of trade (\$m)



Source: GTA (2017)

Top 5 NSW fisheries export destinations by value (\$m) 2016-17



Source: GTA (2017)

STATISTICS TABLES



WHEAT

Measure	Destination	Units	2013-14	2014-15	2015-16	2016-17e	Year-on-year change (%)	4-year MA change (%)	3-year change (%)	Data source PDI shortname
GVP ^o		\$m	1,873	1,933	1,864	2,613	40%	26%	40%	ABS (2017a) + DPI (2017a)
Area planted		000 ha	3,269	3,166	2,933	3,500	19%	9%	7%	ABARES (2017a)
Yield		tonnes/ha	2.02	2.10	2.35	3.25	38%	34%	61%	ABARES (2017a)
Production		000 tonnes	6,596	6,654	6,898	11,375	65%	44%	72%	ABARES (2017a)
Price		\$/tonne	316	300	277	246	-11%	-14%	-22%	ABARES (2017b)
Export value	Total	\$m	719	489	453	1,190	162%	67%	65%	GTA (2017)
	India	\$m	1	2	-	335	N/A	296%	22759%	GTA (2017)
	Indonesia	\$m	43	36	28	177	532%	149%	309%	GTA (2017)
	Vietnam	\$m	48	38	38	129	237%	104%	170%	GTA (2017)
Imports	Total	\$m	0.5	0.4	0.3	0.2	-46%	-52%	-65%	GTA (2017)
Trade balance ⁿ	Total	\$m	719	489	453	1,190	163%	67%	66%	GTA (2017)



COTTON LINT

Measure	Destination	Units	2013-14	2014-15	2015-16	2016-17e	Year-on-year change (%)	4-year MA change (%)	3-year change (%)	Data source PDI shortname
GVP		\$m	1,304	574	874	1,403	60%	35%	8%	ABS (2017a) + DPI (2017a)
Area planted		000 ha	256	124	163	328	101%	51%	28%	ABARES (2017a)
Yield		bales/ha	10.11	11.86	10.68	7.94	-26%	-22%	-21%	ABARES (2017a)
Production		000 bales (227kg)	2,588	1,471	1,740	2,604	50%	24%	1%	ABARES (2017a)
Price		\$/bale	519	451	513	550	7%	8%	6%	ABARES (2017b)
Export value	Total	\$m	1,027	676	593	730	23%	-4%	-29%	GTA (2017)
	China	\$m	698	385	335	228	-32%	-45%	-67%	GTA (2017)
	India	\$m	16	30	39	146	274%	153%	790%	GTA (2017)
	Vietnam	\$m	49	68	82	100	22%	34%	103%	GTA (2017)
Imports	Total	\$m	0.0	0.1	0.1	0.1	1%	21%	113%	GTA (2017)
Trade balance ⁿ	Total	\$m	1,027	676	593	730	23%	-4%	-29%	GTA (2017)



PULSES

Measure	Destination	Units	2013-14	2014-15	2015-16	2016-17e	Year-on-year change (%)	4-year MA change (%)	3-year change (%)	Data source PDI shortname
GVP		\$m	112	178	532	810	52%	99%	624%	ABS (2017a) + DPI (2017a)
Area planted		000 ha	356	350	605	616	2%	28%	73%	ABARES (2017a)
Yield		tonnes/ha (chickpeas)	1.14	1.35	1.23	1.65	34%	23%	45%	ABARES (2017a)
Production		000 tonnes	431	491	819	1,031	26%	49%	139%	ABARES (2017a)
Price		\$/tonne (Chickpeas)	352	567	784	900	15%	38%	155%	ABARES (2017b)
Export value	Total	\$m	80	169	366	532	45%	85%	561%	GTA (2017)
	India	\$m	16	57	187	252	35%	97%	1434%	GTA (2017)
	Pakistan	\$m	4	9	51	156	206%	184%	4105%	GTA (2017)
	Bangladesh	\$m	30	55	58	44	-24%	-6%	46%	GTA (2017)
Imports	Total	\$m	9	9	12	13	3%	18%	38%	GTA (2017)
Trade balance ⁿ	Total	\$m	71	160	354	519	47%	88%	629%	GTA (2017)



BARLEY

Measure	Destination	Units	2013-14	2014-15	2015-16	2016-17e	Year-on-year change (%)	4-year MA change (%)	3-year change (%)	Data source PDI shortname
GVP		\$m	402	551	690	555	-20%	1%	38%	ABS (2017a) + DPI (2017a)
Area planted		000 ha	715	882	966	870	-10%	1%	22%	ABARES (2017a)
Yield		tonnes/ha	2.08	2.12	2.62	3.10	18%	25%	49%	ABARES (2017a)
Production		000 tonnes	1,486	1,869	2,528	2,697	7%	26%	82%	ABARES (2017a)
Price		\$/tonne	267	280	253	191	-25%	-23%	-29%	ABARES (2017b)
Export value ^j	Total	\$m	0.00	-	0.02	0.08	352%	227%	68438%	GTA (2017)
	China	\$m	-	-	-	-	N/A	N/A	N/A	GTA (2017)
	Vietnam	\$m	-	-	-	0.08	N/A	300%	N/A	GTA (2017)
	Bahrain	\$m	-	-	-	-	N/A	N/A	N/A	GTA (2017)
Imports	Total	\$m	0.2	0.2	0.2	0.2	17%	9%	24%	GTA (2017)
Trade balance ⁿ	Total	\$m	-0.2	-0.2	-0.2	-0.1	-21%	-24%	-24%	GTA (2017)



OILSEEDS

Measure	Destination	Units	2013-14	2014-15	2015-16	2016-17e	Year-on-year change (%)	4-year MA change (%)	3-year change (%)	Data source PDI shortname
GVP		\$m	500	510	512	542	6%	5%	8%	ABS (2017a) + DPI (2017a)
Area planted		000 ha	703	723	592	541	-9%	-15%	-23%	ABARES (2017a)
Yield		tonnes/ha (Canola)	1.37	1.45	1.65	1.65	0%	8%	20%	ABARES (2017a)
Production		000 tonnes	959	1,057	976	890	-9%	-8%	-7%	ABARES (2017a)
Price		\$/tonne (Canola)	555	503	583	570	-2%	3%	3%	ABARES (2017b)
Export value	Total	\$m	228	131	136	217	59%	22%	-5%	GTA (2017)
	France	\$m	0	0	10	47	367%	229%	333444%	GTA (2017)
	Germany	\$m	-	0	7	36	399%	233%	N/A	GTA (2017)
	Belgium	\$m	32	-	32	33	6%	37%	3%	GTA (2017)
Imports	Total	\$m	18	17	16	15	-6%	-9%	-16%	GTA (2017)
Trade balance ⁿ	Total	\$m	209	114	120	202	68%	25%	-4%	GTA (2017)



RICE

Measure	Destination	Units	2013-14	2014-15	2015-16	2016-17e	Year-on-year change (%)	4-year MA change (%)	3-year change (%)	Data source PDI shortname
GVP		\$m	269	259	110	244	122%	11%	-10%	ABS (2017a) + DPI (2017a)
Area planted		000 ha	73	69	25	79	218%	28%	7%	ABARES (2017a)
Yield		tonnes/ha	11.05	9.92	10.61	10.25	-3%	-2%	-7%	ABARES (2017a)
Production		000 tonnes	812	688	262	805	207%	25%	-1%	ABARES (2017a)
Price		\$/tonne	340	395	419	359	-14%	-5%	6%	ABARES (2017b)
Export value	Total	\$m	32	43	23	36	54%	6%	10%	GTA (2017)
	Unidentified Country	\$m	32	43	23	36	54%	6%	10%	GTA (2017)
	Papua New Guinea	\$m	-	0	-	0	N/A	192%	N/A	GTA (2017)
	New Zealand	\$m	-	-	-	-	N/A	N/A	N/A	GTA (2017)
Imports	Total	\$m	73	81	83	76	-9%	-3%	5%	GTA (2017)
Trade balance ⁿ	Total	\$m	-41	-38	-60	-41	-33%	-9%	0%	GTA (2017)



SUGAR CANE

Measure	Destination	Units	2013-14	2014-15	2015-16	2016-17e	Year-on-year change (%)	4-year MA change (%)	3-year change (%)	Data source PDI shortname
GVP		\$m	58	57	74	93	25%	32%	60%	ABS (2017a) + DPI (2017a)
Area planted		000 ha	15	14	16	16	1%	5%	8%	ASMC (2017)
Yield		tonnes/ha (Cane)	88	107	136	131	-4%	13%	49%	ASMC (2017)
Production		000 tonnes (Cane)	1,302	1,544	2,173	2,101	-3%	18%	61%	ASMC (2017)
Price		\$/tonne	40	40	37	48	29%	16%	20%	ABARES (2017b)
Export value	Total	\$m	2.5	2.3	3.1	3.2	5%	16%	28%	GTA (2017)
	New Zealand	\$m	0.1	0.4	1.6	1.4	-14%	58%	1571%	GTA (2017)
	Kiribati	\$m	0.4	0.4	0.1	0.4	173%	16%	-6%	GTA (2017)
	Philippines	\$m	0.1	0.0	0.1	0.3	165%	129%	172%	GTA (2017)
Imports	Total	\$m	7	7	5	5	-2%	-15%	-27%	GTA (2017)
Trade balance ⁿ	Total	\$m	-4	-4	-2	-2	-12%	-43%	-59%	GTA (2017)



SORGHUM

Measure	Destination	Units	2013-14	2014-15	2015-16	2016-17e	Year-on-year change (%)	4-year MA change (%)	3-year change (%)	Data source PDI shortname
GVP		\$m	118	172	177	89	-50%	-36%	-25%	ABS (2017a) + DPI (2017a)
Area planted		000 ha	175	184	155	135	-13%	-17%	-23%	ABARES (2017a)
Yield		tonnes/ha	2.39	3.18	3.91	2.70	-31%	-11%	13%	ABARES (2017a)
Production		000 tonnes	419	586	604	365	-40%	-26%	-13%	ABARES (2017a)
Price		\$/tonne	300	301	275	228	-17%	-17%	-24%	ABARES (2017b)
Export value	Total	\$m	32	65	49	55	13%	10%	73%	GTA (2017)
	China	\$m	31	64	48	52	8%	7%	69%	GTA (2017)
	Japan	\$m	0	0	0	2	2248%	237%	1030%	GTA (2017)
	Mexico	\$m	-	-	-	1	N/A	300%	N/A	GTA (2017)
Imports	Total	\$m	-	0.0	0.0	0.0	-77%	-32%	N/A	GTA (2017)
Trade balance ⁿ	Total	\$m	32	65	49	55	13%	10%	73%	GTA (2017)



BEEF

Measure	Destination	Units	2013-14	2014-15	2015-16	2016-17e	Year-on-year change (%)	4-year MA change (%)	3-year change (%)	Data source PDI shortname
GVP		\$m	1,540	2,293	2,562	2,376	-7%	8%	54%	ABS (2017a) + DPI (2017a)
Cattle On Feed (NSW)		000 head	240	300	304	301	-1%	5%	26%	MLA (2017a)
Cattle herd (NSW)		000 head	5,663	5,598	4,998	N/A	N/A	N/A	N/A	MLA (2017a)
NSW Beef cattle herd contribution		% of National	19%	20%	20%	N/A	N/A	N/A	N/A	MLA (2017a)
Production (NSW Slaughter)		000 tonnes	541	596	521	450	-14%	-15%	-17%	MLA (2017a)
Production (NSW head adult & calves)		000 Head	2,099	2,237	1,894	1,578	-17%	-19%	-25%	MLA (2017a)
Average Carcass Weight (Adult & Calves)		kg/head	258	266	275	285	4%	5%	11%	MLA (2017a)
Price (EYCI)		Ac/kg (cwt)	318	401	578	661	14%	35%	108%	MLA (2017a)
Price (NSW saleyard medium cow)		Ac/kg (cwt)	260	341	468	490	5%	26%	88%	MLA (2017a)
Price (NSW saleyard trade steer)		Ac/kg (cwt)	351	419	588	656	12%	30%	87%	MLA (2017a)
Export value	Total	\$m	1,184	1,722	1,577	1,303	-17%	-10%	10%	GTA (2017)
	Japan	\$m	236	318	320	358	12%	16%	52%	GTA (2017)
	United States	\$m	244	628	464	248	-46%	-37%	2%	GTA (2017)
	Korea, South	\$m	193	218	241	234	-3%	5%	21%	GTA (2017)
Imports	Total	\$m	7	5	12	10	-11%	21%	49%	GTA (2017)
Trade balance ⁿ	Total	\$m	1,177	1,717	1,566	1,293	-17%	-10%	10%	GTA (2017)



WOOL

Measure	Destination	Units	2013-14	2014-15	2015-16	2016-17e	Year-on-year change (%)	4-year MA change (%)	3-year change (%)	Data source PDI shortname
GVP		\$m	816	890	946	1,137	20%	20%	39%	ABS (2017a) + DPI (2017a)
Sheep flock (NSW Total)		million head	25.4	25.7	26.0	N/A	N/A	N/A	N/A	ABS (2017b)
Merino ewe flock (NSW 1 year or greater)		million head	11.1	10.1	9.9	N/A	N/A	N/A	N/A	ABS (2017b)
Production		000 tonnes	116	121	111	119	7%	2%	2%	ABS (2017c)
Price (EMI)		c/kg (clean)	1,070	1,102	1,256	1,415	13%	17%	32%	ABARES (2017b)
Export Value	Total	\$m	557	605	584	673	15%	11%	21%	GTA (2017)
	China	\$m	414	453	442	532	20%	16%	28%	GTA (2017)
	Italy	\$m	59	63	64	80	26%	20%	36%	GTA (2017)
	Czech Republic	\$m	39	42	34	31	-8%	-15%	-20%	GTA (2017)
Imports	Total	\$m	0.2	0.2	0.2	0.1	-34%	-31%	-34%	GTA (2017)
Trade balance ⁿ	Total	\$m	557	605	583	673	15%	11%	21%	GTA (2017)



POULTRY

Measure	Destination	Units	2013-14	2014-15	2015-16	2016-17e	Year-on-year change (%)	4-year MA change (%)	3-year change (%)	Data source PDI shortname
GVP		\$m	768	877	875	912	4%	6%	19%	ABS (2017a) + DPI (2017a)
Meat poultry flock (NSW)		million head	N/A	32	32	N/A	N/A	N/A	N/A	ABS (2017b)
Production (chicken Meat)		000 tonnes	347	358	379	398	5%	7%	15%	ABS (2017c)
Price (Gross Unit Value)		Ac/kg	209	226	227	226	-1%	2%	8%	ABARES (2017b)
Export value	Total	\$m	9	15	18	22	25%	39%	146%	GTA (2017)
	Solomon Islands	\$m	2	3	4	4	-7%	12%	50%	GTA (2017)
	Philippines	\$m	1	2	1	3	272%	80%	382%	GTA (2017)
	Japan	\$m	-	2	6	2	-59%	-5%	N/A	GTA (2017)
Imports	Total	\$m	0.0	-	-	-	N/A	-100%	-100%	GTA (2017)
Trade balance ⁿ	Total	\$m	9	15	18	22	25%	39%	147%	GTA (2017)



SHEEP & GOAT MEAT

Measure	Destination	Units	2013-14	2014-15	2015-16	2016-17e	Year-on-year change (%)	4-year MA change (%)	3-year change (%)	Data source PDI shortname
GVP (Total)		\$m	647	760	741	858	16%	14%	33%	ABS (2017a) + DPI (2017a)
GVP (lamb, sheep)		\$m	640	754	735	850	16%	14%	33%	ABS (2017a) + DPI (2017a)
GVP (Goat)c		\$m	7	7	7	8	15%	9%	7%	ABS (2017a) + DPI (2017a)
Sheep flock (NSW Total)		million head	25	26	26	N/A	N/A	N/A	N/A	ABS (2017b)
Non-merino ewe flock (NSW 1 year or greater)		million head	4	5	5	N/A	N/A	N/A	N/A	ABS (2017b)
Production (lamb slaughter)		000 tonnes	110	122	122	119	-2%	1%	8%	MLA (2017a)
Production (mutton slaughter)		000 tonnes	57	54	42	45	7%	-8%	-20%	MLA (2017a)
Production (goat slaughter)f		000 Head	104	112	107	92	-14%	-11%	-12%	MLA (2017a)
Price (ESTLI)		Ac/kg (cwt)	486	520	544	611	12%	13%	26%	MLA (2017a)
Price (Eastern States Mutton Indicator)		Ac/kg (cwt)	268	343	335	393	17%	17%	46%	MLA (2017a)
Price (NSW Average OTH goat indicators)		Ac/kg (cwt)	241	374	500	616	23%	42%	155%	MLA (2017a)
Export value	Total	\$m	443	505	475	566	19%	14%	28%	GTA (2017)
	United States	\$m	60	97	159	185	17%	48%	206%	GTA (2017)
	China	\$m	118	99	57	103	80%	9%	-13%	GTA (2017)
	Japan	\$m	34	34	32	34	8%	2%	0%	GTA (2017)
Imports	Total	\$m	3.5	1.3	0.2	0.5	104%	-65%	-86%	GTA (2017)
Trade balance ⁿ	Total	\$m	440	504	474	566	19%	14%	29%	GTA (2017)



MILK

Measure	Destination	Units	2013-14	2014-15	2015-16	2016-17e	Year-on-year change (%)	4-year MA change (%)	3-year change (%)	Data source PDI shortname
GVP		\$m	517	612	594	559	-6%	-2%	8%	ABS (2017a) + DPI (2017a)
Dairy herd total (NSW)		000 head	327	304	323	N/A	N/A	N/A	N/A	ABS (2017b)
Cows in milk & dry (NSW)		000 head	177	175	182	N/A	N/A	N/A	N/A	ABS (2017b)
NSW cows in milk & dry contribution		% of National	11%	11%	12%	N/A	N/A	N/A	N/A	ABS (2017b)
Production (wholemilk) ^a		million litres	1,104	1,160	1,179	1,121	-5%	-2%	2%	DA (2017a) + ABARES (2017c)
Price (NSW milk)		Ac/litre	51.0	52.8	50.1	N/A	N/A	N/A	N/A	DA (2017b)
Price (NSW milk solids)		\$/kg	7.10	7.31	7.06	N/A	N/A	N/A	N/A	DA (2017b)
Export value	Total	\$m	4	8	10	10	-4%	24%	159%	GTA (2017)
	Singapore	\$m	0	0	2	5	183%	190%	6696%	GTA (2017)
	China	\$m	1	3	5	2	-60%	-21%	328%	GTA (2017)
	Taiwan	\$m	0	1	1	1	18%	39%	256%	GTA (2017)
Imports	Total	\$m	1.2	1.7	1.8	0.9	-49%	-33%	-19%	GTA (2017)
Trade balance ⁿ	Total	\$m	3	6	8	9	7%	37%	239%	GTA (2017)



EGGS

Measure	Destination	Units	2013-14	2014-15	2015-16	2016-17e	Year-on-year change (%)	4 Year MA Change (%)	3-year change (%)	Data source PDI shortname
GVP		\$m	213	239	258	273	6%	11%	28%	ABS (2017a) + DPI (2017a)
Layers & Pullets Flock (NSW)		million head	5	5	6	N/A	N/A	N/A	N/A	ABS (2017b)
Production (NSW Eggs)		million dozen	93	96	104	N/A	N/A	N/A	N/A	ABS (2017b)
NSW egg production contribution		% of National	29%	30%	32%	N/A	N/A	N/A	N/A	ABS (2017b)
Price (National)		Ac/dozen	221	229	238	242	2%	4%	10%	ABARES (2017b)
Consumer price index (Eggs) ^u		CPI (Sydney)	108	111	108	109	1%	0%	1%	ABS (2017e)
Export value	Total	\$m	0	1	2	4	112%	132%	108467%	GTA (2017)
	Philippines	\$m	-	1	-	2	N/A	185%	N/A	GTA (2017)
	South Korea	\$m	-	-	-	1	N/A	300%	N/A	GTA (2017)
	Hong Kong	\$m	-	0	1	1	3%	89%	N/A	GTA (2017)
Imports	Total	\$m	5	4	4	6	34%	22%	11%	GTA (2017)
Trade balance ⁿ	Total	\$m	-5	-3	-2	-2	-24%	-39%	-64%	GTA (2017)



PORK

Measure	Destination	Units	2013-14	2014-15	2015-16	2016-17e	Year-on-year change (%)	4-year MA change (%)	3-year change (%)	Data source PDI shortname
GVP		\$m	200	194	212	224	6%	8%	12%	ABS (2017a) + DPI (2017a)
Pig herd (NSW total)		000 head	430	405	488	N/A	N/A	N/A	N/A	ABS (2017b)
Production (Slaughter)		000 tonnes	64	61	58	65	13%	5%	2%	ABS (2017d)
Price (gross unit value)		Ac/kg	300	310	358	335	-7%	3%	12%	ABARES (2017b)
Export value	Total	\$m	18	16	21	27	34%	34%	52%	GTA (2017)
	Singapore	\$m	6	5	8	12	51%	56%	96%	GTA (2017)
	Philippines	\$m	3	2	2	3	53%	31%	20%	GTA (2017)
	New Zealand	\$m	4	2	4	3	-17%	-5%	-17%	GTA (2017)
Imports	Total	\$m	152	167	145	163	12%	4%	7%	GTA (2017)
Trade balance ⁿ	Total	\$m	-134	-151	-125	-135	8%	-1%	1%	GTA (2017)



HORTICULTURE

Measure	Destination	Units	2013-14	2014-15	2015-16	2016-17e	Year-on-year change (%)	4-year MA change (%)	3-year change (%)	Data source PDI shortname
GVP (Total excl. wine grapes)		\$m	1,248	1,204	1,398	1,442	3%	9%	16%	ABS (2017a) + DPI (2017a)
GVP (fruit, nut & table grapes)		\$m	564	533	678	695	3%	13%	23%	ABS (2017a) + DPI (2017a)
GVP (vegetables)		\$m	435	408	420	444	6%	4%	2%	ABS (2017a) + DPI (2017a)
GVP (nurseries, cut flowers, turf)		\$m	249	263	300	303	1%	9%	22%	ABS (2017a) + DPI (2017a)
Production (oranges, mandarins)		000 tonnes	173	174	202	N/A	N/A	N/A	N/A	ABS (2017b)
Production (macadamias, almonds)		000 tonnes	15	22	20	N/A	N/A	N/A	N/A	ABS (2017b)
Production (melons)		000 tonnes	75	76	63	N/A	N/A	N/A	N/A	ABS (2017b)
Production (mushrooms)		000 tonnes	15	10	12	N/A	N/A	N/A	N/A	ABS (2017b)
Production (potatoes)		000 tonnes	120	111	58	N/A	N/A	N/A	N/A	ABS (2017b)
Area (nurseries, cut flowers, turf)		hectares	3.55	3.46	3.80	N/A	N/A	N/A	N/A	ABS (2017b)
Consumer price index (Fruit) ^U		CPI (Sydney)	88	95	91	99	9%	6%	13%	ABS (2017e)
Consumer price index (vegetables) ^U		CPI (Sydney)	109	115	111	128	15%	10%	18%	ABS (2017e)
Export value	Total	\$m	197	212	240	325	36%	33%	65%	GTA (2017)
	Hong Kong	\$m	24	21	26	45	74%	56%	89%	GTA (2017)
	China	\$m	30	20	21	44	111%	53%	44%	GTA (2017)
	Japan	\$m	24	22	31	41	33%	39%	69%	GTA (2017)
Imports	Total	\$m	785	912	993	1,046	5%	12%	33%	GTA (2017)
Trade balance ⁿ	Total	\$m	-588	-700	-753	-721	-4%	4%	23%	GTA (2017)



WINE

Measure	Destination	Units	2013-14	2014-15	2015-16	2016-17 ^e	Year-on-year change (%)	4-year MA change (%)	3-year change (%)	Data source PDI shortname
GVP		\$m	134	155	148	154	4%	4%	15%	ABS (2017a) + DPI (2017a)
Area planted		000 ha	33	32	29	N/A	N/A	N/A	N/A	ABS (2017b)
Yield		tonnes/ha	13	16	15	N/A	N/A	N/A	N/A	ABS (2017b)
Production ^d		000 tonnes	438	488	438	439	0%	-3%	0%	ABS (2017b) + WA (2017a) _w
Price		\$/tonne	441	476	544	565	4%	12%	28%	ABARES (2017b)
Export value	Total	\$m	468	490	507	508	0%	3%	8%	GTA (2017)
	United States	\$m	249	253	261	245	-6%	-3%	-1%	GTA (2017)
	China	\$m	29	32	43	58	33%	42%	97%	GTA (2017)
	United Kingdom	\$m	61	57	50	51	2%	-7%	-17%	GTA (2017)
Imports	Total	\$m	230	240	264	231	-12%	-4%	0%	GTA (2017)
Trade balance ⁿ	Total	\$m	238	250	243	276	14%	10%	16%	GTA (2017)



FORESTRY

Measure	Destination	Units	2013-14	2014-15	2015-16	2016-17e	Year-on-year change (%)	4-year MA change (%)	3-year change (%)	Data source PDI shortname
GVP (total) ^t		\$m	428	466	458	503	10%	8%	18%	ABARES (2016a) + DPI (2017a)
GVP (softwood) ^t		\$m	317	345	344	381	11%	10%	20%	ABARES (2016a)
GVP (hardwood) ^t		\$m	111	121	115	122	7%	4%	10%	ABARES (2016a)
Plantation areas (softwood)		000 ha	297	306	307	N/A	N/A	N/A	N/A	ABARES (2016a)
Plantation areas (hardwood)		000 ha	91	87	87	N/A	N/A	N/A	N/A	ABARES (2016a)
Production (softwood)		000 m3	4,447	4,505	4,651	N/A	N/A	N/A	N/A	ABARES (2016a)
Production (hardwood)		000 m3	944	996	939	N/A	N/A	N/A	N/A	ABARES (2016a)
Implied Price (softwood) ^r		\$/m3	71	77	74	N/A	N/A	N/A	N/A	ABARES (2016a)
Implied Price (hardwood) ^r		\$/m3	117	121	122	N/A	N/A	N/A	N/A	ABARES (2016a)
Export value	Total	\$m	62	91	92	138	51%	44%	121%	GTA (2017)
	China	\$m	38	67	68	111	64%	56%	191%	GTA (2017)
	Taiwan	\$m	11	11	9	16	72%	33%	42%	GTA (2017)
	Korea, South	\$m	4	3	3	3	-7%	-8%	-24%	GTA (2017)
Imports	Total	\$m	116	137	121	120	-1%	-3%	4%	GTA (2017)
Trade balance ⁿ	Total	\$m	-54	-45	-30	18	-161%	-166%	-134%	GTA (2017)



FISHERY

Measure	Destination	Units	2013-14	2014-15	2015-16	2016-17e	Year-on-year change (%)	4-year MA change (%)	3-year change (%)	Data source PDI shortname
GVP (total) ^t		\$m	146	150	156	158	1%	3%	8%	DPI (2017b) + DPI (2017c) + DPI (2017a)
GVP (aquaculture) ^t		\$m	53	61	65	69	6%	11%	29%	DPI (2017b)
GVP (commercial fisheries) ^t		\$m	93	90	91	89	-3%	-2%	-4%	DPI (2017c)
Production (Sydney & Pacific rock oysters)		million dozens	5.04	5.53	5.74	N/A	N/A	N/A	N/A	DPI (2017b)
Production (Wild Caught Harvest)		000 tonnes	13.63	12.05	11.74	N/A	N/A	N/A	N/A	DPI (2017c)
Consumer Price Index (Fish & Other Seafood) ^u		CPI (Sydney)	103	108	109	111	2%	3%	7%	ABS (2017e)
Export value	Total	\$m	10	12	12	11	-11%	-5%	9%	GTA (2017)
	Vietnam	\$m	2	2	3	3	-21%	2%	25%	GTA (2017)
	Japan	\$m	2	1	2	2	36%	18%	1%	GTA (2017)
	Taiwan	\$m	1	3	1	2	44%	-6%	24%	GTA (2017)
Imports	Total	\$m	492	540	579	572	-1%	5%	16%	GTA (2017)
Trade balance ⁿ	Total	\$m	-482	-528	-567	-561	-1%	5%	16%	GTA (2017)



OTHER

Measure	Destination	Units	2014-15	2015-16	2016-17e	Year-on-year change (%)	4-year MA change (%)	3-year change (%)	Data source PDI shortname
GVPb, ^o		\$m	486	518	498	-4%	7%	36%	ABS (2017a) + DPI (2017a)
Area planted ^k		000 ha	415	320	393	23%	9%	23%	ABARES (2017a)
Yield ^k		tonnes/ha	1.60	1.91	2.07	8%	13%	20%	ABARES (2017a)
Production ^k		000 tonnes	663	612	813	33%	23%	49%	ABARES (2017a)
Exports ⁱ	Total	\$m	510	543	475	-12%	-5%	1%	GTA (2017)
Imports ⁱ	Total	\$m	168	184	174	-5%	0%	1%	GTA (2017)
Trade balance ^{i,n}	Total	\$m	342	359	301	-16%	-7%	2%	GTA (2017)
Implied price (softwood) ^r		\$/m3							
Implied price (hardwood) ^r		\$/m3							
Export value	Total	\$m							
	China	\$m							
	Taiwan	\$m							
	South Korea	\$m							
Imports	Total	\$m							
Trade balance ⁿ	Total	\$m							

GVP TABLE

Industry GVP ^o	Units	2013-14	2014-15	2015-16	2016-17 ^e	Year-on-year change (%)	4-year MA change (%)	3-year change (%)	Data source PDI shortname
Broadacre cropping sub-total	\$m	5,004	4,720	5,351	6,846	28%	25%	37%	
Wheat	\$m	1,873	1,933	1,864	2,613	40%	26%	40%	ABS (2017a) + DPI (2017a)
Barley	\$m	402	551	690	555	-20%	1%	38%	ABS (2017a) + DPI (2017a)
Rice	\$m	269	259	110	244	122%	11%	-10%	ABS (2017a) + DPI (2017a)
Sorghum	\$m	118	172	177	89	-50%	-36%	-25%	ABS (2017a) + DPI (2017a)
Pulses	\$m	112	178	532	810	52%	99%	624%	ABS (2017a) + DPI (2017a)
Oilseeds	\$m	500	510	512	542	6%	5%	8%	ABS (2017a) + DPI (2017a)
Cotton lint	\$m	1,304	574	874	1,403	60%	35%	8%	ABS (2017a) + DPI (2017a)
Sugar cane	\$m	58	57	74	93	25%	32%	60%	ABS (2017a) + DPI (2017a)
Other crops ^b	\$m	367	486	518	498	13%	7%	36%	ABS (2017a) + DPI (2017a)
Horticulture & Viticulture Sub-total	\$m	1,382	1,359	1,546	1,596	3%	9%	15%	
Fruit, nuts, table grapes	\$m	564	533	678	695	3%	13%	23%	ABS (2017a) + DPI (2017a)
Vegetables	\$m	435	408	420	444	6%	4%	2%	ABS (2017a) + DPI (2017a)
Nurseries, cut flowers, turf	\$m	249	263	300	303	1%	9%	22%	ABS (2017a) + DPI (2017a)
Wine grapes	\$m	134	155	148	154	4%	4%	15%	ABS (2017a) + DPI (2017a)
Livestock & livestock products sub-total	\$m	4,700	5,865	6,189	6,339	2%	10%	35%	
Beef cattle	\$m	1,540	2,293	2,562	2,376	-7%	8%	54%	ABS (2017a) + DPI (2017a)
Lamb & mutton	\$m	640	754	735	850	16%	14%	33%	ABS (2017a) + DPI (2017a)
Goat (excl. rangeland goats) ^c	\$m	7	7	7	8	15%	9%	7%	ABS (2017a) + DPI (2017a)
Pork	\$m	200	194	212	224	6%	8%	12%	ABS (2017a) + DPI (2017a)
Poultry	\$m	768	877	875	912	4%	6%	19%	ABS (2017a) + DPI (2017a)
Wool	\$m	816	890	946	1,137	20%	20%	39%	ABS (2017a) + DPI (2017a)
Eggs	\$m	213	239	258	273	6%	11%	28%	ABS (2017a) + DPI (2017a)
Milk	\$m	517	612	594	559	-6%	-2%	8%	ABS (2017a) + DPI (2017a)
Forestry & fisheries sub-total^f	\$m	463	495	499	538	8%	8%	16%	
Softwood ^g	\$m	111	121	115	122	7%	4%	10%	ABARES (2016a)
Hardwood ^g	\$m	317	345	344	381	11%	10%	20%	ABARES (2016a)
Aquaculture ^h	\$m	53	61	65	69	6%	11%	29%	DPI (2017b)
Wild caught ^h	\$m	93	90	91	89	-3%	-2%	-4%	DPI (2017c)
TOTAL GVP	\$m	11,660	12,559	13,700	15,442	13%	16%	32%	

PRODUCTION TABLE

Industry Production Volumes	Units	2013-14	2014-15	2015-16	2016-17 ^a	Year-on-year change (%)	4-year MA change (%)	3-year change (%)	Data source PDI shortname
Broadacre Cropping									
Wheat	000 tonnes	6,596	6,654	6,898	11,375	65%	44%	72%	ABARES (2017a)
Barley	000 tonnes	1,486	1,869	2,528	2,697	7%	26%	82%	ABARES (2017a)
Rice	000 tonnes	812	688	262	805	207%	25%	-1%	ABARES (2017a)
Sorghum	000 tonnes	419	586	604	365	-40%	-26%	-13%	ABARES (2017a)
Pulses	000 tonnes	431	491	819	1,031	26%	49%	139%	ABARES (2017a)
Oilseeds	000 tonnes	959	1,057	976	890	-9%	-8%	-7%	ABARES (2017a)
Cotton Lint	000 bales (227kg)	2,588	1,471	1,740	2,604	50%	24%	1%	ABARES (2017a)
Sugar Cane	000 tonnes (Cane)	1,302	1,544	2,173	2,101	-3%	18%	61%	ASMC (2017)
Other Crops ^k	000 tonnes	547	663	612	813	33%	23%	49%	ABARES (2017a)
Horticulture & Viticulture									
Fruit (oranges, mandarins)	000 tonnes	173	174	202	N/A	N/A	N/A	N/A	ABS (2017b)
Nuts (macadamias, almonds)	000 tonnes	15	22	20	N/A	N/A	N/A	N/A	ABS (2017b)
Vegetables (melons)	000 tonnes	75	76	63	N/A	N/A	N/A	N/A	ABS (2017b)
Vegetables (Mushrooms)	000 tonnes	15	10	12	N/A	N/A	N/A	N/A	ABS (2017b)
Vegetables (Potatoes)	000 tonnes	120	111	58	N/A	N/A	N/A	N/A	ABS (2017b)
Wine Grapes ^{dw}	000 tonnes	438	488	438	439	0%	-3%	0%	ABS (2017b) + WA (2017a) ^w
Livestock & livestock products									
Beef cattle	000 tonnes	541	596	521	450	-14%	-15%	-17%	MLA (2017a)
Lamb & mutton	000 tonnes	167	176	165	165	5%	-8%	-12%	MLA (2017a)
Goat (all goats) ^f	000 head	104	112	107	92	-14%	-11%	-12%	MLA (2017a)
Pork	000 tonnes	64	61	58	65	13%	5%	2%	ABS (2017d)
Poultry	000 tonnes	347	358	379	398	5%	7%	15%	ABS (2017c)
Wool	000 tonnes	116	121	111	119	7%	2%	2%	ABS (2017c)
Eggs	million dozen	93	96	104	N/A	N/A	N/A	N/A	ABS (2017b)
Milk ^q	million litres	1,104	1,160	1,179	1,121	-5%	-2%	2%	DA (2017a) + ABARES (2017c)
Forestry & Fisheries									
Softwood	000 m3	4,447	4,505	4,651	N/A	N/A	N/A	N/A	ABARES (2016a)
Hardwood	000 m3	944	996	939	N/A	N/A	N/A	N/A	ABARES (2016a)
Aquaculture (oysters) ^g	million dozens	5	6	6	N/A	N/A	N/A	N/A	DPI (2017b)
Wild caught	000 tonnes	14	12	12	N/A	N/A	N/A	N/A	DPI (2017c)

PRODUCTION TABLE

Industry Production Areas (Cropping & Forestry)	Units	2013-14	2014-15	2015-16	2016-17 ^s	Year-on-year change (%)	4-year MA change (%)	3-year change (%)	Data source PDI shortname
Broadacre Cropping									
Wheat	000 ha	3,269	3,166	2,933	3,500	19%	9%	7%	ABARES (2017a)
Barley	000 ha	715	882	966	870	-10%	1%	22%	ABARES (2017a)
Rice	000 ha	73	69	25	79	218%	28%	7%	ABARES (2017a)
Sorghum	000 ha	175	184	155	135	-13%	-17%	-23%	ABARES (2017a)
Pulses	000 ha	356	350	605	616	2%	28%	73%	ABARES (2017a)
Oilseeds	000 ha	703	723	592	541	-9%	-15%	-23%	ABARES (2017a)
Cotton Lint	000 ha	256	124	163	328	101%	51%	28%	ABARES (2017a)
Sugar cane	000 ha	15	14	16	16	1%	5%	8%	ASMC (2017)
Other crops ^k	000 ha	318	415	320	393	23%	9%	23%	ABARES (2017a)
Forestry									
Softwood	000 ha	297	306	307	N/A	N/A	N/A	N/A	ABARES (2016a)
Hardwood	000 ha	91	87	87	N/A	N/A	N/A	N/A	ABARES (2016a)

Industry Livestock Numbers (Livestock)	Units	2013-14	2014-15	2015-16	2016-17 ^s	Year-on-year change (%)	4-year MA change (%)	3-year change (%)	Data source PDI shortname
Broadacre Cropping									
Wheat	000 ha	3,269	3,166	2,933	3,500	19%	9%	7%	ABARES (2017a)
Barley	000 ha	715	882	966	870	-10%	1%	22%	ABARES (2017a)
Rice	000 ha	73	69	25	79	218%	28%	7%	ABARES (2017a)
Sorghum	000 ha	175	184	155	135	-13%	-17%	-23%	ABARES (2017a)
Pulses	000 ha	356	350	605	616	2%	28%	73%	ABARES (2017a)
Oilseeds	000 ha	703	723	592	541	-9%	-15%	-23%	ABARES (2017a)
Cotton lint	000 ha	256	124	163	328	101%	51%	28%	ABARES (2017a)
Sugar cane	000 ha	15	14	16	16	1%	5%	8%	ASMC (2017)
Other crops ^k	000 ha	318	415	320	393	23%	9%	23%	ABARES (2017a)
Forestry									
Softwood	000 ha	297	306	307	N/A	N/A	N/A	N/A	ABARES (2016a)
Hardwood	000 ha	91	87	87	N/A	N/A	N/A	N/A	ABARES (2016a)

PRICE TABLE

Industry Prices	Units	2013-14	2014-15	2015-16 ^s	2016-17 ^s	Year-on-year change (%)	4-year MA change (%)	3-year change (%)	Data source PDI shortname
Broadacre Cropping									
Wheat	\$/tonne	316	300	277	246	-11%	-14%	-22%	ABARES (2017b)
Barley	\$/tonne	267	280	253	191	-25%	-23%	-29%	ABARES (2017b)
Rice	\$/tonne	340	395	419	359	-14%	-5%	6%	ABARES (2017b)
Sorghum	\$/tonne	300	301	275	228	-17%	-17%	-24%	ABARES (2017b)
Pulses(chickpeas)	\$/tonne	352	567	784	900	15%	38%	155%	ABARES (2017b)
Oilseeds (canola)	\$/tonne	555	503	583	570	-2%	3%	3%	ABARES (2017b)
Cotton lint	\$/bale	519	451	513	550	7%	8%	6%	ABARES (2017b)
Sugar cane	\$/tonne	40	40	37	48	29%	16%	20%	ABARES (2017b)
Horticulture & viticulture									
Fruit (consumer price index)	CPI	88	95	91	99	9%	6%	13%	ABS (2017e)
Vegetables (consumer price index)	CPI	109	115	111	128	15%	10%	18%	ABS (2017e)
Wine grapes	\$/tonne	441	476	544	565	4%	12%	28%	ABARES (2017b)
Livestock & Livestock Products									
Beef cattle (EYCI)	Ac/kg cwt	318	401	578	661	14%	35%	108%	MLA (2017a)
Beef cattle (NSW saleyard medium cow)	Ac/kg cwt	260	341	468	490	5%	26%	88%	MLA (2017a)
Beef cattle (NSW saleyard trade steer)	Ac/kg cwt	351	419	588	656	12%	30%	87%	MLA (2017a)
Lamb (ESTLI)	Ac/kg cwt	486	520	544	611	12%	13%	26%	MLA (2017a)
Mutton (eastern states mutton indicator)	Ac/kg cwt	268	343	335	393	17%	17%	46%	MLA (2017a)
Goat (NSW average OTH goat indicators)	Ac/kg cwt	241	374	500	616	23%	42%	155%	MLA (2017a)
Pork	Ac/kg cwt	300	310	358	335	-7%	3%	12%	ABARES (2017b)
Poultry	Ac/kg cwt	209	226	227	226	-1%	2%	8%	ABARES (2017b)
Wool (EMI)	Ac/kg clean	1,070	1,102	1,256	1,415	13%	17%	32%	ABARES (2017b)
Eggs (consumer price index)	CPI	108	111	108	109	1%	0%	1%	ABS (2017e)
Milk (NSW Farm Gate)	Ac/litre	51	52.8	50	N/A	N/A	N/A	N/A	DA (2017b)
Forestry & Fisheries									
Softwood (implied) ^r	\$/m3	71	77	74	N/A	N/A	N/A	N/A	ABARES (2016a)
Hardwood (implied) ^r	\$/m3	117	121	122	N/A	N/A	N/A	N/A	ABARES (2016a)
Fish & other seafood (consumer price index)	CPI	103	108	109	111	2%	3%	7%	ABS (2017e)

PRODUCTION TABLE

Industry Exports - Total & Top 3 Destinations	Units	2013-14	2014-15	2015-16	2016-17 ^s	Year-on-year change (%)	4-year MA change (%)	3-year change (%)	Data source PDI shortname
Broadacre Cropping Sub-total	\$m	2,121	1,576	1,624	2,762	70%	37%	30%	
Wheat	\$m	719	489	453	1,190	162%	67%	65%	GTA (2017)
India	\$m	1	2	-	335	N/A	296%	22759%	GTA (2017)
Indonesia	\$m	43	36	28	177	532%	149%	309%	GTA (2017)
Vietnam	\$m	48	38	38	129	237%	104%	170%	GTA (2017)
Barleyⁱ	\$m	0	-	0	0	352%	227%	68438%	GTA (2017)
China	\$m	-	-	-	-	N/A	N/A	N/A	GTA (2017)
Vietnam	\$m	-	-	-	0	N/A	300%	N/A	GTA (2017)
Bahrain	\$m	-	-	-	-	N/A	N/A	N/A	GTA (2017)
Rice	\$m	32	43	23	36	54%	6%	10%	GTA (2017)
Unidentified country	\$m	32	43	23	36	54%	6%	10%	GTA (2017)
Papua New Guinea	\$m	-	0	-	0	N/A	192%	N/A	GTA (2017)
New Zealand	\$m	-	-	-	-	N/A	N/A	N/A	GTA (2017)
Sorghum	\$m	32	65	49	55	13%	10%	73%	GTA (2017)
China	\$m	31	64	48	52	8%	7%	69%	GTA (2017)
Japan	\$m	0	0	0	2	2248%	237%	1030%	GTA (2017)
Mexico	\$m	-	-	-	1	N/A	300%	N/A	GTA (2017)
Pulses	\$m	80	169	366	532	45%	85%	561%	GTA (2017)
India	\$m	16	57	187	252	35%	97%	1434%	GTA (2017)
Pakistan	\$m	4	9	51	156	206%	184%	4105%	GTA (2017)
Bangladesh	\$m	30	55	58	44	-24%	-6%	46%	GTA (2017)
Oilseeds	\$m	228	131	136	217	59%	22%	-5%	GTA (2017)
France	\$m	0	0	10	47	367%	229%	333444%	GTA (2017)
Germany	\$m	-	0	7	36	399%	233%	N/A	GTA (2017)
Belgium	\$m	32	-	32	33	6%	37%	3%	GTA (2017)
Cotton lint	\$m	1,027	676	593	730	23%	-4%	-29%	GTA (2017)
China	\$m	698	385	335	228	-32%	-45%	-67%	GTA (2017)
India	\$m	16	30	39	146	274%	153%	790%	GTA (2017)
Vietnam	\$m	49	68	82	100	22%	34%	103%	GTA (2017)
Sugar cane	\$m	3	2	3	3	5%	16%	28%	GTA (2017)
New Zealand	\$m	0	0	2	1	-14%	58%	1571%	GTA (2017)
Kiribati	\$m	0	0	0	0	173%	16%	-6%	GTA (2017)
Philippines	\$m	0	0	0	0	165%	129%	172%	GTA (2017)
Horticulture sub-total^h	\$m	197	212	240	325	36%	33%	65%	
Horticulture	\$m	197	212	240	325	36%	33%	65%	GTA (2017)
Hong Kong	\$m	24	21	26	45	74%	56%	89%	GTA (2017)
China	\$m	30	20	21	44	111%	53%	44%	GTA (2017)
Japan	\$m	24	22	31	41	33%	39%	69%	GTA (2017)

Industry Exports - total & top 3 destinations	Units	2013-14	2014-15	2015-16	2016-17 ^s	Year-on-year change (%)	4-year MA change (%)	3-year change (%)	Data source PDI shortname
Wine Grape^h	\$m	468	490	507	508	0%	3%	8%	GTA (2017)
United States	\$m	249	253	261	245	-6%	-3%	-1%	GTA (2017)
China	\$m	29	32	43	58	33%	42%	97%	GTA (2017)
United Kingdom	\$m	61	57	50	51	2%	-7%	-17%	GTA (2017)
Livestock & livestock products sub-total	\$m	2,216	2,872	2,686	2,606	-3%	0%	18%	
Beef Cattle	\$m	1,184	1,722	1,577	1,303	-17%	-10%	10%	GTA (2017)
Japan	\$m	236	318	320	358	12%	16%	52%	GTA (2017)
United States	\$m	244	628	464	248	-46%	-37%	2%	GTA (2017)
Korea, South	\$m	193	218	241	234	-3%	5%	21%	GTA (2017)
Lamb, mutton & goat	\$m	443	505	475	566	19%	14%	28%	GTA (2017)
United States	\$m	60	97	159	185	17%	48%	206%	GTA (2017)
China	\$m	118	99	57	103	80%	9%	-13%	GTA (2017)
Japan	\$m	34	34	32	34	8%	2%	0%	GTA (2017)
Pork	\$m	18	16	21	27	34%	34%	52%	GTA (2017)
Singapore	\$m	6	5	8	12	51%	56%	96%	GTA (2017)
Philippines	\$m	3	2	2	3	53%	31%	20%	GTA (2017)
New Zealand	\$m	4	2	4	3	-17%	-5%	-17%	GTA (2017)
Poultry	\$m	9	15	18	22	25%	39%	146%	GTA (2017)
Solomon Islands	\$m	2	3	4	4	-7%	12%	50%	GTA (2017)
Philippines	\$m	1	2	1	3	272%	80%	382%	GTA (2017)
Japan	\$m	-	2	6	2	-59%	-5%	N/A	GTA (2017)
Wool	\$m	557	605	584	673	15%	11%	21%	GTA (2017)
China	\$m	414	453	442	532	20%	16%	28%	GTA (2017)
Italy	\$m	59	63	64	80	26%	20%	36%	GTA (2017)
Czech Republic	\$m	39	42	34	31	-8%	-15%	-20%	GTA (2017)
Eggs	\$m	0	1	2	4	112%	132%	108467%	GTA (2017)
Philippines	\$m	-	1	-	2	N/A	185%	N/A	GTA (2017)
South Korea	\$m	-	-	-	1	N/A	300%	N/A	GTA (2017)
Hong Kong	\$m	-	0	1	1	3%	89%	N/A	GTA (2017)
Milk	\$m	4	8	10	10	-4%	24%	159%	GTA (2017)
Singapore	\$m	0	0	2	5	183%	190%	6696%	GTA (2017)
China	\$m	1	3	5	2	-60%	-21%	328%	GTA (2017)
Taiwan	\$m	0	1	1	1	18%	39%	256%	GTA (2017)
Forestry & fisheries sub-total	\$m	72	104	104	149	44%	39%	106%	
Forestry	\$m	62	91	92	138	51%	44%	121%	GTA (2017)
China	\$m	38	67	68	111	64%	56%	191%	GTA (2017)
Taiwan	\$m	11	11	9	16	72%	33%	42%	GTA (2017)
Korea, South	\$m	4	3	3	3	-7%	-8%	-24%	GTA (2017)
Fisheries	\$m	10	12	12	11	-11%	-5%	9%	GTA (2017)
Vietnam	\$m	2	2	3	3	-21%	2%	25%	GTA (2017)
Japan	\$m	2	1	2	2	36%	18%	1%	GTA (2017)
Taiwan	\$m	1	3	1	2	44%	-6%	24%	GTA (2017)
Other commodities sub-totalⁱ	\$m	469	510	543	475	-12%	-5%	1%	GTA (2017)
TOTAL EXPORTS	\$m	5,076	5,274	5,196	6,318	22%	16%	24%	

IMPORTS TRADE BAL. TABLES

Industry imports - total	Units	2013-14	2014-15	2015-16	2016-17 ^s	Year-on-year Change (%)	4-year MA change (%)	3-year change (%)	Data source PDI shortname
Broadacre cropping sub-total	\$m	108	114	118	110	-7%	-2%	2%	
Wheat	\$m	0	0	0	0	-46%	-52%	-65%	GTA (2017)
Barley ⁱ	\$m	0	0	0	0	17%	9%	24%	GTA (2017)
Rice	\$m	73	81	83	76	-9%	-3%	5%	GTA (2017)
Sorghum	\$m	-	0	0	0	-77%	-32%	N/A	GTA (2017)
Pulses	\$m	9	9	12	13	3%	18%	38%	GTA (2017)
Oilseeds	\$m	18	17	16	15	-6%	-9%	-16%	GTA (2017)
Cotton lint	\$m	0	0	0	0	1%	21%	113%	GTA (2017)
Sugar cane	\$m	7	7	5	5	-2%	-15%	-27%	GTA (2017)
Horticulture Sub-total^h	\$m	785	912	993	1,046	5%	12%	33%	
Horticulture	\$m	785	912	993	1,046	5%	12%	33%	GTA (2017)
Wine grapes ^h	\$m	230	240	264	231	-12%	-4%	0%	GTA (2017)
Livestock & Livestock Products Sub-total	\$m	169	179	163	180	10%	4%	7%	
Beef cattle	\$m	7	5	12	10	-11%	21%	49%	GTA (2017)
Lamb, mutton & goat	\$m	4	1	0	0	104%	-65%	-86%	GTA (2017)
Pork	\$m	152	167	145	163	12%	4%	7%	GTA (2017)
Poultry	\$m	0	-	-	-	N/A	-100%	-100%	GTA (2017)
Wool	\$m	0	0	0	0	-34%	-31%	-34%	GTA (2017)
Eggs	\$m	5	4	4	6	34%	22%	11%	GTA (2017)
Milk	\$m	1	2	2	1	-49%	-33%	-19%	GTA (2017)
Forestry & fisheries sub-total	\$m	608	677	700	692	-1%	3%	14%	
Forestry	\$m	116	137	121	120	-1%	-3%	4%	GTA (2017)
Fisheries	\$m	492	540	579	572	-1%	5%	16%	GTA (2017)
Other commodities Sub-totalⁱ	\$m	173	168	184	174	-5%	0%	1%	GTA (2017)
TOTAL IMPORTS	\$m	1,844	2,051	2,158	2,203	2%	7%	20%	

INDUSTRY TRADE BAL. TABLE

Industry Trade Balance-Total	Units	2013-14	2014-15	2015-16	2016-17 ^s	Year-on-year Change (%)	4-year MA change (%)	3-year change (%)	Data source PDI shortname
Broadacre cropping sub-total	\$m	2,013	1,462	1,506	2,652	76%	39%	32%	
Wheat	\$m	719	489	453	1,190	163%	67%	66%	GTA (2017)
Barley ^j	\$m	-0	-0	-0	-0	-21%	-24%	-24%	GTA (2017)
Rice	\$m	-41	-38	-60	-41	-33%	-9%	0%	GTA (2017)
Sorghum	\$m	32	65	49	55	13%	10%	73%	GTA (2017)
Pulses	\$m	71	160	354	519	47%	88%	629%	GTA (2017)
Oilseeds	\$m	209	114	120	202	68%	25%	-4%	GTA (2017)
Cotton lint	\$m	1,027	676	593	730	23%	-4%	-29%	GTA (2017)
Sugar cane	\$m	-4	-4	-2	-2	-12%	-43%	-59%	GTA (2017)
Horticulture sub-total^h	\$m	-588	-700	-753	-721	-4%	4%	23%	
Horticulture	\$m	-588	-700	-753	-721	-4%	4%	23%	GTA (2017)
Wine grapes ^h	\$m	238	250	243	276	14%	10%	16%	GTA (2017)
Livestock & Livestock Products Sub-total	\$m	2,046	2,692	2,522	2,425	-4%	0%	19%	
Beef cattle	\$m	1,177	1,717	1,566	1,293	-17%	-10%	10%	GTA (2017)
Lamb, mutton & goat	\$m	440	504	474	566	19%	14%	29%	GTA (2017)
Pork	\$m	-134	-151	-125	-135	8%	-1%	1%	GTA (2017)
Poultry	\$m	9	15	18	22	25%	39%	147%	GTA (2017)
Wool	\$m	557	605	583	673	15%	11%	21%	GTA (2017)
Eggs	\$m	-5	-3	-2	-2	-24%	-39%	-64%	GTA (2017)
Milk	\$m	3	6	8	9	7%	37%	239%	GTA (2017)
Forestry & fisheries sub-total	\$m	-536	-573	-596	-543	-9%	-3%	1%	
Forestry	\$m	-54	-45	-30	18	-161%	-166%	-134%	GTA (2017)
Fisheries	\$m	-482	-528	-567	-561	-1%	5%	16%	GTA (2017)
Other commodities sub-totalⁱ	\$m	296	342	359	301	-16%	-7%	2%	GTA (2017)
TOTAL TRADE BALANCE	\$m	3,232	3,223	3,038	4,115	35%	21%	27%	

JOBS & BUSINESSES AGREGGATED

Jobs & businesses aggregated	Units	Directly employed ^l	Manufacturing ^l	Direct businesses ^m	Manufacturing businesses ^m
Agriculture	No.	67,649	57,072	46,866	45,344
Fisheries	No.	1,928	240	1,258	1,522
Forestry	No.	479	17,598	1,257	4,716
Support Services	No.	7,719	-	4,002	-
TOTAL	No.	77,775	74,909	53,383	51,582

JOBS & BUSINESSES BY INDUSTRY GROUP

Jobs & businesses by industry group	Units	Directly employed ^l	Manufacturing ^l	Direct businesses ^m	Manufacturing businesses ^m
Agriculture, Forestry and Fishing Sub-total	No.	77,775	74,909	53,383	51,582
A00 Agriculture, Forestry and Fishing nfd	No.	375	-	-	-
Agriculture Sub-total	No.	67,274	-	46,866	-
010 Agriculture nfd	No.	14,036	-	-	-
011 Nursery and floriculture production	No.	3,144	-	730	-
012 Mushroom and vegetable growing	No.	2,822	-	1,522	-
013 Fruit and tree nut growing	No.	6,684	-	3,664	-
014 Sheep, beef cattle and grain farming	No.	30,540	-	34,884	-
015 Other crop growing	No.	1,456	-	1,466	-
016 Dairy cattle farming	No.	1,531	-	1,545	-
017 Poultry farming	No.	3,004	-	586	-
018 Deer farming	No.	-	-	37	-
019 Other livestock farming	No.	4,057	-	2,432	-
Aquaculture sub-total	No.	771	-	369	-
020 Aquaculture	No.	771	-	369	-
Forestry and logging sub-total	No.	479	-	1,257	-
030 Forestry and logging	No.	479	-	1,257	-
Fishing, hunting and trapping sub-total	No.	1,157	-	889	-
040 Fishing, hunting and trapping nfd	No.	140	-	-	-
041 Fishing	No.	1,018	-	714	-
042 Hunting and trapping	No.	-	-	175	-

JOBS & BUSINESSES BY INDUSTRY GROUP CONTINUED...

Jobs & businesses by industry group	Units	Directly employed ^l	Manufacturing ^l	Direct businesses ^m	Manufacturing businesses ^m
Agriculture, forestry and fishing support services sub-total	No.	7,719	-	4,002	-
051 Forestry support services	No.	1,425	-	254	-
052 Agriculture and fishing support services	No.	6,294	-	3,748	-
Food product manufacturing sub-total	No.	-	57,311	-	46,866
110 Food product manufacturing nfd	No.	-	7,919	-	-
111 Meat and meat product manufacturing	No.	-	16,842	-	730
112 Seafood processing	No.	-	240	-	1,522
113 Dairy product manufacturing	No.	-	3,004	-	3,664
114 Fruit and vegetable processing	No.	-	1,339	-	34,884
115 Oil and fat manufacturing	No.	-	-	-	1,466
116 Grain mill and cereal product manufacturing	No.	-	3,413	-	1,545
117 Bakery product manufacturing	No.	-	17,009	-	586
118 Sugar and confectionery manufacturing	No.	-	1,505	-	37
119 Other food product manufacturing	No.	-	6,042	-	2,432
Wood product manufacturing sub-total	No.	-	12,462	-	714
141 Log sawmilling and timber dressing	No.	-	3,214	-	714
149 Other wood product manufacturing	No.	-	9,248	-	-
Pulp, paper and converted paper product manufacturing sub-total	No.	-	5,136	-	4,002
150 Pulp, paper and converted paper product manufacturing nfd	No.	-	1,459	-	-
151 Pulp, paper and paperboard manufacturing	No.	-	1,032	-	254
152 Converted paper product manufacturing	No.	-	2,645	-	3,748
Sources		ABS (2017e)	ABS (2017e)	ABS (2017f)	ABS (2017f)

END NOTES

- [a]** GVP data is based on the ABS new threshold of \$40k with the exception of forestry & fisheries, which are sourced elsewhere
- [b]** Includes other broadacre crops, hay & silage
- [c]** Goat meat not defined explicitly for each year, but assumed from historic data. ABS intermittently indicates this does not include rangeland ("feral") goats.
- [e]** DPI estimate only, subject to revision
- [f]** Goat production data sourced from a separate source to GVP data. Production data includes rangeland & managed goats
- [d]** 2016-17 data sourced from another provider to prior years and therefore not directly comparable
- [g]** Sydney & Pacific Rock Oysters only
- [h]** Wine is excluded from the total. Due to classification, wine becomes a processed product post farm gate and therefore excluded
- [i]** Includes but not exclusive to other cereals, other broadacre crops, hay & silage, animal products n.e.d
- [j]** Barley reporting restrictions apply & data may not reflect the full trade value
- [k]** Includes maize, oats & triticales. Hay & silage is excluded from this data
- [l]** DPI estimate calculated as average total employment over four quarters to May 2017 of labour force employment data by relevant to each industry. Relevant ANZSIC divisions are Agriculture, Forestry and Fishing (division A) and relevant sub divisions of Manufacturing (division C). Data was sourced from ABS (2017e)
- [m]** DPI estimate using the same ANZSIC classifications in footnote l. Data is based on June 2016 using source ABS (2017f)
- [n]** Negative values denote a net import trade flow
- [o]** From 2010-11 onwards, GVP is based on the ABS new EVAO threshold of greater than \$40k, prior to this values are based on EVAO of greater than \$5k
- [p]** Some values excluded due to lack of data availability
- [q]** All data prior to 2015-16 is sourced from ABARES, while recent data is sourced from Dairy Australia. Data may not be directly comparable
- [r]** Implied price basis ABARES (2016a) GVP & production data
- [s]** Subject to revision
- [t]** GVP is sourced separately to Agriculture GVP and EVAO threshold differs
- [u]** Average over four quarters Sydney CPI data
- [v]** Implied consumption is based on the assumption that total log production is consumed within the same year it is produced, and therefore excludes carry over stocks.
- [w]** 2016-17 production is estimated by extrapolating Wine Australia production growth over the ABS reported 2015-16 levels.
- [x]** Headline GVP data is based on 2016-17 estimated, however production narrative is based on 2015-16 due to lack of detail available for 2016-17.
- [y]** DPI estimate of NSW share of national industry value add. NSW share was determined from a five-year average of NSW share of either sales and service income or GVP to 2014-15. Value add is conceptually different to GVP. Industry manufacturing may use imported inputs. Industry value add represents the value added by an industry to the intermediate inputs used by the industry. It is the measure of the contribution by manufacturing businesses to gross domestic product. As a measure of economic activity it is not equivalent to operating profit before tax. Data was sourced from ABARES (2016a)

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