

NORTHERN TERRITORY PRIMARY INDUSTRY AND FISHERIES ECONOMIC OVERVIEW 2018-19





Contents

Department of Primary Industry and Resources	3
Primary industry	4
Fisheries	4
Economic overview of the Territory – facts and figures	5
Primary industry and fisheries – an economic overview	6
Methodology for the calculation of production values	6
Contribution of industry to sector production value	6
Business overview	9
Industry production values overview	10
Primary industry and fisheries performance	11
Primary industry and fisheries sectors	13
Livestock – cattle	13
Interstate cattle movements	13
Live cattle exports	14
Other livestock	15
Plant industry	16
Fruits	16
Vegetables	17
Field crops	17
Territory markets	17
Forestry	17
Fisheries	17
Appendix	19
Publications	19
Useful links	19



Department of Primary Industry and Resources

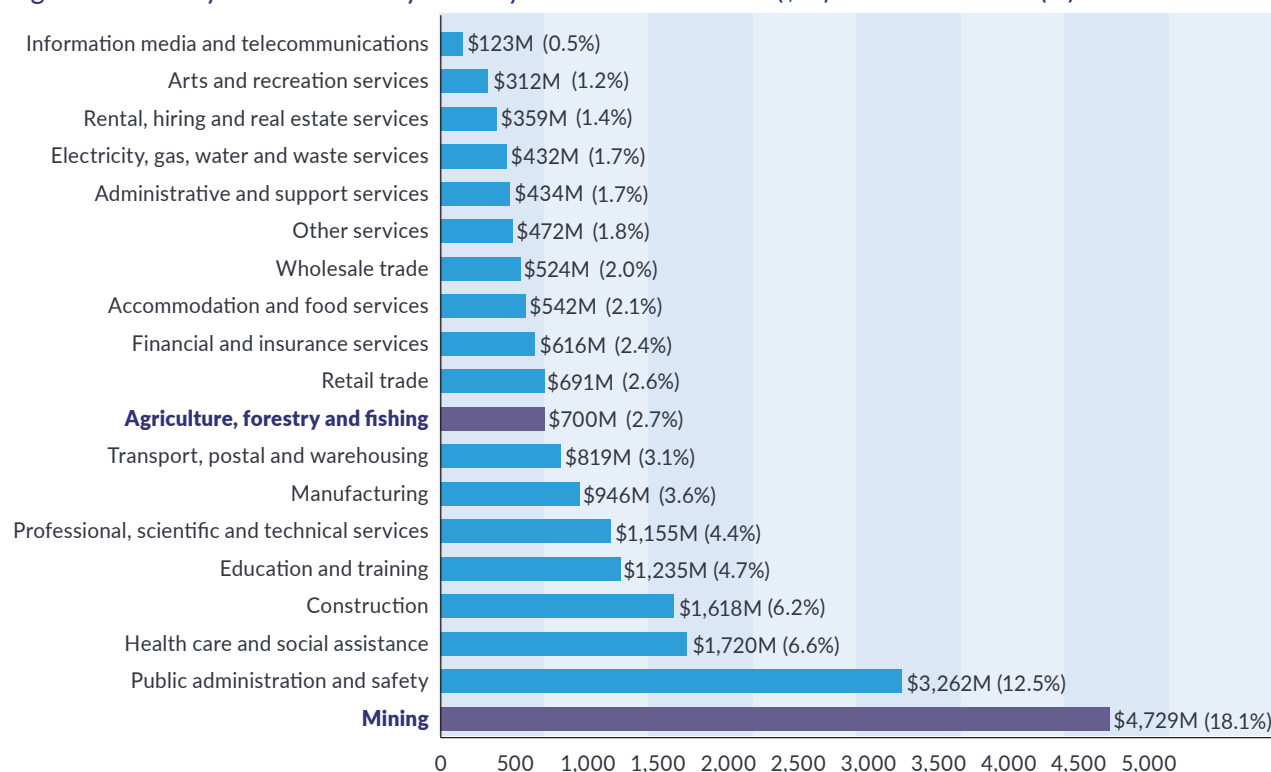
The Northern Territory Government Department of Primary Industry and Resources brings together many of the key functions that drive economic development on Northern Territory lands, coastal areas and inland waterways, and our operations cover the whole of the Territory. The department plays an integral, enabling role through the development and regulation of our industries, which are significant to our economy and advancing our regions. Primary industry and fisheries sectors include fisheries, livestock, horticulture and other agriculture.

The department operates a range of facilities, including research farms, stations, laboratories and scientific precincts, and offices in different regions and climatic zones across the Territory. Our skilled staff across a range of disciplines support our aim to ensure the Territory optimises benefits from its industry sectors.

The department collaborates with diverse industry stakeholders to optimise agriculture and fisheries sector benefits, seizing opportunities to develop Northern Australia and attain the Territory’s full economic potential as a gateway to global markets. We also play a significant role in supporting Aboriginal and regionally based business development, working to increase economic progress and employment growth.

The value added of Territory primary industry and fisheries estimated by the Australian Bureau of Statistics (ABS) exceeds \$700 million annually (Figure 1), accounting for 2.7 per cent of Territory’s gross state product (GSP). Mining is the giant of the Territory resource industry, grossing an annual \$4.7 billion and contributing over 18 per cent of Territory GSP.

Figure 1: Territory GSP 2018-19 by industry sector – value added (\$M) and contribution (%)



Source: ABS 5220.0 – Australian National Accounts: State Accounts, 2018-19

Primary industry

The department delivers strategic services that support profitable and sustainable production for primary industry.

The department works in partnership with producers, industry bodies, community groups and related agencies to promote industry growth and ensure access to markets for animals, plants and plant products. This includes the fisheries, livestock, horticulture and other agriculture sectors.

Services include:

- inspection, treatment and certification services for animals and animal products
- inspection, treatment and certification services for plant and plant products
- research and extension programs to help producers sustainably lift crop and stock yields and capacity
- development of best-practice farming methods for specific environments
- Aboriginal pastoral and horticultural economic development
- biosecurity and laboratory diagnostic services for plant and animal health
- monitoring of, and response to, emergency and endemic animal and plant pests and disease
- supporting industry trade and investment development.

Fisheries

The department works in partnership with commercial and recreational fishing industries, the aquaculture industry, Aboriginal communities and other stakeholders to achieve optimum sustainable utilisation of the Territory's valuable aquatic resources. It follows a consultative and precautionary approach to ensure all Territory wild harvest fisheries, aquaculture and associated aquatic resources are ecologically, economically and socially sustained.

Management programs are based on high quality scientific indicators and designed to ensure the Territory's aquatic resources are not over-exploited.

- Services include:
- facilitating the sustainable commercial catch, sale and processing of fish and aquatic life through licence allocation
- encouraging industry development
- supporting the recreational fishing industry
- preventing introduction of aquatic pests into the Territory
- contributing to the research needs for each Territory fishery
- working in partnership to address the needs of the aquaculture industry
- operating the commercial barramundi hatchery and nursery business
- assisting Aboriginal communities in relation to fishing issues
- delivering community education, including education resources for schools.



Economic overview of the Territory

– facts and figures

In 2018-19, the Territory economy fell by 1.5 per cent to \$26.1 billion, down from \$26.5 billion in 2017-18 (Table 1).

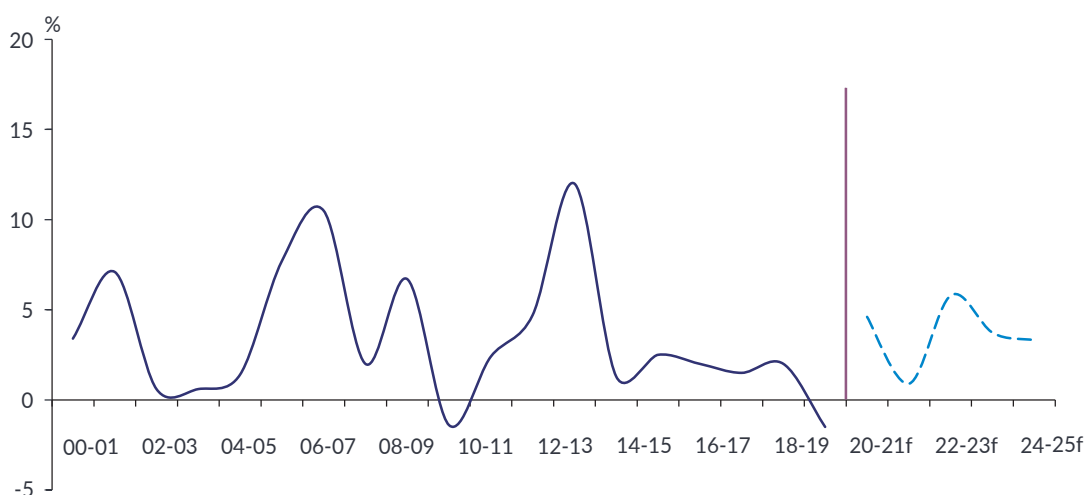
Table 1: Territory economy, 2017-18 and 2018-19

	2017-18	2018-19
Gross state product (\$m)	\$26,500	\$26,109
Population (persons)	247,159	244,761
Exports (\$m)	\$5,721	\$9,467
Imports (\$m)	\$1,957	\$1,825
Unemployment rate (original)	4.1%	4.6%
Inflation rate (national)	1.2%	1.6%
Average weekly full-time adult earnings (persons)	\$1,727	\$1,778

Source: treasury.nt.gov.au

Deloitte Access Economics (DAE) Economic Outlook forecasts moderate growth of the Territory economy by an average of 2.7 per cent over the five years to 2022-23 (Figure 2). This is the highest forecast five-year average economic growth of the jurisdictions and is largely driven by exports. DAE notes that exports (mainly minerals and liquefied natural gas) are expected to be key drivers of the Territory economy, however they will have less flow-on effects to domestic demand.

Figure 2: Territory economic outlook – GSP 2000-01 to 2023-24f



Source: treasury.nt.gov.au



Primary industry and fisheries – an economic overview

Methodology for the calculation of production values

The production values estimated in this publication are calculated at the point of production, not at the point of sale and are based on a farm-gate price (minus marketing costs). In the case of Territory fisheries, the farm-gate price is the onboard or landed price. The Australian Government-managed Northern Prawn Fishery (Territory catch only) (NPF) production value is based on an Australian Bureau of Agricultural and Resource Economics and Sciences (ABARES) export price.

Marketing costs are the cost of moving agricultural and fishery commodities from the point of production (on the farm or fishing vessel) to the point of sale (the market place). These costs include, but are not limited to, freight, cost of containers, commissions, insurance, storage, handling, weighing, yard fees and other fees or charges incurred by the producer in delivering commodities to the market place.

Outputs and values reported in this publication were obtained with the assistance of the Northern Territory (NT) Farmers' Association, Crocodile Farmers Association of the NT, Australian Government Department of Agriculture, Australian Fisheries Management Authority, ABS and ABARES.

Contribution of industry to sector production value

Primary industry and fisheries in the Territory include cattle (interstate movements and live export), other livestock (buffalo, crocodiles, horses, camels, donkeys and goats), horticulture (fruits, vegetables, nursery, cut flowers and turf), and mixed farming (hay and forestry). The fisheries industry comprises harvesting of wild catch (including the Australian Government-managed NPF) and aquaculture. A substantial recreational fishing sector generates tourism activity and provides lifestyle amenity.

The relative contribution of each industry to the primary industry and fisheries total is illustrated in Figure 3, with cattle, horticulture and fisheries being the major sectors. These output and values originate from the department's data collections and are presented in Table 3. The annual performance of the Territory's major commodities by sector is presented in Table 4.

In 2018-19, the total estimated value of Territory primary industry and fisheries production was \$1265.9 million (Table 3), an increase of 22.4 per cent over the previous year. This result reflected positive production results and market conditions. This increase is primarily due to a 36.2 per cent rise in the value of cattle production to \$823.5 million (mainly due to interstate movements and, to a lesser degree, live exports), an 8.4 per cent increase in fisheries value of production to \$119.8 million (driven by aquaculture), a 3 per cent increase in other livestock production value (mainly crocodile and buffalo production) to \$33.8 million, and a 6.5 per cent growth in the value of mixed farming output to \$37.6 million (driven by hay production and Tiwi woodchip exports), while the value of horticultural production rose to \$251.2 million, a 0.1 per cent increase on 2017-18.

Cattle
\$823.5M



Horticulture
\$251.2M



Fisheries
\$119.8M



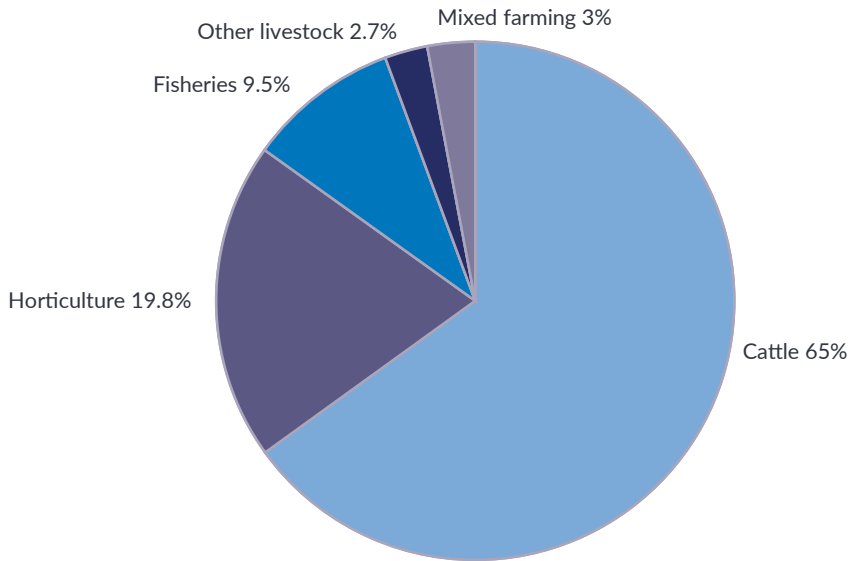
Mixed farming
\$37.6M



Other livestock
\$33.8M



Figure 3: Contribution of industry to sector production value, 2018-19



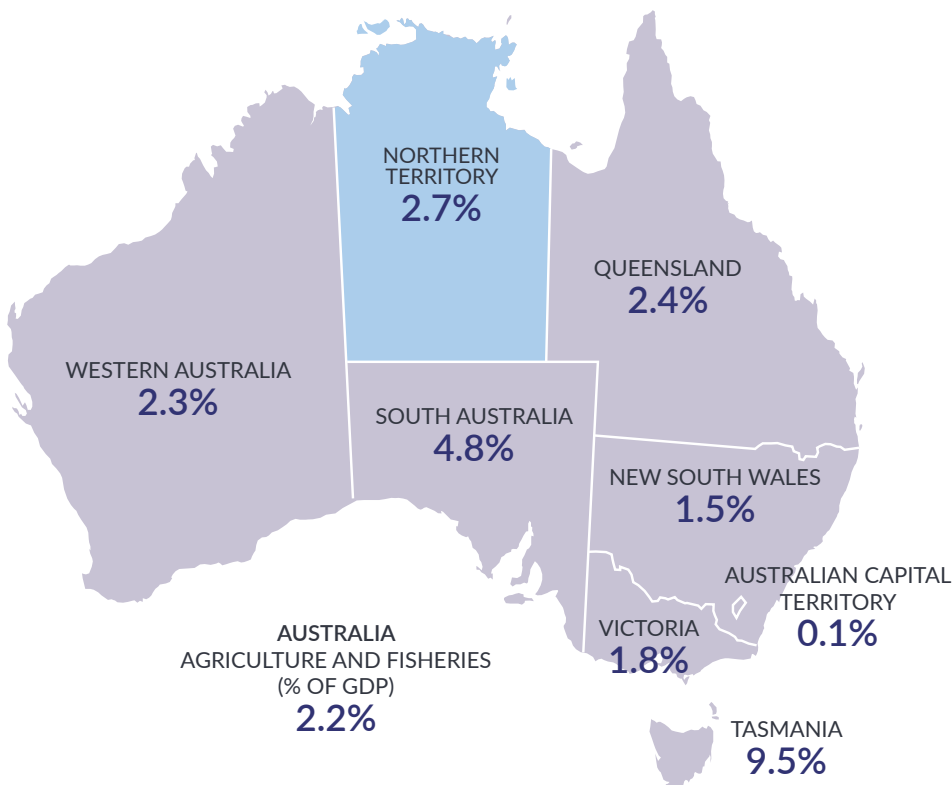
Source: Department of Primary Industry and Resources data collections

Territory primary industry and fisheries have significant links to other sectors of the local economy, such as manufacturing, transport and storage, retail and wholesale trade. These industries are vital in regional areas, providing economic stimulus and employment for approximately 1,791 people in 2018-19 (ABS). This represents 1.3 per cent of the estimated workforce in the Territory. This labour force estimate is subject to a sampling variability and results can be volatile.

Primary industry and fisheries also account for a significant proportion of the Territory's non-mineral export revenue. These industries comprised 2.7 per cent of Territory GSP in 2018-19. This is just below the total primary industry and fisheries contribution (of all states and territories) to Australia's gross domestic product (GDP) of 2.5 per cent (Figure 4).

Exports of Territory primary industry and fisheries outputs are dominated by live cattle exports (mainly to Indonesia), fisheries, horticulture, forestry and, to a lesser extent, agriculture services.

Figure 4: States and territories – agriculture and fisheries contribution to GDP, 2018-19



Source: ABS, Australian National Accounts, Cat No. 5220.0, 2018-19

Figure 5: Agricultural and fishing areas in the Territory



Source: Department of Treasury and Finance



Business overview

There were 935 agriculture, forestry and fishing businesses counted for the period June 2015 to June 2019. The sole trader or owner-operator was the most common form of business structure (68.4 per cent). There are no large firms (200 plus employees) in the sector (Table 2).

The majority of agricultural and fisheries businesses are pastoral businesses (33.6 per cent) and 68.4 per cent of all agricultural and fisheries businesses are non-employed.

Table 2: Counts of Territory businesses by industry and employment, 2015-19

Description	Non-employed	1-19	20-199	200+	Total	By business
Pastoral industries	205	95	14	0	314	33.6%
Plant industries	210	61	12	0	283	30.3%
Other agriculture and fishing support services	85	51	14	0	150	16.0%
Fisheries	69	12	0	0	81	8.7%
Forestry	24	7	3	0	34	3.6%
Other animals	39	17	3	0	59	6.3%
Aquaculture	3	3	0	0	6	0.6%
Hunting and trapping	5	3	0	0	8	0.9%
Total	640	249	46	0	935	100.0%
% by employment	68.4%	26.6%	4.9%	0.0%	100.0%	

Source: ABS, Counts of Australian Businesses, including Entries and Exits, Cat No. 8165.0, June 2015 to June 2019



Industry production values overview

Table 3: Territory primary industry and fisheries production values

Horticulture	Value of production (\$M)			Annual change 17-18 to 18-19
	2016-17	2017-18	2018-19	
Mangoes	88.3	112.8	108.7	-3.6%
Table grapes ¹	8.0	8.7	-	-
Melons	50.3	42.0	57.4	36.7%
Other fruits	17.7	17.7	19.1	7.9%
Vegetables	43.9	43.9	41.3	-5.9%
Nursery, cut flowers and turf	17.7	17.7	15.5	-12.4%
Territory markets	7.8	8.2	9.2	12.2%
Total horticultural	233.7	251.0	251.2	0.1%
Fisheries				
Fish	37.3	37.5	33.6	-10.5%
Crustaceans	5.9	9.8	8.7	-11.6%
Aquaculture	34.4	25.6	41.4	62.0%
Molluscs and echinoderms	0.63	0.51	0.50	-2.9%
Total Territory fisheries	78.3	73.4	84.1	14.6%
NPF crustaceans	62.5	37.2	35.7	-4.0%
Total fisheries	140.8	110.6	119.8	8.4%
Livestock and other agriculture¹				
Cattle	663.7	604.4	823.5	36.2%
Other livestock	30.2	32.9	33.8	3.0%
Total livestock	693.9	637.3	857.3	34.5%
Field crops	19.3	20.5	27.0	31.9%
Forestry	13.7	14.8	10.6	-28.5%
Total other agriculture	33.0	35.3	37.6	6.5%
Total	726.9	672.6	894.9	33.0%
Total livestock and other agriculture				
Horticulture	233.7	251.0	251.2	0.1%
Fisheries	140.8	110.6	119.8	8.4%
Livestock	693.9	637.3	857.3	34.5%
Other agriculture	33.0	35.3	37.6	6.5%
TOTAL	1,101.4	1,034.2	1265.9	22.4%

1. In 2018-19 the table grape production value was consolidated with other fruits.

2. Other agriculture includes mixed farming and forestry.

Source: Department of Primary Industry and Resources data collections



Primary industry and fisheries performance

Table 4: Current year performance of Territory commodities

Commodity	Value of production (\$M)		Annual change	Performance indicator
	2017-18	2018-19		
Territory cattle exported overseas	\$261.6	\$274.5	4.9%	↑
Territory cattle movements interstate	\$308.0	\$544.7	76.9%	↑
Territory cattle slaughtered	\$34.9	\$4.3	-87.7%	↓
Buffalo	\$9.0	\$6.6	-26.2%	↓
Other livestock	\$0.20	\$0.39	90.7%	↑
Crocodiles	\$23.7	\$26.8	13.3%	↑
Mangoes	\$112.8	\$108.7	-3.6%	↓
Table grapes ¹	\$8.7	-	-	-
Melons	\$42.0	\$57.4	36.7%	↑
Other fruits	\$17.7	\$19.1	7.9%	↑
Vegetables	\$43.9	\$41.3	-5.9%	↓
Nursery, cut flowers and turf	\$17.7	\$15.5	-12.4%	↓
Territory markets	\$8.2	\$9.2	12.2%	↑
Forestry	\$14.8	\$10.6	-28.5%	↓
Hay and fodder production	\$20.5	\$27.0	31.9%	↑
Fin fish	\$37.5	\$33.6	-10.5%	↓
Territory crustaceans	\$9.8	\$8.7	-11.6%	↓
NPF crustaceans	\$37.2	\$35.7	-4.1%	↓
Aquaculture	\$25.6	\$41.4	62.0%	↑
Molluscs and echinoderms	\$0.51	\$0.50	-2.9%	↓

1. In 2018-19 the table grape production value was consolidated with other fruits.

Source: Department of Primary Industry and Resources data collections

Territory primary industry and fisheries sectors generate additional outputs (Table 5) and employment in the rest of the Territory economy. In 2018-19, primary industry and fisheries sectors produced \$635.4 million in output value in the rest of the Territory economy (Table 6).

Table 5: Output multipliers by industry for the Territory economy, 2018-19

Industry	Output value created in the rest of the Territory economy ¹ per \$1 million industry output value
Beef cattle	\$510,000
Other agriculture ²	\$480,000
Horticulture	\$510,000
Forestry	\$960,000
Commercial fishing	\$400,000

1. Output created in the rest of the Territory economy excludes the referenced industry.

2. Other agriculture includes other livestock and mixed farming.

Source: Department of Primary Industry and Resources

Table 6: Dollar value of output multipliers by industry for the Territory economy, 2018-19

Industry	Output value by industry (\$M)	Output value created in the rest of the Territory economy ¹ (\$M)
Beef cattle	\$823.2	\$420.0
Other agriculture ²	\$60.8	\$29.2
Horticulture	\$251.2	\$128.1
Forestry	\$10.6	\$10.2
Commercial fishing	\$119.8	\$47.9
Total	\$1,265.7	\$635.4

1. Jobs in the rest of Territory economy excludes the referenced industry.

2. Other agriculture includes other livestock and mixed farming.

Source: Department of Primary Industry and Resources data collections

JOBS CREATED IN THE REST OF THE TERRITORY ECONOMY¹ per 100 industry jobs

Beef cattle

36



Horticulture

51



Commercial fishing

57



Forestry

71



Other agriculture²

97



1. Jobs in the rest of Territory economy excludes the referenced industry.

2. Other agriculture includes other livestock and mixed farming.

Source: Department of Primary Industry and Resources



Primary industry and fisheries sectors

Livestock – cattle

The live cattle export trade (mainly to Indonesia) and interstate movements (mostly to Queensland and South Australia) dominates agricultural production in the Territory. Market destinations for Territory cattle in 2018-19 consisted of live export trade (33.3 per cent), interstate movements (66.2 per cent) and local slaughter (0.5 per cent).

The pastoral industry is a major contributor to incomes in regional areas of the Territory. It also generates considerable flow-on benefits to other industries, particularly transport and storage, business-to-business services and retail trade services. The pastoral industry contributed 65 per cent of the total value of Territory primary industry and fisheries production in 2018-19 (Figure 3).

The estimated value of production for the cattle industry in 2018-19 was \$823.5 million, up 36.2 per cent from 2017-18. In 2018-19, 794,784 head of Territory cattle were turned-off for exports, interstate movements or for slaughter, up 41.2 per cent from 2017-18 (Table 7). Turn-off for slaughter fell significantly in 2018-19 to reflect the August 2018 operational suspension of the Australian Agricultural Company's Livingstone Beef processing facility.

Table 7: Territory cattle industry – turn-off and production values annual percentage changes

Turn-off (Territory cattle only)	2017-18		2018-19		Annual change	
	Head	\$M	Head	\$M	Head	\$M
Interstate movements	243,501	\$261.6	265,007	\$274.5	8.8%	4.9%
Live exports	286,721	\$308.0	525,861	\$544.7	83.4%	76.9%
Slaughter (Territory abattoirs)	32,501	\$34.9	4,131	\$4.3	-87.3%	-87.7%
Total	562,723	\$604.4	794,999	\$823.5	41.3%	36.2%

Source: Department of Primary Industry and Resources data collections

Interstate cattle movements

The majority of Territory cattle movements interstate (Table 8) are slaughter cattle for boxed beef sale in domestic and international markets, such as Japan, South Korea, the United States and Taiwan. Traditionally, over 50 per cent of the interstate movement of Territory cattle goes to Queensland and approximately 20 per cent to South Australia. Western Australia, New South Wales and Victoria account for the remaining 30 per cent of interstate movements.

The value of the total interstate movements of Territory cattle in 2018-19 was estimated at \$544.7 million, up 76.9 per cent from 2017-18 (\$308 million). A total of 525,861 head of Territory cattle were sent interstate in 2018-19, an 83.4 per cent increase over 2017-18 (286,721). This increased turn-off was due to destocking by several of the corporate pastoralists moving cattle to their Queensland properties or selling down to reduce numbers due to dry conditions in the Barkly and Victoria River District.

Table 8: Interstate cattle movements – turn-off and production values annual percentage changes

Description	2017-18		2018-19		Annual change	
	Head	\$M	Head	\$M	Head	\$M
Queensland	161,990	\$174.0	382,363	\$396.1	136.0%	127.6%
South Australia	61,748	\$66.3	61,546	\$63.7	-0.3%	-3.9%
Western Australia	30,922	\$33.2	42,331	\$43.8	36.9%	32.0%
Other states	32,061	\$34.4	39,621	\$41.0	23.6%	19.2%
Total	286,721	\$308.0	525,861	\$544.7	83.4%	76.9%

Source: Department of Primary Industry and Resources data collections

Live cattle exports

A total of 265,007 head of Territory cattle were exported to South East Asia in 2018-19 (Table 9), an 8.8 per cent increase over 2017-18 (243,501 head). The value of production for Territory live cattle exports in 2018-19 was estimated at \$274.5 million, a 4.9 per cent increase over 2017-18 (\$261.6 million).

Indonesia is the largest export market for Territory cattle, accounting for 79.4 per cent of cattle exports through the Port of Darwin in 2018-19. Vietnam is the next biggest market, accounting for over 13 per cent of exports. Other markets for Territory cattle include Brunei, Malaysia, the Philippines and Thailand. In 2018-19, Territory cattle exports accounted for 20.3 per cent of Australia's total live cattle exports and 31 per cent of Australia's total live cattle exports to Indonesia.

Table 9: Territory live cattle exports – turn-off and production values annual percentage changes

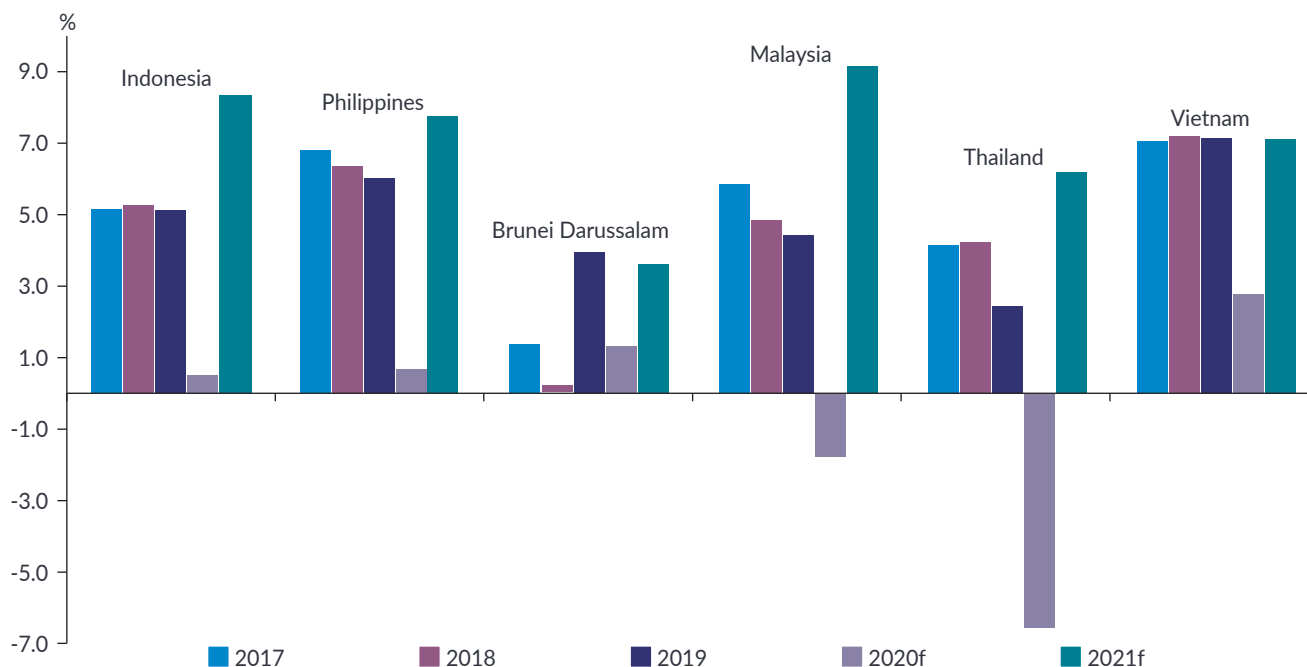
Description	2017-18		2018-19		Annual change	
	Head	\$M	Head	\$M	Head	\$M
Brunei	2,836	\$3.0	2,129	\$2.2	-24.9%	-27.6%
Indonesia	187,023	\$200.9	210,294	\$217.8	12.4%	8.4%
Philippines	4,579	\$4.9	9,953	\$10.3	0.0%	0.0%
Sabah	1,680	\$1.8	0	\$0.0	0.0%	0.0%
Sarawak	1,970	\$2.1	1,567	\$1.6	-20.4%	-23.3%
West Malaysia	12,137	\$13.0	6,075	\$6.3	-49.9%	-51.7%
Thailand	658	\$0.7	616	\$0.6	-6.3%	-9.7%
Vietnam	32,617	\$35.0	34,372	\$35.6	5.4%	1.6%
Total	243,501	\$261.6	265,007	\$274.5	8.8%	4.9%

Note: Live cattle exports only represent Territory cattle shipped from the Port of Darwin.

Source: Department of Primary Industry and Resources data collections

The economies of the major destination countries for live cattle exports are being impacted by the pandemic and the necessary protection measures are severely affecting their economic activity. This will affect household spending. As a result of the pandemic, the global economy is projected to contract sharply by -3 per cent in 2020, much worse than during the 2008-09 financial crisis. In a baseline scenario, which assumes that the pandemic fades in the second half of 2020 and containment efforts can be gradually unwound, the global economy is projected to grow by 5.8 per cent in 2021 as economic activity normalises, helped by policy support.

Figure 6: GDP growth forecasts 2017-2021f for Territory live cattle exports – major destinations



f: forecast

Source: International Monetary Fund, World Economic Outlook Database, April 2019

Other livestock

Other livestock is a category of industries in the Territory that has historically included crocodiles, poultry, buffalo, horses, camels, deer, pigs and goats, exported overseas or sent to domestic markets. Crocodiles are the largest industry in this category. Premium grade crocodile skins are highly sought after in Japan, France, Italy and Asian countries. Second and third grade skins are also exported, although there is a growing domestic demand. The by-products of flesh, feet, teeth and skulls are mainly sold domestically.

Total other livestock (crocodiles, buffalo, horses, camels, pigs, and goats) contributed 2.7 per cent to the total value of Territory primary industry and fisheries production in 2018-19 (Figure 3).

In 2018-19, the total value of production in other livestock increased 3 per cent to an estimated \$33.8 million, from \$32.9 million in 2017-18 (Table 10).

For 2018-19, the value of the Territory's crocodile industry was estimated at \$26.8 million. This accounted for 79.3 per cent of the total value of production of the other livestock industry sector.

Buffalo turn-off decreased 26.2 per cent in 2018-19 to 7,820 head with an estimated value of \$6.6 million.

Table 10: Other Territory livestock industry – production values annual percentage changes

Description	2017-18 (\$M)	2018-19 (\$M)	Annual change
Crocodiles	\$23.7	\$26.8	13.3%
Other livestock	\$0.20	\$0.39	90.7%
Buffalo	\$9.0	\$6.6	-26.2%
Total	\$32.9	\$33.8	3.0%

Source: Department of Primary Industry and Resources data collections

Plant industry

The Territory's plant industry includes:

- fruits
- vegetables
- nursery, cut flowers and turf
- field crops
- Territory markets
- forestry
- other crops.

The value of Territory plant production for 2018-19 was \$288.8 million, an increase of 0.9 per cent compared to 2017-18 (Table 11). Plant industry (horticulture and mixed farming) contributed an estimated 19.8 per cent of the total value of Territory primary industry and fisheries production in 2018-19 (Figure 3).

Almost all production from Territory plant industry is sent interstate (for domestic consumption or to be exported). Less than 1 per cent of plant produce is exported directly from the Territory. Historically, this has involved mangoes, melons and pumpkins to Singapore and, most recently, woodchips to Japan. Field crops are mostly hay production for the cattle industry. In 2018-19, the Territory accounted for 1.7 per cent of national horticulture production.

Table 11: Territory plant industry – production values annual percentage changes

Description	2017-18 (\$M)	2018-19 (\$M)	Annual change	Total production value 2018-19
Fruits	\$181.2	\$185.2	2.2%	64.1%
Vegetables	\$43.9	\$41.3	-5.9%	14.3%
Field crops	\$20.5	\$27.0	31.9%	9.3%
Nursery, cut flowers and turf	\$17.7	\$15.5	-12.4%	5.4%
Territory markets	\$14.8	\$10.6	-28.5%	3.7%
Forestry	\$8.2	\$9.2	12.2%	3.2%
Total	\$286.3	\$288.8	0.9%	100.0%

Source: NT Farmers Association, NT Farming Production 2018

Fruits

The main fruits produced in the Territory include mangoes, melons, and table grapes. Fruit production value in 2018-19 increased an estimated 2.2 per cent to \$185.2 million on 2017-18 (Table 12). This was due to increases in the value for melon and other fruits, offset by a decline in mangoes. There was no production recorded for bananas and table grapes production value was consolidated with other fruits in 2018-19.

Table 12: Territory fruits – tonnes and production values annual percentage changes

Description	2017-18		2018-19		Annual change	
	Tonnes	\$M	Tonnes	\$M	Tonnes	\$M
Mangoes	39,700	\$112.8	32,900	\$108.7	-17.1%	-3.6%
Table grapes	1,950	\$8.7	-	-	-	-
Melons	46,000	\$42.0	64,400	\$57.4	40.0%	36.7%
Other fruits	4,500	\$17.7	6,320	\$19.1	40.4%	7.9%
Total	92,150	\$181.2	103,620	\$185.2	12.4%	2.2%

Source: NT Farmers Association, NT Farming Production 2018

Vegetables

The major vegetables produced in the Territory include cucumber, bitter melon, hairy melon, long melon, okra, snake beans and pumpkin. Data is not collected for individual commodities.

The production value of vegetables fell 5.9 per cent in 2018-19 to \$41.3 million. Vegetable production was 13,200 tonnes for this period.

Field crops

Historically, Territory mixed farming has included seed production, sorghum, maize and other crops, such as sesame and soybeans. Hay and fodder production, used to supply the Territory cattle industry, accounted for 100 per cent of the total field crops production values in 2018-19.

Mixed farming contributed over 3 per cent of the total value of Territory primary industry and fisheries production in 2018-19 (Figure 3).

The value of field crop production in 2018-19 was \$27 million, a 31.9 per cent increase from 2017-18 (\$20.5million).

Territory markets

Local markets accounted for around \$9.2 million of production in 2018-19, mainly in the Darwin markets. Local farmers' markets include Rapid Creek, Palmerston, Parap, Nightcliff and Mindil Beach.

The major supermarket chains use local production where possible, especially bananas, mangoes, rockmelons, watermelons, Lebanese cucumber, Asian vegetables, pineapples, papaya, dragon fruit, rambutan, carambola and pumpkin. The Territory has specialist vegetable producers supplying hydroponic fancy lettuce, tomatoes and other vegetables to local supermarkets.

Forestry

There are more than 49,000 hectares under plantation forestry across the Territory.

Acacia (*Acacia mangium*) plantations on the Tiwi Islands are grown for paper pulp.

Tiwi plantations started to reach maturity in 2015 and trees continue to be harvested and sold into the international woodchip market (mainly Japan). In 2018-19, Tiwi Plantations Corporation exported woodchips worth \$10.6 million.

African mahogany is grown for high-value timber in the Douglas-Daly and Katherine regions. The trees have an expected rotation of between 18 and 25 years. These plantations are currently mid-rotation and have been independently valued at \$100 million standing value, that is the current value of trees within the plantation that will yield saleable timber when harvested at maturity.

Indian sandalwood is grown for oil and pharmaceuticals in the Douglas-Daly and Katherine regions. Sandalwood is the only plantation forestry in Australia routinely grown in a mixed species system and with irrigation. Still at the early rotation phase, Territory sandalwood plantations will not be harvested for more than a decade, when they are expected to go into the valuable international oils and pharmaceutical markets. A standing value is not currently available.

Fisheries

The Territory fishing industry encompasses the commercial, recreational and traditional Aboriginal sectors. The commercial sector includes wild capture and aquaculture production, as well as seafood processing, wholesale, and retail trade.

Most Territory seafood is transported interstate (to be either exported or consumed domestically). The value of Territory fisheries production for 2018-19 was \$119.8 million, an increase of 8.3 per cent compared to 2017-18 (Table 13). This increase is attributed to a \$15.8 million rise in aquaculture output.

This increase was offset by decreases in fish (wild-stock catch), Territory crustaceans, molluscs and echinoderms and NPF crustaceans (Territory catch). In 2018-19, fisheries contributed an estimated 9.6 per cent of the total value of Territory primary industry and fisheries production value (Figure 3).

Table 13: Territory fisheries – production values annual percentage changes

Description	2017-18 (\$M)	2018-19 (\$M)	Annual change
Fish (wild-stock catch)	\$37.5	\$33.6	-10.5%
Territory crustaceans	\$9.8	\$8.7	-11.6%
Aquaculture	\$25.6	\$41.4	62.0%
Molluscs and echinoderms	\$0.51	\$0.50	-2.9%
Total Territory fisheries	\$73.4	\$84.1	14.6%
NPF crustaceans (Territory catch)	\$37.2	\$35.7	-4.1%
Total fisheries	\$110.6	\$119.8	8.4%

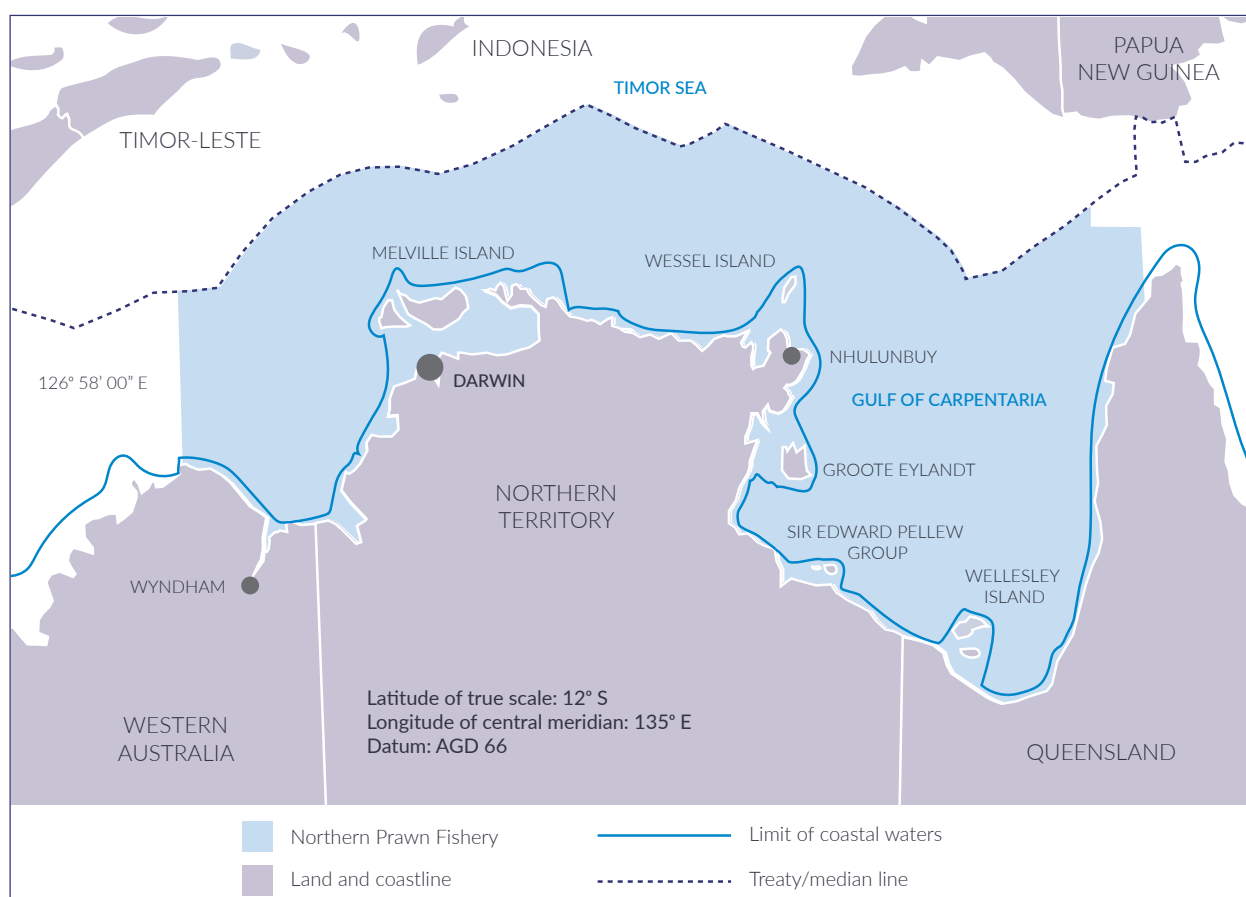
Source: Department of Primary Industry and Resources data collections

Northern Prawn Fleet Fishery management area

The Northern Prawn Fleet Fishery management area is located off Australia's northern coast from Cape York in Queensland to Cape Londonderry in Western Australia. There are 52 vessels licensed to operate within the fishery, which covers approximately 880,000 square kilometres of Australia's northern waters. On average, the value of the NPF catch accounts for 40 per cent of the total value of Territory fisheries.

Within this fishery, arrangements exist between the Australian Government and governments of Western Australia, the Territory and Queensland, whereby the coastal waters of these states and territories are deemed part of the Australian Fishing Zone. The area of the fishery is sourced from the Northern Prawn Fishery Management Plan 1995 (17 October 2003 – amendments up to Northern Prawn Fishery Amendment Plan 2003 (No NPF 04)). The maritime zone boundaries shown on Figure 7 are sourced from the Australian Maritime Boundaries Information System 2001 (Version 1.1) (released October 2001).

Figure 7: Northern Prawn Fleet Fishery management area



Source: Northern Prawn Fishery Report



Appendix

Publications

- Department of Primary Industry and Resources Annual Report 2018-19
dpir.nt.gov.au/publications
- Department of Primary Industry and Resources: Economic Overview 2017
dpir.nt.gov.au/primary-industry/primary-industry-publications/economic-profile
- Department of Primary Industry and Resources: Fisheries publications
dpir.nt.gov.au/fisheries/fisheries-publications
- Department of Primary Industry and Resources: Industry Development Plan 2013-2017
dpir.nt.gov.au/publications
- Department of Trade, Business and Innovation Annual Report 2018-19
business.nt.gov.au/publications/reports/annual-reports
- Department of Treasury and Finance: Economic briefs
treasury.nt.gov.au/dtf/economic-group/economic-briefs

Useful links

- Australian Bureau of Agricultural and Resource Economics
agriculture.gov.au/abares
- Australian Bureau of Statistics
abs.gov.au/
- Innovation: business and economic data
business.nt.gov.au/business-and-economic-data
- Department of Treasury and Finance
treasury.nt.gov.au/
- NT Cattlemen's Association
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Department of Primary Industry and Resources
GPO Box 3000
Darwin NT 0801

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