DEPARTMENT OF
PRIMARY INDUSTRY AND RESOURCES

Overview and Outlook

2016

www.nt.gov.au

NORTHERN TERRITORY GOVERNMENT

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Department of Primary Industry and Resources

The Department of Primary Industry and Resources (DPIR) is the government agency responsible for facilitating industry development in three vital economic sectors, facilitating optimal use of the Territory's primary industry and fishery resources. The combined value of Territory rural and fishing sectors exceeds $700 million a year, accounting for nearly 2% of Territory's Gross State Product (GSP). Mining is the giant of Territory resource industries, grossing an annual $3.0 billion and contributing over 20% of GSP.

The primary aim of the department is to work with its partners to stimulate and sustain economic growth for the whole community by promoting sustainable and productive farming, sustainable use of fish resources.

The industries the department services impact on the economic and social well-being of thousands of owners, managers, employees, service people and families in urban and rural communities, across all Territory regions and climatic zones.

The department's multi-skilled specialist team of scientists, researchers, technicians, extension officers and support staff, have used vision and commitment to help put the Territory on the world map in terms of research, development, production and supply of our diverse resources.

Primary Industry Profile

The Primary Industry Group delivers strategic services that support profitable and sustainable primary production.

It 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 pastoral, agricultural and horticultural sectors.

The main services are:

- 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;
- Indigenous pastoral and horticultural economic development;
- Biosecurity and laboratory diagnostic services for plant and animal health; and
- Monitoring of, and response to, emergency and endemic animal and plant pests and disease.

Fisheries Group Profile

The Fisheries Group works in partnership with commercial and recreational fishing industries, the aquaculture industry, Indigenous communities and other stakeholders to achieve optimum sustainable utilisation of the Territory's valuable aquatic resources. It follows a consultative and precautionary-based approach to ensure that all Territory wild harvest fisheries, aquaculture and associated aquatic resources are ecologically, economically and socially sustained. Fisheries' resource management programs are based on high quality scientific indicators and designed to ensure that 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 license allocation;
- Encouraging industry development;
- Supporting the recreational fishing industries;
- Preventing the 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/nursery business;
- Assisting Indigenous communities in relation to fishing issues; and providing education resources for schools and delivering community education.

Economic Overview of the Northern Territory (NT): Facts and Figures

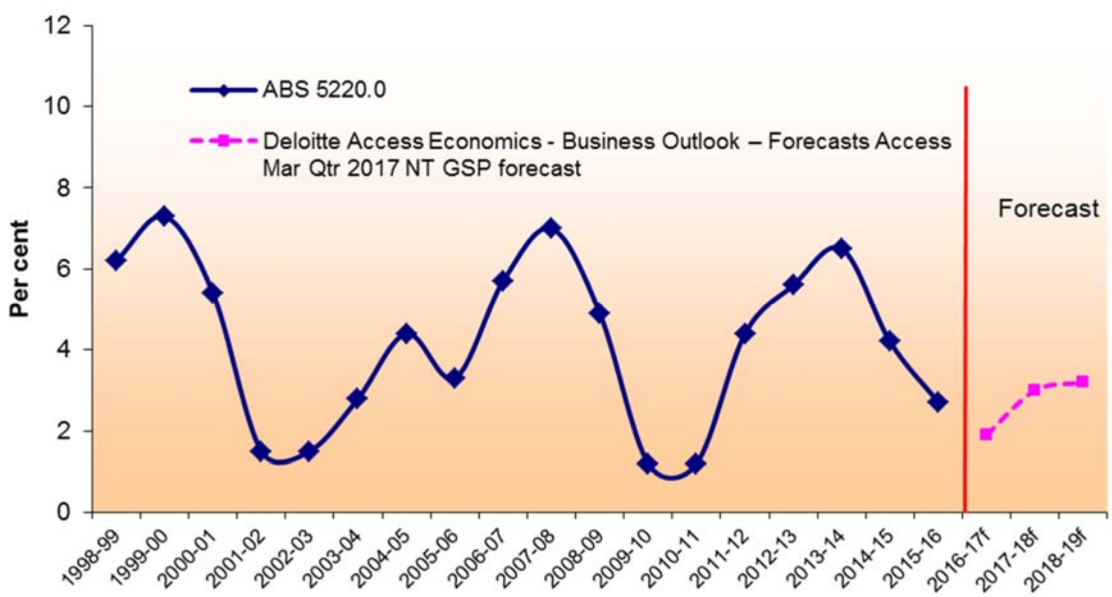
Table 1: NT Economy

Gross State Product ($m)	$23,648	(2015-16)
Population (persons)	245 657	Sept Qtr 2016
Exports ($m)	$4,688	(2015-16)
Imports ($m)	$3,210	(2015-16)
Unemployment rate (original)	3.7%	June 2016
Inflation rate (national)	⬆ 0.1%	(2015-16)
Average weekly full time adult earnings	$1 792	November 2016

Source: www.treasury.nt.gov.au

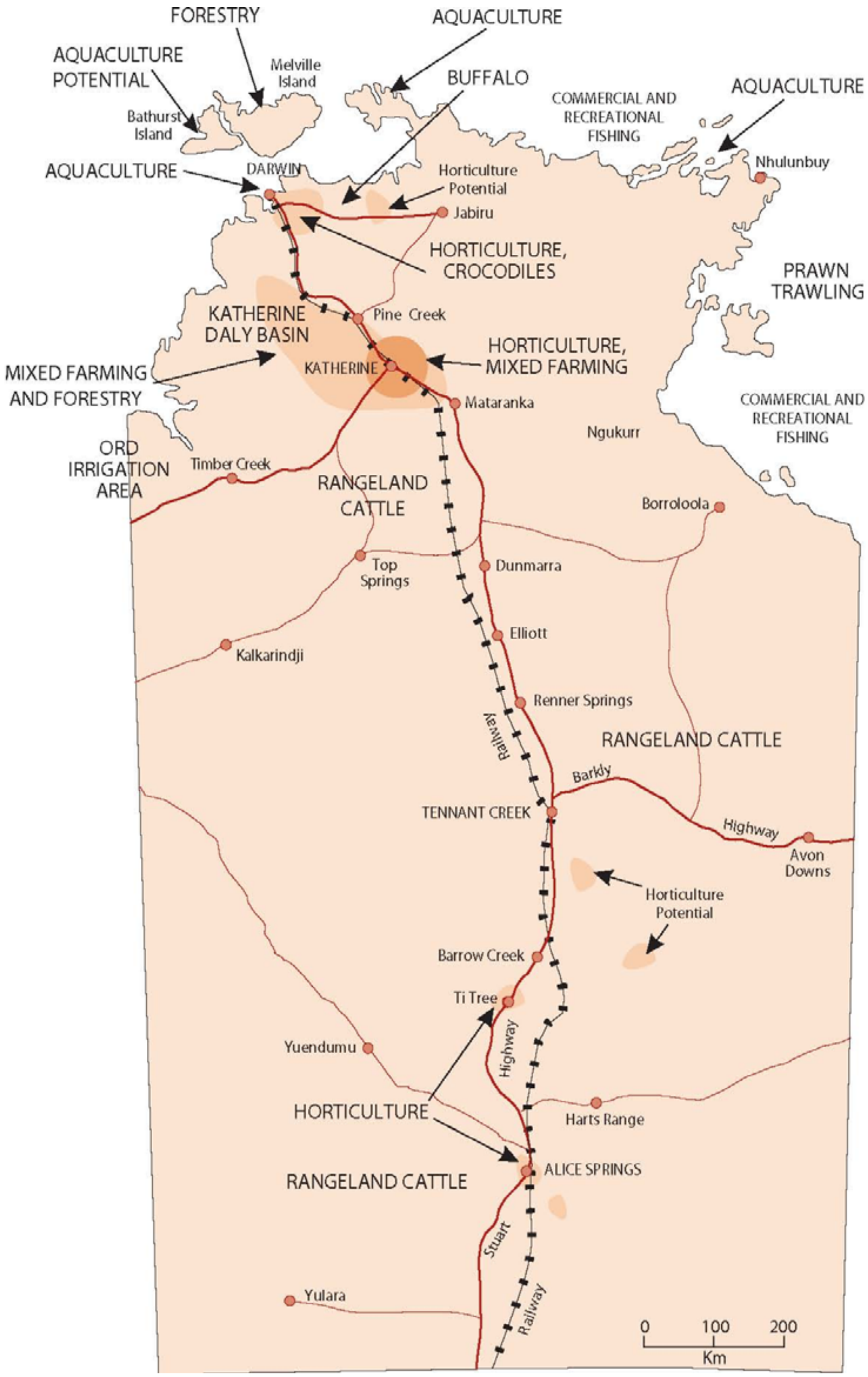
- The NT economy is forecast to continue growing in 2016-17 and 2017-18 as the global and Australian economy continues to grow slowly due to the on-going global and national economic conditions.
- These forecasts include the completion of the Inpex LNG Project and the subsequent impacts on economic growth rates.

Figure 1: NT Economic Outlook - Gross State Product 2000-01 to 2018/19



Source: Australian Bureau of Statistics 2015-16 & Deloitte Access Economics - Economic Growth Forecasts March Quarter 2016 f = forecast

Figure 2: Agricultural and Fishing Areas in the Northern Territory



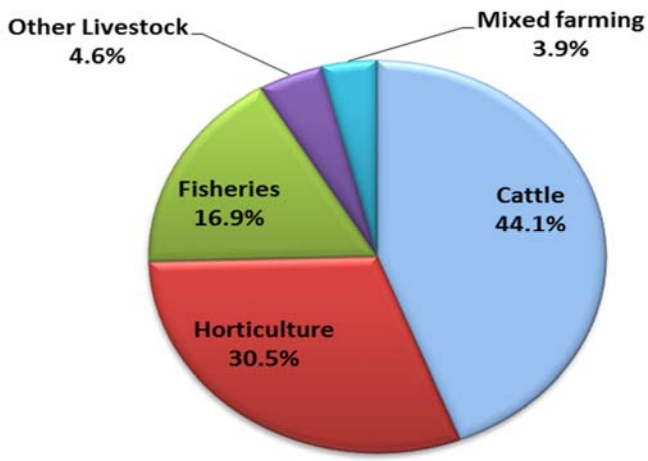
NT Primary Industries and Resources – An Overview

The rural industries and fisheries in the Territory include cattle (interstate and live export), other livestock (buffalo, crocodiles, and goats), horticulture (fruit, vegetables, nursery and cut flowers and turf) and mixed farming (field crops, hay and seeds, and forestry).

The fisheries industry comprises harvesting of wild catch (including the Northern Prawn Fleet) and aquaculture. A substantial recreational fishing sector generates tourism activity and provides lifestyle amenity.

The relative contribution of each industry to the rural and fisheries sector total is illustrated in Figure 3, with the cattle, horticulture industries and fisheries being the major players.

Figure 3: Contribution of Industry to Sector Production Value 2015-16



Source: Department of Primary Industry and Resources data collections

The rural industries and fisheries have significant links to other sectors of the Territory economy such as manufacturing, transport and storage, retail and wholesale trade. These industries are vital in regional areas, providing economic stimulus and full-time employment for on average approximately 2,623 people in 2015-16 (ABS). This labour force estimate is subject to a sampling variability and results can be volatile.

They also account for a significant proportion of the Territory's non-mineral export revenue. Territory rural industries and fisheries accounted for 2.5% of Gross State Product (GSP) in 2015-16, above the national proportion 2.2% (Table 2). Exports of Territory rural and fisheries produce are dominated by live cattle exports (mainly to Indonesia), fisheries, horticulture, and to a lesser extent agriculture services.

Table 2: Agriculture and Fisheries Contribution to NT GSP 2015-16

2015-16	% Contribution to GSP
Tasmania	8.9%
South Australia	4.5%
Queensland	2.5%
Northern Territory	**2.5%**
Victoria	2.4%
Western Australia	2.1%
New South Wales	1.3%
Australian Capital Territory	0.1%
Australia (% of GDP)	**2.2%**

Source: ABS, Australian National Accounts, Cat No. 5220.0, 2015-16

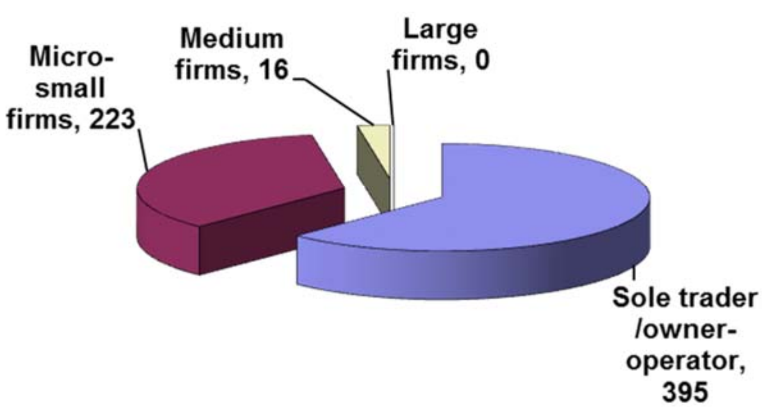
Industry Overview

Agriculture, forestry and fishing industries businesses are structured in one of the following ways:

- Non-employing — sole trader/owner-operator
- Micro/Small — 1 to 19 employees
- Medium — 20 to 199 employees
- Large — 200-plus employees

There were 634 agriculture, forestry and fishing businesses counted for the period June 2012 – June 2016. The sole trader/owner-operator is the most common form of business structure (62.3%) while at the other end of the scale there are no large firms (200 plus employees) in the sector (see Figure 4).

Figure 4: Agriculture Forestry and Fishing Industries: Number of business by firm structure



Source: Australian Bureau of Statistics Counts of Australian Businesses, including Entries and Exits, Cat No. 8165.0, June 2012 to June 2016.

Table 3: Counts of NT Businesses, by Industry and Employment 2012-2016

Description	Non employing	1-19	20-199	200+	Total	% by Industry
Agriculture	292	167	16	0	**475**	**74.9%**
Aquaculture	4	6	0	0	**10**	1.6%
Forestry and Logging	19	3	0	0	**22**	3.5%
Fishing, Hunting and Trapping	47	16	0	0	**63**	9.9%
Agriculture, Forestry and Fishing Support Services	33	31	0	0	**64**	10.1%
Total	**395**	**223**	**16**	**0**	**634**	100%
% by Employment	**62.3%**	35.2%	2.5%	0.0%	100%	

Source: Australian Bureau of Statistics Counts of Australian Businesses, including Entries and Exits, Cat No. 8165.0, June 2012 to June 2016.

The majority of businesses and employment generated by the agricultural and fisheries industries (Table 3) are by (a) agricultural businesses (74.9%) and (b) most businesses are non-employing (62.3%).

In 2015-16, the total value of rural industries and fisheries production is estimated at $736.0 million, an increase of 8.1% over the previous year (see Figure 5). Please note Table 5 represents the data used in Figure 5 in tabular form.

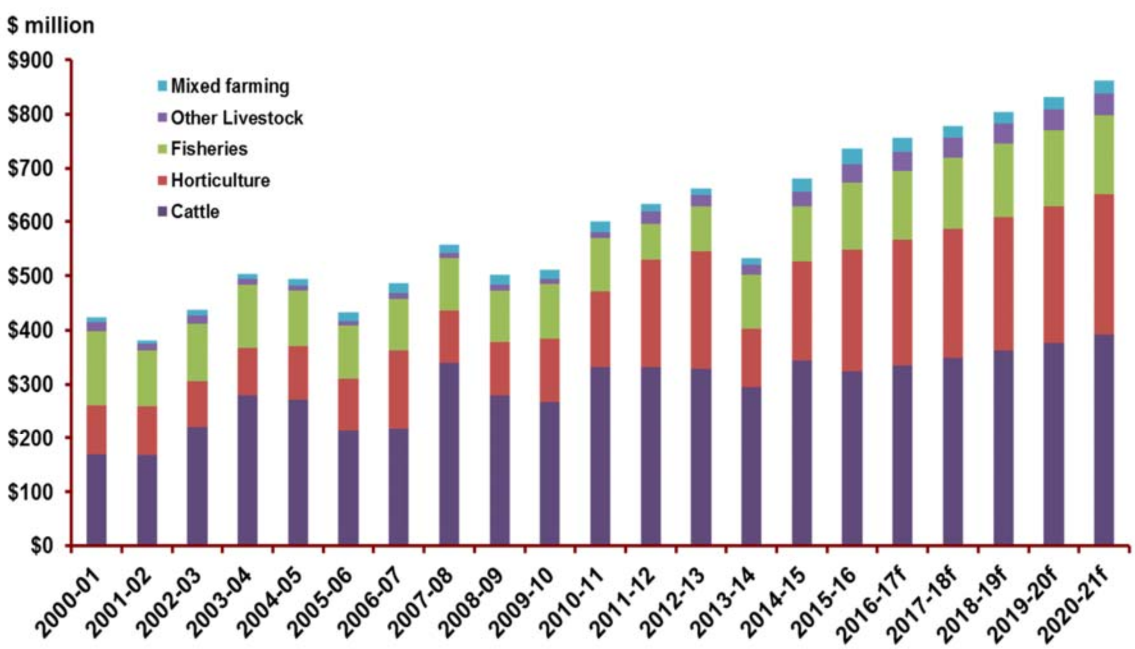
- A decrease of 5.9% in the value of cattle production to $324.4 million. This includes cattle for abattoir production.
- The production value of other livestock (mainly crocodile production) increased by 24.5% to $34.0 million.
- An increase in the production value of horticulture by 23.4% to $224.5 million.
- Mixed farming production increased 17.7% to $28.8 million. These production values are driven predominantly by hay/fodder production that supports the live cattle export trade.
- A 21.5% increase in fisheries production to $124.3 million.

Table 4: NT Primary Industry Production Values Annual Percentage Changes

Description	2014-15 ($m)	2015-16 ($m)	Annual% Change ($m)
Cattle	$344.7	$324.4	-5.9%
Horticulture	$182.0	$224.5	23.4%
Fisheries	$102.4	$124.3	21.5%
Other Livestock	$27.3	$34.0	24.5%
Mixed farming	$24.4	$28.8	17.7%
Total	**$680.7**	**$736.0**	**8.1%**

Source: Department of Primary Industry and Resources data collections

Figure 5: Primary Industry and Resources Outlook: Value of Production 2000-01 to 2020-21



Source: Department of Primary Industry and Resources data collections, f = forecast

Table 5: Primary Industry and Resources Production Values – 2000-01 to 2015-16 ($m)

Year	Cattle $m	Plant Industry $m	Fisheries $m	Other Livestock $m	Mixed Farming $m	Total $m
2000-01	$169.5	$91.7	$136.5	$18.0	$6.9	**$422.5**
2001-02	$167.9	$92.2	$102.3	$13.1	$6.6	**$382.1**
2002-03	$220.9	$85.2	$105.6	$14.8	$11.0	**$437.5**
2003-04	$279.3	$87.5	$116.6	$10.4	$9.4	**$503.2**
2004-05	$271.7	$98.6	$102.5	$9.7	$12.0	**$494.4**
2005-06	$214.1	$95.6	$99.9	$7.1	$15.4	**$432.2**
2006-07	$217.7	$145.1	$94.9	$10.1	$18.9	**$486.5**
2007-08	$339.4	$96.4	$96.9	$9.7	$14.7	**$557.1**
2008-09	$278.9	$99.3	$94.7	$10.2	$18.2	**$501.3**
2009-10	$266.9	$117.7	$100.6	$9.3	$16.7	**$511.2**
2010-11	$331.7	$138.7	$100.1	$10.8	$19.0	**$600.2**
2011-12	$331.7	$198.4	$66.5	$22.5	$14.6	**$633.8**
2012-13	$326.0	$216.8	$83.7	$20.8	$13.0	**$660.3**
2013-14	$290.5	$108.0	$99.0	$18.0	$13.3	**$528.8**
2014-15	$333.5	$182.0	$102.4	$27.3	$24.4	**$669.6**
2015-16	$324.4	$224.5	$124.3	$34.0	$28.8	**$736.0**

Source: Department of Primary Industry and Resources data collections

NT Primary Industries and Resources Performance

Figure 6: Current Year Performance of NT Commodities

Commodity Value of Production	2014-15 $m	2015-16 $m	% Change	Performance Indicator
Live NT cattle exported overseas	$199.4	$155.6	-21.9%	↓
Live NT cattle movements interstate	$126.8	$149.6	18.0%	↑
Cattle slaughtered	$18.5	$19.2	3.8%	↑
Buffalo	$4.1	$4.2	2.6%	↑
Other Livestock	$0.3	$0.2	-36.2%	↓
Crocodiles	$23.0	$29.6	29.1%	↑
Mangoes	$95.5	$88.5	-7.3%	↓
Table Grapes	$0.8	$8.0	903.1%	↑
Bananas	$0.0	$0.0	0.0%	→
Melons	$45.8	$52.6	14.7%	↑
Other fruits	$4.7	$8.0	70.2%	↑
Vegetables	$17.2	$41.5	142.0%	↑
Nursery-Cut Flowers & Turf	$17.9	$18.0	0.4%	↑
NT Markets	$0.0	$7.9	0.0%	↑
Cereal crops	$0.1	$0.0	-100.0%	↓
Other crops	$0.0	$0.0	0.0%	→
Seed production	$1.3	$0.0	-100.0%	↓
Hay/fodder production	$23.0	$20.0	-13.1%	↓
Fin Fish	$26.2	$31.6	20.5%	↑
NT Crustaceans	$4.6	$3.0	-34.8%	↓
NPF Crustaceans	$47.2	$64.9	37.5%	↑
Aquaculture	$24.1	$24.5	1.9%	↑
Molluscs & Echinoderms	$0.25	$0.29	17.8%	↑

NPF Crustaceans = Commonwealth Fishery

Source: Department of Primary Industry and Resources data collections

NT Primary Industries and Resources Outlook

- In the short and medium term, the NT rural industries and fisheries are forecast to continue to expand production values (see Table 6).
- NT rural industries and fisheries are projected to reach over $850 million in production value by 2020-21.

Table 6: Primary Industry and Resources Outlook Production 2015-16 to 2020-21

Year	Cattle $m	Horticulture $m	Fisheries $m	Other Livestock $m	Mixed Farming $m	Total $m
2016-17f	$335.6	$231.2	$128.7	$35.1	$26.0	$756.6
2017-18f	$348.8	$238.2	$133.3	$36.2	$21.2	$777.6
2018-19f	$362.9	$245.3	$138.0	$37.3	$21.9	$805.3
2019-20f	$377.1	$251.8	$142.1	$38.5	$22.5	$832.1
2020-21f	$392.3	$259.4	$147.2	$39.7	$23.2	$861.8

Source: Department of Primary Industry and Resources data collections f = forecast

- Significant value will be derived from the Territory's increased live cattle exports to Indonesia, horticultural production (namely melons and mangoes for interstate markets) and the wild catch from the Northern Prawn Fleet. The outlook for these commodities is positive.
- Mixed farming, in particular hay and fodder production will continue to grow as NT live cattle exports to Indonesia increase and while emerging markets like Vietnam and Cambodia are being established.
- The Other Livestock outlook remains positive mainly driven by the demand for premium crocodile skins.

Industry Multipliers to the NT Economy

NT rural industries and fisheries sectors generate additional outputs and employment in the rest of the NT economy. In 2015-16 NT rural industries and fisheries sectors produced $359.8 million in output value in the rest of the NT economy (see Table 8).

Table 7: Output Multipliers by Industry for the NT Economy 2015-16

Industry	Output Value by industry	Output Value created in the rest of the NT economy
Beef cattle	$1,000,000	$510,000
Other Agriculture	$1,000,000	$480,000
Horticulture	$1,000,000	$510,000
Commercial fishing	$1,000,000	$400,000

Note: Output created in the rest of NT economy excludes the mentioned industry

Note: Other Agriculture includes Other Livestock and Mixed Farming

Source: Department of Business and Employment 2006-07

Table 8: Dollar value of Output Multipliers by Industry for the NT Economy 2015-16

Industry	Output Value by industry 2015-16 ($m)	Output Value created in the rest of the NT economy 2015-16 ($m)
Beef cattle	$324.4	$165.4
Other Agriculture	$62.8	$30.1
Horticulture	$224.5	$114.5
Forestry	$0.0	$0.0
Commercial fishing	$124.3	$49.7
Total	**$736.0**	**$359.8**

Note: Output in the rest of NT economy excludes the mentioned industry
Note: Other Agriculture includes Other Livestock and Mixed Farming
Source: Department of Business and Employment 2006-07

Table 9: Employment Multipliers by Industry for the NT Economy 2015-16

Industry per 100 Jobs	For every Industry Jobs	Jobs created in the rest of the NT economy
Beef cattle	100	36
Other Agriculture	100	97
Horticulture	100	51
Commercial fishing	100	57

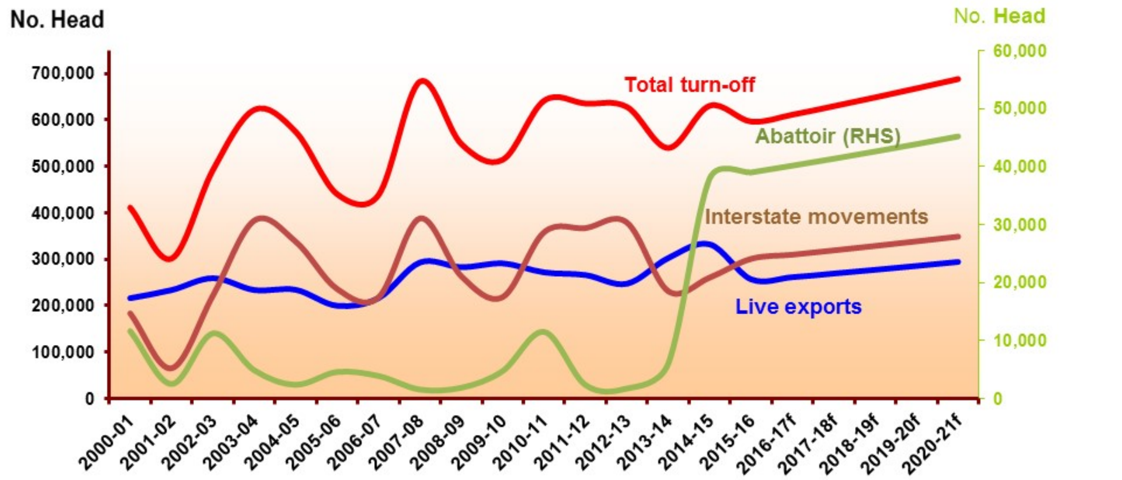
Note: Jobs in the rest of NT economy excludes the mentioned industry
Note: Other Agriculture includes Other Livestock and Mixed Farming
Source: Department of Business and Employment 2006-07

NT Primary Industry Sectors

Livestock (Cattle)

The live cattle export trade (mainly Indonesian) and the sale of cattle in the interstate markets (mostly Queensland and South Australia) dominates agricultural and fisheries production in the Territory. 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.

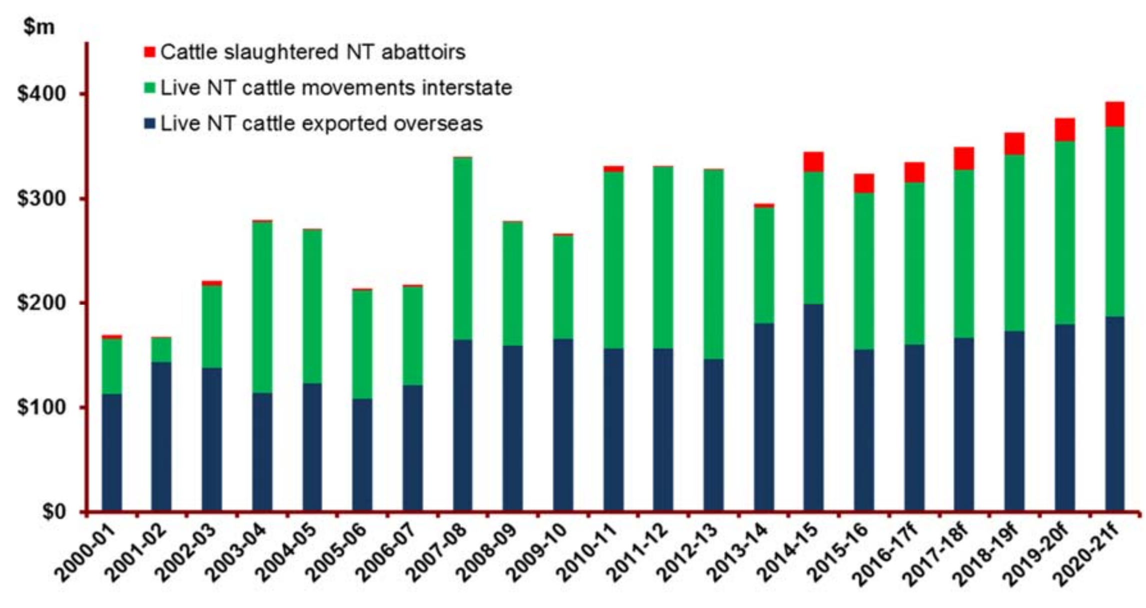
Figure 7: NT Cattle Production (Turn-off) 2000-01 to 2020-21



Source: Department of Primary Industry and Resources data collections, f = forecast

- The pastoral industry contributed 44.1% of the total value of the NT rural industries and fisheries production in 2015-16.
- The estimated value of production for the cattle industry was $324.4 million in 2015-16, down 5.9% from the previous year (see Figure 7 and Table 9). In the current period, 596,829 head of NT cattle were sent overseas, interstate, and slaughtered, down 5.4% from 2014-15 (see Table 10).

Figure 8: NT Cattle Production Values 2000-01 to 2020-21



Source: Department of Primary Industry and Resources data collections, f = forecast

- During 2015-16 NT pastoralists sent 300,956 head of cattle interstate, which is a 15.5% increase on 2014-15. The value of interstate movements in 2015-16 increased 18.0% to $149.6 million, up from $126.8 million in 2014-15 (see Table 11).

- In 2015-16 the NT pastoral industry exported 256,898 head of live NT cattle, a 22.7% decrease on the previous year. The value of live exports in 2015-16 decreased 21.9% to $155.6 million, down from $199.4 million in the previous period (see Table 10 & 12).
- In 2015-16 the NT pastoral industry sent 38,975 head of cattle to slaughter, up from 37,923 head in 2014-15. The value of cattle slaughtered in 2015-16 is $19.2 million up from $18.5 million in the previous year (see Table 10).

Table 10: NT Cattle Industry Turn Off and Production Values Annual Percentage Changes

Destination (NT Cattle Only)	2014-15 (Head)	2015-16 (Head)	2014-15 ($m)	2015-16 ($m)	Annual % Change (Head)	Annual% Change ($m)
Interstate movements	260,525	300,956	$126.8	$149.6	15.5%	18.0%
Exported overseas	332,371	256,898	$199.4	$155.6	-22.7%	-21.9%
Slaughtered	37,923	38,975	$18.5	$19.2	2.8%	3.8%
Total	**630,819**	**596,829**	**$344.7**	**$324.4**	**-5.4%**	**-5.9%**

Source: Department of Primary Industry and Resources data collections

The NT cattle population in 2016 remained stable at 2.0 million head, about 7.7% of the total Australian herd (26.2 million).

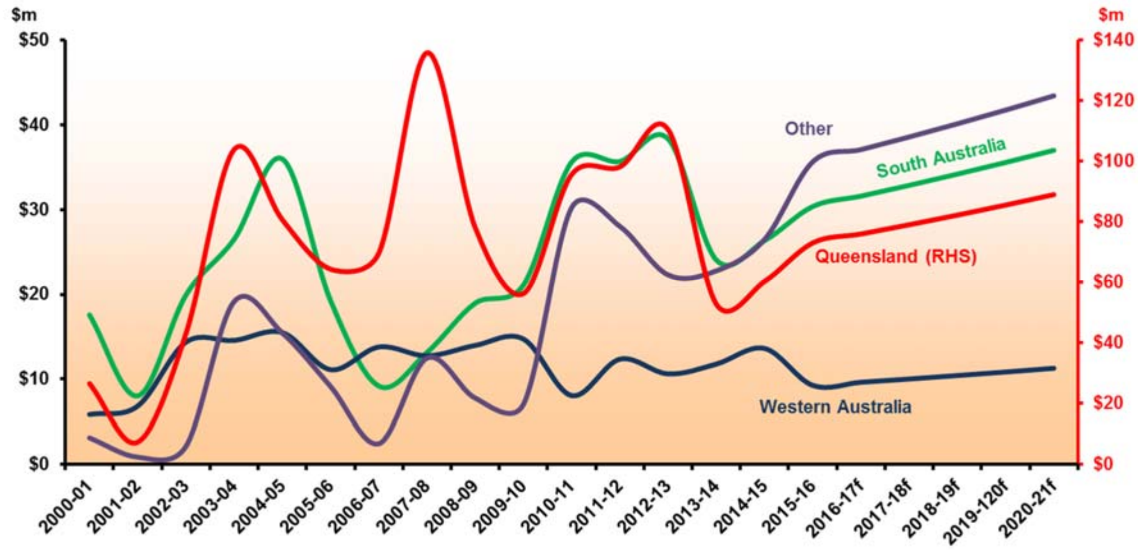
The 2016 estimated cattle population by NT pastoral district,

- Alice Springs Pastoral District has 20% (estimated 400,000 head)
- Barkly Tablelands and Tennant Creek has 30% (estimated 600,000 head)
- Victoria River District and Katherine has 32% (estimated 640,000 head)
- Darwin, Elsey and Gulf have 18% of the total Territory herd (estimated 360,000 head).

Interstate Cattle Movements

The majority of cattle destined for interstate markets are feeder cattle for further growing (grass-fed and grain-fed) before slaughter and sale in the domestic and international markets such as Japan, South Korea, US, and Taiwan.

Figure 9: NT Interstate Cattle Movements: Value of Production 2000-01 to 2020-21



Source: Department of Primary Industry and Resources data collections, f = forecast

The value of the total interstate movements of Territory cattle in 2015-16 was estimated at $149.6 million, up 18.0% from the previous year ($126.8 million).

A total of 300,956 head of Territory cattle were sent interstate in 2015-16, a 15.5% increase over the previous year (260,525).

- Queensland was the main destination for Territory cattle in 2015-16, taking about 49.6% (149,167 head of cattle) of the total interstate movement of NT cattle. This represents an increase of 19.9% on the previous year (124,401 head). The value of Queensland movements is valued at $73.1 million, up 21.1% on 2014-15 ($60.3 million).
- 58,409 head or 19.4% of total interstate movements were sent to South Australia, up 14.2% on 2014-15 (51,160 head). This trade is valued at $30.4 million, up 15.3% on the previous period ($26.4 million).
- Western Australia took 8.7% (26,333 head of cattle) of total Territory cattle transferred interstate, and decrease of 24.0% on 2014-15 (34,661 head). This is valued at $10.5 million, a 23.3% decrease on 2014-15 ($13.6 million).
- 67,036 head of cattle (22.3% of total interstate movements) went to Other States (Victoria & NSW), up 33.3% on the previous year (50,303 head). These movements are estimated at $35.7 million, a rise of 34.6% on 2014-15 ($26.5 million).

Table 11: Interstate Cattle Movements Turn Off and Production Values Annual Percentage Changes

Description	2014-15 (Head)	2015-16 (Head)	2014-15 ($m)	2015-16 ($m)	Annual % Change (Head)	Annual % Change ($m)
Queensland	124,401	149,178	$60.3	$73.1	19.9%	21.1%
South Australia	51,160	58,409	$26.4	$30.4	14.2%	15.3%
Western Australia	34,661	26,333	$13.6	$10.5	-24.0%	-23.3%
Other States	50,303	67,036	$26.5	$35.7	33.3%	34.6%
Total	**260,525**	**300,956**	**$126.8**	**$149.6**	**15.5%**	**18.0%**

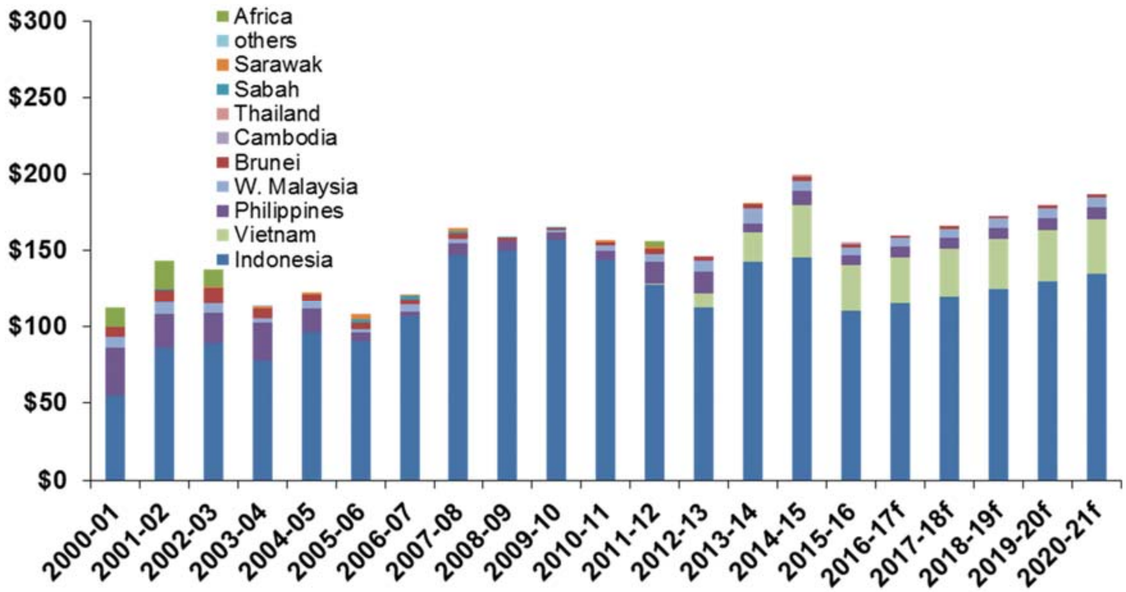
Source: Department of Primary Industry and Resources data collections

Live Cattle Exports

Territory live cattle exports in 2015-16 were estimated at $155.6 million, a 21.9% decrease over the previous period ($199.4 million). This is an expected result for the live cattle export industry as the Indonesia government increased import quotas (to alleviate high domestic beef prices), increased competition from other beef imports, impact of high domestic prices and re-stocking of the NT herds. (Please note: the head of cattle here represents only Territory cattle shipped through the Port of Darwin).

- In 2015-16, Territory cattle accounted for 21.4% of the total Australian live cattle exports to all overseas markets and 32.5% of total Australian live exports to Indonesia.
- A total of 256,898 head of Territory cattle were exported to South East Asia, a 22.7% decrease over 2014-15 (332,371 head).
- In 2015-16 the value of production for live cattle exports is estimated at $155.6 million, down 21.9% on the 2014-15.
- Territory live cattle exports to South East Asia are forecast to increase in the future but performance will depend critically on exchange rate movements, import quotas, potentially Foot and Mouth Disease-free South American suppliers, to a lesser extent competition from the Asian subcontinent, Australian domestic beef prices and locally supplied substitutes such as fish and chicken.

Figure 10: NT Live Cattle Export Destinations: Value of Production 2000-01 to 2020-21



Source: Department of Primary Industry and Resources data collections, f = forecast

Indonesia is the largest market for Territory live cattle exports, taking 71.7% of the total NT live cattle exports out of the Port of Darwin in 2015-16.

- 2,439 head of cattle were exported to Brunei in 2015-16, representing 33.9% decrease on the previous year (3,689 head). Production values decreased 33.2% from $2.6 million to $1.7 million in 2015-16.
- Live cattle exports to Indonesia decreased by 24.7% to 184,098 head in 2015-16. This trade is valued at $110.7million, down 24.0% on 2014-15 ($145.7 million).
- In 2015-16 Territory cattle exports to the Philippines fell 27.6% to 10,853 head of cattle, while the value of production decreased 26.9% to $6.5 million.
- In 2015-16, 7,634 cattle were exported to West Malaysia down 19.8% from 9,515 head in 2014-15. The value of production fell 19.0% to $5.4 million from $6.7 million reported last year.
- Thailand received 1,055 head of cattle in 2015-16 valued at $0.6 million.
- Vietnam (an emerging market for NT live cattle exports) received 48,883 head of cattle valued at $29.4 million in 2015-16. In 2014-15 Vietnam imported 56,992 head valued at $33.9 million.
- In 2015-16 Cambodia received its 1st shipment of NT cattle (1,936 head) worth $1.2 million.

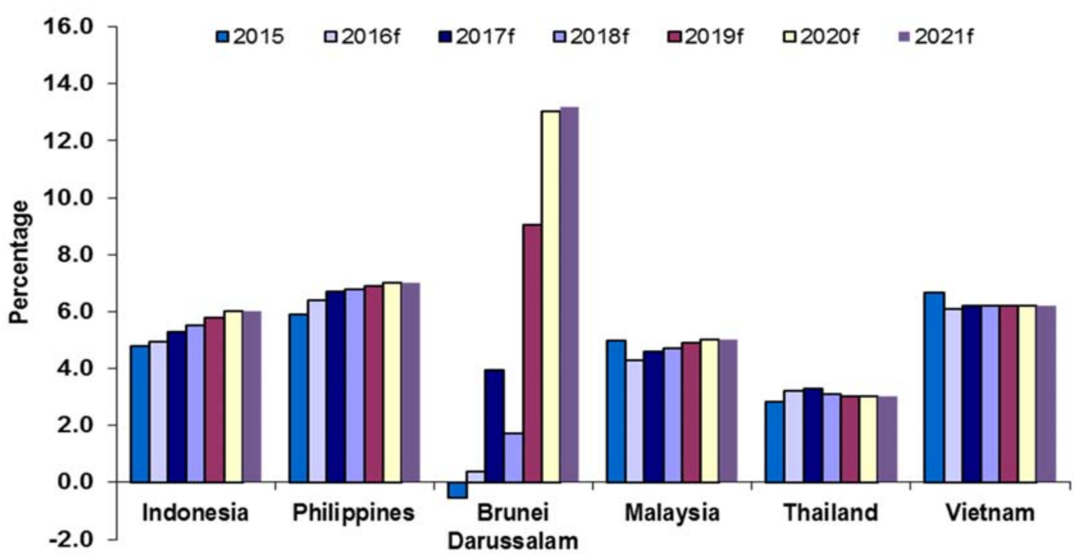
Table 12: Live Cattle Exports: Turn Off and Production Values Annual Percentage Changes

Description	2014-15 (Head)	2015-16 (Head)	2014-15 ($m)	2015-16 ($m)	Annual % Change	Annual% Change

					(Head)	($m)
Brunei	3,689	2,439	$2.6	$1.7	**-33.9%**	**-33.2%**
Indonesia	244,630	184,098	$145.7	$110.7	**-24.7%**	**-24.0%**
Philippines	14,990	10,853	$8.9	$6.5	**-27.6%**	**-26.9%**
W. Malaysia	9,515	7,634	$6.7	$5.4	**-19.8%**	**-19.0%**
Thailand	2,555	1,055	$1.5	$0.6	**-58.7%**	**-58.3%**
Vietnam	56,992	48,883	$33.9	$29.4	**-14.2%**	**-13.4%**
Cambodia	0	1,936	$0.0	$1.2	**0%**	**0%**
Total	**332,371**	**256,898**	**$199.4**	**$155.6**	**-22.7%**	**-21.9%**

Source: Department of Primary Industry and Resources data collections

Figure 11: GDP Growth Forecasts for NT Live Cattle Export Major Destinations 2015-2021



Source: International Monetary Fund, World Economic Outlook Database, October 2016 f = forecast

The economies of the destination countries for live cattle exports are forecast to maintain positive GDP growth supporting strong domestic demand for Territory beef (see Figure 11).

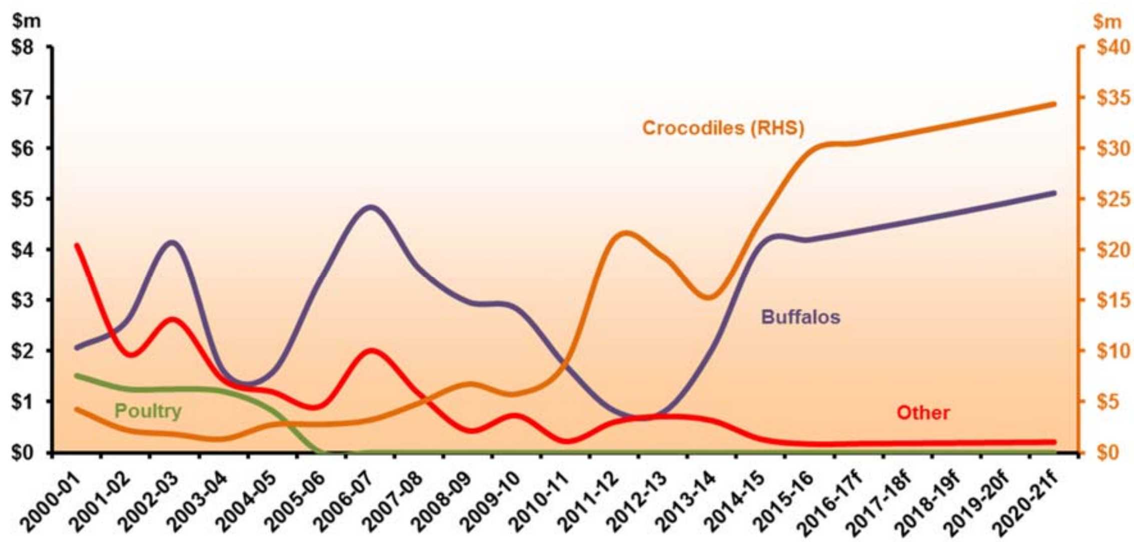
This is offset by the depreciating value of the Australian Dollar, competition from other beef producers, and local substitutes like fish, pork, and chicken.

Other Livestock Industry

Other Livestock is a category of industries in the NT which has historically included crocodiles, poultry, buffalo, horses, camels, deer, pigs and goats, exported overseas or sent to domestic markets.

Crocodiles are the largest industry classified in the Other Livestock grouping. Premium grade crocodile skins are highly sought after in Japan, France, Italy and Asian countries. Second and third grade skins are also exported, although a growing domestic demand is emerging. The by-products of flesh, feet, teeth and skulls are mainly sold domestically.

Figure 12: NT Other Livestock: Value of Production 2000-01 to 2020-21



Source: Department of Primary Industry and Resources data collections, f = forecast

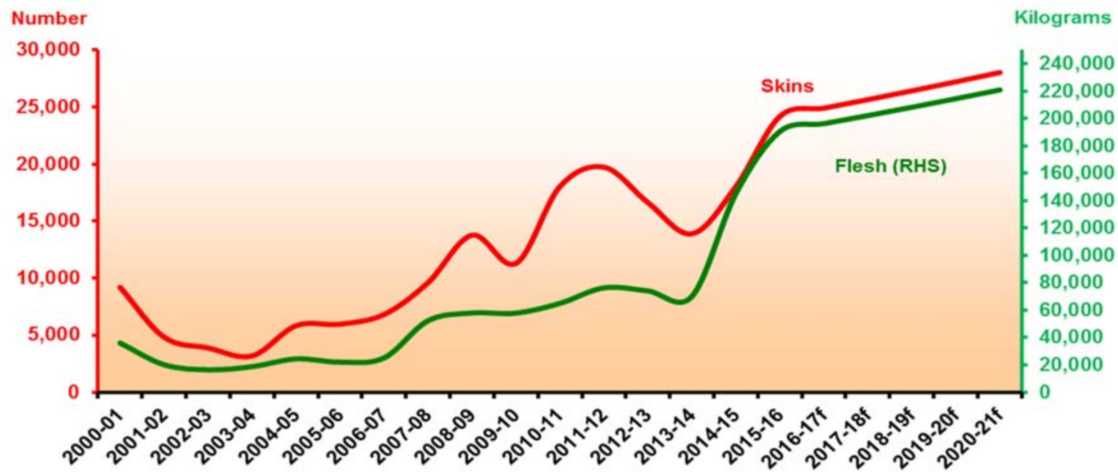
Total Other Livestock (crocodiles, buffalo, horses, camels, pigs, and goats) contributed 4.6% to the total value of Territory rural industries and fisheries production in 2015-16.

- In 2015-16 the total value of production in Other Livestock rose 23.8% to an estimated $34.0 million up from $27.3 million in 2014-15.
- For 2015-16 the value of the Territory's crocodile industry is estimated at $29.6 million. This accounted for 87.2% of the total value of production of all the Other Livestock industry sectors.
- Buffalo numbers rose 1.2% in 2015-16 to 5,131 head with an estimated value of production of $4.2 million.

- 90.8% (4,660) of the buffalo turned off were exported live overseas to Vietnam (the largest importer with 4.131 head), Brunei (525 head) and Indonesia (4 head). There were 438 buffalo sent to interstate markets and 33 were slaughtered in 2015-16.

- In 2015-16 there were horses (218), camels (168), and goats (702) that are classified in the "Other" category in Figure 12. The estimated value of production was estimated at $0.2 million, a 36.2% decrease on 2014-15 ($0.3 million).

Figure 13: NT Crocodile Production 2000-01 to 2020-21

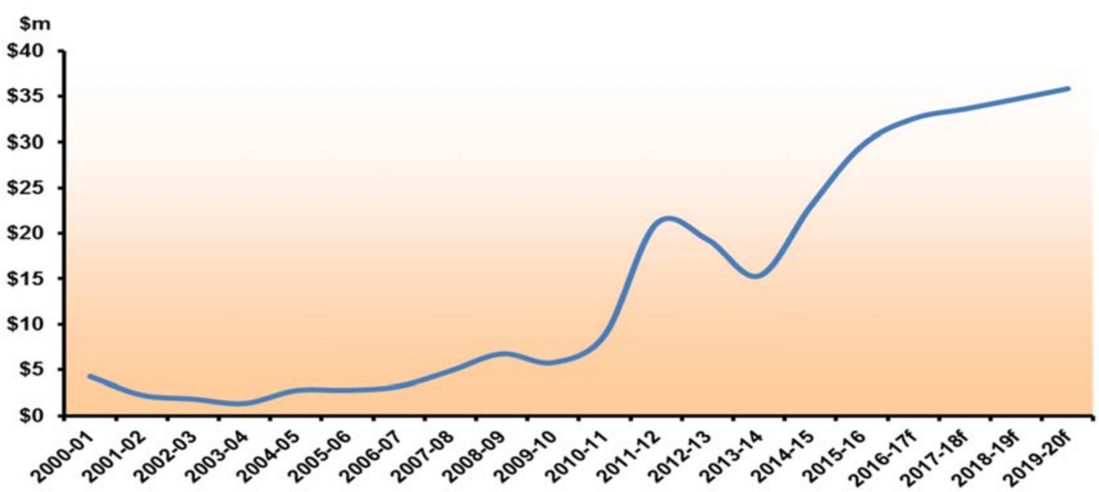


Source: Department of Primary Industry and Resources data collections, f = forecast

In 2015-16 the Territory's crocodile industry produced 190,509 kilograms of flesh, up from 145,251 kilograms the previous year. The value of production for flesh in 2015-16 is estimated at $1.4 million, up from $1.3 million in 2014-15.

In 2015-16 the Territory's crocodile industry produced 24,180 skins up by 34.2% from 18,024 skins in 2014-15. The value of production for skins in 2015-16 is estimated at $23.1 million, a 37.1% increase on the previous period ($16.8 million).

Figure 14: Northern Territory Crocodile Skins Value of Production 2000-01 to 2020-21



Source: Department of Primary Industry and Resources data collections, f = forecast

- There were 19,388 live sales in 2015-16 valued at $4.4 million. Live sales refer to individual animals that are sold as animals and not for processing purposes.

- Other revenues derived from back straps and other crocodile products are valued at $0.6 million.

- The Territory's crocodile industry total production value for 2015-16 is $29.6 million. This is a 29.1% increase in value on 2014-15 ($22.9 million).

Plant Industry

The Territory's Plant industry includes fruit, vegetables, nurseries-cut flowers and turf, field crops, NT markets, and other crops. The value of Territory plant production for 2015-16 was $253.2 million, an increase of around 22.7% compared to the previous year (see Table 13). Plant Industry contributed an estimated 34.5% of the total value of Territory rural industries and fisheries production in 2014-15 (see Figure 3).

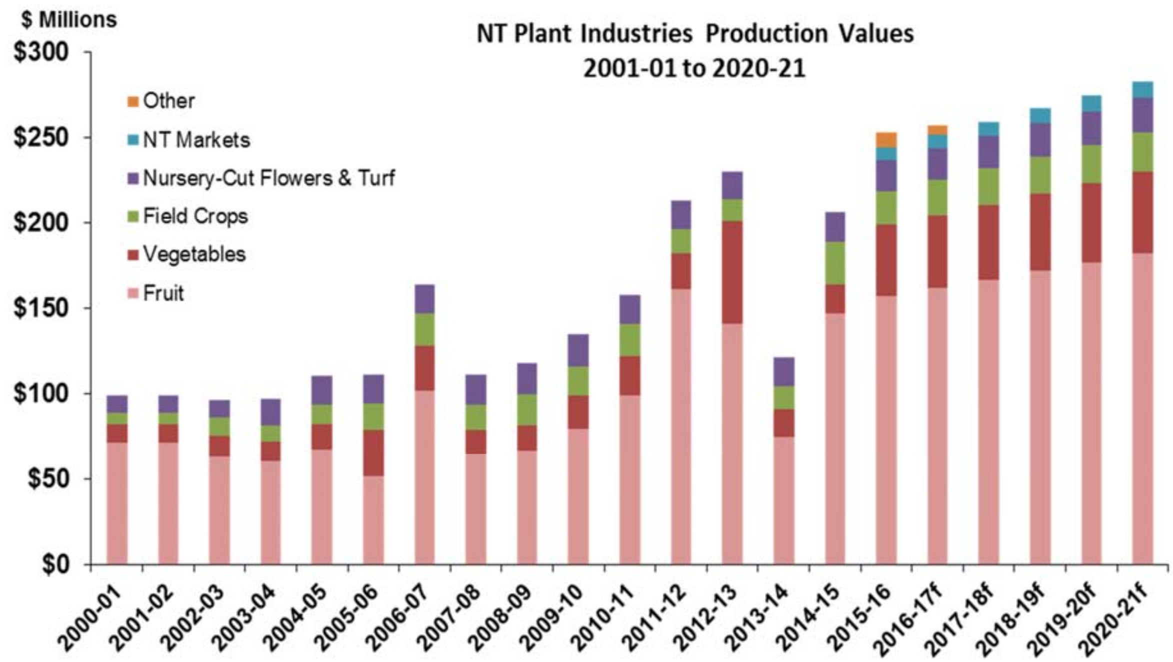
NT plant industry statistics are collected and reported on a calendar year basis which corresponds to the harvesting season. As such, production figures for the 2015 calendar year are referred to as the 2015-16 financial year.

Table 13: Plant Industry Production Values Annual Percentage Changes

Description	2014-15 ($m)	2015-16 ($m)	Annual % Change ($m)	% of total production 2015-16
Fruit	$146.9	$157.1	**6.9%**	**62.0%**
Vegetables	$17.2	$41.5	**142.0%**	**16.4%**
Field Crops	$24.4	$20.0	**-18.1%**	**7.9%**
Nursery-Cut Flowers & Turf	$17.9	$18.0	**0.4%**	**7.1%**
NT Markets	$0.0	$7.9	**0.0%**	**3.1%**
Other (forestry/poppy)[2]	$0.0	$8.8	**0.0%**	**3.5%**
Total	**$206.4**	**$253.2**	**22.7%**	**100.0%**

Source: (1) NT Framers Economic Profile of Plant Based Industries in the NT 2015
(2) Department of Primary Industry and Resources data collections f = forecast

Figure 15: NT Horticulture: Value of Production 2000-01 to 2020-21



Source: (1) NT Framers Economic Profile of Plant Based Industries in the NT 2015
(2) Department of Primary Industry and Resources data collections f = forecast

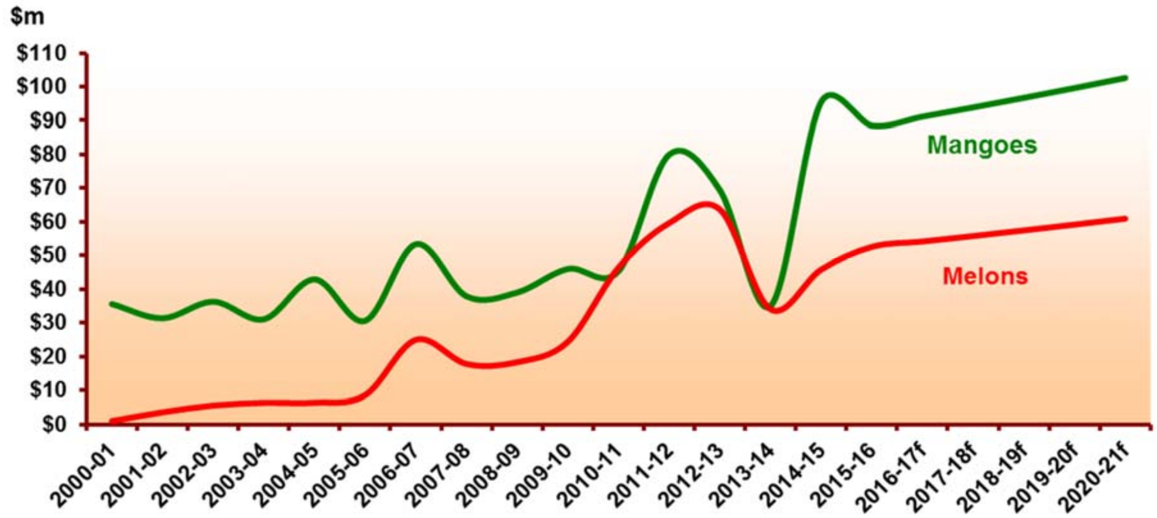
The majority of the Territory's horticultural production is destined for interstate markets.

- 62.0% ($157.1 million) of total value of horticulture production is derived from fruit production. Mangoes and melons are the major wet crops grown in the Territory.
- Vegetables contributed 16.4% ($41.5 million) to total horticulture value.
- Field crops contributed 7.9% ($20.0 million) to total horticulture value.
- 7.1% ($18.0 million) of total Territory horticulture value is attributed to nursery, cut flowers and turf.

Fruit

The main fruits produced in the Territory include mangoes, melons, and table grape. Fruit production value was up an estimated 6.9% to $157.1 million on the previous period. This is due to increases in value for table grapes, melons and other fruits which were offset by a decline in mango value. .There was no production recorded for bananas in 2015-16.

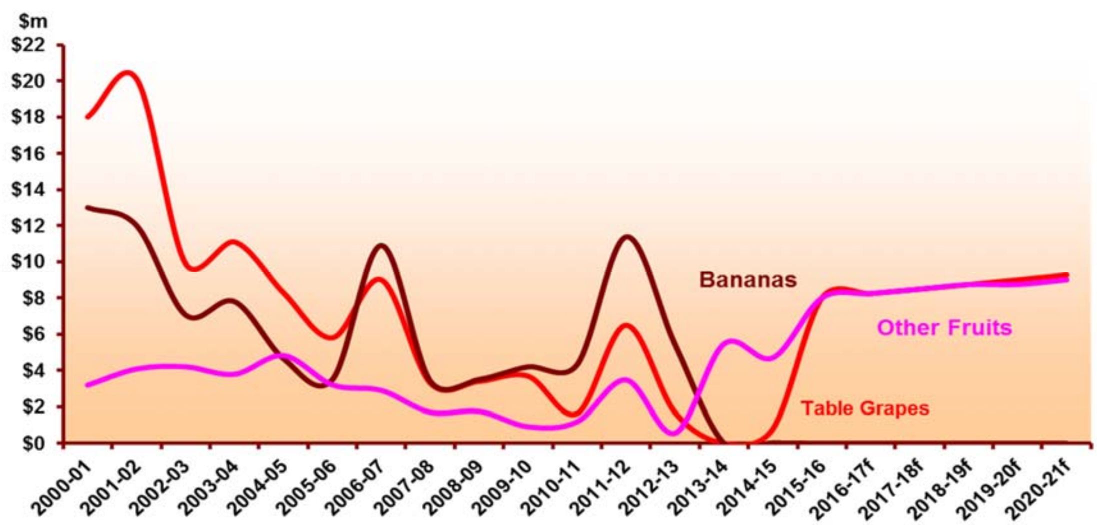
Figure 16: NT Mango and Melon: Value of Production 2000-01 to 2020-21



Source: (1) NT Framers Economic Profile of Plant Based Industries in the Northern Territory 2015
(2) Department of Primary Industry and Resources data collections f = forecast

- Mango value of production decreased to $88.5 million in 2015-16, down 7.3% on the previous period ($95.5 million).
- Mango output decreased by 7.0% to 26,500 tonnes in 2015-16 compared to 28,500 tonnes in 2014-15.
- In 2015-16 melons production value increased to $52.6 million, a 14.7% rise on the previous year ($45.8 million).
- 51,000 tonnes of melons were grown in 2015-16, down 15.9% on 2014-15 (60,617 tonnes).

Figure 17: Northern Territory Banana, Grape and Other Fruit: Value of Production 2000-01 to 2020-21



Source: (1) NT Framers Economic Profile of Plant Based Industries in the NT 2015
(2) Department of Primary Industry and Resources data collections f = forecast

- The production value of table grapes increased to $8.0 million for 2015-16 up from $0.8 million in 2014-15. Grape production increased from 1,252 tonnes in 2014-15 to 2000 for 2015-16.

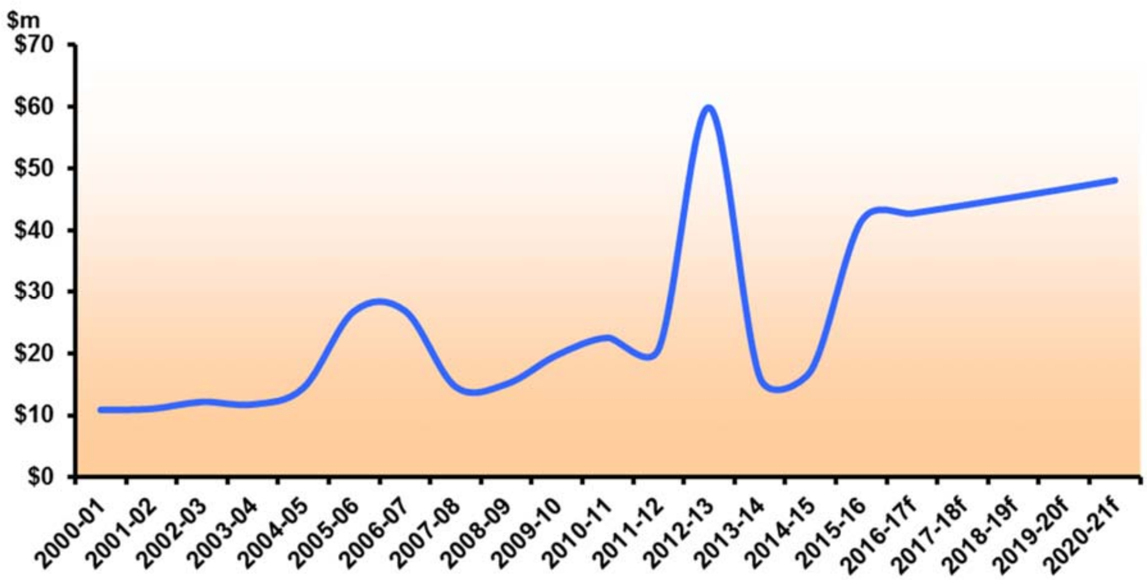
- The production value of the Other Fruit category increased to $8.0 million in 2015-16 a rise from $4.7 million on 2014-15 results. Other Fruit production increased from 1,225 tonnes in the previous year to 2000 tonnes in 2015-16.

- There is no banana production estimate (or forecasts) for 2015-16 as the industry recovers fully from a banana freckle outbreak and on-going issues from Panama disease.

Vegetables

The major vegetables produced in the Territory include cucumber, bitter melon, hairy melon, long melon, okra, snake beans, pumpkin and other vegetables. There was no data collected for the values of production for individual commodities in 2015-16.

Figure 18: NT Vegetables: Total Value of Production 2000-01 to 2020-21



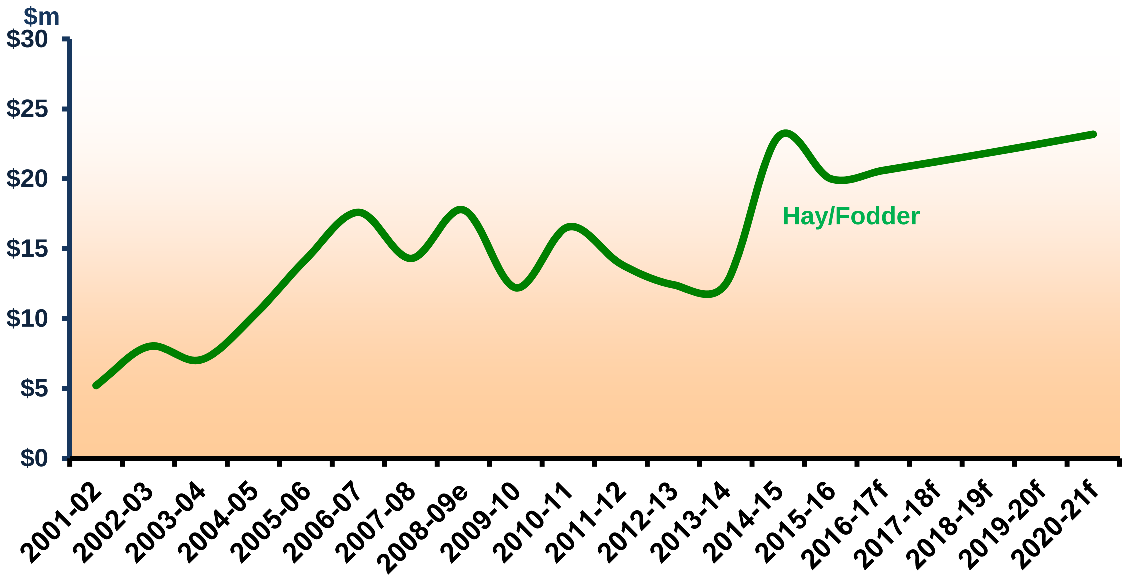
Source: (1) NT Framers Economic Profile of Plant Based Industries in the NT 2015
(2) Department of Primary Industry and Resources data collections f = forecast

The production value of vegetables increased to $41.5 million for 2015-16 up from $17.2 million in 2014-15 (as producers enjoyed higher yields and improved prices). Vegetable production increased from 9,805 tonnes in 2014-15 to 14,000 for 2015-16.

Field Crops

Mixed farming historically includes hay/fodder, pasture seed production, cereal crops (sorghum, maize etc.) and other crops such as sesame and soybeans.

Figure 20: NT Field Crops: Value of Production 2000-01 to 2020-21



Source: (1) NT Framers Economic Profile of Plant Based Industries in the NT 2015
(2) Department of Primary Industry and Resources data collections f = forecast

Mixed farming contributed over 3.9% of the total value of Territory rural industries and fisheries production in 2015-16.

- The value of field crop production in 2015-16 was $20.0 million, an 18.1% decrease from 2014-15 ($24.4 million).
- Hay/fodder production accounted for 100% ($20.0 million) of the total field crops production values in 2015-16.
- Hay/fodder output for the current period was 80,000 tonnes, down 5.6% on 84,370 tonnes produced in 2014-15.
- In 2015-16 there was no recorded seed production. In 2014-15 seed production was valued at $1.3 million.

NT Markets

Local markets accounted for around $7.8 million of production in 2015-16, mainly in the Darwin market. The major supermarket chains use local production as much as possible especially bananas, mangoes, rockmelons, watermelons, Lebanese cucumber, Asian vegetables, pineapples, papaya, dragon fruit, rambutan, carambola and pumpkin. The NT has specialist vegetable producers dedicated to local supermarkets supplying hydroponic fancy lettuce, tomatoes and other vegetables.

Sales at local farmers markets including Rapid Creek, Palmerston, Parap, Nightcliff and Mindil Beach are significant. These farmers markets have become very important for many NT residents and are popular with tourists. Well known NT chefs are regular buyers at these markets. There is a wide range of specialist Asian vegetables on sale at these markets, not seen in the major supermarkets.

Source: NT Framers Economic Profile of Plant Based Industries in the NT 2015

OTHER

FORESTRY

- The ABC reported that Tiwi Planation's Corporations (TPC) export of woodchips is expected to provide between $140 million and $150 million in income over the next 5 years. TPC estimates that between 200,000-400,000 tonnes of wood chips would be exported every year with an annual gross value of $18-$21 million. In February 2016 ABC reported that TPC 1st shipment of woodchips was 35,000 tonnes. The estimated value of this shipment is $6.4 million.

POPPY PRODUCTION

- In 2015-16 TPI Enterprise successfully cultivated a commercial trial crop of 100 hectares of poppies in the Douglas Daly region. As no actual yield figures were released by TPI an estimated figure was calculated using a low range yield of 800kgs. The estimated value of this output is $2.4 million.

Fisheries

The Territory fishing industry encompasses the commercial, recreational and traditional Indigenous sectors. The commercial sector includes the harvesting of wild catch fisheries and aquaculture, as well as the processing, trade and retailing of seafood.

This upward value trend (see Figure 21 and Table 4) is also reflected in Territory fisheries, with the total value of fishing production in 2015-16 increasing by 21.5% to $124.3 million, up from $102.4 million the previous year. This increase is mainly attributed to the rises in Northern Prawn Fleet (NT catch only) and NT wild catch (fish), and to a lesser extent aquaculture and NT crustaceans.

Table 14: NT Fisheries Production Values Annual Percentage Changes

Description	2014-15 ($m)	2015-16 ($m)	Annual% Change ($m)
Fin Fish	$26.2	$31.6	20.5%
NT Crustaceans	$4.6	$3.0	-34.8%
Aquaculture	$24.1	$24.5	1.9%
Molluscs & Echinoderms	$0.25	$0.29	17.8%
Total NT Fisheries	**$55.1**	**$59.4**	**5.3%**
NPF Crustaceans (NT catch)	$47.2	$64.9	37.5%
Total	**$102.4**	**$124.3**	**21.5%**

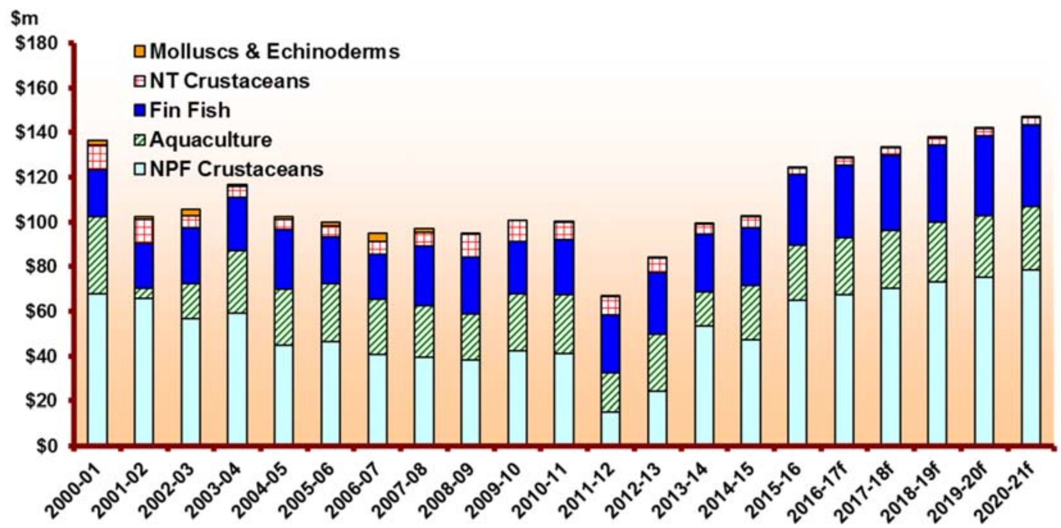
Source: Department of Primary Industry and Resources data collections

In 2015-16, Fisheries contributed an estimated 16.9% of the total value of Territory rural industries and fisheries production value.

- Fish production value is estimated at $31.2 million for 2015-16, an increase of 20.5% on the previous year ($26.2 million).
- The value of wild catch NT crustaceans production (wild catch crabs and other crustaceans) attributed to the Territory (excluding the Northern Prawn Fishery) decreased by an estimated 34.8%, from $4.6 million in 2014-15 to an estimated $3.0 million in 2015-16.

- In 2015-16 the estimated value of the NT prawn catch by the Northern Pawn Fleet (Commonwealth managed Fishery) increased by 37.5% to $64.9million.
- Total aquaculture production value increased by 1.9% to an estimated $24.5 million in 2015-16, up from $24.1 million for the previous year.
- The value of molluscs and echinoderms was estimated at $0.29 million in 2015-16, up from $0.25 million in 2015-16.

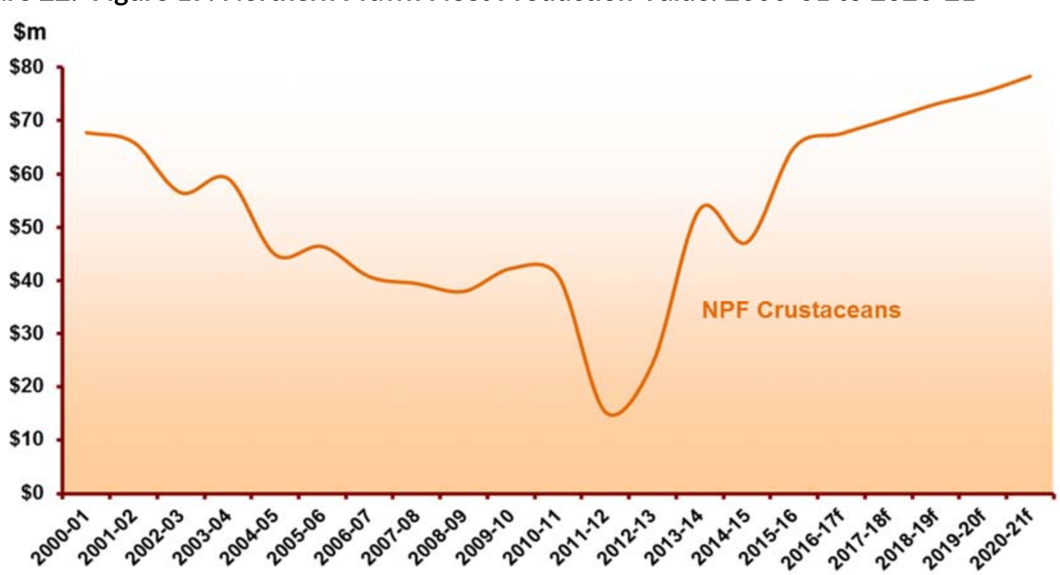
Figure 21: NT Fisheries: Value of Production 2000-01 to 2020-21



Source: Department of Primary Industry and Resources data collections, f = forecast. NPF = Northern Prawn Fleet

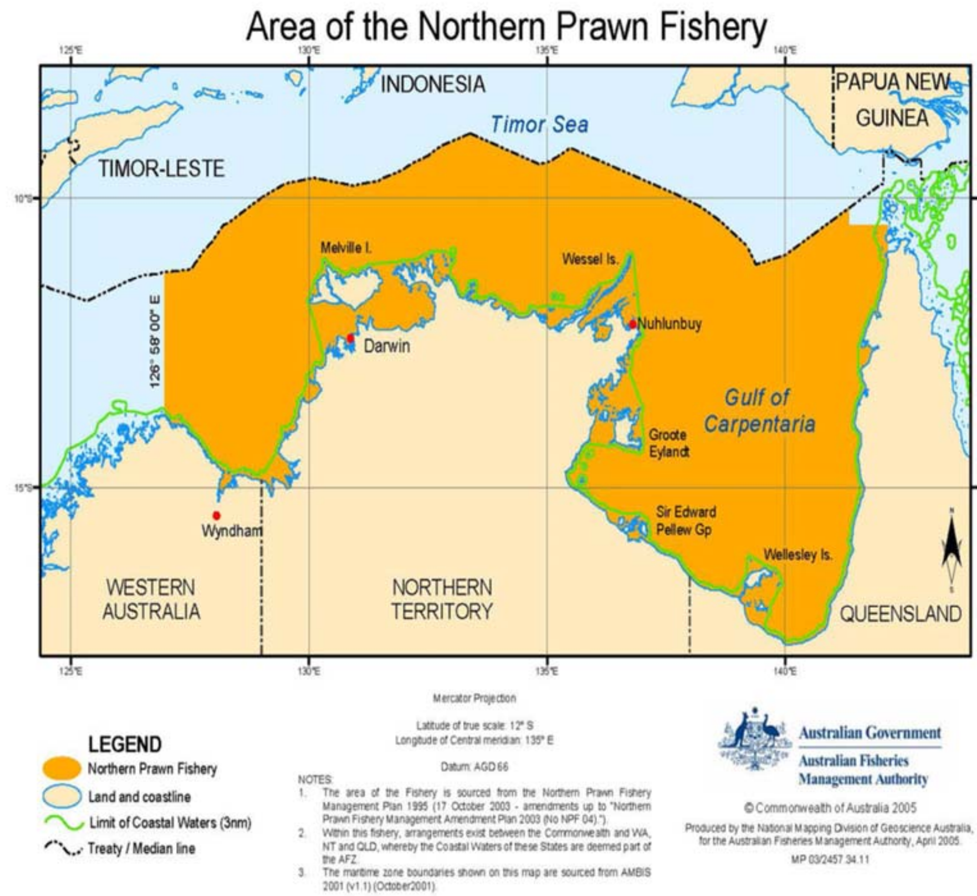
- In 2015-16 the estimated value of the prawn catch (NT only) by the Northern Pawn Fleet (Commonwealth managed Fishery) increased by 37.5% to $64.9 million (see Figure 21). In 2014-15 value of production was estimated at $47.2 million.
- Output from the Northern Pawn Fleet for 2015-16 is estimated at 3,796 tonnes, a 16.6% increase on the previous period (3,255 tonnes).

Figure 22: Figure 19: Northern Prawn Fleet Production Value: 2000-01 to 2020-21



Source: Northern Prawn Fleet data collections, f = forecast.

Figure 23: Northern Prawn Fishery Management Area.

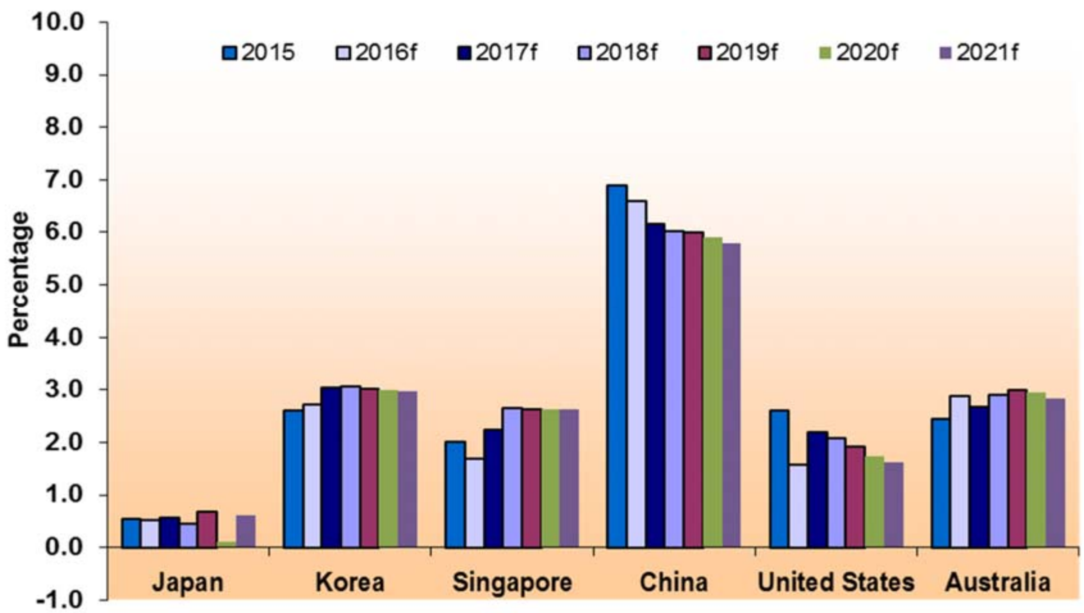


Source Northern Prawn Fishery Report

NT Major International Trading Partners

- South East Asia (mainly Indonesia) remains a significant destination for live cattle exports with Japan, South Korea, and to a lesser extent Taiwan and the US for interstate movement of NT cattle.
- Other livestock is destined for South East Asian and interstate markets.
- The economies in South East Asia and domestic markets within Australia are destinations for seafood and horticulture.

Figure 24: NT Trading Partners GDP Forecasts 2015-2021



Source International Monetary Fund, World Economic Outlook Database, October 2016 f = forecast

NT International Trading Partners: Exchange Rates

In 2016 the Australia Dollar has depreciated across the currencies listed in Table 14 (offset by moderating against the Malaysian, Taiwanese and Indian currencies as demand for exports fall, interest rates in Australia stay low, and less buying of the Australian Dollar as a safe haven or for speculation. A lower Australia Dollar makes imported inputs for production more expensive but exports cheaper and more competitive.

Table 15: Exchange Rates of Northern Territory's International Trading Partners 2015-2016

Exchange Rates of Northern Territory International Trading Partners

last working day of the month (daily 4pm)	Apr 2015	May 2015	Jun 2015	Jul 2015	Aug 2015	Sep 2015
US - Dollar	0.80	0.77	0.77	0.73	0.71	0.70
Japan - Yen	94.66	94.93	93.92	90.48	86.60	84.05
Euro	0.72	0.70	0.69	0.67	0.64	0.62
Singapore Dollar	1.06	1.03	1.03	1.00	1.01	1.00
Malaysian - Ringgit	2.85	2.80	2.90	2.78	3.00	3.11
Taiwan - Dollar	24.43	23.49	23.72	23.03	23.29	23.03
Indian - Rupee	50.72	48.86	48.95	46.70	47.39	46.08
Indonesia - Rupiah	10331	10127	10228	9836	10032	10280
Chinese - Renminbi	4.95	4.75	4.77	4.53	4.56	4.46
	Oct 2015	**Nov 2015**	**Dec 2015**	**Jan 2016**	**Feb 2016**	**Mar 2016**
US - Dollar	0.71	0.72	0.73	0.71	0.71	0.77
Japan - Yen	86.12	88.22	87.98	85.21	80.76	85.93
Euro	0.65	0.68	0.67	0.65	0.65	0.68
Singapore Dollar	1.00	1.02	1.03	1.01	1.01	1.03
Malaysian - Ringgit	3.05	3.06	3.13	2.95	3.01	3.01
Taiwan - Dollar	23.09	23.50	24.04	23.79	23.80	24.66
Indian - Rupee	46.30	48.04	48.51	48.32	48.98	50.77
Indonesia - Rupiah	9706	9950	10082	9826	9563	10172
Chinese - Renminbi	4.50	4.60	4.74	4.67	4.68	4.95

Source: Reserve Bank of Australia April 2015 to March 2016

The Percentage Rate of Change from the April 2015 to March 2016		min rate	max rate
US - Dollar	-4.1%	0.70	0.80
Japan - Yen	-9.2%	80.76	94.93
Euro	-6.0%	0.62	0.72
Singapore Dollar	-2.1%	1.00	1.06
Malaysian - Ringgit	5.5%	2.78	3.13
Taiwan - Dollar	0.9%	23.03	24.66
Indian - Rupee	0.1%	46.08	50.77
Indonesia - Rupiah	-1.5%	9563	10331
Chinese - Renminbi	0.0%	4.5	5.0

Publications

- Information for Prospective Investors in Agricultural Enterprises in the NT
  https://dpif.nt.gov.au/publications
- DBE Annual Report 2015-16
  https://business.nt.gov.au/publications/annual-reports
- Department of Primary Industry and Resources Annual Report 2015-16
  https://dpif.nt.gov.au/publications
- Fishery Status Reports 2015
  https://dpif.nt.gov.au/publications
- NT Rural Industries and Fisheries: Economic Outlook 2015
  https://dpif.nt.gov.au/statistics-surveys-and-research/economic-profile
- NT Department of Primary Industry and Resources: Industry Development Plan 2013-2017
  https://dpif.nt.gov.au/publications

Useful Links

- Australian Bureau of Statistics
  http://www.abs.gov.au/
- Australian Bureau of Agricultural and Resource Economics
  http://www.abare.gov.au/corporate/about_us/about.html
- Department of Business and Employment
  https://business.nt.gov.au/
- Department of Primary Industry and Resources
  https://dpif.nt.gov.au
- NT Agricultural Association
  http://www.ntaga.org.au/
- NT Cattlemen’s Association
  http://www.ntca.org.au/
- NT Horticultural Association
  http://www.ntha.com.au/
- Economic Indicators (DBE)
  https://business.nt.gov.au/business-and-economic-data