

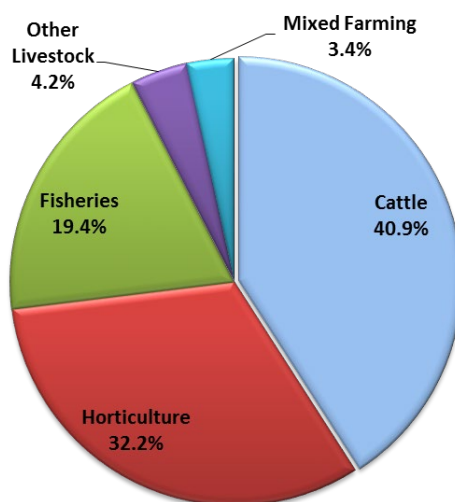
Northern Territory rural industries and fisheries Economic Outlook 2017



Overview

The rural industries and fisheries in the Northern Territory (NT) include cattle (interstate, abattoir and live export), other livestock (buffalo, crocodiles and horses), horticulture (fruit, vegetables, nursery and cut flowers) and mixed farming (fodder 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 percentage contribution of each industry to the rural and fisheries total is illustrated in Figure 1, with the cattle, fisheries and horticulture industries being the major players.

Figure 1: Contribution of Industry to Sector Production Value, 2016-17



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 employment for approximately 1,899 persons in 2016-17 (ABS). This labour force estimate is subject to high sampling variability. The sector also account for a significant proportion of the Territory's non-mineral export revenue, with the live cattle trade. Territory rural industries and fisheries accounted for 2.7% of Gross State Product (GSP) in 2016-17, just below the national proportion of 2.8% (Table 1). Exports of Territory rural and fisheries produce are dominated by live cattle exports (mainly to Indonesia and Vietnam), aquaculture, fishing, forestry and to a lesser extent agriculture services.

Economic Outlook 2017

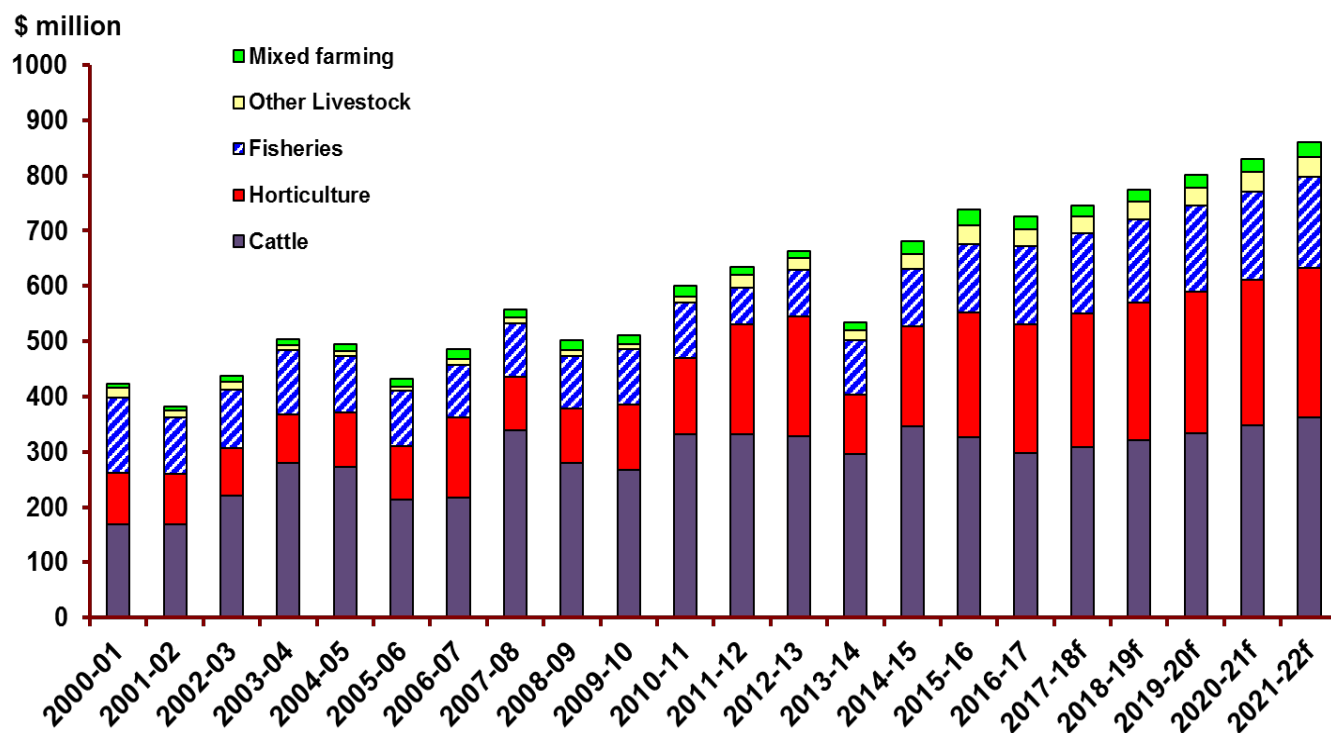
In 2016-17, the total estimated value of rural industries and fisheries production was \$726.5 million, a decrease of 1.6% over the previous year, a result reflective of mixed production results and market conditions (see Figure 2). The decrease is primarily due to a 9.1% decrease in the value of cattle production to \$297.1 million (due to falling exports and abattoir output while interstate movements increased marginally), 11.2% fall in other livestock production (mainly crocodile production) to \$30.2 million and a 14.1% decrease in the value of mixed farming to \$24.7 million (driven by Tiwi forestry shipments and hay production). These decreases were offset by a 4.1% growth in the value of horticultural production to \$233.7 million, and a 13.3% increase in fisheries production to \$140.8 million (driven by the wild stock catch and aquaculture).

Table 1: Agriculture, Forestry and Fisheries Contribution to GSP by State

2016-17	% Contribution to GSP
Tasmania	9.6%
South Australia	5.9%
Queensland	3.4%
Western Australia	2.9%
Northern Territory	2.7%
Victoria	2.6%
NSW	1.8%
Australian Capital Territory	0.1%
Australia (% of GDP)	2.8%

Source: ABS 5220.0

Figure 2: NT Rural Industries and Fisheries Production Value



Source: Department of Primary Industry and Resources data collections

Economic Outlook 2017

Table 2: Gross Value of Territory Rural Industries and Fisheries Production (\$ million)

Value of horticultural production (\$ million)						
	2014-15	2015-16	2016-17	2017-18f	2018-19f	2019-20f
Mangoes	95.5	88.5	88.3	90.9	93.7	96.5
Table Grapes	0.8	8.0	8.0	8.2	8.5	8.7
Bananas	0.0	0.0	0.0	0.0	0.0	0.0
Melons	45.8	52.6	50.3	51.8	53.4	55.0
Other fruits	4.7	8.0	17.7	18.2	18.8	19.3
Vegetables	17.2	41.5	43.9	45.2	46.6	48.0
Nursery-Cut Flowers & Turf	17.9	18.0	17.7	18.2	18.8	19.3
Local markets	0.0	7.9	7.8	8.0	8.3	8.5
Total	182.0	224.5	233.7	240.7	247.9	255.4

Value of fisheries production (\$ million)						
	2014-15	2015-16	2016-17	2017-18f	2018-19f	2019-20f
Fish	26.2	31.6	37.3	38.4	39.5	40.7
Crustaceans	4.6	3.0	5.9	6.1	6.3	6.5
Aquaculture	24.5	24.5	34.4	35.5	36.5	37.6
Molluscs & Echinoderms	0.2	0.3	0.6	0.7	0.7	0.7
Total NT Fisheries	55.5	59.4	78.3	80.7	83.1	85.6
Crustaceans-NPF	47.2	64.9	62.5	65.0	67.7	69.7
Total Fisheries	102.8	124.3	140.8	145.7	150.7	155.3

Value of cattle, other livestock and mixed farming (\$ million)						
	2014-15	2015-16	2016-17	2017-18f	2018-19f	2019-20f
Cattle	345.3	327.0	297.1	308.8	321.2	334.1
Other Livestock	27.3	34.0	30.2	31.2	32.2	33.2
Field crops	24.4	20.0	19.3	19.9	21.5	23.1
Poppy	0.0	2.4	0.0	0.0	0.0	0.0
Forestry	0.0	6.4	5.4	0.0	0.0	0.0
Total	397.0	389.7	352.0	359.8	374.9	390.5

Total NT Rural Industries and Fisheries Production Value (\$ million)						
	2014-15	2015-16	2016-17f	2017-18f	2018-19f	2019-20f
Horticulture	182.0	224.5	233.7	240.7	247.9	255.4
Fisheries	102.8	124.3	140.8	145.7	150.7	155.3
Cattle	345.3	327.0	297.1	308.8	321.2	334.1
Other Livestock	27.3	34.0	30.2	31.2	32.2	33.2
Mixed Farming	24.4	28.8	24.7	19.9	21.5	23.1
Grand Total	681.8	738.5	726.5	746.2	773.5	801.1

Source: Department of Primary Industry and Resources data collections, f = forecast. (1) Please note all figures here have been rounded respectively and may not tally to totals. (2) NPF = Northern Prawn Fleet (Commonwealth-managed fishery). (3) Cattle valuations are calculated using farm gate production values not market or whole of industry contribution values. (4) Local Markets value is derived from production sold at markets located mainly in Darwin plus production sold to supermarket chains.

Forecasting Notes

No data was collected for Bananas for 2016-17 therefore no forecasts were generated.

No forecasts were generated for Poppy as it is was one-off trial crop not ongoing production.

No forecasts were generated for Forestry as the \$5.4m (2016-17) represents the second of two shipments of woodchips so a forecast is not generated beyond 2016-17.

Please use this data from 1 May 2018 to 30 June 2019 only

Economic Outlook 2017

Table 3: Gross Value of Territory Rural Industries and Fisheries Production (Percentage changes)

	13-14 to 14-15	14-15 to 15-16	15-16 to 16-17
	%	%	%
Mangoes	172.6%	-7.3%	-0.2%
Table Grapes	0.0%	903.1%	0.0%
Bananas	0.0%	0.0%	0.0%
Melons	34.7%	14.7%	-4.4%
Other fruits	-14.1%	70.2%	121.3%
Vegetables	6.7%	142.0%	5.7%
Nursery-Cut Flowers & Turf	3.0%	0.4%	-1.7%
Local markets	0.0%	0.0%	-0.8%
Total	68.4%	23.4%	4.1%

	13-14 to 14-15	14-15 to 15-16	15-16 to 16-17
	%	%	%
Fish	1.0%	20.5%	17.9%
Crustaceans	8.5%	-34.8%	99.3%
Aquaculture	61.1%	0.2%	40.5%
Molluscs & Echinoderms	57.5%	17.8%	0.0%
Total NT Fisheries	21.9%	7.0%	31.8%
Crustaceans - NPF	-11.6%	37.5%	-3.7%
Total Fisheries	3.8%	21.0%	13.3%

	13-14 to 14-15	14-15 to 15-16	15-16 to 16-17
	%	%	%
Cattle	17.0%	-5.3%	-9.1%
Other Livestock	51.9%	24.5%	-11.2%
Field crops	84.0%	-18.1%	-3.5%
Poppy	0.0%	0.0%	-100.0%
Forestry	0.0%	0.0%	-14.9%

	13-14 to 14-15	14-15 to 15-16	15-16 to 16-17
	%	%	%
Horticulture	68.4%	23.4%	4.1%
Fisheries	3.8%	21.0%	13.3%
Cattle	17.0%	-5.3%	-9.1%
Other Livestock	51.9%	24.5%	-11.2%
Mixed Farming	84.0%	17.7%	-14.1%
Total	27.8%	8.3%	-1.6%

Source: Department of Primary Industry and Resources data collections
 NPF = Northern Prawn Fleet (Commonwealth-managed fishery)

Please use this data from 1 May 2018 to 30 June 2019 only.



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