



Overview and Outlook 2015





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Department of Primary Industry and Fisheries

The Department of Primary Industry and Fisheries (DPI&F) 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 \$500 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 NT: Facts and Figures

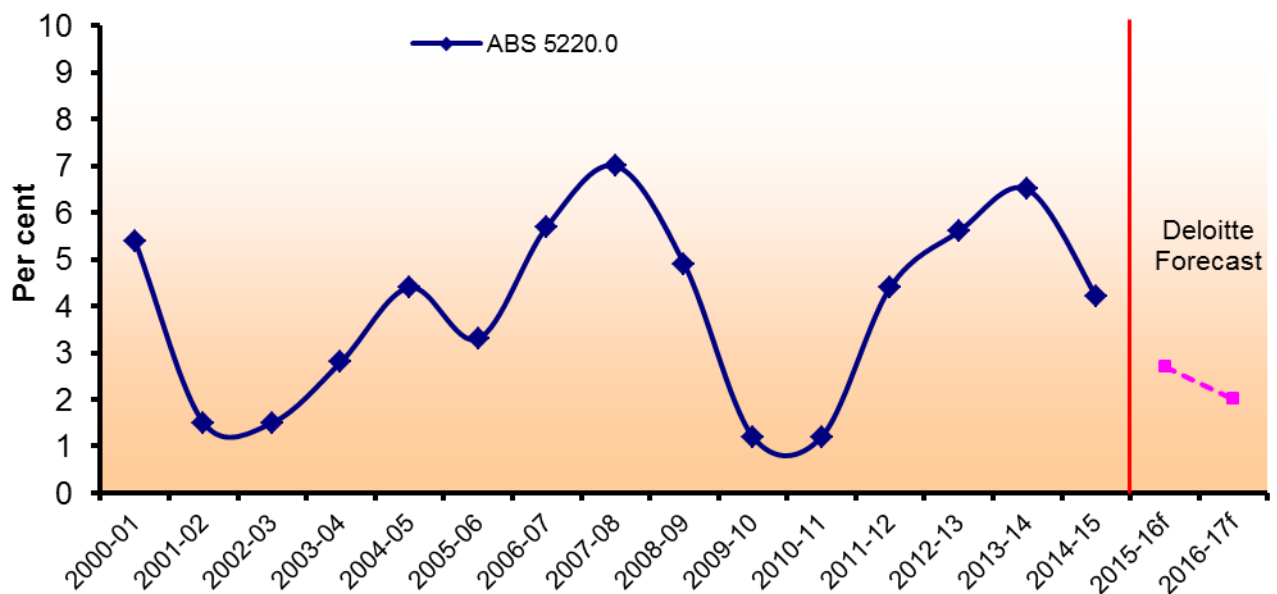
Table 1: NT Economy

Gross State Product (\$m)	\$22,450	(2014-15)
Population (persons)	244 484	Sept Qtr. 2015
Exports (\$m)	\$6,000	(2014-15)
Imports (\$m)	\$5,100	(2014-15)
Unemployment rate (original)	4.5%	June 2015
Inflation rate (national)	1.7%	(2014-15)
Average weekly full time adult earnings	\$1,640	November 2015

Source: www.treasury.nt.gov.au

- The NT economy is forecast to continue growing in 2015-16 and 2016-17 as the world 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 the NT economic growth rates.

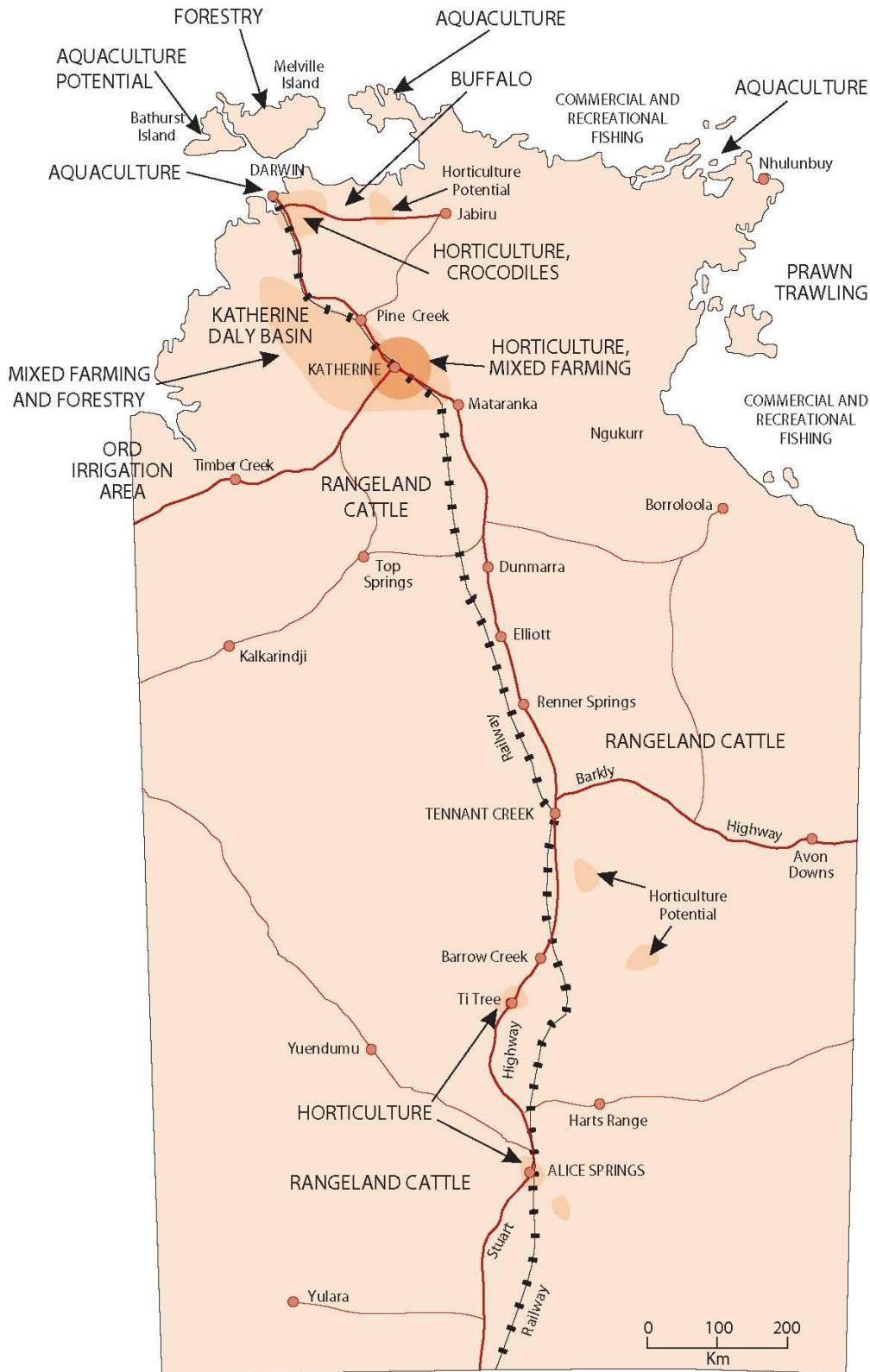
Figure 1: Northern Territory Economic Outlook - Gross State Product 2000-01 to 2016/17



Source: Australian Bureau of Statistics 2014-15 & Deloitte Access Economics - Economic Growth Forecasts March Quarter 2016 f = forecast



Figure 2: Agricultural and Fishing Areas in the Northern Territory





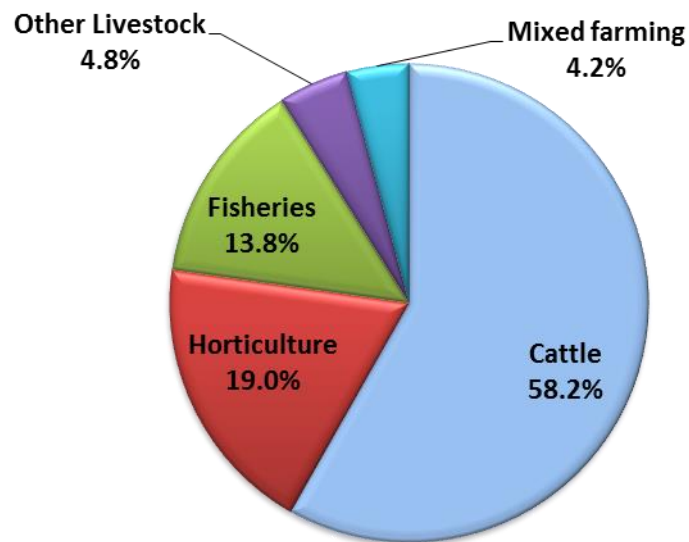
NT Primary Industries and Fisheries – An Overview

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 2014-15



Source: Department of Primary Industry and Fisheries 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 1,400 people in 2014-15 (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 1.8% of Gross State Product (GSP) in 2014-15, below the national proportion (2.3%) (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 Northern Territory GSP 2014-15

2014-15	% Contribution to GSP
Tasmania	9.0%
South Australia	4.9%
Victoria	2.8%
Queensland	2.4%
Western Australia	1.8%
Northern Territory	1.8%
New South Wales	1.3%
Australian Capital Territory	0.04%
Australia (% of GDP)	2.3%

Source: ABS, Australian National Accounts, Cat No. 5220.0, 2014-15

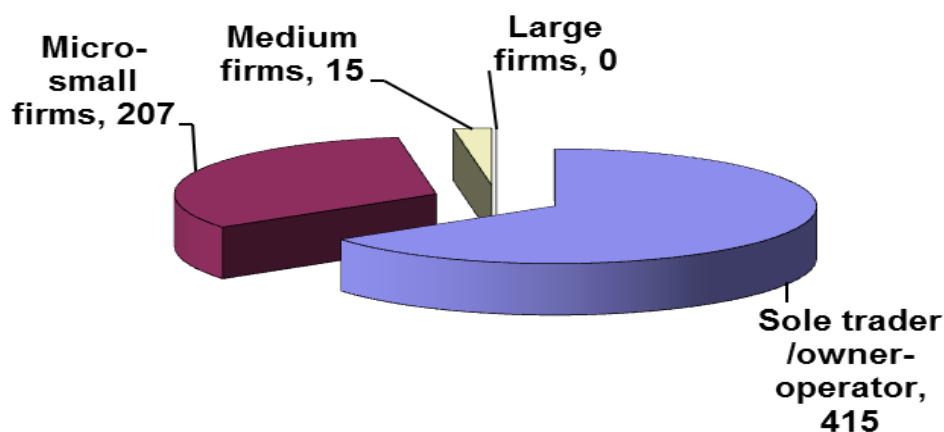
Industry Overview

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 637 agriculture, forestry and fishing business counted for the period June 2011 – June 2015. The sole trader/owner-operator is the most common form of business structure (65.1%) 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 2011 to June 2015.



Table 3: Counts of NT Businesses, by Industry and Employment 2011-2015

Description	Non employing	1-19	20-199	200+	Total	% by Industry
Agriculture	297	157	12	0	466	73.2%
Aquaculture	5	5	0	0	10	1.6%
Forestry and Logging	29	3	0	0	32	5.0%
Fishing, Hunting and Trapping	44	16	0	0	60	9.4%
Agriculture, Forestry and Fishing Support Services	40	26	3	0	69	10.8%
Total	415	207	15	0	637	100%
% by Employment	65.1%	32.5%	2.4%	0.0%	100%	

Source: Australian Bureau of Statistics Counts of Australian Businesses, including Entries and Exits, Cat No. 8165.0, June 2011 to June 2015.

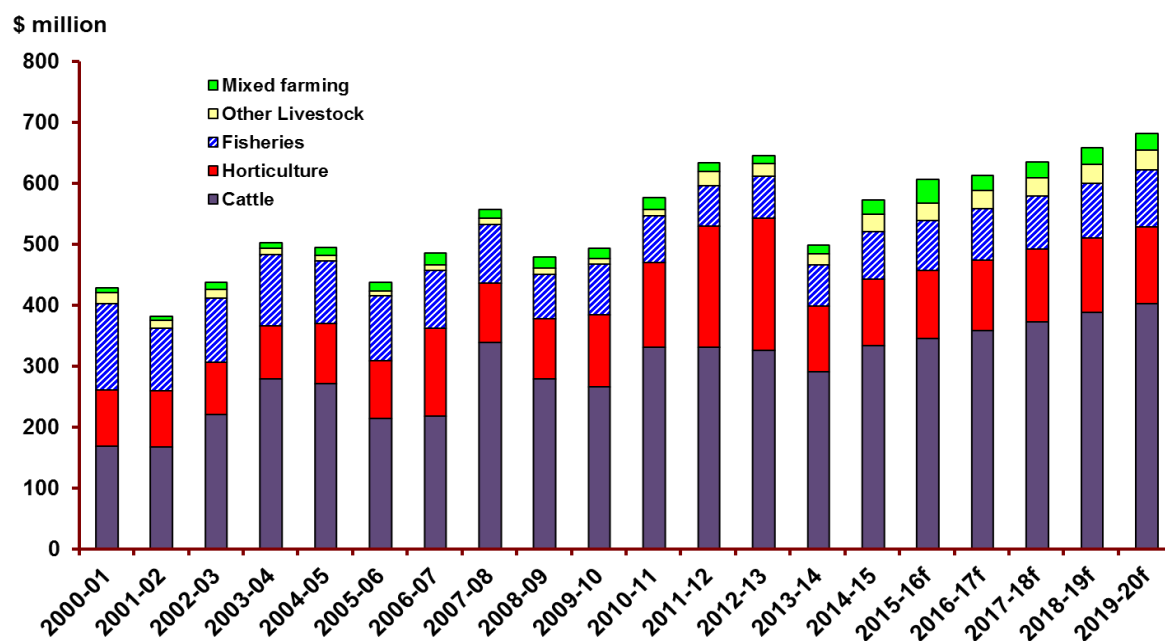
The majority of businesses and employment generated by the agricultural and fisheries industries (Table 3) are by (a) agricultural businesses (73.2%) and (b) most businesses are non-employing (65.1%).

In 2014-15, the total value of rural industries and fisheries production is estimated at \$572.8 million, an increase of 15.0% over the previous year (see Figure 5). Please note Table 4 represents the data used in Figure 5 in tabular form.

- An increase of 14.8% in the value of cattle production to \$333.5 million. This includes cattle for abattoir production.
- The production value of other livestock (mainly crocodile production) increased by 51.8% to \$27.3 million.
- A marginal increase in the production value of horticulture by 1.0% to \$108.7 million.
- Mixed farming production increased 81.1% to \$24.0 million. These production values are driven predominantly by hay/fodder production that supports the live cattle export trade.
- A 15.3% increase in fisheries production to \$79.2 million.



Figure 5: Primary Industry and Fisheries Outlook: Value of Production 2000-01 to 2019-20



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

Table 4: Primary Industry and Fisheries Outlook Production – 2000-01 to 2014-15 (\$m)

Year	Cattle \$m	Horticulture \$m	Fisheries \$m	Other Livestock \$m	Mixed Farming \$m	Total \$m
2000-01	169.5	91.7	142.1	18.0	6.9	428.1
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	106.0	7.1	15.4	438.2
2006-07	217.7	145.1	94.0	10.1	18.9	485.7
2007-08	339.4	96.4	96.9	9.7	14.7	557.1
2008-09	278.9	99.3	72.7	10.2	18.2	479.2
2009-10	266.9	117.7	83.0	9.3	16.7	493.6
2010-11	331.7	138.7	76.6	10.8	19.0	576.8
2011-12	331.7	198.4	66.5	22.5	14.6	633.8
2012-13	326.0	216.8	68.9	20.8	13.0	645.4
2013-14	290.5	107.7	68.7	18.0	13.3	498.1
2014-15	333.5	108.7	79.2	27.3	24.0	572.8

Source: Department of Primary Industry and Fisheries data collections



NT Primary Industries and Fisheries Performance

Figure 6: Current Year Performance of Northern Territory Commodities

Commodity	2013-14	2014-15	%	Performance
Value of Production	\$m	\$m	Change	Indicator
Live NT cattle exported overseas	\$180.6	\$199.4	10.4%	↑
Live NT cattle movements interstate	\$107.0	\$115.9	8.2%	↑
Cattle slaughtered	\$2.9	\$18.3	528.0%	↑
Buffalo	\$2.0	\$4.1	101.0%	↑
Other Livestock	\$0.6	\$0.3	-58.8%	↓
Crocodiles	\$15.3	\$23.0	49.9%	↑
Mangoes	\$35.0	\$36.1	3.0%	↑
Table Grapes	\$0.0	\$0.0	0.0%	→
Bananas	\$0.0	\$0.0	0.0%	→
Melons	\$34.0	\$35.1	3.0%	↑
Other fruits	\$3.6	\$0.6	-84.2%	↓
Vegetables	\$16.1	\$16.6	3.0%	↑
Nursery & Cut Flowers	\$17.4	\$17.9	3.0%	↑
Turf	\$1.5	\$2.5	66.7%	↑
Cereal crops	\$0.0	\$0.0	0.0%	→
Other crops	\$0.0	\$0.0	0.0%	→
Seed production	\$0.8	\$1.3	65.4%	↑
Hay/fodder production	\$12.5	\$22.7	82.1%	↑
Fin Fish	\$26.0	\$26.2	1.0%	↑
NT Crustaceans	\$4.2	\$4.6	8.5%	↑
NPF Crustaceans	\$23.1	\$24.0	4.0%	↑
Aquaculture	\$15.2	\$24.1	58.4%	↑
Molluscs & Echinoderms	\$0.16	\$0.25	57.5%	↑

NPF Crustaceans = Commonwealth Fishery

Source: Department of Primary Industry and Fisheries data collections

NPF Crustaceans = Commonwealth administered prawn fishery

NT Primary Industries and Fisheries Outlook

- In the short and medium term, the NT rural industries and fisheries are forecast to continue to expand production values (see Table 5).
- NT rural industries and fisheries are projected to reach almost \$700 million in production value by 2019-20.

Table 5: Primary Industry and Fisheries Outlook Production 2015-16 to 2019-20

Year	Cattle \$m	Horticulture \$m	Fisheries \$m	Other Livestock \$m	Mixed Farming \$m	Total \$m
2015-16f	\$345.0	\$112.0	\$81.5	\$28.5	\$39.4	\$606.4
2016-17f	\$358.9	\$115.3	\$84.2	\$29.5	\$25.5	\$613.4
2017-18f	\$372.9	\$118.8	\$87.0	\$30.5	\$26.3	\$635.4
2018-19f	\$387.9	\$122.4	\$89.9	\$31.5	\$27.0	\$658.7
2019-20f	\$403.1	\$126.0	\$92.9	\$32.5	\$27.9	\$682.4



Source: Department of Primary Industry and Fisheries 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 are being established.
- The Other Livestock outlook remains positive driven mainly 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 2014-15 NT rural industries and fisheries sectors produced \$283.8 million in output value in the rest of the NT economy (see Table 7).

Table 6: Output Multipliers by Industry for the NT Economy 2014-15

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 7: Dollar value of Output Multipliers by Industry for the NT Economy 2014-15

Industry	Output Value by industry 2014-15 (\$m)	Output Value created in the rest of the NT economy 2014-15 (\$m)
Beef cattle	\$333.5	\$170.1
Other Agriculture	\$51.3	\$24.6
Horticulture	\$108.7	\$55.4
Forestry	\$0.0	\$0.0
Commercial fishing	\$79.2	\$31.7
Total	\$572.8	\$281.9

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 8: Employment Multipliers by Industry for the NT Economy 2014-15

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

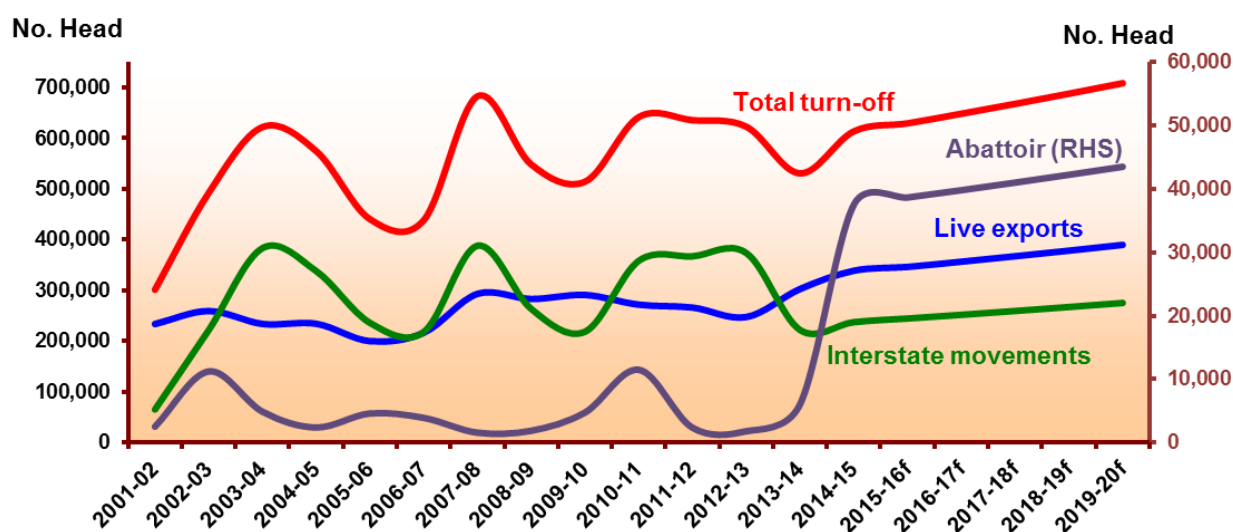
Source: Department of Business and Employment 2006-07

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: Northern Territory Cattle: Value of Production 2000-01 to 2019-20

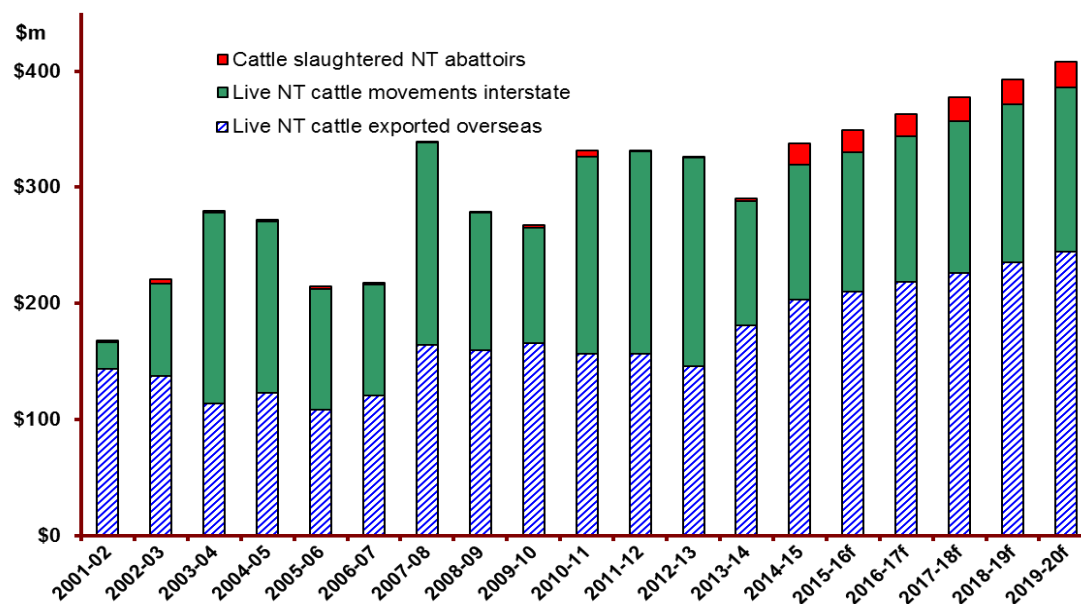


Source: Department of Primary Industry and Fisheries data collections, f = forecast

- The pastoral industry contributed 58.5% of the total value of the Northern Territory rural industries and fisheries production in 2014-15.
- The estimated value of production for the cattle industry was \$333.5 million in 2014-15, up 14.8% from the previous year (see Figure 7 and Table 9). In the current period, 613,744 head of NT cattle were sent overseas, interstate, and slaughtered, up 14.4% from 2013-14 (see Table 9).



Figure 8: Northern Territory Cattle Production Values 2000-01 to 2019-20



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

- In 2014-15 the NT pastoral industry exported 332,371 head of live NT cattle, a 9.8% increase on the previous year. The value of live exports in 2014-15 increased 10.4% to \$199.4 million, up from \$180.6 million in the previous period (see Table 9).
- During 2014-15 the NT pastoralists sent 237,443 head of cattle interstate, which is a 7.0% increase on 2013-14. The value of interstate movements in 2014-15 increased 8.2% to \$115.9 million in 2014-15, up from \$107.0 million in 2013-14 (see Table 9).
- In 2014-15 the NT pastoral industry sent 37,529 head of cattle to slaughter, up from 6,036 head in 2013-14. The value of cattle slaughtered in 2014-15 is \$18.3 million up from \$2.9 million in the previous year (see Table 9).

Table 9: Interstate Cattle Movements Annual Percentage Changes (Head and Value)

Description (NT Cattle Only)	2013-14 (Head)	2014-15 (Head)	2013-14 (\$m)	2014-15 (\$m)	Annual % Change (Head)	Annual % Change (\$m)
Exported overseas	302,768	332,371	\$180.6	\$199.4	9.8%	10.4%
Interstate movements	221,949	237,443	\$107.0	\$115.9	7.0%	8.2%
Slaughtered	6,036	37,529	\$2.9	\$18.3	521.8%	528.0%
Total	530,753	607,343	\$290.5	\$333.5	14.4%	14.8%



Source: Department of Primary Industry and Fisheries data collections

The Northern Territory cattle population in 2015 was over 2.0 million head, about 7.7% of the total Australian herd (26.0 million).

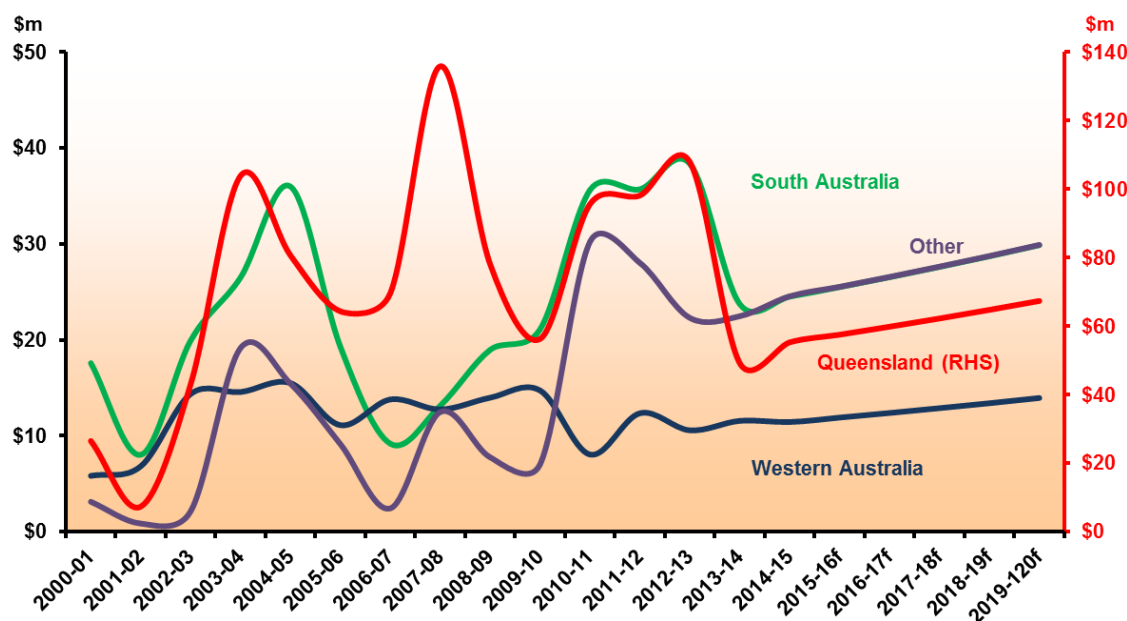
The 2015 estimated cattle population by NT pastoral district,

- 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: Northern Territory Interstate Cattle Movements: Value of Production 2000-01 to 2019-20



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

The value of the total interstate movements of Territory cattle in 2014-15 was estimated at \$115.9 million, up 8.2% from the previous year (\$107.0 million).

A total of 237,443 head of Territory cattle were sent interstate in 2014-15, a 7.0% increase over the previous year (221,949).

- Queensland was the main destination for Territory cattle in 2014-15, taking about 48.1% (114,106 head of cattle) of the total interstate movement of cattle. This represents an increase of 11.2% on the previous year (102,577 head). The value of Queensland movements is valued at \$55.3 million, up 12.4% on 2013-14 (\$49.2 million).



- 47,615 head or 20.1% of total interstate movements were sent to South Australia, up 2.3% on 2013-14 (46,558 head). This trade is valued at \$24.5 million, up 3.3% on the previous period (\$23.7 million).
- Western Australia took 12.3% (29,112 head of cattle) of total Territory cattle transferred interstate, and decrease of 2.0% on 2013-14 (29,710 head). This is valued at \$11.4 million, a 1.0% decrease on 2013-14 (\$11.5 million).
- 46,610 head of cattle (19.6% of total interstate movements) went to Other States (Vic & NSW), up 8.1% on the previous year (43,104 head). These movements are estimated at \$24.5 million, a rise of 9.2% on 2013-14 (\$22.4 million).

Table 10: Interstate Cattle Movements Annual Percentage Changes (Head and Value)

Description	2013-14 (Head)	2014-15 (Head)	2013-14 (\$m)	2014-15 (\$m)	Annual % Change (Head)	Annual % Change (\$m)
South Australia	46,558	47,615	\$23.7	\$24.5	2.3%	3.3%
Queensland	102,577	114,106	\$49.2	\$55.3	11.2%	12.4%
Western Australia	29,710	29,112	\$11.5	\$11.4	-2.0%	-1.0%
Other States	43,104	46,610	\$22.4	\$24.5	8.1%	9.2%
Total	221,949	237,443	\$107.0	\$115.9	7.0%	8.2%

Source: Department of Primary Industry and Fisheries data collections

Live Cattle Exports

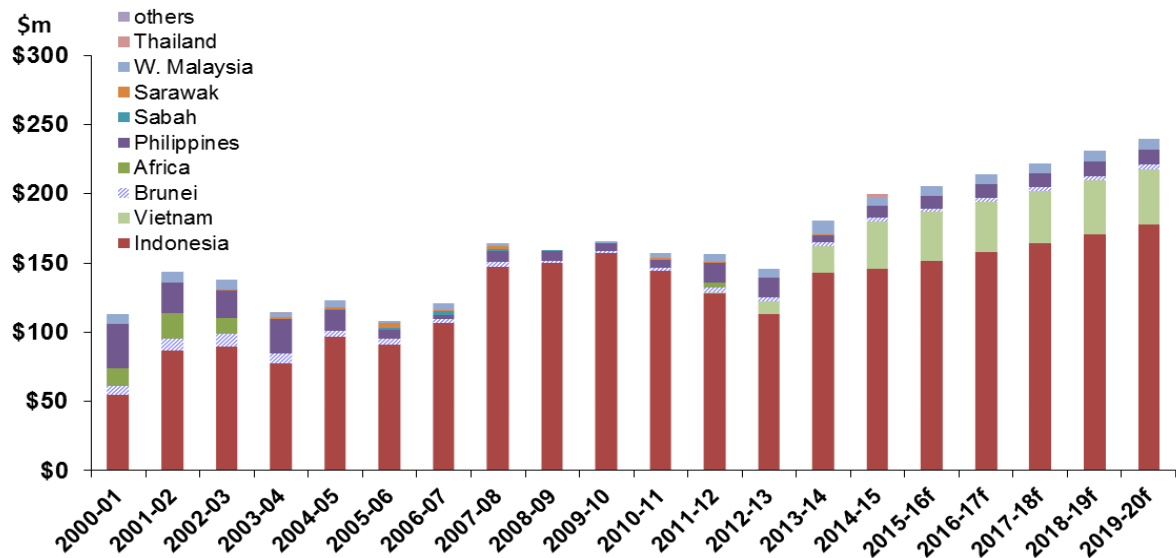
Territory live cattle exports in 2014-15 were estimated at \$199.4 million, a 10.4% increase over the previous period (\$180.6 million). This is a strong result for the live cattle export industry as the Indonesia government increased import quotas to alleviate high domestic beef prices. (Please note: the head of cattle here represents only Territory cattle shipped through the Port of Darwin).

- In 2014-15, Territory cattle accounted for 24.1% of the total Australian live cattle exports to all overseas markets and 32.8% of total Australia live exports to Indonesia.
- A total of 332,371 head of Territory cattle were exported to South East Asia, a 9.8% increase over 2013-14 (302,768).
- Territory live cattle exports to South East Asia are expected 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, and locally supplied substitutes such as fish and chicken.

Figure 10: Northern Territory Live Cattle Export Destinations: Value of Production 2000-01 to 2019-20



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

Indonesia is the largest market for Territory live cattle exports, taking 73.6% of total NT live cattle exports out of the Port of Darwin in 2014-15.

- 3,689 head of cattle were exported to Brunei in 2014-15, representing 8.6% decrease on the previous year (4,037 head). Production values decreased 7.7% from \$2.8 million to \$2.6 million in 2014-15.
- Live cattle exports to Indonesia increased by 1.1% to 244,630 head in 2014-15 valued at \$145.7 million, up 2.1% on 2013-14 (\$142.7 million). Territory cattle export values remain robust as domestic beef prices in Indonesian remain high.
- In 2014-15 Territory cattle exports to the Philippines rose 62.6% to 14,990 head of cattle, while the value of production increased 64.2% to \$8.9 million.
- In 2014-15 9,515 cattle were exported to West Malaysia down 33.5% from 14,307 head in 2013-14. The value of production fell 32.8% to \$6.7 million from \$10.0 million reported last year.
- Vietnam (an emerging market for NT live cattle exports) received 56,992 head of cattle valued at \$33.9 million in 2014-15. In 2013-14 Vietnam received 32,465 head valued at \$19.1 million.

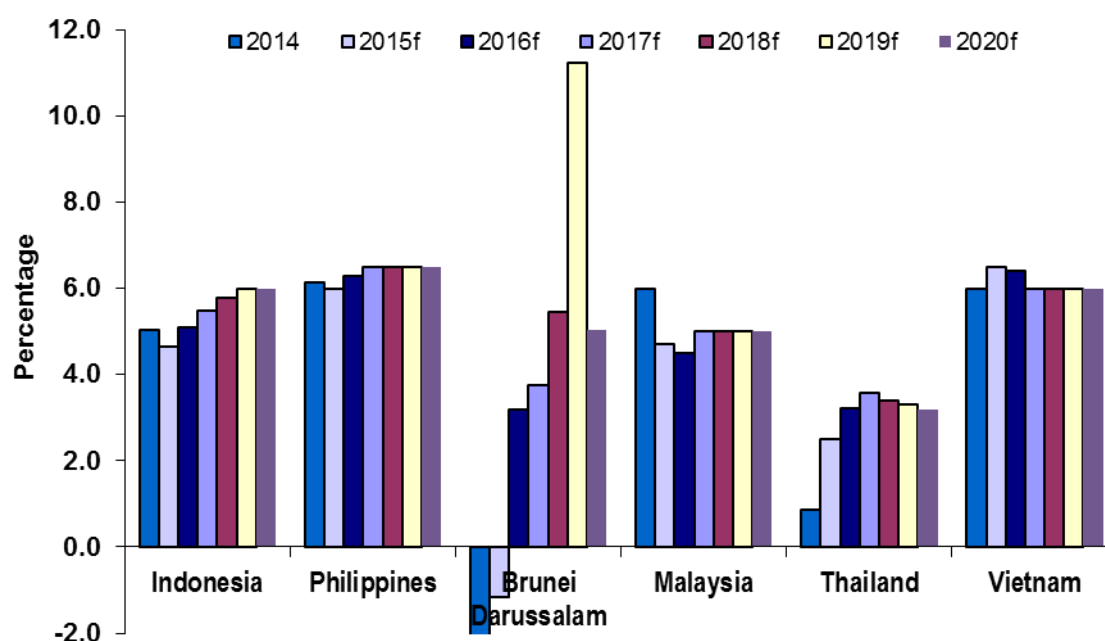


Table 11: Live Cattle Exports Annual Percentage Changes (Head and Value)

Description	2013-14 (Head)	2014-15 (Head)	2013-14 (\$m)	2014-15 (\$m)	Annual % Change (Head)	Annual % Change (\$m)
Brunei	4,037	3,689	\$2.8	\$2.6	-8.6%	-7.7%
Indonesia	241,939	244,630	\$142.7	\$145.7	1.1%	2.1%
Philippines	9,220	14,990	\$5.4	\$8.9	62.6%	64.2%
Sarawak	800	-	\$0.6	\$0.0	-100.0%	-100.0%
W. Malaysia	14,307	9,515	\$10.0	\$6.7	-33.5%	-32.8%
Thailand	-	2,555	\$0.0	\$1.5	0.0%	0.0%
Vietnam	32,465	56,992	\$19.1	\$33.9	75.5%	77.3%
Total	302,768	332,371	\$180.6	\$199.4	9.8%	10.4%

Source: Department of Primary Industry and Fisheries data collections

Figure 11: GDP Growth Forecasts for NT Live Cattle Export Major Destinations 2014-2020



Source: International Monetary Fund, World Economic Outlook Database, October 2015 f = forecast



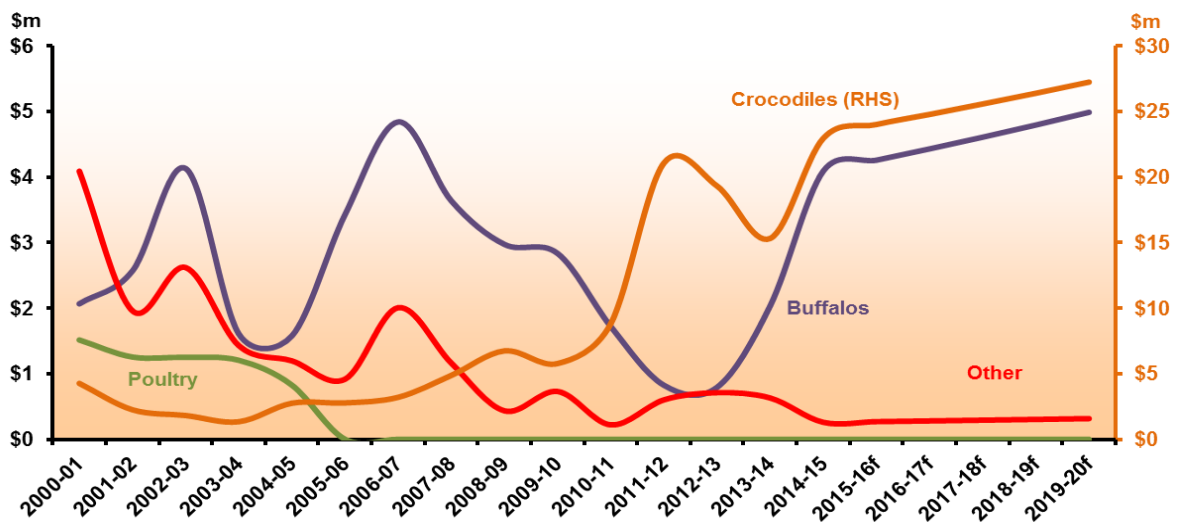
The economies of the destination countries for live cattle exports are forecast to maintain positive GDP growth supporting strong domestic demand for Territory beef (see Figure 11). This is offset by the depreciating value of the Australian Dollar, competition from other beef producers, and local substitutes 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 interstate 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 on the domestic market.

Figure 12: Northern Territory Other Livestock: Value of Production 2000-01 to 2019-20



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

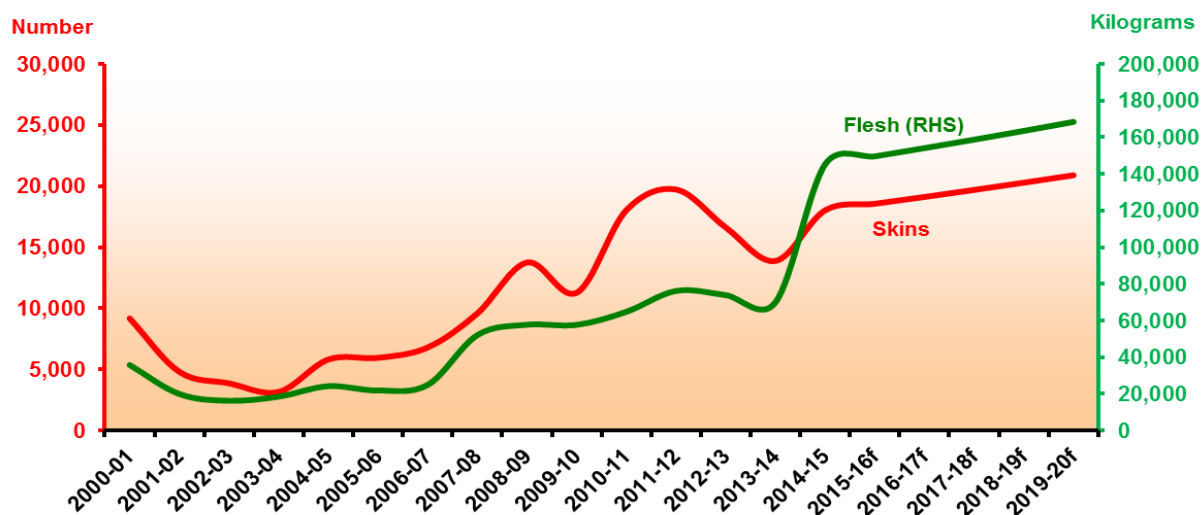
Total Other Livestock (crocodiles, buffalo, horses, camels, pigs, and goats) contributed 4.7% to the total value of Territory rural industries and fisheries production in 2014-15.

- In 2014-15 the total value of production in Other Livestock rose 51.8% to an estimated \$27.3 million up from \$18.0 million in 2013-14.
- For 2014-15 the value of the Territory's crocodile industry is estimated at \$23.0 million. This accounted for 84.1% of the total value of production of all the Other Livestock industry sectors.
- Buffalo numbers rose 97.1% in 2014-15 to 5,069 head with an estimated value of production of \$4.1 million.



- 97.1% of the buffalo turned off were exported live overseas to Vietnam (the largest importer 4332 head) and Brunei (588 head). There were 65 buffalo sent to interstate markets and 84 were slaughtered in 2014-15.
- In 2014-15 there were horses (462), camels (237), and goats (945) that are classified in the “Other” category in Figure 12. The estimated value of production was estimated at \$0.3 million, a 58.8% decrease on 2013-14 (\$0.63 million).

Figure 13: Northern Territory Crocodile Production 2000-01 to 2019-20

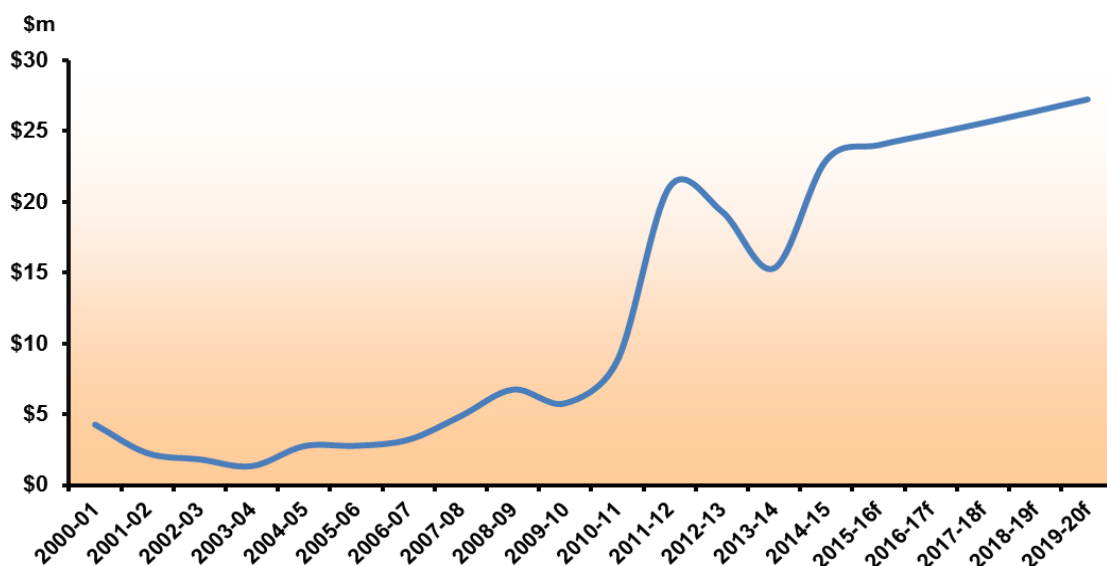


Source: Department of Primary Industry and Fisheries data collections, f = forecast

In 2014-15 the Territory’s crocodile industry produced 145,251 kilograms of flesh, up from 69,928 kilograms the previous year. The value of production for flesh in 2014-15 is estimated at \$1.3 million, up from \$0.49 million in 2013-14.

In 2014-15 the Territory’s crocodile industry produced 18,024 skins up by 29.8% from 13,887 skins in 2013-14. The value of production for skins in 2014-15 is estimated at \$16.8 million, a 25.4% increase on the previous period (\$13.4 million).

Figure 14: Northern Territory Crocodile Skins Value of Production 2000-01 to 2019-20





- There were 10,386 live sales in 2014-15 valued at \$2.9 million. Live sales refer to individual animals that are sold as animals and not for production purposes.
- Other revenues derived from back straps and other crocodile products are valued at \$1.8 million.
- The Territory's crocodile industry total production value for 2014-15 to \$23.0 million. This is a 49.9% increase in value on 2013-14 (\$15.3 million).

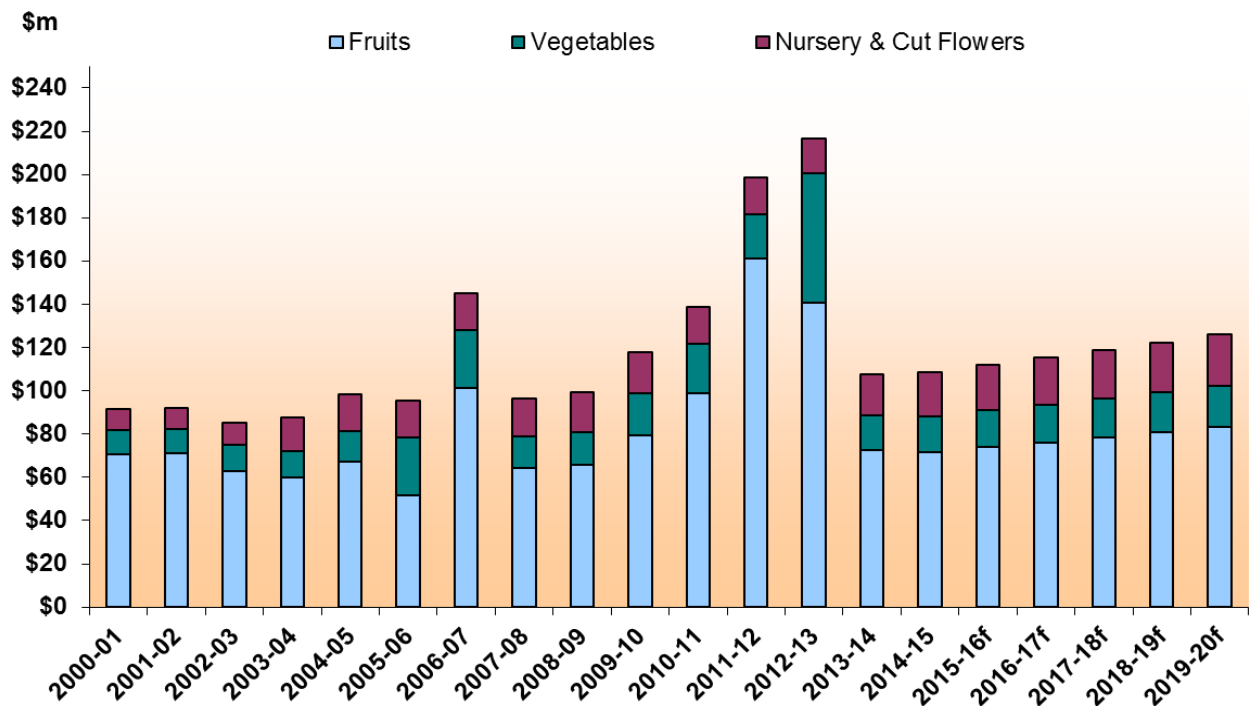
Horticulture

The Territory horticulture industry includes fruit, vegetables, nurseries and cut flowers. The value of Territory horticultural production (including nurseries, cut flowers, and turf) for 2014-15 was \$108.7 million an increase of around 1.0% compared to the previous year (see Figure 15). Horticulture contributed an estimated 19.0% of the total value of Territory rural industries and fisheries production in 2014-15 (see Figure 3).

No horticulture data was collected for 2014-15 therefore estimates were generated based on the data collected for the 2013-14 period.

DPI&F horticultural statistics are obtained on a calendar year basis which corresponds to the harvesting season. As such, horticultural production figures for the 2014 calendar year are referred to as the 2014-15 financial year.

Figure 15: Northern Territory Horticulture: Value of Production 2000-01 to 2019-20



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



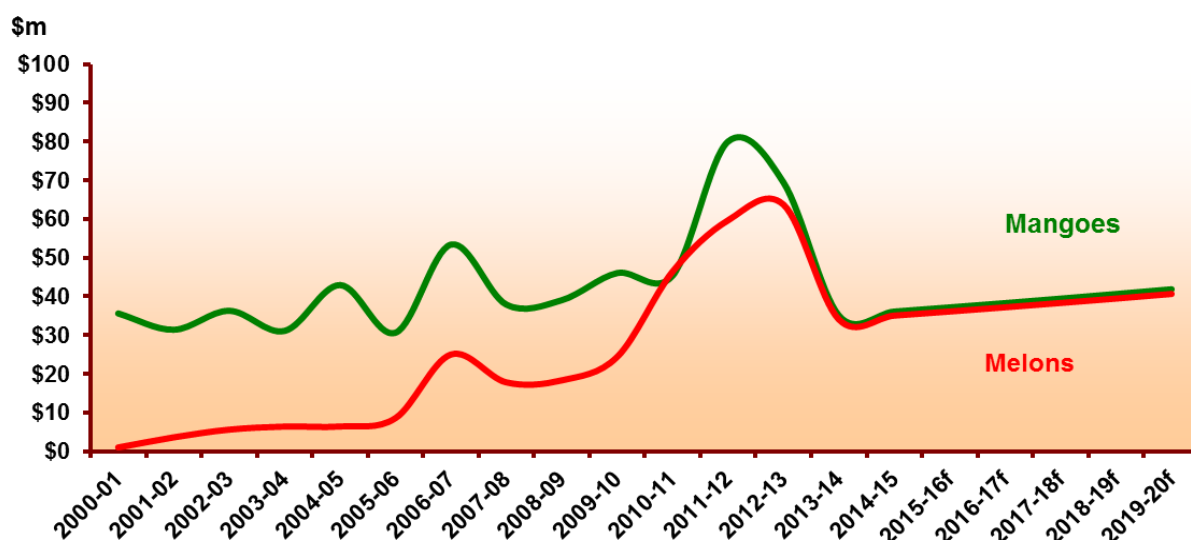
The majority of the Territory's horticultural production is destined for interstate markets.

- 66.0% (\$71.7 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 15.2% (\$16.6 million) to total horticulture value.
- 18.8% (\$20.4 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, bananas and table grapes. Fruit value of production was down an estimated 1.3% on the previous period. This is due the 2014-15 estimates being based on conservative yields from 2013-14. There were no production recorded in 2013-14 for bananas and table grapes therefore no estimates were generated for 2014-15.

Figure 16: Northern Territory Mango and Melon: Value of Production 2000-01 to 2019-20

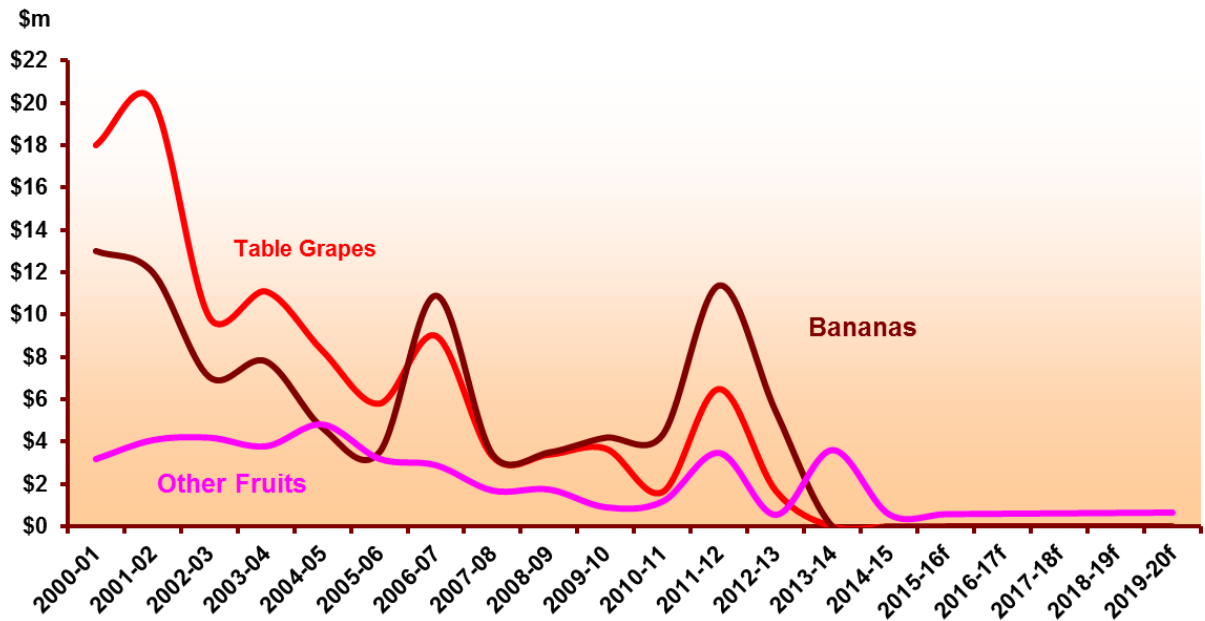


Source: Department of Primary Industry and Fisheries data collections, f = forecast

- Mangoes value of production increased to \$36.1 million in 2014-15, up 3.0% on the previous period (\$35.0 million).
- Mango output increased by 3.0% to 10,877 tonnes in 2014-15 compared to 10,560 tonnes in 2013-14.
- In 2013-14 melons value of production increased to \$35.1 million, a 3.0% rise on the previous year (\$34.0 million).
- 46,820 tonnes of melons were grown in 2014-15, up 3.0% on 2013-14 (45,456 tonnes).



Figure 17: Northern Territory Banana, Grape and Other fruit: Value of Production 2000-01 to 2019-20



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

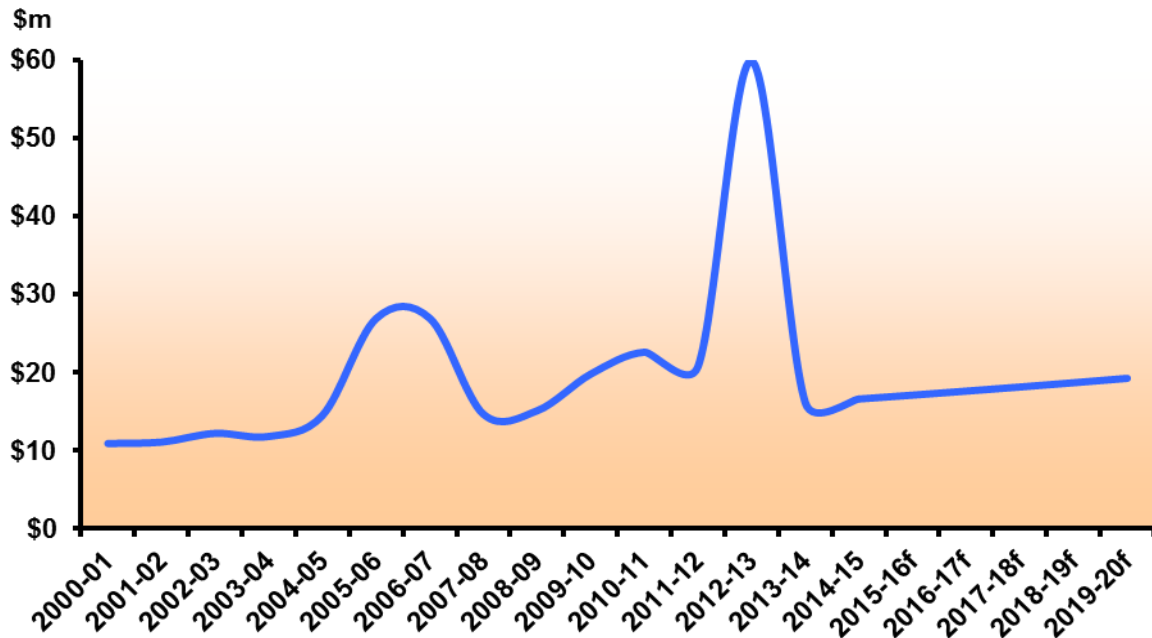
- There is no table grape output estimate (or forecasts) for 2014-15 due no production recorded in 2013-14.
- There is no banana production estimate (or forecasts) for 2014-15 due no production recorded in 2013-14.
- The production value of the Other Fruits category decreased to \$0.6 million in 2014-15 a fall from \$3.6 million on 2013-14 results. Other Fruits production decreased from 1,752 tonnes in the previous year to 273 tonnes in 2014-15.



Vegetables

The major vegetables produced in the Territory include cucumber, bitter melon, okra, snake beans and pumpkin.

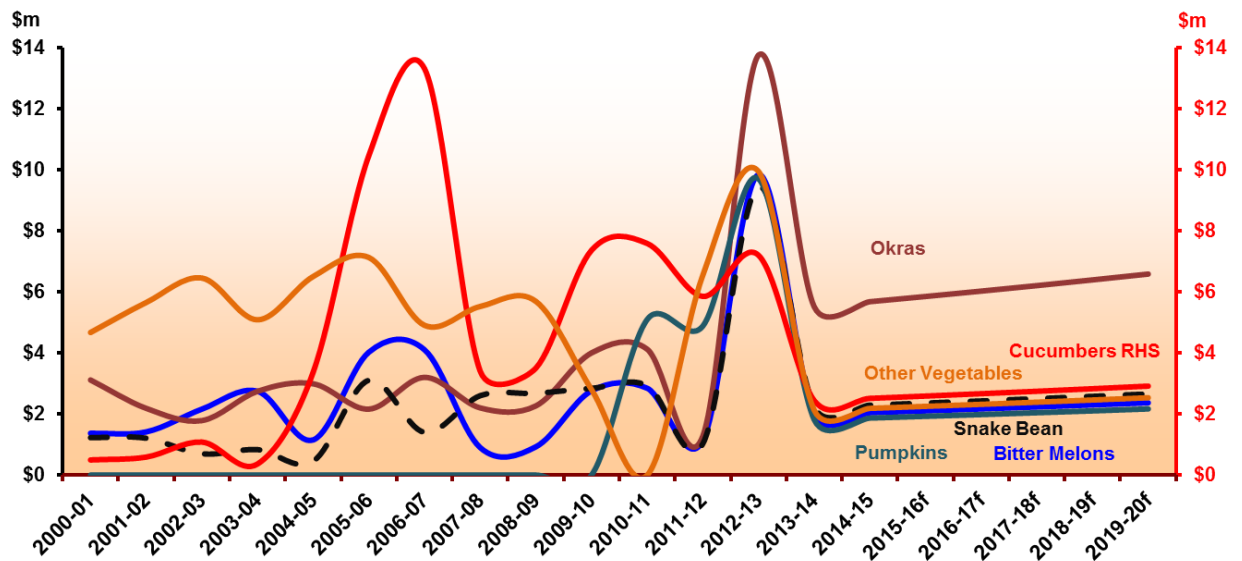
Figure 18: Northern Territory Vegetables: Total Value of Production 2000-01 to 2019-20



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

There was no data collected for 2014-15 so vegetable production in 2014-15 is based on estimates using reported vegetable production from 2013-14.

Figure 19: Northern Territory Vegetables: Value of Production 2000-01 to 2019-20



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

- Cucumber value of production increased 3.0% to an estimated \$2.5 million in 2014-15 up from \$2.4 million in the previous year.

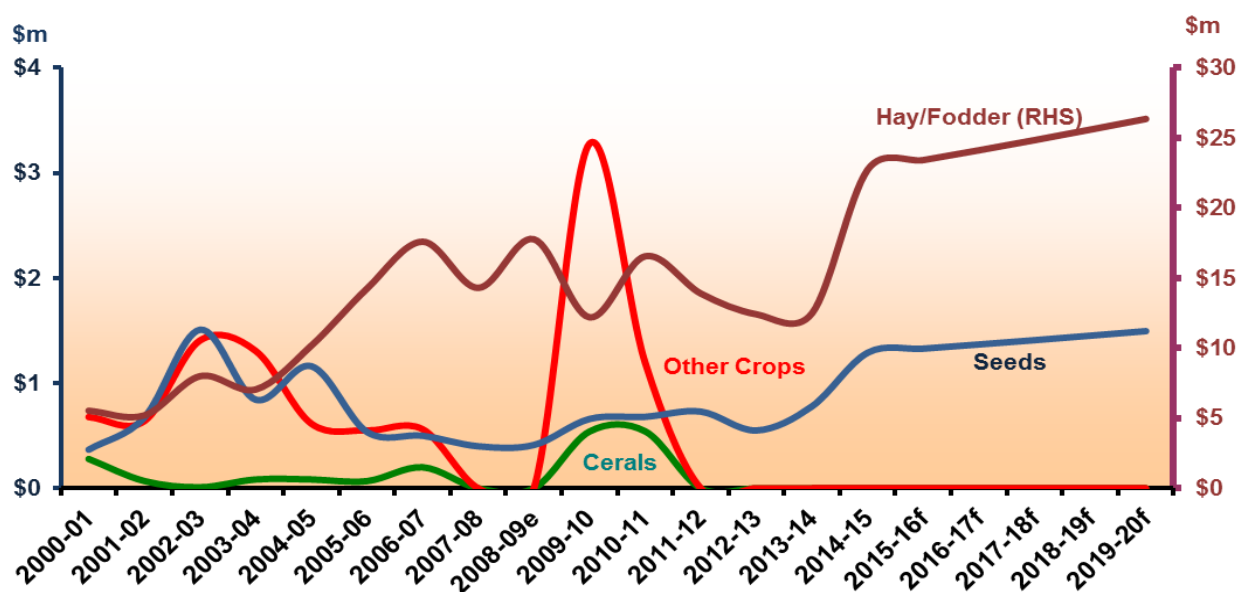


- Cucumber output increased 3.0% to 1,384 tonnes in 2014-15 from 1,344 tonnes in the previous period.
- In 2014-15 the value of production for Okra was estimated at \$5.7 million, a 3.0% increase from \$5.5 million in 2013-14.
- 949 tonnes of Okra was produced in 2014-15, up 3.0% from 922 tonnes in the previous year.
- Bitter Melon production values were estimated at \$2.04 million in 2014-15, a 3.0% increase from \$1.98 million in the previous period.
- 791 tonnes of Bitter Melons were grown in 2014-15, up 3.0% from 768 tonnes in 2013-14.
- In 2014-15 value of production of Snake Bean increased 3.0% to \$2.3 million compared to \$2.2 million in 2013-14.
- 396 tonnes of Snake Bean were produced in 2014-15, a 3.0% increase from 384 tonnes in the previous year.
- Pumpkin production rose 3.0% to 5,047 tonnes in 2014-15 from 4,900 tonnes for 2013-14, while value of production increased 3.0% to \$1.9 million in 2014-15 from \$1.8 million in the previous period.
- The production value of the Other Vegetables category was \$2.2 million in 2014-15, up 3.0% from \$2.1 million for the last reporting period. Other Vegetables output was estimated at 985 tonnes up 3.0% on the 956 tonnes produced in 2013-14.

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: Northern Territory Field Crops: Value of Production 2000-01 to 2019-20



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



- Mixed farming contributed over 4.2% of the total value of Territory rural industries and fisheries production in 2014-15.
- The value of field crop production in 2014-15 was \$24.0 million, an 81.1% increase from 2013-14 (\$13.3 million).
- Hay/fodder production accounted for 94.6% (\$22.7 million) of the total field crops production values in 2014-15. This is an 82.1% increase in value on 2013-14 (\$12.5 million).
- Hay/fodder output for the current period was 84,370 tonnes, up 60.5% on 52,560 tonnes produced in 2013-14.
- In 2014-15 there was 25.2% increase in seed production valued at \$1.3 million, up from \$0.8 million in 2013-14.

FORESTRY

- No production data was recorded in 2014-15.

POPPY PRODUCTION

- No production data was recorded in 2014-15.

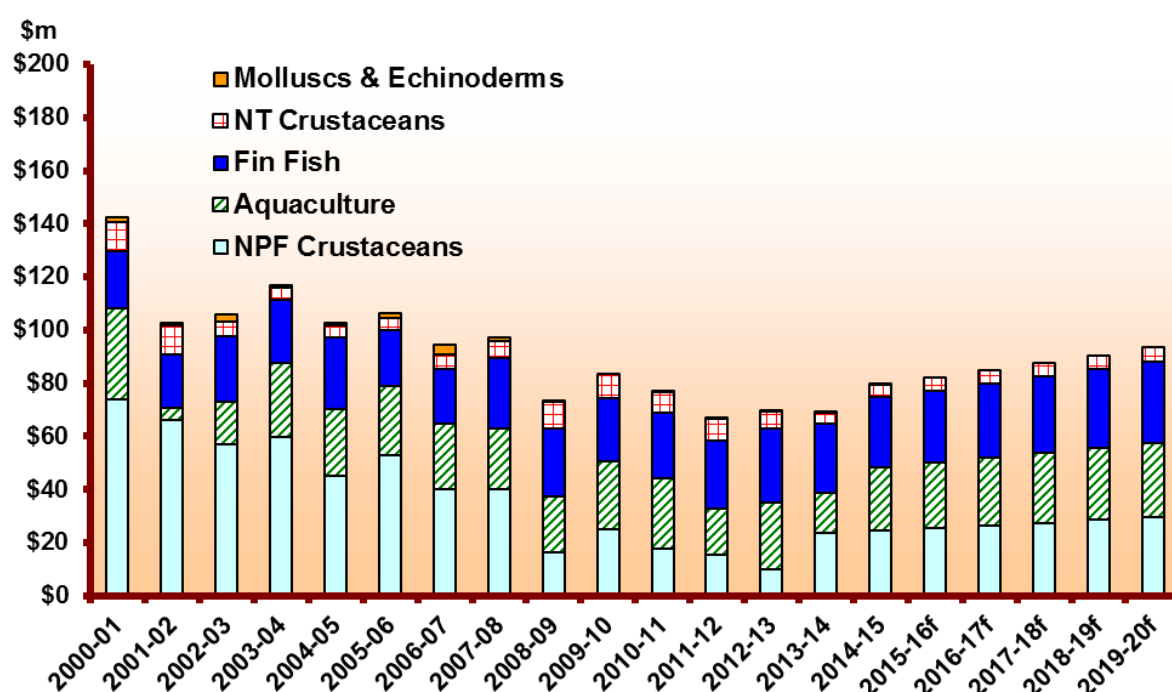


Fisheries

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 2014-15 increasing by 15.3% to \$79.2 million, up from \$68.7 million the previous year. This increase is mainly attributed to the rises in aquaculture, and to a lesser extent NT wild catch (fish) and NT crustaceans and the Northern Prawn Fleet (NT catch only).

Figure 21: Northern Territory Fisheries: Value of Production 2000-01 to 2019-20



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

Fisheries contributed an estimated 13.8% of the total 2014-15 value of Territory rural industries and fisheries production value.

- Fish production value is estimated at \$26.2 million for 2014-15, an increase of 1.0% on the previous year (\$25.9 million).
- The value of wild catch NT crustaceans production (wild catch crabs and other crustaceans) attributed to the Territory (excluding the Northern Prawn Fishery) increased by an estimated 8.5%, from \$4.2 million in 2013-14 to an estimated \$4.6 million in 2014-15.
- In 2014-15 the estimated value of the prawn catch (NT only) by the Northern Prawn Fleet (Commonwealth managed Fishery) increased by 4.0% to \$24.0 million.



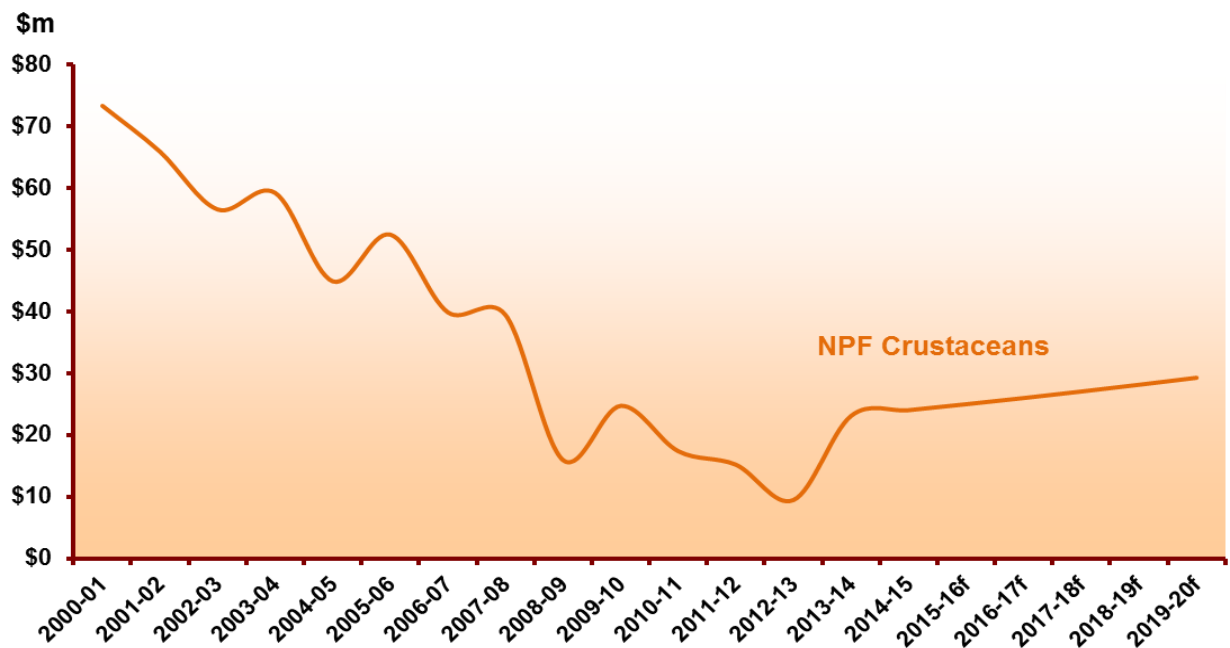
Table 11: Live Cattle Exports Annual Percentage Changes (Value)

Description	2013-14 (\$m)	2014-15 (\$m)	Annual% Change (\$m)
Fin Fish	\$26.0	\$26.2	1.0%
NT Crustaceans	\$4.2	\$4.6	8.5%
Aquaculture	\$15.2	\$24.1	58.4%
Molluscs & Echinoderms	\$0.16	\$0.25	57.5%
NPF Crustaceans	\$23.1	\$24.0	4.0%
Total	\$68.7	\$79.2	15.3%

Source: Department of Primary Industry and Fisheries data collections

- Total aquaculture production value increased by 58.4% to an estimated \$24.1 million in 2014-15, up from \$15.2 million for the previous year.
- The value of molluscs and echinoderms was estimated at \$0.25 million in 2014-15, up from \$0.16 million in 2013-14.

Figure 22: Figure 19: Northern Prawn Fleet Production Value: 2000-01 to 2019-20



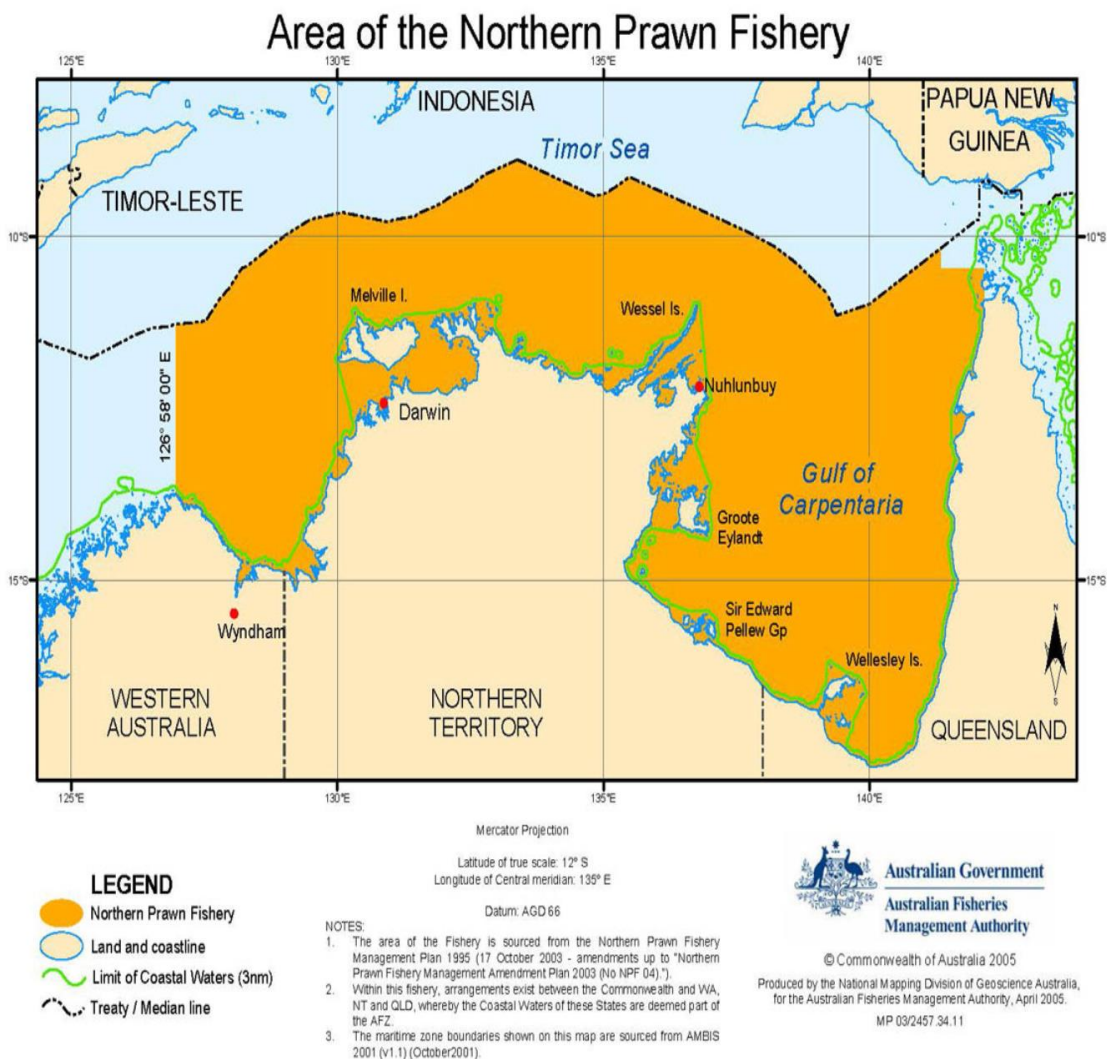
Source: Northern Prawn Fleet data collections, f = forecast.



- In 2014-15 the estimated value of the prawn catch (NT only) by the Northern Prawn Fleet (Commonwealth managed Fishery) increased by 4.0% to \$24.0million (see Figure 21). In 2013-14 value of production was estimated at \$23.1 million.
- Output from the Northern Prawn Fleet for 2014-15 is estimated at 1.66 tonnes, a 3.0% increase on the previous period (1.61 tonnes).

The Northern Prawn Fishery (NPF) is located off Australia's northern coast, and extends from the low watermark to the outer edge of the Australian Fishing Zone (AFZ) in the area between Cape York in Queensland and Cape Londonderry in Western Australia (Figure 23).

Figure 23: Northern Prawn Fishery Management Area.



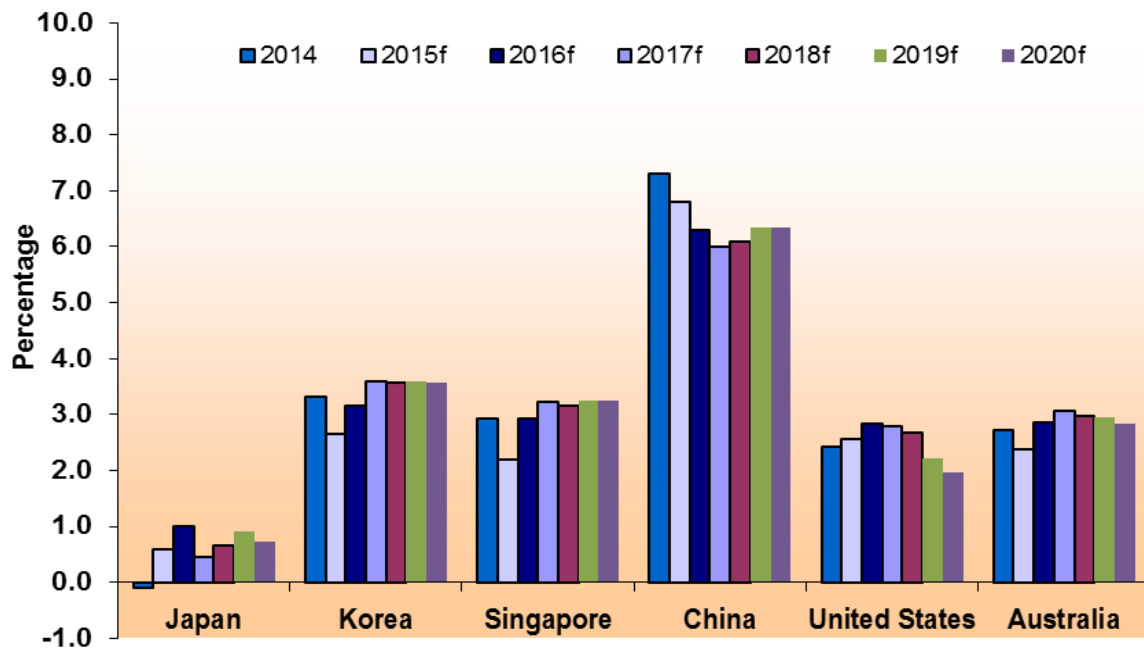
Source Northern Prawn Fishery Data Summary 2015



Northern Territory 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 2014-2020



Source International Monetary Fund, World Economic Outlook Database, October 2015 f = forecast

Northern Territory International Trading Partners: Exchange Rates

In 2014 the Australia Dollar has depreciated across the currencies listed in Table 10 (offset by moderating against the Euro), as demand for commodities fall, interest rates in Australia are lowered, 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 12 (1) & (2) & (3): Exchange Rates of Northern Territory's International Trading Partners 2014-2015

last working day of the
month (daily 4pm)

	Apr 2014	May 2014	Jun 2014	Jul 2014	Aug 2014	Sep 2014
US - Dollar	0.93	0.93	0.94	0.93	0.93	0.88
Japan - Yen	95.08	94.66	95.43	95.79	97.07	95.73
Euro	0.67	0.69	0.69	0.70	0.71	0.69
Singapore Dollar	1.17	1.17	1.18	1.16	1.17	1.11
Malaysian - Ringgit	3.03	3.00	3.02	2.97	2.95	2.86
Taiwan - Dollar	28.06	27.95	28.13	27.94	27.94	26.65
Indian - Rupee	56.04	55.00	56.59	56.18	56.58	53.96
Indonesia - Rupiah	10736	10841	11177	10795	10946	10649
Chinese - Renminbi	5.82	5.82	5.85	5.76	5.74	5.38
	Oct 2014	Nov 2014	Dec 2014	Jan 2015	Feb 2015	Mar 2015
US - Dollar	0.88	0.85	0.82	0.79	0.78	0.76
Japan - Yen	97.02	100.43	98.04	92.77	92.83	91.72
Euro	0.70	0.68	0.67	0.70	0.70	0.71
Singapore Dollar	1.13	1.11	1.08	1.07	1.06	1.05
Malaysian - Ringgit	2.89	2.86	2.87	2.86	2.81	2.83
Taiwan - Dollar	26.74	26.29	25.91	24.76	24.51	23.90
Indian - Rupee	54.07	52.56	51.96	48.39	48.17	47.83
Indonesia - Rupiah	10650	10362	10202	9856	10027	9993
Chinese - Renminbi	5.38	5.22	5.09	4.92	4.89	4.73

Source: Reserve Bank of Australia April 2014 to March 2015

The Percentage Rate of Change from the April 2014 to March 2015

		min rate	max rate
US - Dollar	0%	0.76	0.94
Japan - Yen	-3.5%	91.72	100.43
Euro	5.1%	0.67	0.71
Singapore Dollar	-10.0%	1.05	1.18
Malaysian - Ringgit	-6.6%	2.81	3.03
Taiwan - Dollar	-14.8%	23.90	28.13
Indian - Rupee	-14.7%	47.83	56.59
Indonesia - Rupiah	-6.9%	9856	11177
Chinese - Renminbi	-18.6%	4.7	5.8



Publications

- Information for Prospective Investors in Agricultural Enterprises in the Northern Territory
<https://dpif.nt.gov.au/publications>
- DBE Annual Report 2014-15
<https://business.nt.gov.au/publications/annual-reports>
- Department of Primary Industry and Fisheries Annual Report 2014-15
<https://dpif.nt.gov.au/publications>
- Fishery Status Reports 2015
<https://dpif.nt.gov.au/publications>
- Northern Territory Rural Industries and Fisheries: Economic Outlook 2015
<https://dpif.nt.gov.au/statistics-surveys-and-research/economic-profile>
- Northern Territory Department of Primary Industry and Fisheries 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 Fisheries
<https://dpif.nt.gov.au>
- Northern Territory Agricultural Association
<http://www.ntaga.org.au/>
- Northern Territory Cattlemen's Association
<http://www.ntca.org.au/>
- Northern Territory Horticultural Association
<http://www.ntha.com.au/>
- Economic Indicators (DBE)
<https://business.nt.gov.au/business-and-economic-data>