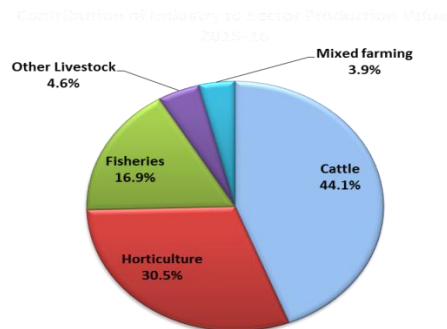


Northern Territory rural industries and fisheries Economic Outlook 2016

Overview

The rural industries and fisheries in the Northern Territory (NT) include cattle (interstate and live export), other livestock (buffalo, crocodiles and goats), 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, 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 employment for approximately 2,623 persons in 2015-16 (ABS). This labour force estimate is subject to high sampling variability. The sectors 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 2.5% of Gross State Product (GSP) in 2015-16, above the national proportion of 2.2% (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.

In 2015-16, the total estimated value of rural industries and fisheries production was \$736.0 million, an increase of 8.1% over the previous year, a result reflective of the improving production and market conditions for NT primary industries and fisheries (see Figure 2). The increase is primarily due to a 23.4% growth in the value of horticultural production to \$224.5 million, a 21.5% increase in fisheries production to \$124.3 million (driven by the wild stock catch and NPF output), 24.5% rise in other livestock production (mainly crocodile

Economic Outlook 2016

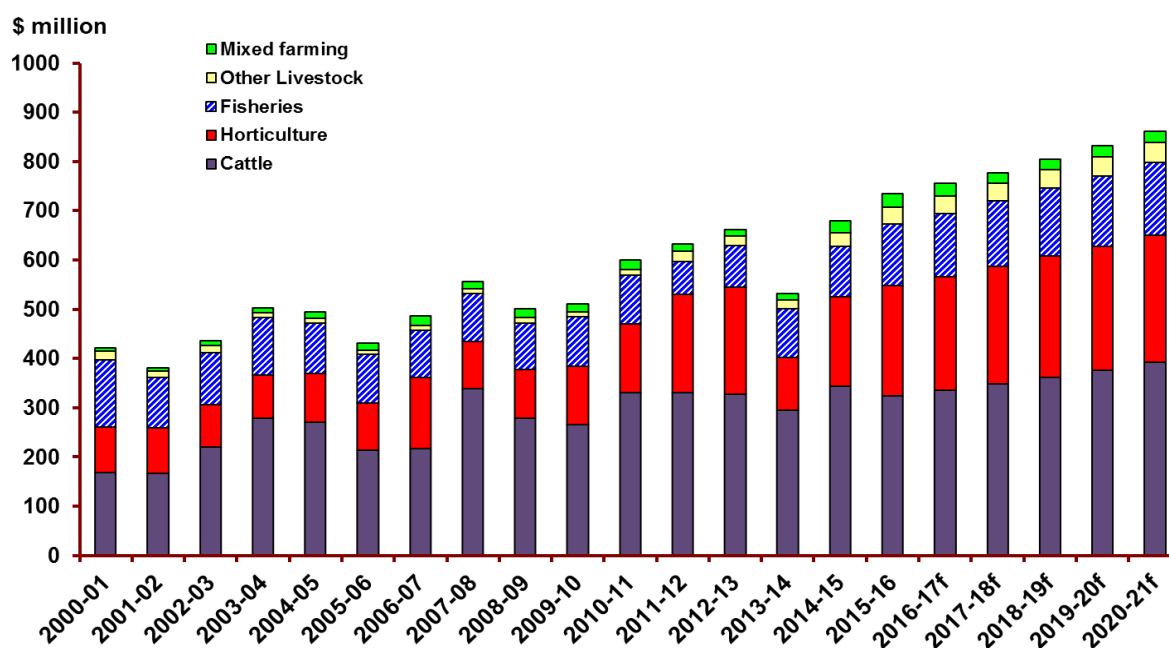
production) to \$34.0 million and a 17.7% increase in the value of mixed farming to \$28.8 million (driven by hay-fodder for cattle production). These increases were offset by a 5.9% decrease in the value of cattle production to \$324.4 million (due to falling exports while interstate movements and abattoir increased).

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

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 5220.0

Figure 2: NT Rural Industries and Fisheries Production Value



Source: Department of Primary Industry and Resources data collections

Economic Outlook 2016

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

Value of horticultural production (\$ million)						
	2013-14	2014-15	2015-16	2016-17f	2017-18f	2018-19f
Mangoes	35.0	95.5	88.5	91.2	93.9	96.7
Table Grapes	0.0	0.8	8.0	8.2	8.5	8.7
Bananas	0.0	0.0	0.0	0.0	0.0	0.0
Melons	34.0	45.8	52.6	54.2	55.8	57.5
Other fruits	5.5	4.7	8.0	8.2	8.5	8.7
Vegetables	16.1	17.2	41.5	42.8	44.1	45.4
Nursery-Cut Flowers & Turf	17.4	17.9	18.0	18.5	19.1	19.7
Local markets	0.0	0.0	7.9	8.1	8.3	8.6
Total	108.0	182.0	224.5	231.2	238.2	245.3

Value of fisheries production (\$ million)						
	2013-14	2014-15	2015-16	2016-17f	2017-18f	2018-19f
Fish	26.0	26.2	31.6	32.6	33.5	34.6
Crustaceans	4.2	4.6	3.0	3.1	3.2	3.3
Aquaculture	15.2	24.1	24.5	25.3	26.0	26.8
Molluscs & Echinoderms	0.2	0.2	0.3	0.3	0.3	0.3
Total NT Fisheries	45.6	55.1	59.4	61.2	63.0	64.9
Crustaceans-NPF	53.4	47.2	64.9	67.5	70.3	73.1
Total Fisheries	99.0	102.4	124.3	128.7	133.3	138.0

Value of cattle, other livestock and mixed farming (\$ million)						
	2013-14	2014-15	2015-16	2016-17f	2017-18f	2018-19f
Cattle	295.0	344.7	324.4	335.6	348.8	362.9
Other Livestock	18.0	27.3	34.0	35.1	36.2	37.3
Field crops	13.3	24.4	20.0	20.6	21.2	21.9
Poppy	0.0	0.0	2.4	0.0	0.0	0.0
Forestry	0.0	0.0	6.4	5.4	0.0	0.0
Total	326.2	396.4	387.1	396.7	406.2	422.0

Total NT Rural Industries and Fisheries Production Value (\$ million)						
	2013-14	2014-15	2015-16	2016-17f	2017-18f	2018-19f
Horticulture	108.0	182.0	224.5	231.2	238.2	245.3
Fisheries	99.0	102.4	124.3	128.7	133.3	138.0
Cattle	295.0	344.7	324.4	335.6	348.8	362.9
Other Livestock	18.0	27.3	34.0	35.1	36.2	37.3
Mixed Farming	13.3	24.4	28.8	26.0	21.2	21.9
Grand Total	533.3	680.7	736.0	756.6	777.6	805.3

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

Please note all figures here have been rounded respectively and may not tally to totals.

NPF = Northern Prawn Fleet (Commonwealth-managed fishery)

Cattle valuations are calculated using farm gate production values not market or whole of industry contribution values

Locals 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 2015-16 therefore no forecasts were generated.

No forecasts were generated for Poppy as the \$2.4m (2015-16) represents a one-off trial crop not ongoing production.

No forecasts were generated for Forestry as the \$6.4m (2015-16) represents only one of two shipments of woodchips and a forecast is not available beyond 2016-17. Large plantations of African Mahogany and Sandalwood in the NT have not reached maturity and therefore their value cannot be included at this point.

Economic Outlook 2016

Please use this data from 1 July 2017 to 30 June 2018 only

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

	12-13 to 13-14	13-14 to 14-15	14-15 to 15-16
	%	%	%
Mangoes	-49.5%	172.6%	-7.3%
Table Grapes	-100.0%	0.0%	0.0%
Bananas	-100.0%	0.0%	0.0%
Melons	-46.6%	34.7%	14.7%
Other fruits	884.9%	-14.1%	70.2%
Vegetables	-73.1%	6.7%	142.0%
Nursery-Cut Flowers & Turf	7.7%	3.0%	0.4%
Local markets	0.0%	0.0%	0.0%
Total	-50.2%	68.4%	23.4%

	12-13 to 13-14	13-14 to 14-15	14-15 to 15-16
	%	%	%
Fish	-6.3%	1.0%	20.5%
Crustaceans	-33.6%	8.5%	-34.8%
Aquaculture	-39.9%	58.4%	1.9%
Molluscs & Echinoderms	0.0%	0.0%	17.8%
Total NT Fisheries	-23.3%	21.1%	7.8%
Crustaceans - NPF	119.5%	-11.6%	37.5%
Total Fisheries	18.2%	3.4%	21.5%

	12-13 to 13-14	13-14 to 14-15	14-15 to 15-16
	%	%	%
Cattle	-10.2%	16.8%	-5.9%
Other Livestock	-13.6%	51.9%	24.5%
Field crops	2.3%	84.0%	-18.1%
Poppy	0.0%	0.0%	0.0%
Forestry	0.0%	0.0%	0.0%

	12-13 to 13-14	13-14 to 14-15	14-15 to 15-16
	%	%	%
Horticulture	-50.2%	68.4%	23.4%
Fisheries	18.2%	3.4%	21.5%
Cattle	-10.2%	16.8%	-5.9%
Other Livestock	-13.6%	51.9%	24.5%
Mixed Farming	2.3%	84.0%	17.7%
Total	-19.6%	27.7%	8.1%

Source: Department of Primary Industry and Resources data collections

NPF = Northern Prawn Fleet (Commonwealth-managed fishery)

Please use this data from 1 July 2017 to 30 June 2018 only.



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