



Northern
Territory
Government

DEPARTMENT OF PRIMARY INDUSTRY AND FISHERIES



Overview and Outlook 2014





TABLE OF CONTENTS

Department of Primary Industry and Fisheries	1
Primary Industry Profile	1
Fisheries Group Profile.....	2
Economic Overview of the NT: Facts and Figures	3
NT Primary Industry and Fisheries – An Overview	5
Industry Overview	6
NT Primary Industry and Fisheries Performance	9
NT Primary Industry and Fisheries Outlook	9
Industry Multipliers to the NT Economy	10
NT Primary Industry Sectors	11
Livestock (Cattle).....	11
Interstate Cattle Movements.....	13
Live Cattle Exports	14
Other Livestock Industry	15
Horticulture.....	18
Fruit.....	19
Vegetables	21
Field Crops.....	22
Fisheries.....	24
Northern Territory Major International Trading Partners	26
Northern Territory International Trading Partners: Exchange Rates	27
Publications	28
Useful Links	28



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 \$400 million a year, accounting for nearly 2% of 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

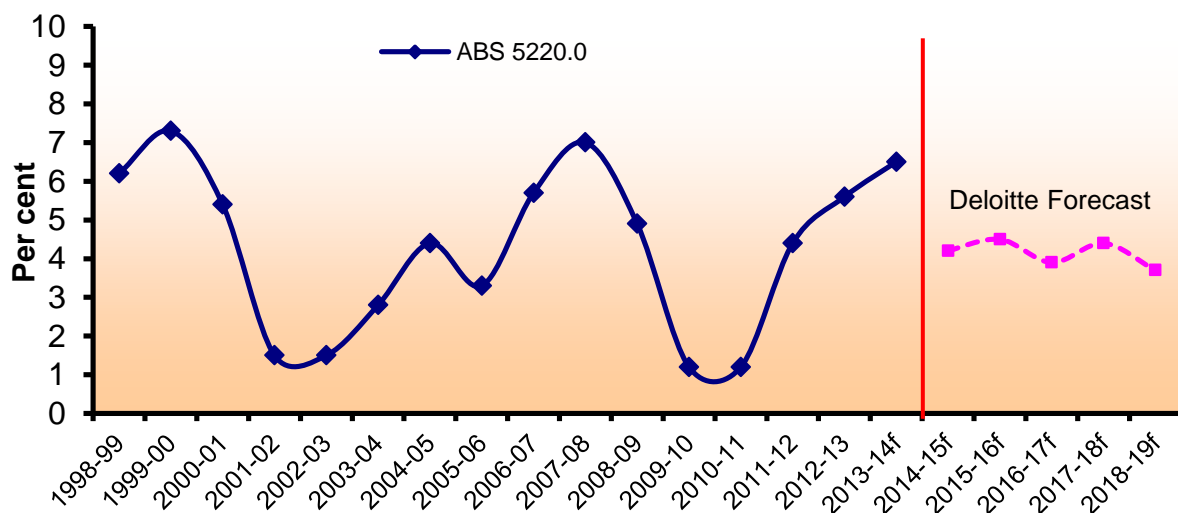
Table 1: NT Economy

Gross State Product (\$m)	\$21,220	(2013-14)
Population (persons)	246,322	Sept Qtr 2014
Exports (\$m)	\$6,830	(2013-14)
Imports (\$m)	\$3,508	(2013-14)
Unemployment rate (original)	5.2%	June 2014
Inflation rate (national)	2.3%	(2013-14)
Average weekly full time adult earnings (persons)	\$1,565	November 2014

Source: Australian Bureau of Statistics

- The NT economy is forecast to continue grow in 2013-14 and 2014-15 as the world economy continues to grow slowly due to the on-going global economic conditions.
- These forecasts include the impact of the \$34 billion Inpex LNG Project on the NT economy.

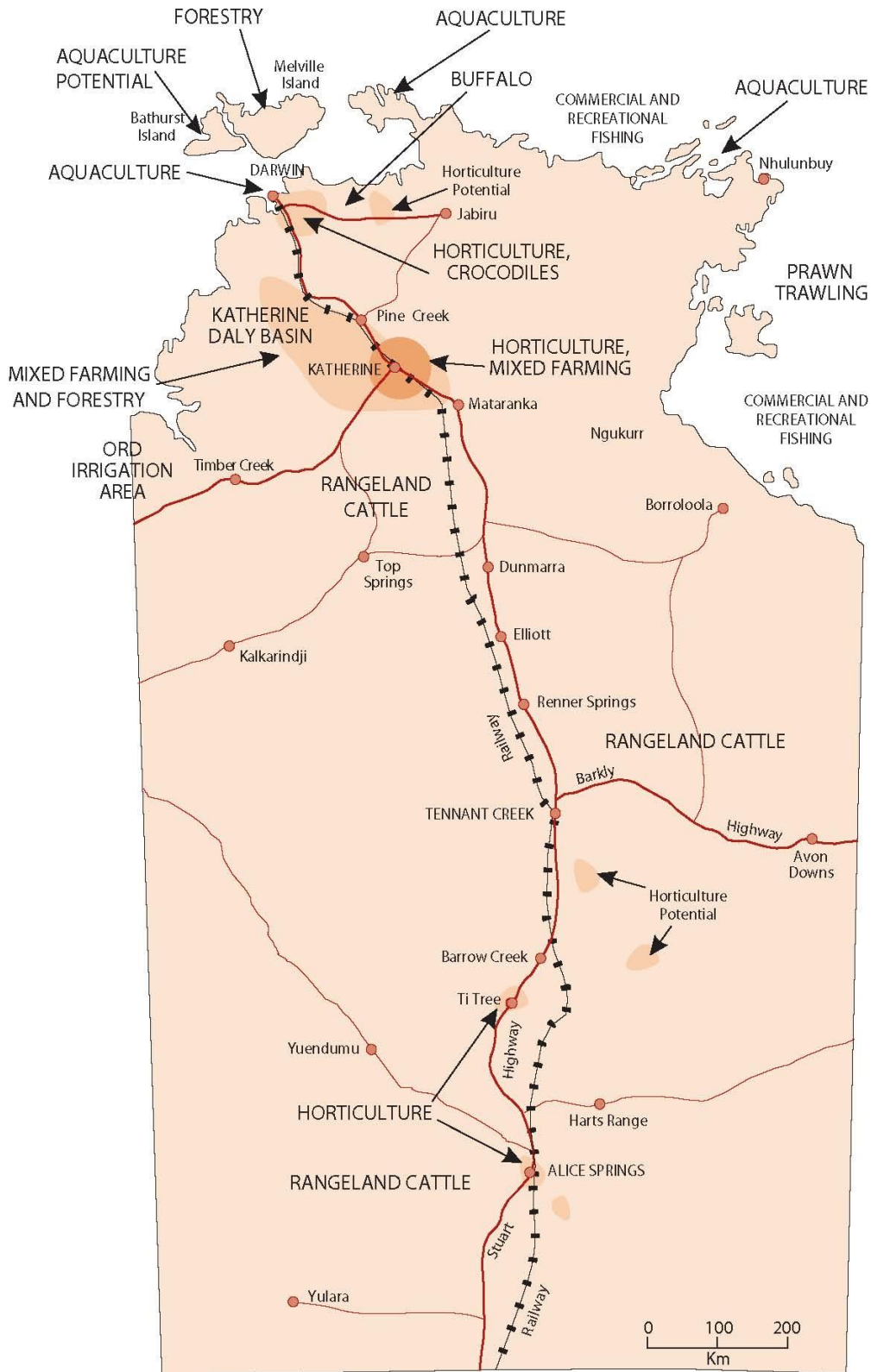
Figure 1: Northern Territory Economic Outlook - Gross State Product 1998-99 to 2018-19



Source: Australian Bureau of Statistics 2013-14 & Deloitte Access Economics Economic Growth Forecasts March Quarter 2015 f = forecast



Figure 2: Agricultural and Fishing Areas in the Northern Territory





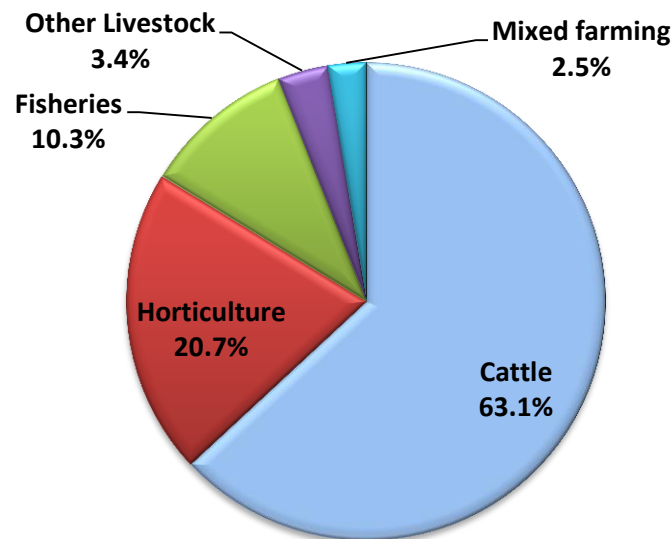
NT Primary Industry and Fisheries – An Overview

The rural and fisheries industries in the Territory include cattle (interstate and live export), other livestock (buffalo, crocodiles, and goats), horticulture (fruit, vegetables, nursery and cut flowers) 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 total is illustrated in Figure 3, with the cattle, fisheries and horticulture industries being the major players.

Figure 3: Contribution of Industry to Sector Production Value, 2013-14



Source: Department of Primary Industry and Fisheries data collections

Rural and fisheries industries 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 1,100 people in 2013-14 (ABS). This labour force estimate is subject to very high 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 2.1% of Gross State Product (GSP) in 2013-14, below the national proportion (2.3%) (Table 2). Exports of Territory rural and fisheries produce are dominated by live cattle exports (mainly to Indonesia), horticulture, fisheries, and to a lesser extent agriculture services.



Table 2: Agriculture and Fisheries Contribution to Northern Territory GSP 2012-13

2013-14	% Contribution to GSP
Tasmania	7.3%
South Australia	5.5%
Victoria	2.6%
Western Australia	2.6%
Queensland	2.3%
Northern Territory	2.1%
New South Wales	1.2%
Australian Capital Territory	0.06%
Australia (% of GDP)	2.3%

Source: ABS, Australian National Accounts, Cat No. 5220.0, 2013-14

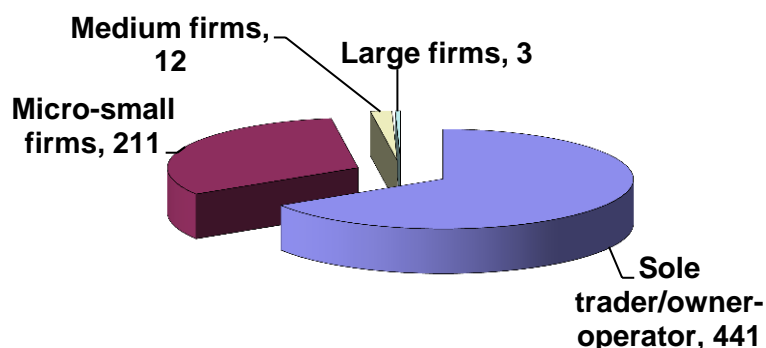
Industry Overview

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 667 agriculture, forestry and fishing business counted for the period June 2010 – June 2014. The sole trader/owner-operator is the most common form of business structure (66.1%) while at the other end of the scale there are 3 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 2010 to June 2014.



Table 3: Counts of NT Businesses, by Industry and Employment 2010-2014

Description	Non employing	1-19	20-199	200+	Total	% by Industry
Agriculture	315	159	9	0	483	72.4%
Aquaculture	5	4	0	3	12	1.8%
Forestry and Logging	38	3	0	0	41	6.1%
Fishing, Hunting and Trapping	47	19	0	0	66	9.9%
Agriculture, Forestry and Fishing Support Services	36	26	3	0	65	9.7%
Total	441	211	12	3	667	100%
% by Employment	66.1%	31.6%	1.8%	0.4%	100%	

Source: Australian Bureau of Statistics Counts of Australian Businesses, including Entries and Exits, Cat No. 8165.0, June 2010 to June 2014.

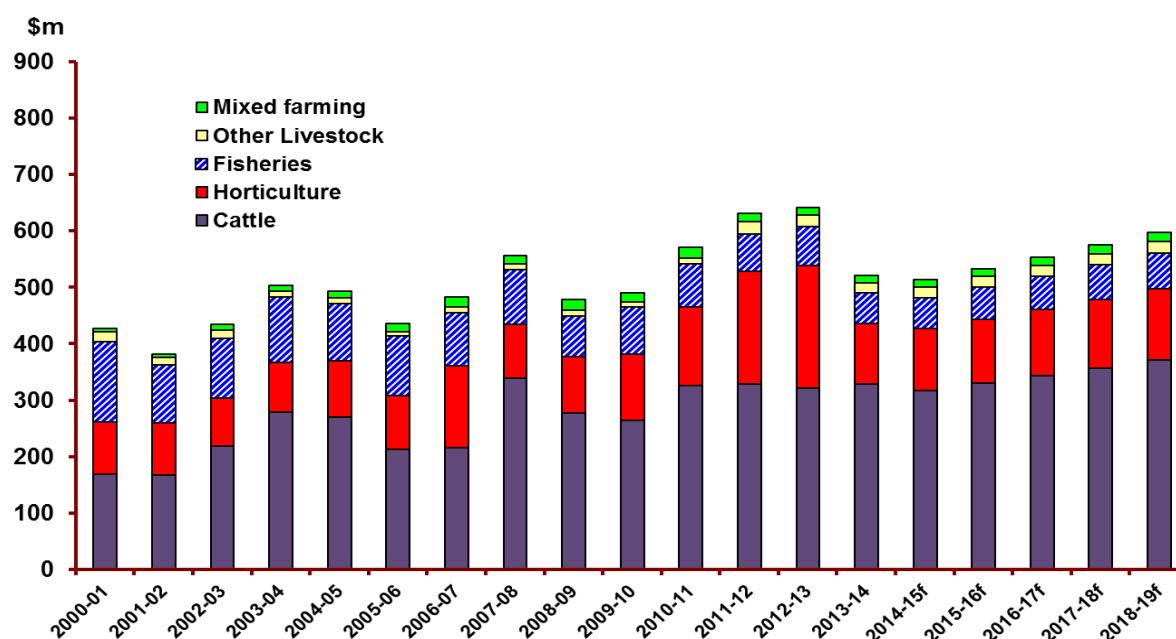
The majority of businesses and employment generated by the agricultural and fisheries industries (Table 3) are by (1) agricultural businesses (72.4%) and (2) most businesses are non-employing (66.1%).

In 2013-14, the total value of rural industries and fisheries production is estimated at \$521.2 million, a decrease of 18.1% over the previous year (see Figure 5). Table 4 represents the data used in Figure 5 in tabular form.

- This is due to a significant fall in the production value of horticulture by 50.3% to \$107.7 million.
- A 22.4% decrease in fisheries production to \$53.5 million.
- The production value of other livestock (mainly crocodiles) decreased by 13.9% to \$17.9 million.
- These decreases were offset by a 2.0% rise in the value of cattle production to \$328.8 million.
- An increase in mixed farming of 11.3% to \$13.3 million. These production values are driven predominantly by hay/fodder production that supports the live cattle export trade.



Figure 5: Primary Industry and Fisheries Outlook: Value of Production 2000-01 to 2018-19



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

Table 4: Primary Industry and Fisheries Outlook Production – 2000-01 to 2013-14 (\$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	218.9	85.2	105.6	14.8	11.0	435.5
2003-04	279.2	87.5	116.6	10.5	9.4	503.2
2004-05	270.9	98.6	102.5	9.7	12.0	493.7
2005-06	212.7	95.6	106.0	7.1	15.4	436.7
2006-07	215.8	145.1	94.0	10.0	18.9	483.9
2007-08	338.7	96.4	98.0	9.6	14.7	557.5
2008-09	275.0	99.3	72.8	10.1	18.2	475.4
2009-10	264.4	117.7	83.3	9.3	16.7	491.4
2010-11	325.2	138.7	76.6	10.7	19.0	570.2
2011-12	328.1	198.4	80.2	22.5	14.6	641.5
2012-13	307.4	216.8	78.7	20.8	13.0	636.6
2013-14	328.8	107.7	53.5	17.9	13.3	521.2

Source: Department of Primary Industry and Fisheries data collections



NT Primary Industry and Fisheries Performance

Figure 6: Current Year Performance of Northern Territory Commodities

Commodity	2012-13	2013-14	%	Performance
Value of Production	\$m	\$m	Change	Indicator
Live NT cattle exported overseas	\$145.9	\$230.6	58.0%	↑
Live NT cattle movements interstate	\$176.3	\$98.2	-44.3%	↓
Buffalo	\$0.8	\$2.0	151.1%	↑
Other Livestock	\$0.7	\$0.6	-11.6%	↓
Crocodiles	\$19.3	\$15.3	-20.7%	↓
Mangoes	\$69.4	\$35.0	-49.5%	↓
Table Grapes	\$1.7	\$0.0	-100.0%	↓
Bananas	\$5.4	\$0.0	-100.0%	↓
Melons	\$63.7	\$34.0	-46.6%	↓
Other fruits	\$0.6	\$3.6	550.5%	↑
Vegetables	\$59.9	\$16.1	-73.1%	↓
Nursery & Cut Flowers	\$16.2	\$17.4	7.7%	↑
Turf	\$0.0	\$1.5	0.0%	↑
Cereal crops	\$0.0	\$0.0	0.0%	→
Other crops	\$0.0	\$0.0	0.0%	→
Seed production	\$0.6	\$0.8	41.8%	↑
Hay/fodder production	\$12.4	\$12.5	0.6%	↑
Fin Fish	\$27.7	\$23.4	-15.5%	↓
NT Crustaceans	\$6.4	\$4.2	-33.6%	↓
NPF Crustaceans	\$9.5	\$10.5	10.3%	↑
Aquaculture	\$25.3	\$15.2	-39.9%	↓
Molluscs & Echinoderms	\$0.01	\$0.16	1059.6%	↑

Source: Department of Primary Industry and Fisheries data collections

NPF Crustaceans = Commonwealth administered prawn fishery

NT Primary Industry and Fisheries Outlook

- In the short and medium term, the NT agriculture and fisheries sectors are forecast to continue to expand production values (see Table 5).
- NT agriculture and fisheries sectors are projected to reach almost \$600 million in production value by 2018-19.

Table 5: Primary Industry and Fisheries Outlook Production 2014-15f to 2018-19f

Year	Cattle \$m	Horticulture \$m	Fisheries \$m	Other Livestock \$m	Mixed Farming \$m	Total \$m
2014-15f	318.0	108.7	55.0	18.5	13.7	513.9
2015-16f	330.7	112.9	56.8	19.1	14.1	533.5
2016-17f	344.0	117.2	58.6	19.7	14.5	554.0
2017-18f	357.7	121.6	60.5	20.3	14.9	575.0
2018-19f	372.1	126.1	62.5	20.9	15.4	597.0

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 new 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

Table 6: Output Multipliers by Industry for the NT Economy 2013-14

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 2013-14

Industry	Output Value by industry 2013-14 (\$m)	Output Value created in the rest of the NT economy 2013-14 (\$m)
Beef cattle	\$328.8	\$167.6
Other Agriculture	\$31.2	\$14.97
Horticulture	\$107.7	\$54.92
Commercial fishing	\$53.5	\$21.4
Total	\$521.2	\$259.0

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 2012-13

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

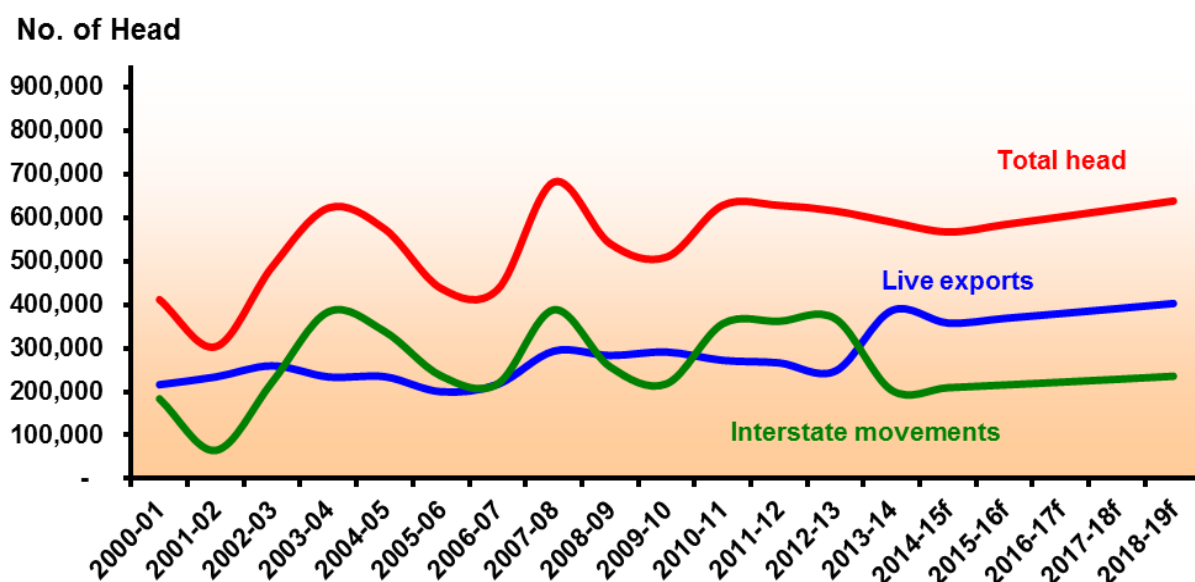
Source: Department of Business and Employment 2006-07

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 provides considerable flow-on benefits to other industries, particularly transport and storage, business to business services, and retail trade services.

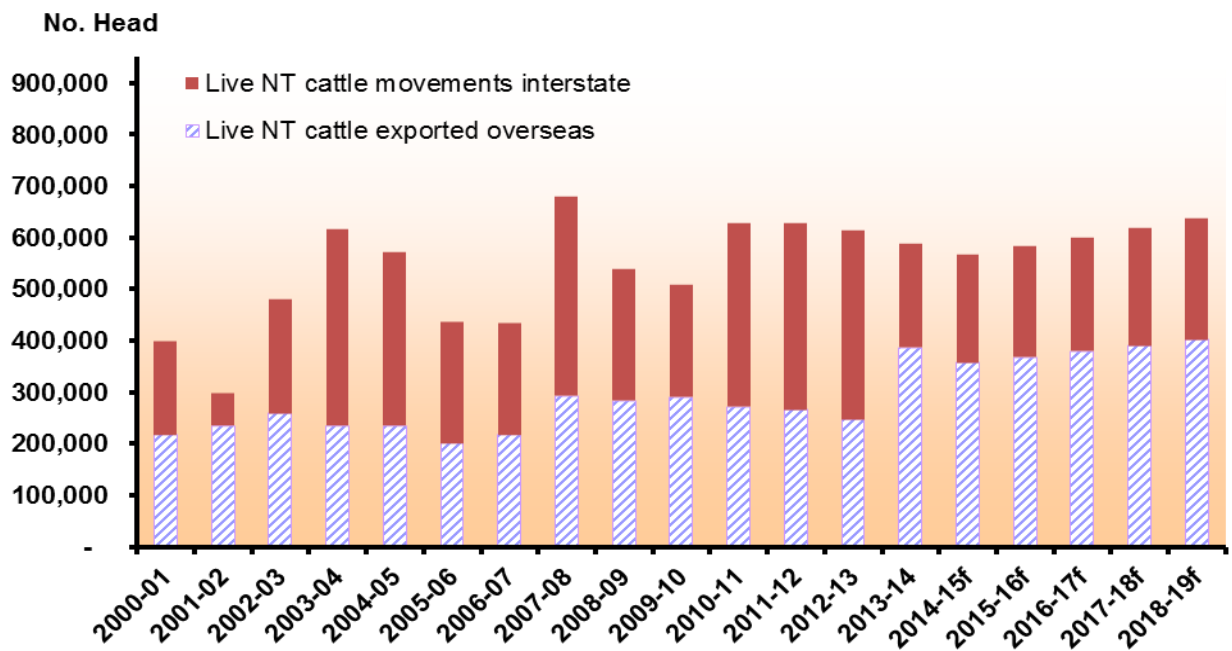
Figure 7: Northern Territory Cattle: Value of Production 2000-01 to 2018-19



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



Figure 8: Northern Territory Cattle Production Numbers 2000-01 to 2018-19



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

- The pastoral industry contributed 63.1% of the total value of the Northern Territory rural industries and fisheries production in 2013-14.
- The estimated value of production for the cattle industry was \$328.8 million in 2013-14, up 2.0% from the previous year (see Figure 7 and Table 4). In the current period, 589,397 head of NT cattle were sent overseas and interstate, down 4.1% from 2012-13.
- In 2013-14 the NT pastoral industry exported 386,355 head of live NT cattle, a 56.2% increase on the previous year (see Figure 8).
- During 2013-14 the NT pastoralists sent 203,042 head of cattle interstate, which is a -44.7% decrease on 2012-13 (see Figure 8).

The Northern Territory cattle population in 2013 was approximately 2.0 million head, about 7% of the total Australian herd.

The estimated cattle population by NT pastoral district,

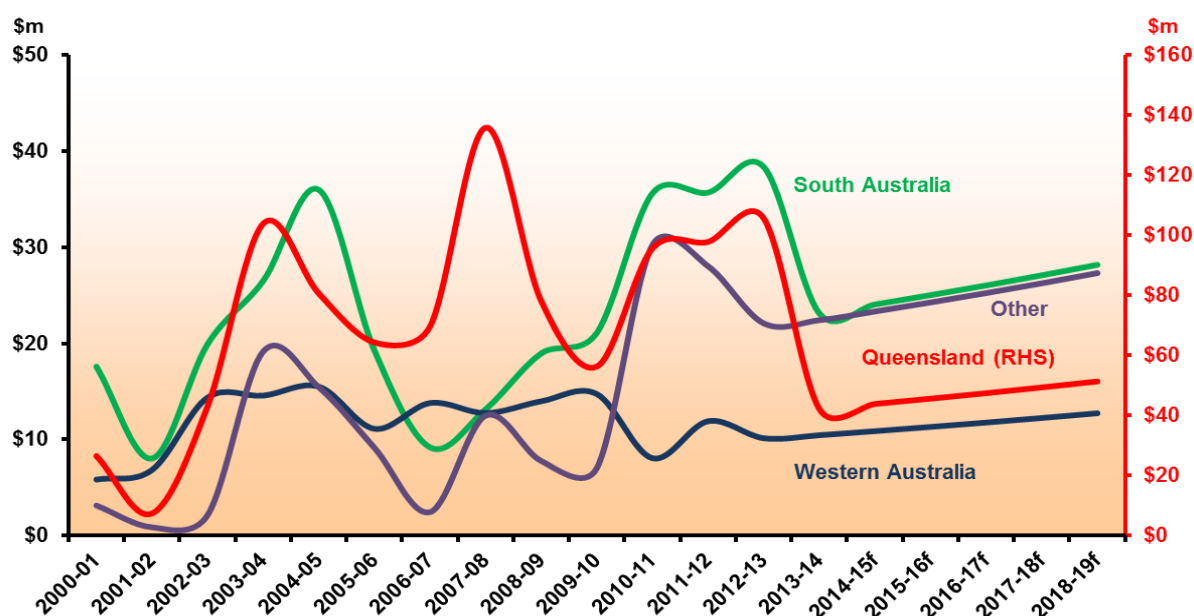
- Alice Springs Pastoral District has 20%
- Barkly Tablelands and Tennant Creek has 30%
- Victoria River District and Katherine has 32%
- Darwin, Elsey and Gulf have 18% of the total Territory herd.



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 2018-19



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

The value of the total interstate movements of Territory cattle in 2013-14 was estimated at \$98.1 million, down 44.3% from the previous year (\$176.2 million)

A total of 203,042 head of Territory cattle were sent interstate in 2013-14, a 44.7% decrease over the previous year (367,404)

- Queensland was the main destination for Territory cattle in 2013-14, taking about 43.3% (87,820 head of cattle) of the total interstate movement of cattle. This represents a decrease of 60.5% on the previous year (222,325 head). The value of Queensland movements was valued at \$42.1 million, down 60.1% on 2012-13 (\$105.6 million).
- 45,363 head or 22.3% of total interstate movements were sent to South Australia, down 40.3% on 2012-13 (75,991 head). This trade was valued at \$23.1 million, down 39.7% on the previous period (\$38.3 million).
- Western Australia took 13.2% (26,853 head of cattle) of total Territory cattle transferred interstate, an increase of 2.1% on 2012-13 (26,299 head). This was valued at \$10.4 million, a 3.1% increase on 2012-13 (\$10.1 million).
- 43,006 head of cattle (21.2% of total interstate movements) went to Other States (Vic & NSW), up 0.5% on the previous year (42,789 head). These movements are estimated at \$22.4 million, a rise of 1.5% on 2012-13 (\$22.0 million).

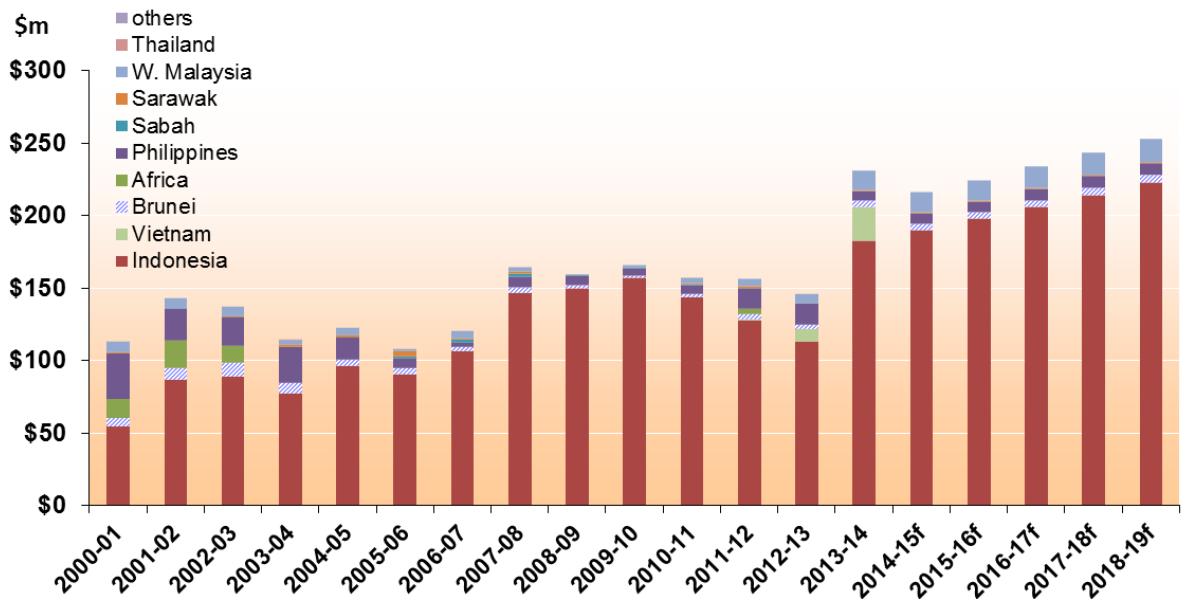


Live Cattle Exports

Territory live cattle exports in 2013-14 were estimated at \$230.6 million, a 58.0% increase over the previous period (\$145.9 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 2013-14, Territory cattle accounted for 38.8 % of the total Australian live cattle exports to all overseas markets and 50.5% of total Australia live exports to Indonesia.
- A total of 386,355 head of Territory cattle were exported to South East Asia, a 56.2% increase over 2012-13 (247,399)
- 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 2018-19



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

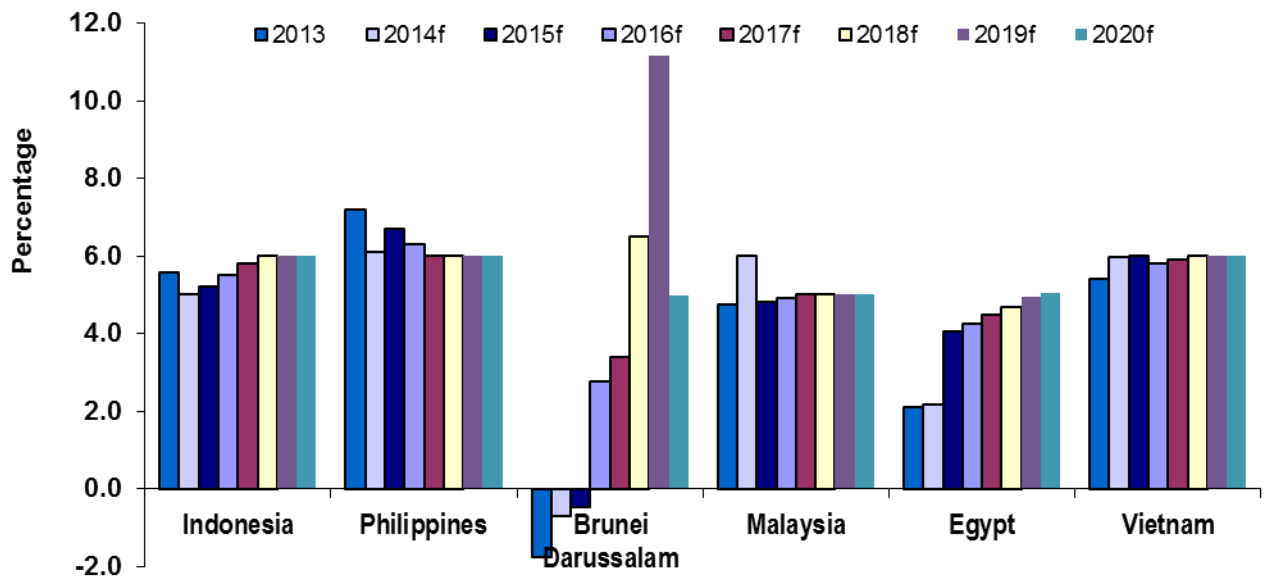
Indonesia is the largest market for Territory live cattle exports, taking 80.2% of total NT live cattle exports out of the Port of Darwin in 2013-14.

- NT cattle exports to Indonesia increased by 60.2% to 309,873 head in 2013-14 valued at \$182.7 million, up 61.8% on 2012-13 (\$112.9 million). Territory cattle export values grew as domestic beef prices in Indonesian rose sharply as demand outstripped supply.



- Vietnam (a new merging market for NT live cattle exports) received 39,171 head of cattle valued at \$23.0million in 2013-14. Last reporting period Vietnam received 15,827 head valued at \$9.2 million.
- In 2013-14, 19,003 cattle were exported to West Malaysia almost double from 9,648 head in 2012-13. Value of production rose 98.9% to \$13.2 million up from \$6.6 million last year.
- In 2013-14 Territory cattle exports to the Philippines fell 53.1% to 11,393 head of cattle, while value of production fell 52.6% to \$6.7 million.
- 6,115 head of cattle were exported to Brunei in 2013-14, representing 44.2% increase on the previous year (4,242 head). Production values increase 45.6% from \$2.9 million to \$4.2 million in 2013-14.

Figure 11: GDP Growth Forecasts for NT Live Cattle Export Major Destinations 2013-2020



Source: International Monetary Fund, World Economic Outlook Database, April 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 and chicken.

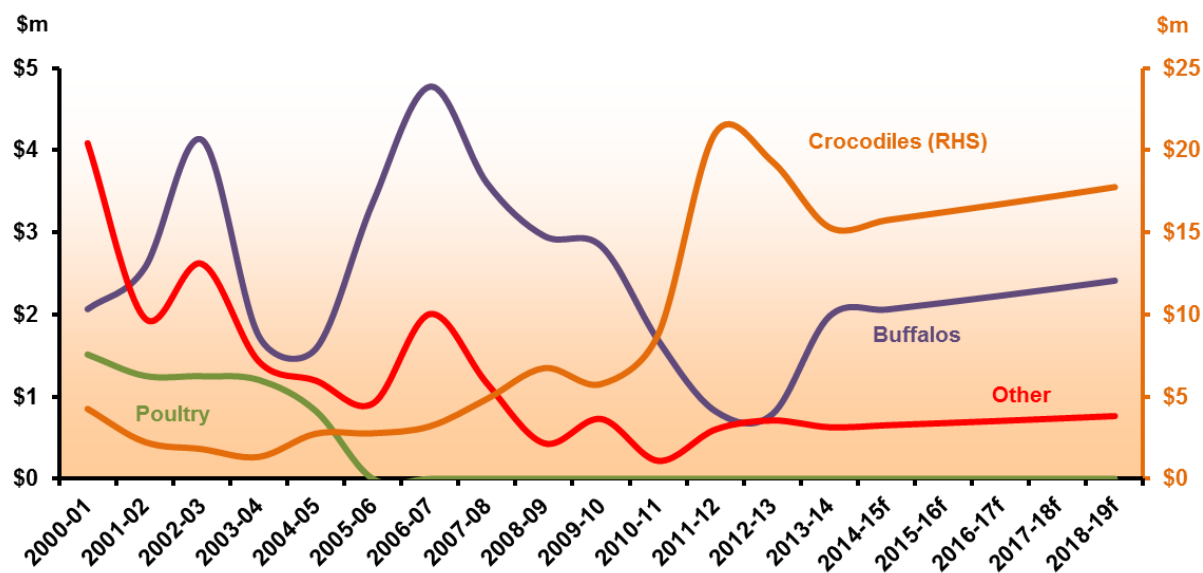
Other Livestock Industry

Other Livestock is a category of industries in the Northern Territory 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 2018-19



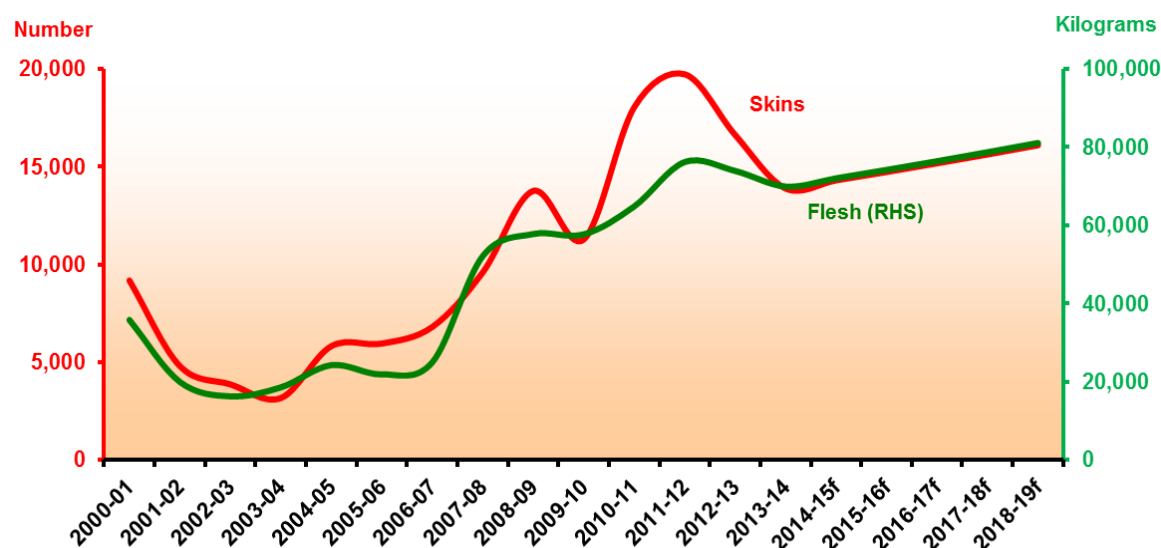
Source: Department of Primary Industry and Fisheries data collections, f = forecast

Total Other Livestock (crocodiles, buffalo, horses, camels, pigs, and goats) contributed 3.4% to the total value of Territory rural industries and fisheries production in 2013-14.

- In 2013-14 the total value of production in Other Livestock fell 13.9% to an estimated \$17.9 million down from \$20.8 million in 2012-13.
- For 2013-14 the value of the Territory's crocodile industry is estimated at \$15.3 million. This accounted for 85.4% of the total value of production of all the Other Livestock industries.
- Buffalo numbers rose 148.6% in 2013-14 to 2,464 head with an estimated value of production of \$1.9 million.
- 98.3% of the buffalo turned off were exported live overseas with Vietnam the largest importer (1,921) and Brunei (502 head). There were 41 buffalo sent to interstate markets in 2013-14.
- In 2013-14 there were horses (978), donkeys (222), camels (917), pigs (10) and goats (768) that are classified in the "Other" category in Figure 12. The estimated value of production was estimated at \$0.6 million, an 11.6% decrease on 2012-13 (\$0.7 million).



Figure 13: Northern Territory Crocodile Production 2000-01 to 2018-19



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

In 2013-14 the Territory's crocodile industry produced 69,928 kilograms of flesh, down 5.4% from the previous year (73,920 kilograms). The value of production for flesh in 2013-14 is estimated at \$0.4 million down 18.1% on 2012-13 (\$0.6 million).

- In 2013-14 the Territory's crocodile industry produced 13,887 skins down by 16.5% from 16,622 skins in 2012-13. The decrease was due to changing consumer demands and a desire to take longer to "finish" achieving improved skin quality. The value of production for skins in 2013-14 is estimated at \$13.4 million, a 22.2% decrease on the previous period (\$17.2 million).
- There were 948 live sales in 2013-14 valued at \$0.3 million. Live sales refer to individual animals that are sold as animals and not for production purposes.
- Other revenues derived from back straps croc products etc. is valued at \$1.05 million
- The Territory's crocodile industry total production value for 2013-14 to \$15.3 million. This is a 20.7% decrease in value on 2012-13 (\$19.3 million).

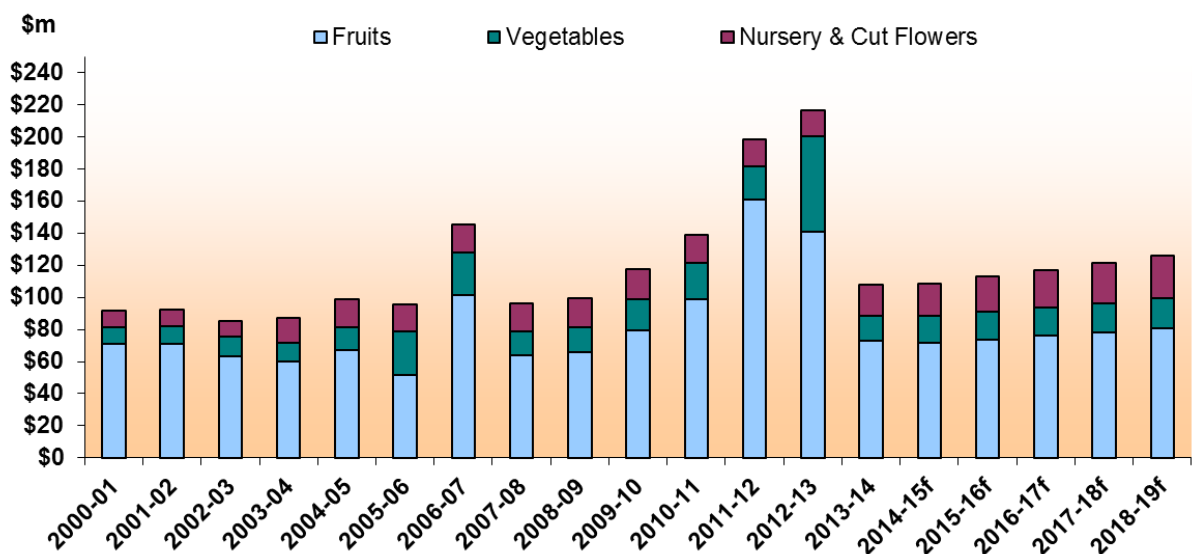


Horticulture

The Territory horticulture industry includes fruit, vegetables, nurseries and cut flowers. The value of Territory horticultural production (including nurseries and cut flowers) for 2013-14 was \$107.7 million a decrease of around 50.3% compared to the previous year (see Figure 14 and Table 2). Horticulture contributed an estimated 20.7% of the total value of Territory rural industries and fisheries production in 2013-14.

DPI&F horticultural statistics are obtained on a calendar year basis which corresponds to the harvesting season. As such, horticultural production figures for the 2013 calendar year are referred to as the 2013-14 financial year.

Figure 14: Northern Territory Horticulture: Value of Production 2000-01 to 2018-19



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

The main reasons for the decrease in the value of horticultural value of production in 2014 (2013-14) were due to (1) poor wet and dry seasons producing average yields, (2) average prices, (3) no table grape production due to rains just before harvest, (4) vegetables yields and prices returning to average levels and the (5) banana freckle eradication program. The majority of Territory horticultural production is destined for interstate markets.

- 67.5% (\$72.7 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 14.9% (\$16.1 million) to total horticulture value.
- 17.6% (\$18.9 million) of total Territory horticulture value is attributed to nursery, cut flowers and turf.

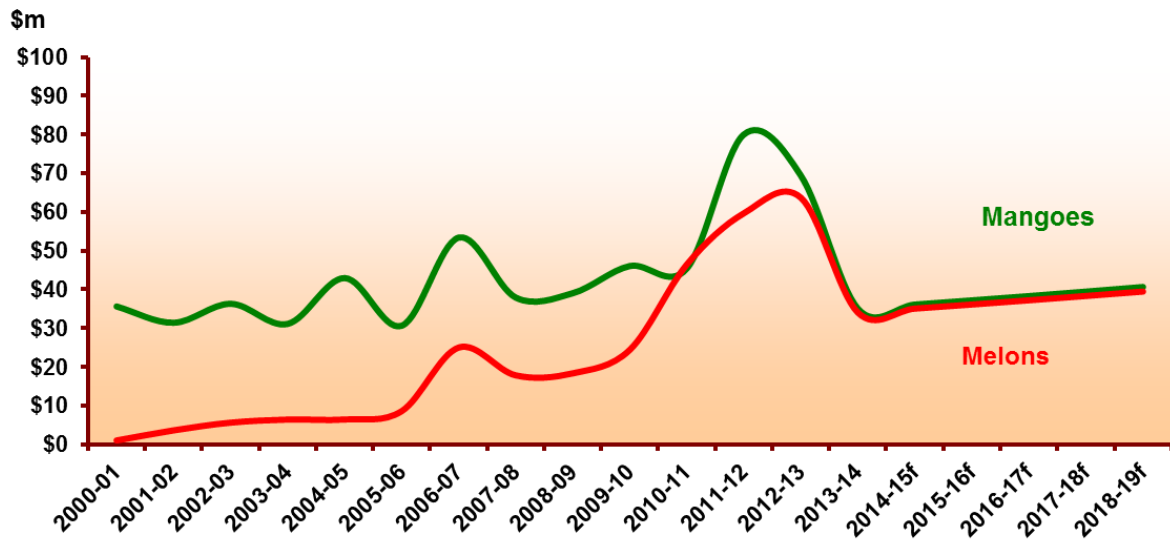


Fruit

The main fruits produced in the Territory include mango, table grapes, bananas and melons.

Fruit value of production was 48.4% less in 2013-14 largely due to decreases in yields, prices, no table grape production, and no banana production due to freckle eradication program.

Figure15: Northern Territory Mango and Melon: Value of Production 2000-01 to 2018-19

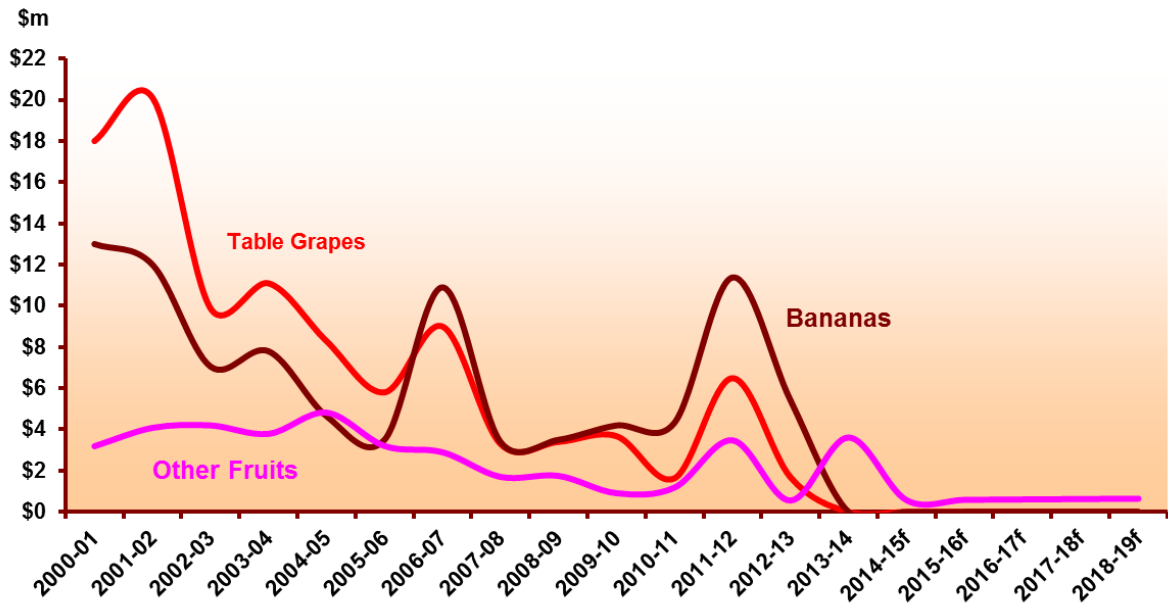


Source: Department of Primary Industry and Fisheries data collections, f = forecast

- Mangoes value of production decreased to \$35.0 million in 2013-14, down 49.5% on the previous period (\$69.4 million).
- Mango output fell by 63.6% to 10,560 tonnes compared to 29,000 tonnes in 2012-13.
- In 2013-14 melons value of production decreased to \$34.0 million, a 46.6% reduction on the previous year (\$63.7 million).
- 45,456 tonnes of melons were grown in 2013-14, up 2.5% on 2012-13 (44,333 tonnes).



Figure 16: Northern Territory Banana, Grape and Other fruit: Value of Production 2000-01 to 2018-19



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

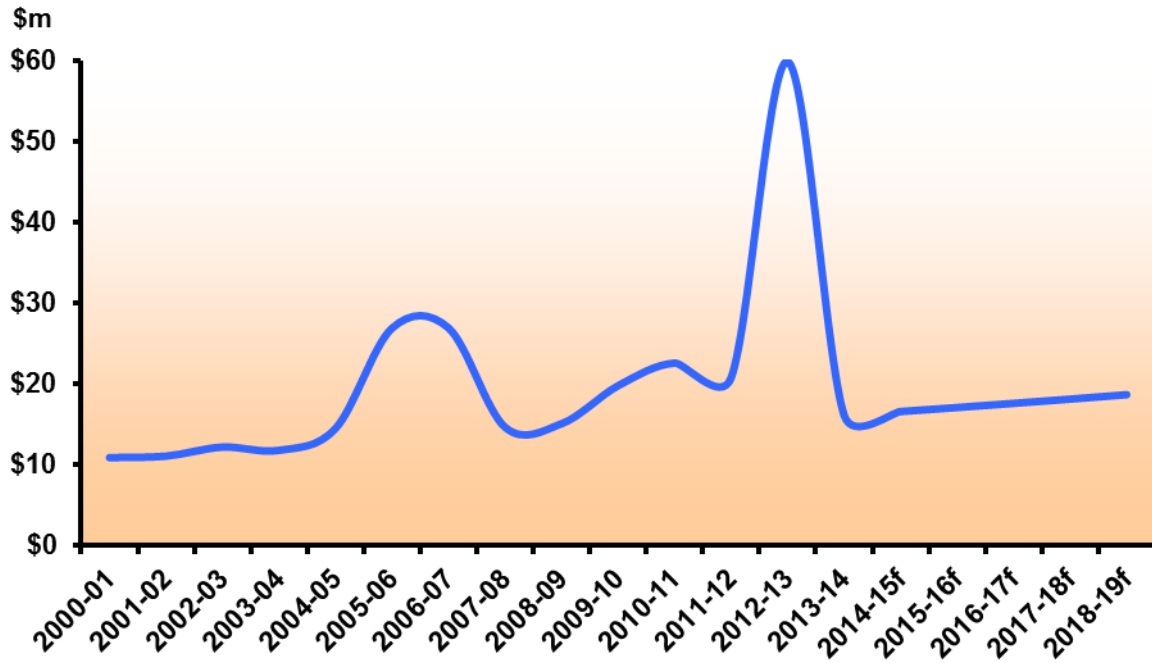
- There is no table grape output due to un-seasonal rain destroying crops before harvest.
- There is no banana production due to banana freckle eradication program.
- The production value of the Other Fruits category increased to \$3.6 million in 2013-14 a rise from \$0.6 million on 2012-13 results. Other Fruits production increased from 265 tonnes in the previous year to 1,752 tonnes in 2013-14.



Vegetables

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

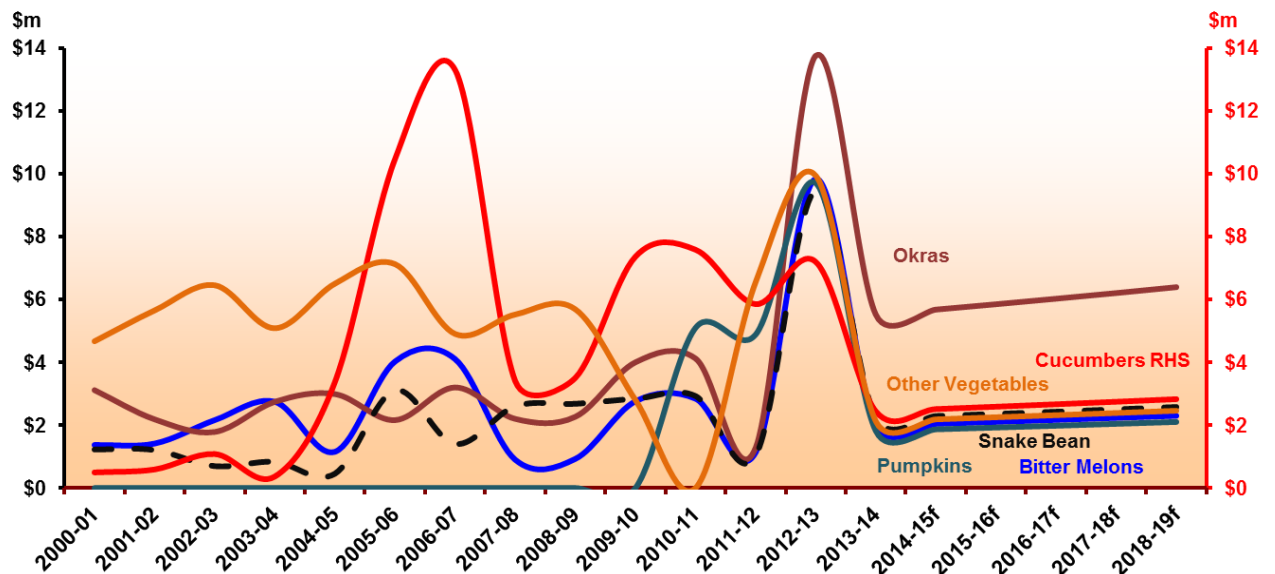
Figure 17: Northern Territory Vegetables: Total Value of Production 2000-01 to 2018-19



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

- Vegetable production was significantly lower in 2013-14 due to reported vegetable production returning to average yields and prices.

Figure 18: Northern Territory Vegetables: Value of Production 2000-01 to 2018-19



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

- Cucumber value of production decreased 66.1% to an estimated \$2.4 million in 2013-14 down from \$7.2 million in the previous year.

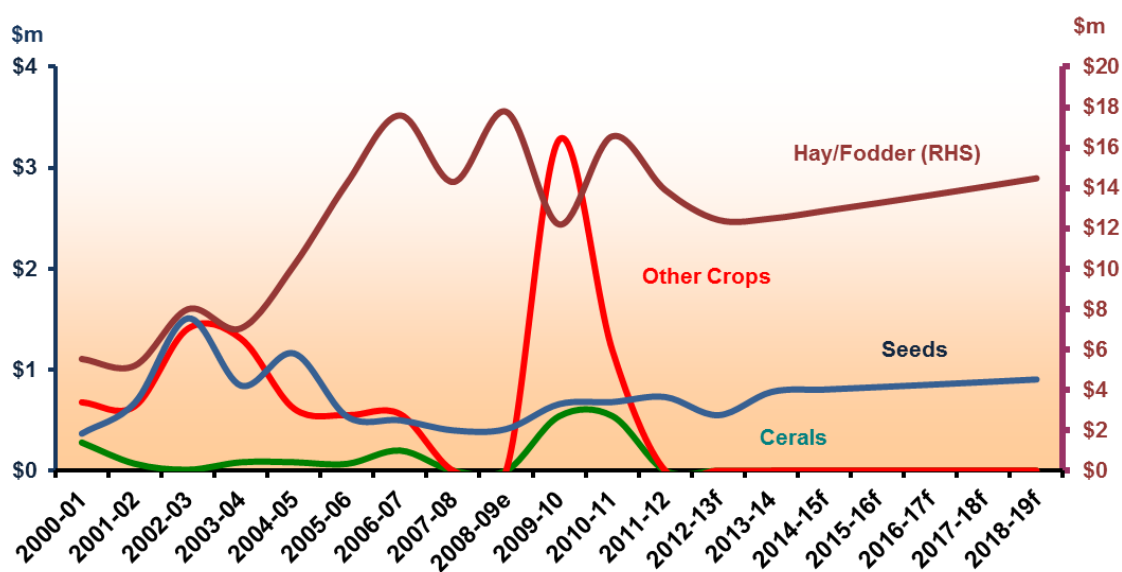


- Cucumber output decreased 53.1% to 1,344 tonnes in 2013-14 from 2,864 tonnes in the previous period. Prices for cucumber were extremely poor with many growers terminating their crop as the result.
- In 2013-14 the value of production for Okra was estimated at \$5.5 million, a 59.9% decrease from \$13.7 million in 2012-13.
- 922 tonnes of Okra was produced in 2013-14, down 55.0% from 2,047 tonnes in the previous year.
- Bitter Melon production values were estimated at \$2.0 million in 2013-14, a 79.9% decrease from \$9.8 million in the previous period.
- 768 tonnes of Bitter Melons were grown in 2013-14, down 77.5% from 3,415 tonnes in 2012-13.
- In 2013-14 value of production of Snake Bean decreased 76.5% to \$2.2 million compared to \$9.5 million in 2012-13.
- 384 tonnes of Snake Bean were produced in 2013-14, a 72.3% fall from 1,388 tonnes in the previous year.
- Pumpkin production fell 3.0% to 4,900 tonnes in 2013-14 from 5,053 tonnes for 2012-13 while value of production decrease 81.3% to \$1.8 million (as prices crashed) in 2013-14.
- The production value of the Other Vegetables category was \$2.1 million in 2013-14, down 78.6% from \$9.9 million for the last reporting period. Other Vegetables output was reported at 956 tonnes down 80.2% on the 4836 tonnes produced in 2012-13.

Field Crops

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

Figure 19: Northern Territory Field Crops: Value of Production 2000-01 to 2018-19



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



- Mixed farming contributed over 2.5% of the total value of Territory rural industries and fisheries production in 2013-14.
- The value of field crop production in 2013-14 was \$13.3 million, a 2.3% increase from 2012-13 (\$13.0 million).
- Hay/fodder production accounted for 94.1% (\$12.5 million) of the total field crops production values in 2013-14. This is a 0.6% increase in value on 2012-13 (\$12.4 million).
- Hay/fodder output for the current period was 52,560 tonnes, up 0.4% on 52,340 tonnes produced in 2012-13.
- In 2013-14 there was 41.8% increase in seed production valued at \$0.8 million, up from \$0.6 million in 2012-13.

FORESTRY

- In 2012–13, wood products generated \$22 million, but data for income from paper and paper products were not available for this period. Woodchips are not exported from the Northern Territory.

Source: Agriculture, Fisheries and Forestry in the Outback region of the Northern Territory, 2015 ABARES

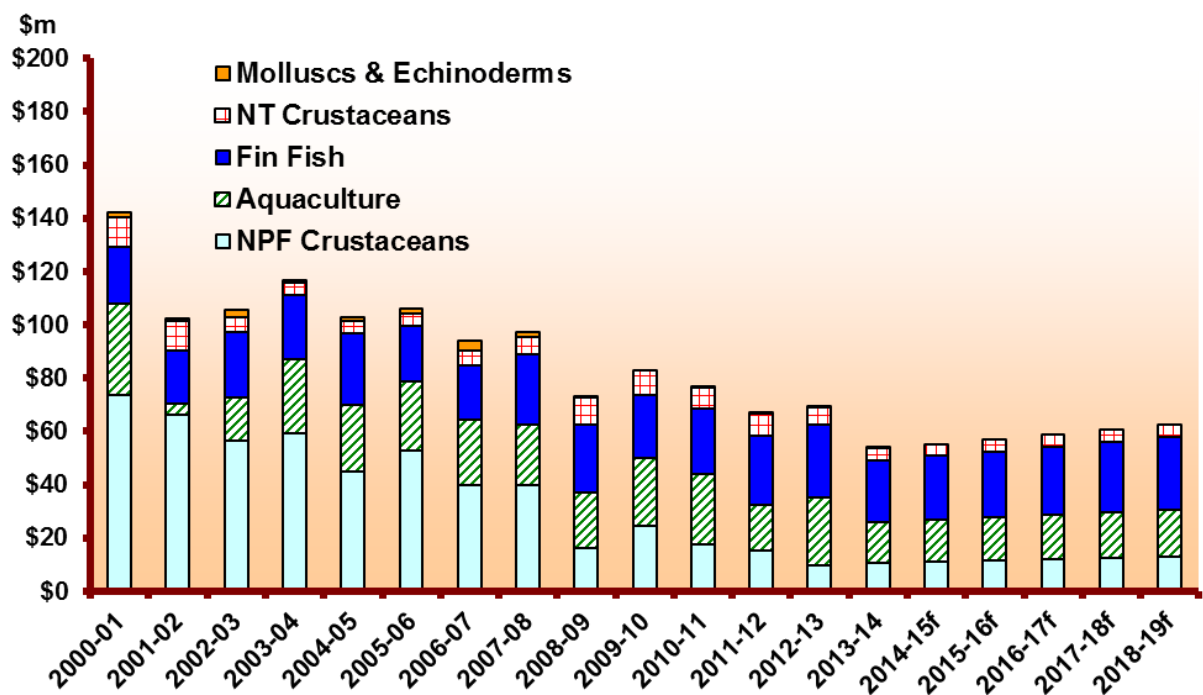


Fisheries

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 downward value trend (see Figure 20 and Table 4) is also reflected in Territory fisheries, with the total value of fishing production in 2013-14 decreasing by 22.4% to \$53.5 million, down from \$68.9 million the previous year. This decrease is mainly attributed to the falls in aquaculture, and to a lesser extent NT wild catch (fish) and NT crustaceans.

Figure 20: Northern Territory Fisheries: Value of Production 2000-01 to 2018-19



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

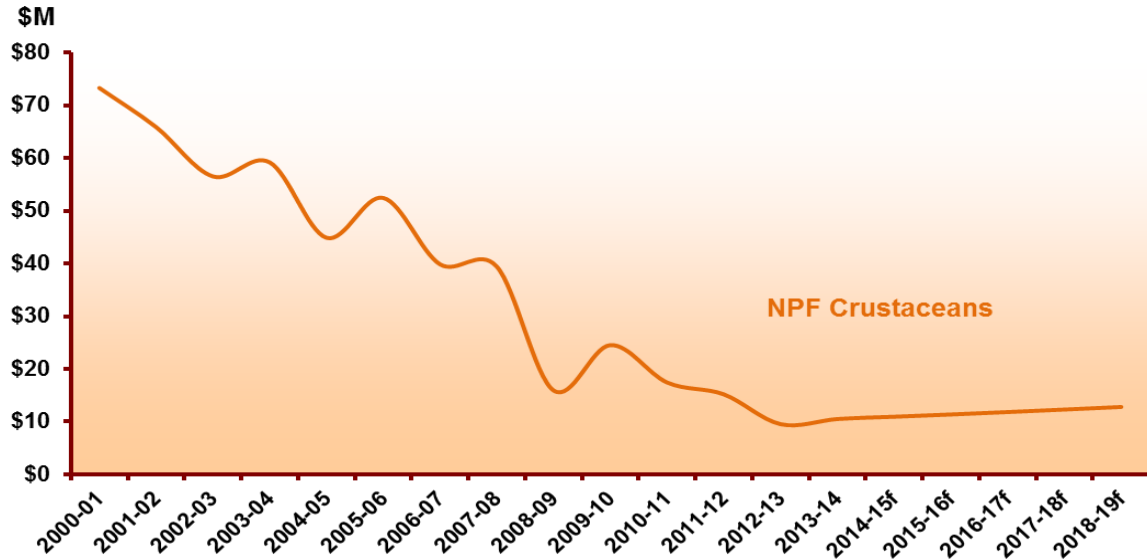
Fisheries contributed an estimated 10.3% of the total 2013-14 value of Territory rural industries and fisheries production value.

- Fish production value is estimated at \$23.4 million for 2013-14, a decrease of 15.5% on the previous year (\$27.7 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 33.6%, from \$6.4 million in 2012-13 to an estimated \$4.2 million in 2013-14.
- Total aquaculture production value decreased by 39.9% to an estimated \$15.2 million in 2013-14, down from \$25.3 million for the previous year. This is primarily due to decreases in pearl and barramundi production.



- The value of molluscs and echinoderms was estimated at \$0.2 million in 2013-14. No production was recorded in 2012-13.

Figure 21: Figure 19: Northern Prawn Fleet Production Value: 2000-01 to 2018-19



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

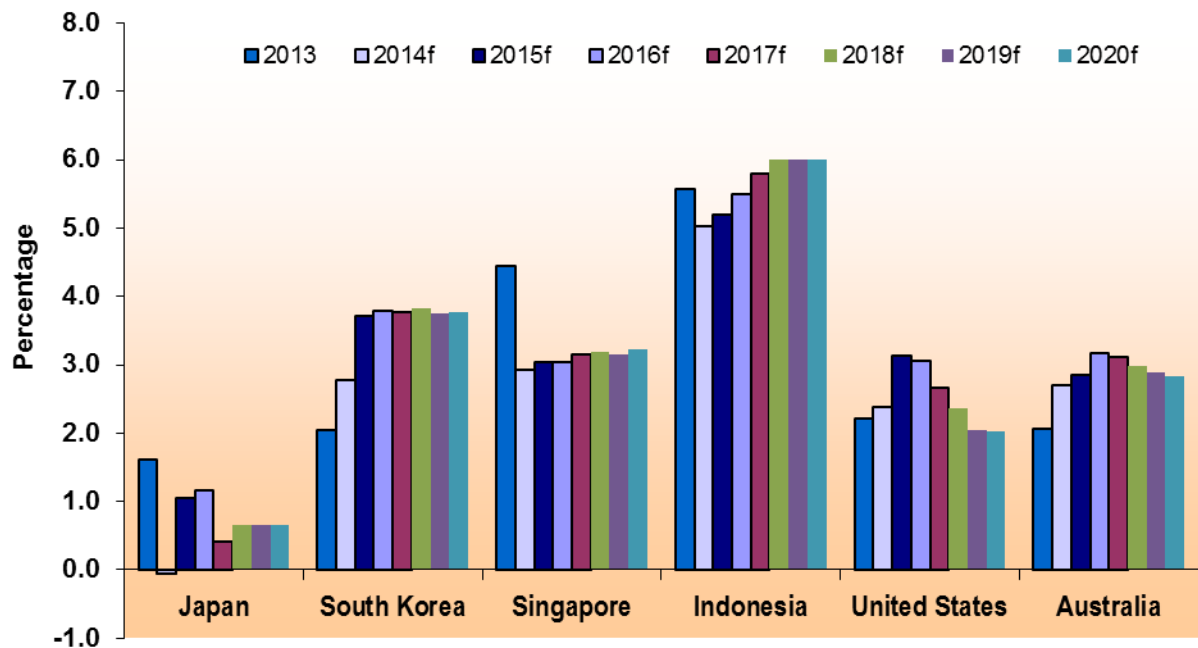
- In 2013-14 the estimated value of the prawn catch by the Northern Prawn Fleet (Commonwealth managed Fishery) increased by 10.3% to \$10.5 million (see Figure 21). In 2012-13 value of production was estimated at \$9.5 million.
- Output from the Northern Prawn Fleet for 2013-14 is estimated at 0.738 tonnes, a 3.0% increase on the previous period (0.717 tonnes).



Northern Territory Major International Trading Partners

- South East Asia (namely 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 21: NT Trading Partners GDP Forecasts 2012-2020



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

Northern Territory International Trading Partners: Exchange Rates

In 2013 the Australia Dollar has been depreciating across the currencies list in Table 10 (offset by moderating against the Indonesian Dollar), 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 10 (1) & (2) & (3): Exchange Rates of Northern Territory's International Trading Partners

last working day of the month (daily 4pm)	Apr 2013	May 2013	Jun 2013	Jul 2013	Aug 2013	Sep 2013
US - Dollar	1.04	0.96	0.93	0.90	0.89	0.93
Japan - Yen	101.39	97.34	91.64	88.48	87.84	91.13
Euro	0.79	0.74	0.71	0.68	0.68	0.69
Singapore Dollar	1.28	1.22	1.17	1.15	1.14	1.17
Malaysian - Ringgit	3.14	2.98	2.94	2.94	2.94	3.04
Taiwan - Dollar	30.54	28.90	27.80	27.08	26.77	27.53
Indian - Rupee	56.22	54.54	55.36	55.18	59.64	58.42
Indonesia - Rupiah	10081	9459	9208	9290	9770	10845
Chinese - Renminbi	6.39	5.92	5.70	5.54	5.48	5.70
	Oct 2013	Nov 2013	Dec 2013	Jan 2014	Feb 2014	Mar 2014
US - Dollar	0.95	0.91	0.89	0.88	0.89	0.92
Japan - Yen	93.40	92.94	93.95	89.75	90.91	94.83
Euro	0.69	0.67	0.65	0.65	0.65	0.67
Singapore Dollar	1.18	1.14	1.13	1.12	1.13	1.16
Malaysian - Ringgit	3.00	2.93	2.94	2.93	2.94	3.02
Taiwan - Dollar	27.89	26.91	26.75	26.60	27.14	28.10
Indian - Rupee	58.24	56.60	55.38	54.70	55.58	55.22
Indonesia - Rupiah	10714	10884	10899	10700	10417	10475
Chinese - Renminbi	5.78	5.54	5.41	5.31	5.51	5.74

Source: Reserve Bank of Australia April 2013 to March 2014

The Percentage Rate of Change from the April 2013 to March 2014

US - Dollar	-11.1%
Japan - Yen	-6.5%
Euro	-15.2%
Singapore Dollar	-9.0%
Malaysian - Ringgit	-4.0%
Taiwan - Dollar	-8.0%
South Korean - Won	-1.8%
Indonesia - Rupiah	3.9%
Chinese - Renminbi	-10.2%



Publications

- *Information for Prospective Investors in Agricultural Enterprises in the Northern Territory*
<http://www.nt.gov.au/d/Content/File/p/pi/AgriBro.pdf>
- DBE Annual Report 2012-13
[Annual Report 2012-13 - Department of Business](#)
- Department of Primary Industry and Fisheries Annual Report 2012-13
[Annual Reports-Department of Primary Industry and Fisheries-DPIF](#)
- Fishery Status Reports 2012
[Fishery Status Reports-Department of Primary Industry and Fisheries-Fisheries](#)
- Northern Territory Rural Industries and Fisheries: Economic Outlook 2013
http://www.nt.gov.au/d/Content/File/p/pi/economic_outlook_2013.docx
- Northern Territory Department of Primary Industry and Fisheries Industry Development Plan 2013-2017
http://www.nt.gov.au/d/Content/File/p/pi/DPIF_Development_Plan1.pdf

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
<http://www.nt.gov.au/dbe/index.html>
- Department of Primary Industry and Fisheries
<http://www.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/>
- Reference Library – Economic Indicators (DBE)
<http://www.nt.gov.au/dbe/economics.shtm#abs>