Western Australian agrifood and fisheries exports by global regions 2015/16

- North America: $127m
- Central America and Caribbean: $4m
- Africa, South of Sahara: $42m
- Middle East and North Africa: $848m
- North-East Asia: $2117m
- Other Asia: $142m
- ASEAN: $2579m
- Oceania: $30m
- Europe: $763m
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About this booklet

The Western Australia Agrifood, Fibre, Fisheries and Forestry Industries (WAAFFFI) booklet is developed by the Department of Primary Industries and Regional Development (DPIRD) in partnership with the Forest Products Commission.

WAAFFFI has a trade focus and provides a single source for consistent Western Australian agrifood, fibre, fisheries and forestry industry statistics and insights on observed industry trends.

The 2017 WAAFFFI booklet is based on 2015/16 economic indicators from the Department of Treasury, DPIRD data and statistics from the Australian Bureau of Statistics (ABS), in line with the release cycle dates of final ABS data. All values are in Australian dollars.

Export values published in this edition of WAAFFFI differ significantly from previous editions. This is due to the ABS increasing the threshold for the Estimated Value of Agricultural Operations from $5000 to $40 000; and DPIRD reviewing some agrifood export codes for accuracy and consistency.

Forestry industry exports are not presented in this booklet as data is not publicly available.

Please note that for some graphs and tables, the figures and percentages presented do not always add to the total and/or 100% due to rounding.
2017 Western Australia’s Agrifood, Fibre, Fisheries and Forestry Industries

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Western Australia’s agriculture, food, fibre, fisheries and forestry industries are providers of world-class, premium, safe products.

The growing global demand for food presents an opportunity for Western Australia to realise the long-term potential of its agricultural development.

About 60% of the world’s population lives within Western Australia’s time zone, making us ideally placed to capitalise on opportunities.

Our state government plays a significant role in harnessing international trade opportunities for the Western Australian agriculture and food sector.

We are investing to build Western Australia’s research and development capabilities to assist our growers and processors to be competitive in a 21st century market.

The state government, through the Department of Primary Industries and Regional Development and the Forest Products Commission, is working on major initiatives to grow, protect and support the sectors to help ensure their long-term success.

Increased investment and international trade are paramount to the development of agriculture, food and fibre industries.

We work with industry to help negotiate regulatory barriers and to assist in developing export capabilities and investment attraction.

The department works in partnership with businesses, industries, communities and other governments at the domestic and international level.

The Gross Value of Agricultural Production (GVAP) for 2015/16 was $8.2 billion, up 4.2% from 2014/15 ($7.9 billion).

The top export destinations (by $ value) were Indonesia ($941 million), mainland China ($912 million), Vietnam ($833 million), Japan ($542 million), South Korea ($514 million) and Germany ($271 million).

The sector places a high value on overseas markets and works to drive innovation to deliver better outcomes for our customers in Australia and overseas.

We have grown our capacity to better meet market demand.

An increasingly prosperous Asia, coupled with rapid worldwide population growth, is now starting to provide the buying power needed to make that development viable.

Our range of climatic conditions means we are uniquely placed to provide year-round quality food products for domestic consumption and for export.

Watch us grow.

Hon Alannah MacTiernan MLC
Minister for Agriculture and Food
High-quality fisheries and pristine waters have given Western Australia an international reputation as a producer of premium quality seafood.

Covering one-third of the Australian continent, and with 12,500 kilometres of coastline, Western Australia’s immaculate blue waters are home to a fantastic diversity of marine life covering both temperate and tropical climate regions.

Commercial fishing, including pearling and aquaculture, contributes almost $600 million in exports to the state’s economy each year, providing employment for thousands of Western Australians in these sectors and associated service industries.

Most of Western Australia’s seafood is exported and destined for markets in China and Hong Kong.

Third-party certification, through the international sustainable fisheries certification body, the Marine Stewardship Council (MSC), has been important to Western Australia’s western rock lobster fishery, the first fishery in the world to receive such accreditation and to be re-certified three further times.

The tick of approval from a well-respected third-party certification group is increasingly becoming the standard expected by consumers and the seafood retail industry across the globe. As well as recognising the sustainability of the assessed fish stocks, certification demonstrates our fisheries management achieves the highest international standard.

Building on the rock lobster certification, a number of other Western Australian fisheries now have the MSC sustainability tick, including Shark Bay and Exmouth Gulf prawns, Peel-Harvey blue swimmer crabs and the abalone and deep sea crustacean fisheries.

Government and industry partnerships, along with management arrangements developed in consultation with all user groups, ensure that the state’s fisheries will be in excellent health for future generations.

Hon Dave Kelly MLA
Minister for Fisheries
The Department of Primary Industries and Regional Development (DPIRD) was established on 1 July 2017. It sees the amalgamation of the departments of Agriculture and Food, Fisheries, and Regional Development, and staff from nine Regional Development Commissions.

DPIRD provides a strong and unified service for Western Australia’s food-oriented primary industries and regions. It provides the state government with the opportunity to tap into additional skills and resources; pursue significant activities with a whole-of-government focus; and more effectively harnesses innovation that advances the capability and prosperity of the agrifood and fisheries industries.

These changes elevate the importance of the state’s primary industries and regions, reinforcing the state government’s commitment to capitalising on the growth opportunities across industry to drive new employment opportunities.

**Agriculture and food**

Agriculture and Food within DPIRD is the state government’s peak agricultural development body. Its focus is on enabling the agrifood sector to capitalise on local, national and international market opportunities while protecting the state’s resources through biosecurity and natural resource management activities.

While Agriculture and Food’s work is aimed primarily at building jobs and economic diversity, our activities also generate significant social and environmental benefits through research and development in the areas of land and water management, nature conservation, salinity, soil acidity and climate.

Western Australia’s agrifood sector comprises some 14 500 agriculture-related businesses, with a gross value of agricultural production of $8.2 billion in 2015/16.

Regular engagement and consultation with industry ensures that the state government is aware of the challenges faced by the agrifood sector, understands key drivers for growth and is able to support business to respond to new and niche market opportunities.

Agriculture and Food works closely with the agrifood sector, from suppliers of raw materials through to producers, processors, marketers and consumers. It partners with scientists, innovators and regulators throughout the world to make the best use of global advances in agriculture and food-related innovation, technologies and best practice.

Importantly, the department is a strong advocate for the state’s agrifood sector and its vital contribution to the economy, jobs and regional growth. It aims to drive increased opportunities through identifying consumer demand and opportunities for product innovation and facilitating the development of value-added processing to create premium quality food and beverages.

The contribution of the agrifood sector to the state’s economy has increased in real terms in recent years, reflecting growing international demand, particularly from Asia, for the state’s high-quality, traceable and clean produce. This trend is expected to continue, and Agriculture and Food will play a critical role in ensuring that the state’s agrifood sector is able to capitalise on this growth opportunity.
Fisheries

Fisheries within DPIRD is responsible for conserving, sustainably developing and sharing the use of Western Australia’s aquatic resources and their ecosystems for the benefit of present and future generations.

This is done through managing fisheries and aquatic ecosystems, assessing and monitoring of fish stocks, enforcement and education, biosecurity management and licensing commercial and recreational fishing activity, including commercial aquaculture.

Fisheries licenses and regulates commercial fisheries, which includes rock lobster, pearling, prawns, scallops, abalone and finfish and is annually worth almost $600 million in exports. It also manages a state-wide recreational fishery accessed by more than 750 000 people.

The core responsibility of Fisheries is the management of fisheries and aquatic resources, including pearling and aquaculture in Western Australia. This is done in collaboration with the local fisheries and fisheries-related sectors, and the community.

DPIRD carries out fisheries research, management, surveillance, enforcement and education along the state’s 12 500 kilometre coastline and within Australia's Exclusive Economic Zone, which extends 200 nautical miles (370 kilometres) from the state’s coast.

Forest Products Commission

The Forest Products Commission (FPC) builds and maintains a sustainable and commercially viable forest products industry that provides economic and social benefits for all Western Australians. The FPC supports the industry using native forests, pine and sandalwood plantations and wild sandalwood on land owned or leased by the state, ensuring that Western Australia’s forests are a strategic and sustainable resource into the future.

The agency contributes to the economy via sustainable harvesting and regeneration of the state’s forest resources, promoting innovation and generating a positive return to the state.

FPC’s operations include harvesting and selling of wood and forest products, forest regeneration and working with government, industry and the community. This includes promoting dual access in the state’s forests and plantations for other uses such as recreation, to support tourism.

The forest products industry in Western Australia contributes about $1 billion annually to the state’s economy and directly employs more than 5000 people, including many in regional and remote areas.

The FPC takes its environmental and social responsibilities seriously and sustainable management is the cornerstone of the Western Australian forestry industry. Forest operations managed by the agency are independently audited and certified under the Australian Forestry Standard and the Environmental Management System ISO 14001.
## Facts and Figures

### Western Australia’s economy (2015/16)

<table>
<thead>
<tr>
<th>Category</th>
<th>Value</th>
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<tbody>
<tr>
<td>Gross State Product</td>
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<td>Economic growth rate</td>
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<tr>
<td>Population</td>
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<tr>
<td>Imports</td>
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<tr>
<td>Exports</td>
<td>$99.6 billion</td>
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<td>Life expectancy at birth</td>
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<td>• males</td>
<td>81 years</td>
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<tr>
<td>• females</td>
<td>85 years</td>
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<td>Unemployment rate</td>
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<tr>
<td>Inflation rate</td>
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<td>Average weekly earnings</td>
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Land and sea use
Overview

- Western Australia is the largest Australian state, covering the entire western third of the continent.
- It spans 2400 kilometres from north to south, with a land area of more than 2.5 million square kilometres and a coastline of 12 500 kilometres.
- Western Australia’s waters are home to a diverse range of marine life that contributes to our international reputation as a producer of premium quality seafood.
- The capital city of Perth is closer geographically to Jakarta, Indonesia, than it is to Australia’s capital Canberra.
- From the tropical north, to the temperate areas in the south-west corner, Western Australia experiences a variety of climatic conditions. As distance from the coast increases, rainfall decreases and the temperature variations become greater.
- In 2016, the five-year average growing season rainfall in the south-west of Western Australia was 448 millimetres.
- Agriculture is Western Australia’s second major export industry.
- The state’s soils and range of climates are suited to a variety of agricultural and forestry production, from broadacre cropping to irrigated pastures, horticulture and sandalwood.
- This vast land area creates opportunities for a diverse agricultural sector that provides the raw materials for a rapidly growing range of processed exports. These include wine, barley, malt, noodles and fine leather.
- Western Australia’s production areas are free from major animal and plant pests and diseases common in many other parts of the world. Strict biosecurity requirements and regulations ensure this status is maintained for the benefit of local producers and consumers around the globe.
- A major east–west rail line carries freight and passengers between Western Australia and other Australian states. An extensive rail network services agriculture and industry in the state’s south-west.
- Perth Airport has regular services linking Perth to global destinations. The services are capable of freighting premium agrifood, fisheries and high-value forestry products (such as essential oils) to major destinations, including China, Hong Kong, Indonesia, Malaysia, Singapore and the Middle East.
- International containerised shipping can be accessed at Fremantle (south of Perth), the state’s main port. The nine regional ports — Albany, Broome, Bunbury, Dampier, Esperance, Geraldton, Kwinana, Port Hedland and Wyndham — are linked to major agrifood and forestry producing areas.
- The main ports used to load bulk grain are Geraldton, Kwinana, Bunbury, Albany and Esperance. The main ports used to load live cattle and sheep are Fremantle, Broome, Wyndham and Geraldton.
<table>
<thead>
<tr>
<th>Legend</th>
<th>Description</th>
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<tbody>
<tr>
<td><img src="image" alt="Cow" /></td>
<td>Rangelands — mainly cattle grazing</td>
</tr>
<tr>
<td><img src="image" alt="Sheep" /></td>
<td>Rangelands — mainly sheep and goats</td>
</tr>
<tr>
<td><img src="image" alt="Pasture" /></td>
<td>Rangelands — no grazing</td>
</tr>
<tr>
<td><img src="image" alt="Crops" /></td>
<td>Broadacre farming (cropping and livestock)</td>
</tr>
<tr>
<td><img src="image" alt="Pasture" /></td>
<td>Intensive livestock grazing on improved pastures</td>
</tr>
<tr>
<td><img src="image" alt="Dairy" /></td>
<td>Dairy</td>
</tr>
<tr>
<td><img src="image" alt="Fruit" /></td>
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<td>Viticulture</td>
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<td><img src="image" alt="Trees" /></td>
<td>Forestry plantations</td>
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<td><img src="image" alt="Desert" /></td>
<td>Arid interior</td>
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<tr>
<td><img src="image" alt="Irrigation" /></td>
<td>Irrigated horticulture outside south-west region</td>
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<tr>
<td><img src="image" alt="Airplane" /></td>
<td>International airport</td>
</tr>
</tbody>
</table>
Production and exports
Overview

Production
- In 2015/16, the gross value of Western Australia’s agricultural production was $8.2 billion, up from $7.9 billion in 2014/15.
- Western Australia produces more grain than any other state in Australia. Western Australia’s total wheat production in 2015/16 of 8.5 million tonnes equates to over 38% of Australia’s total production (22.3 million tonnes).
- It is also a significant producer of high-quality meat and livestock, oilseed, seafood, dairy, wool, and viticulture, horticulture and honey products.
- Western rock lobster dominates the fisheries sector in Western Australia with the state also producing crab, prawns (shrimps) and marron (native freshwater crayfish), abalone, scallops and finfish.
- The forestry industry comprises hardwood plantations, softwood (pine) plantations, native timbers and sandalwood. In 2015/16, the value of logs harvested by the industry was $350 million. Production was dominated by hardwood plantations, which accounted for $262 million of the value of logs.

Exports
- The agrifood, fibre and fisheries industries are highly export orientated, accounting for over $7.6 billion in exports in 2015/16.
- Exports have increased by almost 49% over the past seven years, driven by strong growth in barley, canola, lupin and lobster exports. However, 2015/16 was the first year to experience negative (year-on-year) growth since 2010/11.
- In 2015/16, the top three products exported were wheat, barley and canola, closely followed by wool and lobster.
- In 2015/16, the top five Western Australian export markets for agrifood products were Indonesia, mainland China, Vietnam, Japan and South Korea.
- The most valuable fish species in Australia – western rock lobster – accounted for $453 million or 76% of fisheries exports in 2015/16.
- There is a high-level of overseas demand for live animals (cattle and sheep) from Western Australia, driven mainly by South-East Asia and the Middle East.
- Almost one-third of Australia’s live animal exports come from Western Australia.
- Much of Western Australia’s seafood products are used in high-class restaurants in China (including Hong Kong) and throughout Asia.
- For the first time since 2010/11, exports to the South-East Asian markets (including Indonesia, Malaysia, Singapore and Vietnam) exceeded those to the North-East Asia region (including mainland China, Japan and South Korea).
Competitive strengths

Western Australian agrifood, fibre, fisheries and forestry industries take advantage of growing global demand by building on a range of competitive strengths, including:

» a well-managed and protected environment that uses high-quality, traceable systems and certification to ensure that Western Australia maintains its advantage as a reliable producer of clean, safe and premium food
» land and irrigation water resources available to expand production
» an ecologically sustainable fisheries industry
» distinct and quality forestry products
» diverse land and climatic conditions allowing production year-round
» modern infrastructure and sophisticated supply chains
» access to the latest innovations through vibrant national and international science and innovation partnerships
» a stable and well-regulated economy with a skilled productive labour force
» a beneficial geographic location that is in the same time zone as much of Asia
» an isolated production base from the rest of the world that is protected by world class biosecurity practices, ensuring our produce is free from exotic pests and diseases.

Western Australian agrifood sector – 2015/16 facts and figures

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<table>
<thead>
<tr>
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</thead>
<tbody>
<tr>
<td>Gross value of agricultural production (GVAP)</td>
<td>$8.2 billion</td>
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<tr>
<td>Food retail sales value</td>
<td>$13.8 billion</td>
</tr>
<tr>
<td>Agrifood export value</td>
<td>$7.6 billion</td>
</tr>
<tr>
<td>WA agrifood exports as a % of Australian agrifood exports</td>
<td>16%</td>
</tr>
<tr>
<td>Number of agricultural producers</td>
<td>14 469</td>
</tr>
<tr>
<td>Employment in the sector</td>
<td>183 600</td>
</tr>
</tbody>
</table>
Agrifood and fibre production 2015/16

- Cereals $3508m (42.8%)
- Meat and livestock products $1778m (21.7%)
- Pulses, pastures and oilseeds $1123m (13.7%)
- Horticulture $909m (11.1%)
- Wool $661m (8.1%)
- Dairy $202m (2.5%)
- Apiculture $11m (0.1%)

Total: $8192m
### Agrifood, fibre and fisheries exports 2015/16

**Total**: $7639m

- **Cereals and cereal products**: $4023m (52.7%)
- **Meat and livestock products**: $1236m (16.2%)
- **Pulses, pastures and oilseeds**: $923m (12.1%)
- **Horticulture**: $119m (1.6%)
- **Fisheries**: $598m (7.8%)
- **Wool**: $477m (6.2%)
- **Dairy**: $57m (0.7%)
- **Forestry**: $54m (0.7%)
- **Apiculture**: $5m (0.1%)
- **Other processed agrifood products**: $148m (1.9%)
Agrifood, fibre and fisheries production and exports by industry 2015/16

Total production: $8192m
Total exports: $7639m
Agrifood, fibre and fisheries production and exports 2010/11 to 2015/16
Top 10 export markets for Western Australia agrifood, fibre and fisheries products 2015/16

- Indonesia
- Mainland China
- Vietnam
- Japan
- South Korea
- Germany
- Philippines
- Belgium
- Malaysia
- Kuwait
Agrifood, fibre and fisheries exports by global region 2010/11 to 2015/16
Cereals

- The Western Australian cereal industry is a major contributor to the agricultural sector and the Australian economy.
- About 4200 cereal farms, primarily family owned and operated businesses, produce on average 12 million tonnes of cereals each year. Farm sizes range from 1000 to 15 000 hectares.
- The state produces 30–40% of Australia’s cereals under a rain-fed Mediterranean environment. The main cereals produced, in order of production volume, are wheat, barley and oats.
- Cereals have a wide range of end-use products, such as noodles, breads and baked goods, beverages and animal feed.
- Cereal production is highly mechanised and requires low agrichemical inputs, which makes production cost-efficient and competitive in export markets.
- The cereals industry in Western Australia continues to focus on producing high-quality wheat, barley and oats suitable for our quality discerning markets (e.g. wheat for Japanese white salted udon noodles).
- Western Australia is a major producer of malting and feed barley and plays a significant role in the world malting barley trade. It is the top supplier of malting and feed barley to China and shochu barley to Japan and the Middle East, and is also a major market for feed barley.
- Western Australia has the largest barley malting facility in the southern hemisphere. There are two malting plants with a capacity of around 250 000 tonnes.
- The state grows high-quality milling oats and is home to Australia’s largest mill. Interest in oats and oat products for exports has grown significantly in recent years with notable investment growth in downstream processing and value adding.
- The value of cereal production in Western Australia is dependent on seasonal conditions and prices. Excellent conditions in 2015/16 resulted in production valued at $3.5 billion, down from $3.7 billion in 2014/15 due to lower prices.
- Western Australian cereal exports accounted for 46% of Australian cereal exports over the past 10 years.
- In 2015/16, the value of the state’s total cereal exports was $4 billion. Of these, 5% were processed products.
- Wheat exports were valued at $2.8 billion in 2015/16. Barley exports were $820 million and oat exports were $93 million. The value of oat exports has increased solidly in recent years on the back of strong demand, particularly from China.
- Cereal hay exports were $139 million in 2015/16 and have been rising strongly since 2011/12, driven by strong demand in Asia, notably South Korea, Japan, Taiwan and China.
- The top six markets for Western Australian wheat in 2015/16 were Indonesia, South Korea, Japan, Vietnam, mainland China and the Philippines, accounting for 78% of all exports.
- To support the grains industry, DPIRD has significant direct investment in grains research, development and extension capability and activities, research infrastructure, and policy development. It also applies biosecurity policies and operations targeted to facilitate safe trade, tourism and commodity movement while reducing exposure of the state’s grain industry to exotic biological risks.
Cereal production 2010/11 to 2015/16

Cereal exports 2010/11 to 2015/16

Top 10 Western Australian cereal markets 2015/16

Total = $4023m

Wheat $2779m (69.1%)
Barley $820m (20.4%)
Oats $93m (2.3%)
Malt $129m (3.2%)
Cereal hay $139m (3.5%)
Other $61m (1.5%)

Indonesia $843m
South Korea $511m
Japan $427m
Vietnam $322m
Mainland China $308m
Philippines $287m
Malaysia $207m
Yemen $187m
Kuwait $181m
Thailand $175m

Total cereal exports 2010/11 to 2015/16 = $4023m
Pulses, pasture and oilseeds

- Western Australia is the world’s largest producer and exporter of Australian sweet white lupin. Due to its unique nutritional value and chemical composition, lupin is attracting increasing attention as a new and healthy potential ‘super food’ for human food consumption.
- Western Australia also grows and exports (for human consumption) smaller quantities of other pulses such as field pea, chickpea, albus lupin and faba bean.
- Pastures are often grown as part of the cropping rotation and may be grazed or cut for hay.
- The production of lupin and other pulse crops contributes valuable nitrogen to the soil in Western Australia’s agricultural areas. These crops, along with canola, play an important role as part of crop rotations together with cereal crops in our farming systems.
- Nearly all oilseed production in Western Australia is canola. Western Australia is the major canola producing state in Australia, averaging just under half of total canola production.
- Both conventional and genetically modified canola varieties are grown in Western Australia, with strict segregation in the supply chain allowing the two production systems to co-exist and meet the requirements of markets requiring non-genetically modified canola.
- There are two significant canola crushing facilities in Western Australia. However, these are small by world standards and crush less than 10% of the state’s crop.
- Western Australian canola is now recognised as the highest-quality canola in Australia with oil content an average 2-4% higher than other states.
- Innovative plant breeding, research and market development are ensuring Western Australia maintains its position as Australia’s biggest producer and exporter of pulses and canola.

- The production value of pulses, pasture and oilseeds in 2015/16 was $1.1 billion, dominated by canola at $730 million. Total production was slightly down on the previous season’s harvest.
- Between 2010/11 and 2015/16, the value of pulse and oilseed exports increased strongly from almost $509 million to $864 million. Growth has been driven by increased canola production due to high export prices and rotational benefits from better grass weed control.
- The value of canola exports was lower in 2015/16 than in 2014/15, dropping from $819 million to $746 million due to a smaller crop and lower prices.
- The top six Western Australian canola export markets in 2015/16 were Germany, Belgium, France, Netherlands, Japan and Nepal who accounted for 99% of exports.
- The top six Western Australian export markets for field peas in 2015/16 were Malaysia, Bangladesh, India, the Philippines, Sri Lanka and Belgium, who took 86% of all exports.
Pulses, pastures and oilseeds production 2010/11 to 2015/16

- Canola
- Other oilseeds
- Lupins
- Other broadacre (cotton, sugar, coriander)
- Other pulses
- Pasture hay

Pulses, pastures and oilseeds exports 2010/11 to 2015/16

- Canola
- Lupins
- Other oilseeds
- Other pulses
- Pasture products

Top 10 Western Australian pulses, pastures and oilseeds markets 2015/16

1. Germany
2. Belgium
3. France
4. Netherlands
5. Japan
6. Nepal
7. United States of America
8. Bangladesh
9. Malaysia
10. India

Other oilseeds $15m (2%)
Canola $746m (81%)
Lupins $81m (9%)
Pasture products $59m (6%)
Other pulses $22m (2%)

Total = $923m
Meat and live animals

- With a reliable climate and abundant land, Western Australia has the supply chain infrastructure and procedures in place to service both the meat and live animal industries, with scope for expansion.
- Western Australia produces and exports a wide range of high-quality meat products (both chilled and frozen), including beef, lamb, mutton, pork and goat meat.
- Western Australia has invested significantly in the development of improved animal welfare practices, particularly in the live animal export sector and in alternative housing for breeding sows (female pigs).
- Western Australia is the world’s largest exporter of live animals, with all live animal exports from Australia being subject to the Australian Government’s Exporter Supply Chain Assurance System (ESCAS).
- The ESCAS ensures all livestock exported for slaughter are handled to internationally agreed (OIE – World Organisation for Animal Health) animal welfare standards, and are able to be traced throughout the supply chain using the National Livestock Identification System that is mandated by state and Australian Government legislation.

Meat and live animal industries

Beef/cattle industry

- The state’s beef herd comprised 1.9 million head in July 2016 and had a gross value of production of $857 million. The gross value of production for beef cattle disposals (slaughter and live export) has increased 31% year-on-year, largely due to strong prices and the increased value of exports, especially of live animals.
- Beef produced in Western Australia has a reputation for high-quality based on Meat Standards Australia’s benchmarks.
- The Western Australian cattle herd is relatively stable, with about half of the state’s cattle located in northern production systems and half in the southern production systems.
- Northern cattle systems are extensive operations run on large properties with big numbers of cattle. While there are more southern cattle properties, they are smaller in size compared to those in the north.
- Seventy-eight per cent of Western Australian cattle are contained within herds of over 500 head, on only 13% of the state’s cattle properties (2011 census).
- Cattle can be sold via domestic slaughter, live export or transferred interstate.
- There are 13 beef abattoirs in Western Australia, six of which have international accreditations.
- The three largest beef processing facilities with multiple export market accreditations are located in the south-west of the state.
- Of the cattle processed in Western Australia in 2015/16, 59% were consumed on the domestic market, while the remaining 41% were exported to 30 international markets.
Sheep industry

- The Western Australia sheep flock numbered 13.9 million head at the end of 2015/16 and produced high quality meat and wool for world markets.
- The gross value of production for sheep disposals (slaughter and live export) was $513 million in 2015/16, a 7% increase year-on-year. This was partly due to strong prices and an increase in the value of live exports from Western Australia.
- The majority of Western Australian sheep are located in the southern cropping zones of the state, with some also located in the southern rangelands.
- There are about 4500 sheep farms in Western Australia and about 80% have flocks of over 500 sheep.
- Breeding ewes make up 52% of the flock. Since the early 1990s, the proportion of breeding ewes in the flock has been increasing as the industry transitions from a reliance on wool to a dual-product wool and sheep meat industry.
- Of Western Australian sheep disposed of in 2015/16, 70% were processed domestically, while 28% were exported live and 1% were transferred interstate.
- There are 16 abattoirs that process sheep in Western Australia, nine of which are export accredited. Most (72%) of the sheep processed in Western Australia were exported to international markets with the remaining 28% consumed locally.
- Four live export companies operate out of Western Australia with the majority of sheep loaded in Fremantle.

Pigs

- The Western Australian pork industry is recognised as a supplier of premium-quality pork reared under production systems that place a high priority on animal welfare.
- The industry is very concentrated, with 12 producers accounting for more than 80% of the sow herd.
- Production systems include straw-based housing systems, fully/partially slatted intensive systems and free-range operations.
- Western Australian pork production was worth $35 million in 2015/16, an increase of 35% when compared to 2010/11 ($26 million).
- There has been a rapid increase in free-range production to meet consumer demands, with Western Australia providing products for a large supermarket chain on a national level.
- A single key abattoir processes pigs in Western Australia, supported by several smaller operations.
The Western Australian poultry industry is comprised of chicken meat and egg industries.

The chicken meat (broiler) industry contributes about 80% of the state’s earnings from poultry.

There are 35 contract broiler farms located north and south of Perth.

Two vertically integrated processors control 90% of the state’s chicken meat market and, between them, process 44 million birds a year.

Most production is consumed locally, with exports declining in recent years as a result of global pricing pressure.

The broiler industry has experienced consolidation and growth over the past 12 months.

The Western Australian egg industry sells primarily to the domestic market and has experienced moderate growth in recent years.

Western Australian egg production was 27 million eggs valued at $69 million in 2015/16, an increase of 43% when compared to 2010/11.

Most eggs are purchased fresh rather than processed.

Currently, 58% of the layers are caged while 36% are free range. The remaining 6% are barn layers.

Production will continue to move towards free-range and barn-laid systems, driven by demand from consumers and major retail supermarkets.

The total $1.1 billion of meat and live animal exports in 2015/16, 53% consisted of meat and edible offal exports while 47% came from live animal exports.

The sheep and cattle export industries dominate Western Australian meat and live animal exports, accounting for almost 95% of total exports.

Western Australian sheep meat exports have risen 38% in value from $234 million in 2010/11 to $323 million in 2015/16, driven by higher prices and surging demand from export partners such as China. The major markets for Western Australian lamb, mutton and edible offal in 2015/16 were the United Arab Emirates (UAE), mainland China, Jordan, Saudi Arabia and the United States of America (US).

Of Western Australian sheep disposed of in 2015/16, 28% were exported live to over 10 countries from the port of Fremantle.

Western Australian live sheep exports were valued at $200 million in 2015/16, a year-on-year increase of 5%.

The top five export markets for Western Australian live sheep in 2015/16 were Kuwait, Qatar, Jordan, the UAE and Bahrain.

The value of Western Australian beef exports (including edible offal) has risen 103% from $106 million in 2010/11 to $215 million in 2015/16, due to the increased value of exports to destinations such as China and the US.

The top five markets by value for beef exports in 2015/16 were Korea, Japan, Indonesia, the US and mainland China.

The value of Western Australian live cattle exports increased 33% to $327 million between 2010/11 and 2015/16 and 38% year-on-year.

The major export markets by value for Western Australian live cattle in 2015/16 were Indonesia, Vietnam, Israel, Malaysia and Egypt.

Poultry meat and offal exports have declined in recent years from $3.6 million in 2010/11 to $531 000 in 2015/16.

Pork exports (meat and edible offal) reached $35 million in 2015/16, up 36% since 2010/11, with most exports destined for Singapore.
Meat and live animal product exports 2015/16

- Beef $215m (17%)
- Live cattle $327m (26%)
- Sheep meat $323m (26%)
- Pig meat $35m (3%)
- Other meat $18m (2%)
- Other livestock products $118m (10%)

Total = $1236m

Meat and live animal product exports 2010/11 to 2015/16

- Beef cattle
- Sheep
- Other livestock products

Graph showing production from 2010/11 to 2015/16.
Dairy

- Western Australian milk has been identified as some of the cleanest and highest quality in Australia due to the state’s very high herd health status.
- The reliable Mediterranean climate produces large supplies of high-quality grain and fodder for the dairy sector.
- The Western Australian dairy herd consists of about 60,000 milking cows with a supplier base of 157 farmers, and in 2015/16 produced around 387 million litres of milk, an increase of 6% on the previous year.
- Milk production takes place all year round using free-range production systems.
- Western Australian dairy production was worth $202 million in 2015/16, an increase of 29% when compared to 2010/11 ($157 million).
- Dairy processing in Western Australia is dominated by three large multi-national companies that process around 90% of the state’s milk production. A number of smaller processors of speciality dairy products also operate in the state.
- Limited high-value processing is conducted in Western Australia, with milk and cream dominating exports.
- Dairy product exports increased by 14% in 2015/16 to $57 million, up from $50 million in 2014/15.
- The export of milk and cream in 2015/16 was almost 98% of Western Australia’s total dairy product exports, with milk and cream exports increasing from $48 million in 2014/15 to $56 million in 2015/16.
- Since 2010/11, milk and cream exports in Western Australia have increased significantly, while exports in cheese, and ice-cream have declined.

- A lack of significant growth in milk production in recent years, seasonal fluctuations and depressed global commodity prices have contributed to the shift away from cheese and ice-cream exports.
- The state’s close transport links to various trade partners are a key to delivering high quality fresh products in the shortest possible time to international customers in Singapore, China and the Philippines.
- While there is potential export growth to Asia, the Western Australian dairy industry faces challenges such as globally low prices and seasonal fluctuations in milk supply which results in downward pressure on profit margins.
- DPIRD is supporting a significant expansion of the state’s dairy sector, having identified opportunities for development of large-scale, highly competitive milk production in the Central Midlands and Great Southern regions of the state.

Dairy production and exports 2010/11 to 2015/16

<table>
<thead>
<tr>
<th>Year</th>
<th>Milk production</th>
<th>Dairy exports</th>
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</thead>
<tbody>
<tr>
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<td>$50 million</td>
<td>$38 million</td>
</tr>
<tr>
<td>2011/12</td>
<td>$50 million</td>
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<tr>
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<td>$50 million</td>
</tr>
<tr>
<td>2015/16</td>
<td>$50 million</td>
<td>$57 million</td>
</tr>
</tbody>
</table>
Dairy exports 2015/16

Milk and cream $55.8m (97.7%)
Yoghurt $0.7m (1.3%)
Other dairy $0.1m (0.3%)

Total = $57m

Dairy exports by product 2010/11 to 2015/16

- Milk and cream
- Yoghurt
- Cheese
- Other dairy

Top 10 Western Australian dairy markets 2015/16

1. Mainland China
2. United States of America
3. Taiwan
4. Maldives
5. Cambodia
6. Singapore
7. Philippines
8. South Korea
9. Hong Kong
10. Malaysia

Top 10 Western Australian dairy markets 2015/16

- Singapore
- Mainland China
- Philippines
- South Korea
- Hong Kong
- Malaysia
- Taiwan
- United States of America
- Cambodia
- Maldives

Dairy exports by product 2010/11 to 2015/16

- 2010/11: $60m
- 2011/12: $57m
- 2012/13: $55m
- 2013/14: $53m
- 2014/15: $52m
- 2015/16: $50m

Total = $57m
Wool

- Western Australia has 13.9 million sheep run by 4500 sheep producers, producing both sheep meat and wool. They are mostly located in the south of the state.
- Of the breeding ewe population in Western Australia, 82% is made up of merino ewes, reflecting the importance of the wool enterprise to the state’s sheep industry.
- Western Australia has a long, well-established history of wool growing and is internationally cost competitive in wool handling and delivery.
- Western Australia produced 65.2 million kilograms of greasy wool in 2015/16, about 20% of the Australian clip.
- The value of wool production in Western Australia was $661 million in 2015/16, a year-on-year increase of 22%, while exports accounted for $477 million.
- In 2015/16, Western Australia’s average wool fibre diameter was 19.8 micron compared to Australia’s average of 21.0 micron.
- More than 95% of wool production in Western Australia is merino wool measuring less than 24.5 micron. Superfine wool (under 19.5 micron) accounted for 50% of Western Australia wool production in 2015/16.
- Due to a lack of processing facilities in Western Australia, the majority of the state’s wool is processed by overseas markets, or in some instances in the eastern states.
- Western Australia’s major wool markets in 2015/16 were mainland China (83%), India (8%) and the Czech Republic (4%).
Value of wool production and exports 2010/11 to 2015/16

Top five Western Australian wool markets 2015/16

- Mainland China
- India
- Czech Republic
- Malaysia
- Italy
Horticulture

- Western Australia produces premium high-quality horticultural produce in an industry that is:
  - counter-seasonal to the northern hemisphere
  - adopting new production and post-harvest handling technologies
  - generating new varieties and value-adding opportunities.
- The estimated production value of Western Australia’s horticulture in 2015/16 was $919 million, with $119 million worth of fresh horticulture products exported.
- Horticulture is an intensive production system. The value of production per hectare for horticulture was $27,500. For the whole of agriculture, the value of production was $100 per hectare and for broadacre cropping $500 per hectare. Among horticulture industries, cutflower, nursery and turf industries had the highest per hectare value at $81,380.
- Irrigated agriculture presents a significant opportunity for growth for the Western Australian agricultural sector. DPIRD is leading work to capitalise on this opportunity by focusing on growth and development in the north of the state, and security of land, water use and intensification in the south.
- Fruit (including grapes), vegetables (for human consumption) and nursery industries occupied an area of 33,093 hectares, with 1,449 businesses involved in production in Western Australia. Of this area:
  - fruits, including grapes, occupied 62% of the area and accounted for 61% of the total number of businesses
  - vegetables occupied 34% of the area and accounted for 27% of the number of businesses
  - nursery industries occupied 4% of the area and accounted for 12% of the number of businesses.
- After a decline in 2011/12, exports of fruits and vegetables have shown an increasing trend, with a 67% increase from 2012/13 to 2015/16. Nursery industries have shown a declining trend.
- Both fruit and vegetable exports were concentrated, with the top five destinations, accounting for approximately 76% of exports. The top five destinations for:
  - vegetables were the UAE, Singapore, Malaysia, Saudi Arabia and Qatar
  - fruits were Singapore, the UAE, Hong Kong, Malaysia and Kuwait.
- Fifty-one industries were involved in fruit and vegetable processing.
**Vegetables**

- Vegetables were almost 50% of the total horticultural exports (including wine) from Western Australia.
- In 2015/16 vegetables had an estimated production value of $390 million, and an export value of $81 million.
- Between 2010/11 and 2015/16, the export value of vegetables increased from $67 million to $81 million (22%).
- There were 386 businesses with an area of 11,173 hectares involved in vegetable production (for human consumption).
- Carrots were the largest horticultural export industry, with an estimated export value of $65 million. The top 10 growers accounted for 91% of the industry. Western Australian carrots were exported to more than 20 countries, and Western Australian exports comprised 81% of Australia’s carrot exports by value.
- Western Australia’s mushrooms and truffles have a well established reputation for quality.
- Western Australia exported 77% of Australia’s truffles and mushrooms, with 95% of the state’s truffle production from Manjimup. In 2015/16, $3.5 million of Western Australian truffles and mushrooms were exported.
- Potatoes (all types) were the second largest export category after carrots, with a combined export value of $4.5 million.
- The UAE was the major destination for our vegetables (29%), followed by Singapore (15%) and Malaysia (14%).

**Fruits and other horticulture**

- In 2015/16, the production value for fruits and nuts was $336 million, $117 million for nursery and turf and $77 million for grapes (inclusive of wine grapes).
- There were 889 farm businesses producing fruit in an area of 20,484 hectares, and 174 businesses producing nursery products, cutflowers and cultivated turf in an area of 1436 hectares.
- The export value for fruits and nuts was $36 million, and $2 million for nursery products.
- The value of fruit exports has increased by 162% since 2010/11, while nursery exports have declined by 51%. In the same period, fruit exports declined and then rebounded strongly to $36 million in 2015/16, an increase of more than 80% from the previous year.
- Strawberries had an export value of $22 million, and accounted for 61% of total fruit exports from Western Australia and 83% of total strawberry exports from Australia. The major export destinations were Singapore, the UAE, Kuwait, Thailand and Malaysia.
- Western Australia has a seasonal advantage in strawberry production, with our production counter-seasonal to major producing countries.
- Nursery and turf exports were dominated by floriculture, with Japan taking 65% of exported flowers from Western Australia.
- Singapore was our major export destination (28%) for fruits, followed by the UAE (20%) and Hong Kong (12%).
Horticulture exports by industry 2010/11 to 2015/16

**Contribution of horticultural products to exports 2015/16**

- Vegetables: $81m (68%)
- Fruit and nuts: $36m (30%)
- Nursery products: $2m (2%)

Total = $119m

**Top 10 Western Australian horticulture markets 2015/16**

United Arab Emirates
Singapore
Malaysia
Saudi Arabia
Hong Kong
Qatar
Kuwait
Thailand
Bahrain
Japan

Note: The figures represent the contribution of various horticultural products to exports from 2010/11 to 2015/16, with a focus on the top markets and the notable increase in exports of vegetables and fruit and nuts.
Apiculture

• Western Australian honey is renowned for its superior quality as it is sourced from the state’s pristine hardwood forests.
• Global demand for quality and nutritious honey, honey products and healthy disease-free live bees is strong and on the rise. The demand for specialist pharmaceutical honey products is also gaining momentum.
• At present there are more than 120 commercial honey producers in Western Australia, as well as numerous hobby bee keepers who produce and sell home products through community markets.
• The total number of hives in Western Australia is estimated at 40,000 (8.2% of the Australian total), representing 7.5% of the total national honey production.
• The industry is dominated by a single company that controls 90% of the Australian honey market. The company is Western Australia’s main processor, collecting surplus honey from other producers in addition to its own hives.
• In 2015/16, the Western Australian apiculture industry produced $11 million of product. About half (45%) was exported, with most exports of live bees going to Canada, and most exports of honey to the Philippines and China. The export value of apiculture products has increased by over 160% since 2010/11, with significant growth across honey, live bee exports and beeswax.
• Honey, honey bees (including live bees) and second-hand hive equipment are banned from entering the state due to stringent biosecurity measures.
Apiculture exports 2010/11 to 2015/16

Apiculture product exports 2015/16

Top 10 Western Australian apiculture products 2015/16

- Philippines: $1.0m (12%)
- Canada: $0.9m (11%)
- Mainland China: $0.8m (10%)
- Mauritius: $0.7m (9%)
- Germany: $0.6m (8%)
- Japan: $0.5m (6%)
- Hong Kong: $0.4m (5%)
- Singapore: $0.3m (4%)
- Malaysia: $0.2m (3%)
- United Arab Emirates: $0.1m (2%)

Total = $4.9m
Fisheries

Competitive strengths

• Western Australia has some of the finest and most sought after ecologically sustainable seafood in the world, ranging from rock lobster, crab, prawns (shrimps) and marron to abalone and scallops.
• Western Australia also produces globally renowned South Sea pearls.
• High-quality and unspoiled waters have given Western Australia an international reputation as a supplier of superb seafood.
• Western Australia has a diversity of marine life and provides opportunities for recreational and commercial fishing, pearling, aquaculture and tourism.

Key statistics

• Fisheries exports in 2015/16 were valued at over $597 million, including $453 million from one of the most valuable fish species in Australia – western rock lobster.
• Other key features of the Western Australian fishing industry include:
  » a pearl production industry valued at $95 million per annum
  » a prawn (shrimp) industry valued at $11 million per annum
  » an aquaculture industry in the south producing yields of fresh water fish including Western Australia’s iconic marron
  » a growing marine aquaculture industry producing finfish, abalone, edible oysters and other high-quality products.
• Western Australia’s major export destinations for marine products in 2015/16 were Vietnam, Hong Kong, mainland China, Japan and the USA.
• The top three markets for crustacean exports in 2015/16 were Vietnam, mainland China and Japan.
• Our commercial and recreational fisheries continue to provide valuable support to the state’s economy, contributing $1.2 billion annually annually.

General issues affecting the sector in 2015/16

• High demand from China has resulted in Western Australia’s rock lobster exports continuing the strong growth that began in 2012/13.
• In 2015/16, rock lobster exports made up over three quarters of the total value of Western Australia’s fisheries’ exports.
• Investment in sustainability certification, through the Marine Stewardship Council continues, with seven fisheries now certified, comprising the majority of the state’s value of fisheries production.
• To promote the development of large-scale marine finfish aquaculture, the state government created a Kimberley Aquaculture Development Zone providing an ‘investment-ready’ platform for aquaculture ventures, with a second zone in the state’s mid-west region having been declared recently.
• The state government is also building a multi-species shellfish hatchery near Albany to provide juvenile seed stocks to support the shellfish sector. Another project to identify zones on the south coast suitable for shellfish grow-out on a large scale is underway.
Fisheries exports 2010/11 to 2015/16

Fisheries exports 2015/16 Top 10 Western Australian fisheries markets 2015/16

- **Lobster** $453m (75.8%)
- **Pearls** $92m (15.5%)
- **Other fisheries products** $44m (7.3%)
- **Fish meat** $8m (1.3%)
- **Live fish** $0.1m (0.1%)

Total = $598m

Top 10 Western Australian fisheries markets 2015/16

- Vietnam
- Mainland China
- Thailand
- Taiwan
- Switzerland
- United States of America
- Singapore
- Japan
- Hong Kong
- Spain

$ million

$ million
Food and beverages

- Western Australia’s agricultural and food industries provide premium-quality food and beverage products to customers across the globe, and particularly to the Asian region.
- The food and beverage processing and manufacturing industry comprises over 1800 businesses, with nearly half of the state’s food businesses located in the south-west of Western Australia.
- There is a growing trend towards the production of high-value premium food and beverage products in regional areas, including truffle-based condiments, gourmet cured meats, ciders and cold-pressed fruit juices.
- Food and beverage processing represents over 11% by value of the state’s total manufacturing sector.
- The food and beverage market can be broadly categorised into two segments: retail and food service.
  - The ‘grocery’ sub-segment of retail is the dominant distribution channel for the domestic and export retail of food and beverages. The grocery channel consists of full-service supermarket chains and independent grocery stores.
  - Food service includes restaurants, takeaway outlets and institutions such as hospitals and mining sites.
- In 2015/16, Western Australian food and beverage manufacturing businesses had a total turnover of $5.9 billion, slightly lower than the previous year.
- Retail sales in the food industry averaged $1.1 billion per month in 2015/16, which equated to an annual turnover of more than $13.8 billion. This represented an increase of 1.4% from 2014/15. The food service industry had a turnover of $5 billion in 2015/16, a decline of 2.8% from the previous year.
- Western Australia exported $1.5 billion of processed agrifood and fisheries products in 2015/16, including processed cereals, oilseeds, pulses, beef, sheep, dairy, horticulture (including wine) and seafood products. Of this total, major transformed food and beverage products accounted for $115 million and prepared animal feed products accounted for $23 million.
- Overall, exports of processed, value-added products increased by 30% between 2010/11 and 2015/16, driven by the decline in the value of the Australian dollar since 2010/11. The number of businesses also grew, taking advantage of new market access provisions under several free trade agreements.
- The highest value food and beverage exports between 2010/11 and 2015/16 have been meat and meat-based products, seafood products, cereal-based products, and highly processed food and beverage products.
- DPIRD is driving a value-chain approach, helping food businesses to capitalise on opportunities, especially in the area of premium food and beverage products by better understanding markets, relationships and constraints within supply and value-chains.
Total processed agrifood and fisheries product exports 2010/11 to 2015/16

Processed agrifood and fisheries exports 2015/16

- Crustaceans $478m (32%)
- Cereal products $190m (13%)
- Beverages - wine $44m (3%)
- Dairy products $57m (4%)
- Food stuffs $64m (4%)
- Other $82m (5%)

**Total = $1506m**

Meat and edible offal $591m (39%)
Forestry

- Western Australia’s timber industry is sustainably managed and produces high-quality products for both domestic and export markets.
- The state’s forestry sector directly employs more than 5000 people, mostly in regional Western Australia. The sector injects more than $1 billion into the state’s economy annually.
- There are four main timber industries in Western Australia:
  - hardwood plantations industry – consists of blue gum plantations in the south-west and Great Southern regions
  - sandalwood industry – currently, the majority of production involves arid timber found in remote locations in the Goldfields and Rangelands. A sandalwood plantation industry is now emerging
  - softwood (pine) plantations industry – ranges from Gingin (north of Perth) to Esperance (on the southern coastline of Western Australia)
  - native timber industry – sustainably sourced from the south-west region and including jarrah, marri and karri.
- The Western Australian forest and plantation sectors (softwood and hardwood plantations, and hardwood native timbers) produced logs worth $350 million in 2015/16. The result was the same as 2014/15, which saw a rise on previous years following increased woodchip exports and expanded local housing construction.
- In 2015/16, the value of hardwood plantations was $262 million, up from $239 million in 2014/15. The largest segment, Tasmanian blue gums, is used for high-grade writing and printing paper and is exported as woodchips from Bunbury and Albany to markets in East Asia.
- Softwood timbers are mainly processed locally and used for domestic housing and construction. A softening of the housing market resulted in a slight drop in the value of the softwood timber production. In 2015/16 production was valued at $59 million, down from $61 million the previous year.
- The FPC has invested $20 million over five years to expand Western Australia’s softwood estate. The investment aims to address the decline in the softwood estate, increasing it by 20 000 hectares to ensure continued supply.
- The state’s unique native forest timbers continue to be highly sought after by leading furniture designers, manufacturers and timber suppliers for producing high-quality furniture, flooring and joinery products. In 2015/16, the value of native timber produced was $28 million, up $2 million on the previous year.
- Western Australian sandalwood is exported all over the world, and is used in a range of high-quality products such as perfumes, pharmaceuticals, incense and wood carving. Current markets include Asia, India, the Middle East and Europe.
- Sandalwood is a significant segment of Western Australia’s forestry industry. Revenue from the state’s wild sandalwood resource continues to enjoy strong growth on the back of resource shortages in India and the Pacific Islands. In 2015/16, revenue totalled $31 million, up 29% on 2014/15 ($24 million).
- The increasing quantity of sustainably managed and independently certified regrowth native timber resource provides for new development opportunities for engineered wood products and residue commodities. Demand for these essential products outstrips supply, and presents an opportunity for long-term investment in timber plantations.
Value of logs produced 2010/11 to 2015/16

- **Softwood plantation**
- **Hardwood plantation**
- **Hardwood native**
- **Sandalwood (wild Western Australian)**

<table>
<thead>
<tr>
<th>Year</th>
<th>$ million</th>
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<tbody>
<tr>
<td>2010/11</td>
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<td>2011/12</td>
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<td>2015/16</td>
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## Value of agrifood, fisheries and forest exports, by commodities (2015/16)

<table>
<thead>
<tr>
<th>Commodity</th>
<th>WA ($m)</th>
<th>Australia ($m)</th>
<th>Proportion of WA to Aust %</th>
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<tr>
<td>Wheat</td>
<td>2779.4</td>
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<td>Barley</td>
<td>820.4</td>
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<td>729.2</td>
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<td>Wool</td>
<td>476.8</td>
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<td>Oats - other processing products</td>
<td>55.2</td>
<td>85.3</td>
<td>64.7%</td>
</tr>
<tr>
<td>Beef</td>
<td>54.3</td>
<td>3372.0</td>
<td>1.6%</td>
</tr>
<tr>
<td>Beverages - wine</td>
<td>44.0</td>
<td>2183.9</td>
<td>2.0%</td>
</tr>
<tr>
<td>Commodity</td>
<td>WA ($m)</td>
<td>Australia ($m)</td>
<td>Proportion of WA to Aust %</td>
</tr>
<tr>
<td>---------------------------------</td>
<td>---------</td>
<td>----------------</td>
<td>---------------------------</td>
</tr>
<tr>
<td>Fruit and nuts</td>
<td>36.0</td>
<td>1949.8</td>
<td>1.8%</td>
</tr>
<tr>
<td>Pig meat</td>
<td>33.2</td>
<td>118.9</td>
<td>27.9%</td>
</tr>
<tr>
<td>Wood in the rough</td>
<td>31.7</td>
<td>438.0</td>
<td>7.2%</td>
</tr>
<tr>
<td>Animal fats and tallow</td>
<td>26.7</td>
<td>374.8</td>
<td>7.1%</td>
</tr>
<tr>
<td>Shrimps and prawns</td>
<td>22.8</td>
<td>114.4</td>
<td>19.9%</td>
</tr>
<tr>
<td>Pet and stock food</td>
<td>22.6</td>
<td>320.7</td>
<td>7.0%</td>
</tr>
<tr>
<td>Forestry</td>
<td>21.8</td>
<td>1310.7</td>
<td>1.7%</td>
</tr>
<tr>
<td>Other pulses</td>
<td>21.7</td>
<td>1687.3</td>
<td>1.3%</td>
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<tr>
<td>Essential oils</td>
<td>20.1</td>
<td>84.9</td>
<td>23.6%</td>
</tr>
<tr>
<td>Other animal products</td>
<td>18.3</td>
<td>394.1</td>
<td>4.6%</td>
</tr>
<tr>
<td>Oilseed products</td>
<td>17.8</td>
<td>221.0</td>
<td>8.1%</td>
</tr>
<tr>
<td>Other oilseeds</td>
<td>14.3</td>
<td>45.7</td>
<td>31.3%</td>
</tr>
<tr>
<td>Abalone</td>
<td>14.3</td>
<td>182.0</td>
<td>7.8%</td>
</tr>
<tr>
<td>Mixed industry products</td>
<td>10.1</td>
<td>31.3</td>
<td>32.2%</td>
</tr>
<tr>
<td>Other marine</td>
<td>8.7</td>
<td>383.3</td>
<td>2.3%</td>
</tr>
<tr>
<td>Other agrifood products</td>
<td>8.0</td>
<td>1112.5</td>
<td>0.7%</td>
</tr>
<tr>
<td>Other live animals</td>
<td>5.6</td>
<td>197.0</td>
<td>2.8%</td>
</tr>
<tr>
<td>Other cereal products</td>
<td>5.1</td>
<td>401.9</td>
<td>1.3%</td>
</tr>
<tr>
<td>Scallops</td>
<td>4.0</td>
<td>11.7</td>
<td>34.4%</td>
</tr>
<tr>
<td>Honey</td>
<td>3.5</td>
<td>45.3</td>
<td>7.7%</td>
</tr>
<tr>
<td>Other beverages</td>
<td>2.6</td>
<td>404.5</td>
<td>0.6%</td>
</tr>
<tr>
<td>Commodity</td>
<td>WA ($m)</td>
<td>Australia ($m)</td>
<td>Proportion of WA to Aust %</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>---------</td>
<td>----------------</td>
<td>-----------------------------</td>
</tr>
<tr>
<td>Cotton</td>
<td>2.5</td>
<td>1351.5</td>
<td>0.2%</td>
</tr>
<tr>
<td>Other cereal grains</td>
<td>2.3</td>
<td>357.8</td>
<td>0.6%</td>
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<tr>
<td>Nursery products</td>
<td>2.2</td>
<td>34.8</td>
<td>6.4%</td>
</tr>
<tr>
<td>Crabs</td>
<td>1.6</td>
<td>7.6</td>
<td>20.9%</td>
</tr>
<tr>
<td>Other dairy products</td>
<td>1.3</td>
<td>2098.9</td>
<td>0.1%</td>
</tr>
<tr>
<td>Beeswax</td>
<td>0.6</td>
<td>3.7</td>
<td>16.6%</td>
</tr>
<tr>
<td>Molluscs</td>
<td>0.6</td>
<td>27.4</td>
<td>2.1%</td>
</tr>
<tr>
<td>Poultry</td>
<td>0.5</td>
<td>58.6</td>
<td>0.9%</td>
</tr>
<tr>
<td>Textiles (excluding cotton)</td>
<td>0.3</td>
<td>12.2</td>
<td>2.1%</td>
</tr>
<tr>
<td>Other crustaceans</td>
<td>0.1</td>
<td>0.6</td>
<td>25.4%</td>
</tr>
<tr>
<td>Eggs</td>
<td>0.1</td>
<td>3.9</td>
<td>1.8%</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td>7639.1</td>
<td>46 847.4</td>
<td>16.3%</td>
</tr>
</tbody>
</table>
### Value of agrifood and fisheries exports to markets

<table>
<thead>
<tr>
<th>Market</th>
<th>WA ($m)</th>
<th>Australia ($m)</th>
<th>Proportion of WA to Aust %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Indonesia</td>
<td>940.8</td>
<td>2707.2</td>
<td>34.8%</td>
</tr>
<tr>
<td>Mainland China</td>
<td>912.4</td>
<td>10 165.0</td>
<td>9.0%</td>
</tr>
<tr>
<td>Vietnam</td>
<td>833.5</td>
<td>2110.0</td>
<td>39.5%</td>
</tr>
<tr>
<td>Japan</td>
<td>541.8</td>
<td>4766.3</td>
<td>11.4%</td>
</tr>
<tr>
<td>South Korea</td>
<td>513.6</td>
<td>2654.9</td>
<td>19.3%</td>
</tr>
<tr>
<td>Germany</td>
<td>270.6</td>
<td>513.1</td>
<td>52.7%</td>
</tr>
<tr>
<td>Philippines</td>
<td>265.4</td>
<td>675.1</td>
<td>39.3%</td>
</tr>
<tr>
<td>Belgium</td>
<td>257.6</td>
<td>433.7</td>
<td>59.4%</td>
</tr>
<tr>
<td>Malaysia</td>
<td>244.8</td>
<td>1092.9</td>
<td>22.4%</td>
</tr>
<tr>
<td>Kuwait</td>
<td>203.1</td>
<td>417.7</td>
<td>48.6%</td>
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<tr>
<td>Singapore</td>
<td>166.9</td>
<td>1163.5</td>
<td>14.3%</td>
</tr>
<tr>
<td>Yemen</td>
<td>133.2</td>
<td>305.9</td>
<td>43.5%</td>
</tr>
<tr>
<td>United Arab Emirates</td>
<td>112.9</td>
<td>850.4</td>
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<td>Thailand</td>
<td>112.2</td>
<td>732.4</td>
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<td>Hong Kong</td>
<td>111.9</td>
<td>1526.3</td>
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<tr>
<td>United States of America</td>
<td>103.9</td>
<td>4731.9</td>
<td>2.2%</td>
</tr>
<tr>
<td>Qatar</td>
<td>100.5</td>
<td>233.0</td>
<td>43.1%</td>
</tr>
<tr>
<td>France</td>
<td>92.3</td>
<td>225.7</td>
<td>40.9%</td>
</tr>
<tr>
<td>India</td>
<td>77.3</td>
<td>1292.6</td>
<td>6.0%</td>
</tr>
<tr>
<td>Israel</td>
<td>69.0</td>
<td>134.7</td>
<td>51.2%</td>
</tr>
<tr>
<td>Netherlands</td>
<td>67.4</td>
<td>482.1</td>
<td>14.0%</td>
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<tr>
<td>Market</td>
<td>WA ($m)</td>
<td>Australia ($m)</td>
<td>Proportion of WA to Aust %</td>
</tr>
<tr>
<td>-------------------</td>
<td>---------</td>
<td>----------------</td>
<td>---------------------------</td>
</tr>
<tr>
<td>Bahrain</td>
<td>50.5</td>
<td>129.2</td>
<td>39.1%</td>
</tr>
<tr>
<td>Jordan</td>
<td>49.1</td>
<td>146.9</td>
<td>33.4%</td>
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<tr>
<td>Saudi Arabia</td>
<td>42.7</td>
<td>642.8</td>
<td>6.6%</td>
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<tr>
<td>Taiwan</td>
<td>37.1</td>
<td>868.3</td>
<td>4.3%</td>
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<tr>
<td>Egypt</td>
<td>36.3</td>
<td>354.8</td>
<td>10.2%</td>
</tr>
<tr>
<td>Bangladesh</td>
<td>32.4</td>
<td>484.7</td>
<td>6.7%</td>
</tr>
<tr>
<td>Canada</td>
<td>22.9</td>
<td>545.4</td>
<td>4.2%</td>
</tr>
<tr>
<td>New Zealand</td>
<td>22.1</td>
<td>1649.0</td>
<td>1.3%</td>
</tr>
<tr>
<td>Czech Republic</td>
<td>20.6</td>
<td>120.4</td>
<td>17.2%</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>19.4</td>
<td>720.8</td>
<td>2.7%</td>
</tr>
<tr>
<td>Oman</td>
<td>17.1</td>
<td>117.2</td>
<td>14.6%</td>
</tr>
<tr>
<td>Turkey</td>
<td>17.1</td>
<td>72.5</td>
<td>23.6%</td>
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<tr>
<td>Nepal</td>
<td>16.9</td>
<td>37.7</td>
<td>44.8%</td>
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<tr>
<td>Sri Lanka</td>
<td>13.9</td>
<td>178.9</td>
<td>7.8%</td>
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<tr>
<td>Switzerland</td>
<td>13.5</td>
<td>87.5</td>
<td>15.4%</td>
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<tr>
<td>Mauritius</td>
<td>11.9</td>
<td>87.2</td>
<td>13.7%</td>
</tr>
<tr>
<td>South Africa</td>
<td>11.2</td>
<td>115.9</td>
<td>9.7%</td>
</tr>
<tr>
<td>Italy</td>
<td>9.3</td>
<td>447.4</td>
<td>2.1%</td>
</tr>
<tr>
<td>Malawi</td>
<td>7.9</td>
<td>20.3</td>
<td>38.9%</td>
</tr>
<tr>
<td>Pakistan</td>
<td>6.9</td>
<td>196.0</td>
<td>3.5%</td>
</tr>
<tr>
<td>Iran</td>
<td>6.1</td>
<td>63.9</td>
<td>9.5%</td>
</tr>
<tr>
<td>Market</td>
<td>WA ($m)</td>
<td>Australia ($m)</td>
<td>Proportion of WA to Aust %</td>
</tr>
<tr>
<td>----------------------------</td>
<td>---------</td>
<td>----------------</td>
<td>----------------------------</td>
</tr>
<tr>
<td>Russian Federation</td>
<td>5.9</td>
<td>101.2</td>
<td>5.9%</td>
</tr>
<tr>
<td>Republic of Myanmar</td>
<td>5.6</td>
<td>143.7</td>
<td>3.9%</td>
</tr>
<tr>
<td>Tanzania</td>
<td>5.5</td>
<td>7.4</td>
<td>73.9%</td>
</tr>
<tr>
<td>Brunei Darussalam</td>
<td>5.1</td>
<td>34.5</td>
<td>14.9%</td>
</tr>
<tr>
<td>Cambodia</td>
<td>5.1</td>
<td>35.6</td>
<td>14.2%</td>
</tr>
<tr>
<td>Other</td>
<td>1016.2</td>
<td>2223.7</td>
<td>45.7%</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>7639.1</strong></td>
<td><strong>46 847.4</strong></td>
<td><strong>16.3%</strong></td>
</tr>
</tbody>
</table>
## Definition of key terms

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agricultural products or unprocessed agrifood products</td>
<td>Refers to crops, livestock and livestock products, horticultural, viticultural, and any other products raised or produced on farms.</td>
</tr>
<tr>
<td>Agrifood sector</td>
<td>Refers to agricultural activities, food manufacturing and processing as well as related input and output services and logistics chains.</td>
</tr>
<tr>
<td>Agrifood products</td>
<td>Refers to agricultural products, processed seafood, beyond farm-gate edible and non-edible manufactured products and value-added agricultural products.</td>
</tr>
<tr>
<td>Gross value of agricultural production</td>
<td>Refers to the value of agricultural products at their first point of sale. It includes the value of agricultural products that are exported in their raw form. It does not capture the value of seafood products or processed agricultural products.</td>
</tr>
<tr>
<td>Production value</td>
<td>Refers to the gross value of agricultural production.</td>
</tr>
<tr>
<td>Pasture products</td>
<td>Refers to swedes, mangolds, fodder roots, clover, sainfoin, forage kale and similar forage products, in the form of pellets or not.</td>
</tr>
<tr>
<td>Pasture hay</td>
<td>Refers to hay made from pasture that may or may not be seeded.</td>
</tr>
<tr>
<td>Seafood</td>
<td>Refers to edible fish products for human consumption from both wild capture (from the oceans) and aquaculture (which can be marine aquaculture or fresh water aquaculture on land). It is used interchangeably with fisheries products.</td>
</tr>
</tbody>
</table>
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