Western Australian agrifood and fisheries exports by global regions 2016/17

- North America: $149m
- Central America and Caribbean: $1m
- Middle East and North Africa: $1091m
- Europe: $1326m
- North-East Asia: $3180m
- Other Asia: $245m
- ASEAN: $2301m
- Africa (south of Sahara): $46m
- Oceania: $39m
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 statistics and insights on observed industry trends.

The 2018 WAAFFFI booklet is based on 2016/17 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. The GVAP data (gross value of agricultural products) is from the ABS: Value of Agricultural Commodities Produced (cat. no 7503.0). Export data is from the ABS monthly International Merchandise Trade subscription, with DPIRD analysis. Further export data is sourced from the ABS in customised data reports.

Export values published in this edition of the WAAFFFI differ slightly from previous editions. This is due to 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.
Western Australia’s agriculture, fisheries and forestry sectors are significant contributors to the state economy, generating growth and jobs throughout the regions and in metropolitan areas.

The value of these sectors to Western Australia is celebrated in this publication, which demonstrates how important primary industry production is to the fabric of our state.

Global demand for clean, safe, premium quality products from Western Australia has increased year-on-year in recent times. This demand is backed by our strong biosecurity systems, sophisticated supply chains and enviable reputation as a reliable supplier.

In 2016/17 there was a 24% increase in gross value added from agriculture, fisheries and forestry. Together, these sectors contributed 3% to the gross state product for Western Australia, and when combined with food and beverage manufacturing an additional $5.9 billion and total employment of 188,400 is a major contributor to the state.

Trade growth

Markets for Western Australian agricultural and fisheries products are heavily export orientated.

In 2016/17, agriculture and food exports were worth $8 billion, while commercial fishing exports – including pearling and aquaculture – totalled more than $533 million.

International trade across these sectors has increased almost 30% over the past five years, driven by strong growth in barley, live cattle, fresh and chilled lamb, lupin and oat exports.

Asia continues to be the major export destination for Western Australian agricultural products at 65% of export total, led by China, Indonesia, Vietnam and Japan, while Germany is an important European market.

While Western Australian commodity production continues to grow, our value added industries are also emerging as an important growth and jobs driver throughout the state.

There is a growing trend towards higher-value premium food and beverage processing, which represents more than 11% of the state’s total manufacturing sector and shows potential for future growth.

Most of Western Australia’s wild caught premium seafood production is exported, with strong demand in 2016/17 from Vietnam, Hong Kong, mainland China, Japan and the United States for Western rock lobster and prawns.

Although relatively small by comparison, the aquaculture sector is considered to have significant capacity for growth, underpinned by increasing global demand for cultured seafood products and investment in commercial aquaculture in Western Australia.

The forest products industry contributes more than $1.4 billion to the Western Australian economy annually.

Softwood timbers are primarily used for domestic housing and construction, while most timbers from hardwood plantations are exported as woodchips to markets in East Asia to be made into high-grade writing and printing paper.

The Western Australian forest and plantation sectors (softwood and hardwood plantations, and hardwood native timbers) produced logs worth $359 million in 2016/17.
Agricultural and forestry trade initiatives

The state government is investing in a number of initiatives to assist Western Australia businesses to secure a share of growing global demand for food, fibre and forestry products.

Export Competitiveness and Value Add Investment Grants are providing support to WA agrifood businesses to build export capacity and competitiveness to capture new international markets.

The Asia Market Success project is assisting Western Australian agrifood businesses to invest in accessing and developing high value, premium export markets in the region.

The Department of Primary Industries and Regional Development (DPIRD) regularly hosts overseas trade delegations which support market access, trade relationships and investment prospects.

The state government is also investing in new initiatives to reinforce our competitive strengths and cultivate new market opportunities for forest products.

Fisheries trade endeavours

Third-party certification, through the international sustainable fisheries certification body, the Marine Stewardship Council (MSC), has been important to the success of Western Australia’s Western rock lobster fishery – the first commercial fishery in the world to receive such accreditation in the year 2000, and to be re-certified three more 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 that our fisheries management achieves international best practice standards.

The state government continues to support the introduction of priority fisheries to achieve MSC certification and provides technical and financial support to achieve this.

Western Australia now has eight MSC certified fisheries – Western rock lobster, wild-caught abalone, Exmouth Gulf prawn, Shark Bay prawn, Peel Harvey Estuary commercial and recreational blue swimmer crab, Peel Harvey sea mullet, Australian west coast deep sea crab and the West Coast Silver lipped pearl fishery.

The state government has significantly invested in Western Australia’s potential to be a supplier of aquaculture finfish and shellfish.

This has been achieved through the establishment of the Mid West Aquaculture Development Zone, in which one of Australia’s largest aquaculture companies will operate, the development of the Albany Shellfish Hatchery, the upgrade of the DPIRD Fish Health Laboratory and securing a strong future for the Australian Centre for Applied Aquaculture Research.
Investing in the future

Investment in our biosecurity defences continues to be a priority, to protect and grow our agriculture, fisheries and forestry industries. This is increasingly underpinned by our reputation as a producer of safe, sustainable and biosecure products.

Research and development capability and global competitiveness are critical to the success and sustainability of the agriculture, fisheries and forestry industry sectors.

Through boosting the state’s scientific capacity to drive research development and innovation across the sector, it ensures that Western Australia remains internationally competitive and profitable.

This includes supporting traditional scientific disciplines, as well as investment in digital technology to capture the next leap in data driven productivity and efficiency improvements.

These are exciting times for Western Australia’s agriculture, fisheries and forestry sectors and we are working hard to ensure our industries are well equipped to tackle both the challenges and opportunities before them.

Hon. Alannah MacTiernan MLC
Minister for Agriculture and Food

Hon. Dave Kelly MLA
Minister for Fisheries; Forestry
2. Profiles

Department of Primary Industries and Regional Development

The Department of Primary Industries and Regional Development (DPIRD) is committed to growing and protecting Western Australia’s agriculture, fisheries and food sector.

DPIRD supports the agrifood sector to significantly increase its value by capitalising on growing global demand for food while safeguarding our state’s precious natural resources.

As an economic development agency, we conduct targeted research and development and foster innovation to enable the sector to overcome barriers for growth and increase its contribution to the state’s economy.

Our highly skilled staff work collaboratively with industry, delivering services across more than 100 million hectares of the state and to agribusinesses along the supply and value chains.

We also provide a range of resources and information to support agrifood businesses and educate the Western Australian community.

The sector is a significant contributor to the state’s economy – with exports totaling an estimated $8.5 billion in 2016/17.

Agriculture and food

Western Australia’s agriculture and food sector is a world-class producer of safe, high-quality agriculture, food and fibre products, vital to our state’s economy and to feeding local consumers and overseas consumers in our target export markets.

Our state’s agrifood sector is well placed to offer premium products that are sustainably and ethically produced, of known provenance and exceptional quality.

As well as being the nation’s largest grain-producing region, Western Australia is a significant producer of Australia’s meat and livestock, dairy, wool, horticulture and honey products.

Western Australia is one of the most pest-free and disease-free agricultural production areas in the world. Strict quarantine requirements ensure this status is maintained for the benefit of local producers and consumers around the globe.

This, combined with a focus on innovation, research and development, allows the sector to meet the specific requirements of domestic and overseas customers.
The sector places a high value on overseas markets, with agriculture being our second major export industry. Our state exports around 80% of its agricultural production.

In 2016/17, Western Australia exported an estimated $8.5 billion in agriculture and food products. The top three products exported were wheat, canola and barley.

For the past decade, about 70% of our agrifood exports has been destined for Asia, with China, Indonesia and Vietnam being our largest markets by value in 2016/17.

With growing demand for premium agrifood products, especially in Asia, Western Australia is in a good position to build on its reputation as a reliable supplier of clean, safe and high-quality food to overseas markets.

It is a significant source of employment, with the broader sector providing jobs for 188,400 people in 2016/17, and continues to be the lifeblood of rural and regional communities.

**Fisheries**

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 fish stocks, enforcement and education, biosecurity management and licensing of commercial and recreational fishing activity, including commercial aquaculture.

DPIRD licenses and regulates commercial fisheries, which include the rock lobster, pearling, prawns, scallops, abalone and finfish fisheries, and are worth around $550 million in exports annually. DPIRD also manages a statewide recreational fishery accessed by more than 750,000 people.

The core responsibility of DPIRD 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 activities along the state’s 12,500-kilometre coastline and within Australia’s exclusive economic zone, which extends 200 nautical miles (370 kilometres) from the 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.

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

The forest products industry contributes about $1.4 billion annually to the state's economy and supports employment for more than 6000 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.
## 3. Facts and figures – Western Australia’s economy

<table>
<thead>
<tr>
<th>Category</th>
<th>Value</th>
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<tbody>
<tr>
<td>Gross State Product</td>
<td>$233 billion</td>
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<tr>
<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>
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<tr>
<td>Land area</td>
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<tr>
<td>Unemployment rate</td>
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<tr>
<td>Consumer Price Index</td>
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<tr>
<td>Average Weekly Earnings</td>
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<td>Life expectancy at birth:</td>
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<tr>
<td>Males</td>
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</tr>
<tr>
<td>Females</td>
<td>85 years</td>
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</table>

State exports as a % of total Australian exports by value: **41%**
4. **Land and sea use – an 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 range of climatic conditions. As distance from the coast increases, rainfall decreases and temperature variations become greater.
- The five-year average growing season (May–Oct) rainfall over the south-west is 462 millimetres.
• Agriculture is Western Australia’s second major export industry, behind mining, oil and gas combined.

• Our soils and range of climates are suited to a variety of agricultural and forestry production, from broadacre cropping to irrigated pastures, horticulture and sandalwood.

• The 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, malt, rolled oats, 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, primarily grain, 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 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.
Western Australian land-use map

Legend

- Rangelands — mainly cattle grazing
- Rangelands — mainly sheep and goats
- Rangelands — no grazing
- Broadacre farming (cropping and livestock)
- Intensive livestock grazing on improved pastures
- Dairy
- Horticulture
- Viticulture
- Forestry plantations
- Arid interior
- Irrigated horticulture outside south-west region
- Sandalwood
- Port
- International airport
5. Production and exports – an overview

### Production
- In 2016/17, the gross value of Western Australia’s agricultural production was $9 billion, up from $8.2 billion in 2015/16.
- Western Australia produces more grain than any other state in Australia. Western Australia’s total wheat production in 2016/17 of 9.6 million tonnes equated to over 30% of Australia’s total production (31.8 million tonnes).
- We are also a significant producer of high-quality meat and livestock, oilseed, seafood, dairy, wool, and viticulture, horticulture and honey products.
- While western rock lobster dominates the fisheries sector, the state also produces 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 2016/17, the value of logs (including sandalwood) harvested by the industry was $359 million. Hardwood plantations dominate production, accounting for $248 million of the value of all logs.

### Exports
- The agrifood, fibre and fisheries industries are highly export orientated, accounting for $8.5 billion in exports in 2016/17.
- International trade has increased almost 30% over the past five years, driven by strong growth in wool, barley, canola, lupin and lobster exports.
- In 2016/17, the top five products exported were wheat, canola, barley, wool and lobster.
- North-East Asia, which includes mainland China, Japan and South Korea, continues to be our major region for export of agrifood, fibre and fisheries products, followed by South-East Asian markets.
- In 2016/17, our top five export markets for agrifood products were mainland China, Indonesia, Vietnam, Germany and Japan.
- The most valuable fish species in Western Australia – western rock lobster – accounted for $433 million or 81% of fisheries exports in 2016/17.
- There is high overseas demand for live animals (cattle and sheep) from Western Australia, driven mainly by South-East Asia and the Middle East.
- More than one-third of Australian live animal exports came from Western Australia in 2016/17, while the state was the dominant exporter of live sheep.
- Much of Western Australia’s seafood products are used in high-class restaurants in China (including Hong Kong) and throughout other parts of Asia.
Competitive strengths

- To capture growing global demand, Western Australian agrifood, fibre, fisheries and forestry industries aim to build on a range of competitive strengths, including:
  - land and irrigation water resources available to expand production
  - a well-managed and ecologically sustainable fisheries industry
  - distinct and quality forestry products
  - diverse geographical and climatic conditions allowing production of a wide range of products
  - modern infrastructure and sophisticated supply chains
  - access to the latest innovations through vibrant national and international science and innovation partnerships
  - a stable, well-regulated economy with a skilled and productive labour force
  - a beneficial geographic location that is in the same time zone as much of Asia
  - a production base that is geographically isolated from the rest of the world and protected by world-class biosecurity practices, ensuring our produce is relatively free from exotic pests and diseases
  - 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.

### Western Australian agrifood sector – 2016/17 facts and figures

<table>
<thead>
<tr>
<th>Indicator</th>
<th>2016/17 value</th>
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<tbody>
<tr>
<td>Gross value of agricultural production (GVAP)</td>
<td>$9 billion</td>
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<tr>
<td>Food retail sales value</td>
<td>$13.9 billion</td>
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<tr>
<td>Agrifood export value</td>
<td>$8.5 billion</td>
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<tr>
<td>State agrifood exports as a % of Australian agrifood exports</td>
<td>17%</td>
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<tr>
<td>No. of agricultural businesses (ABS)</td>
<td>8873</td>
</tr>
<tr>
<td>Employment in the sector</td>
<td>188 400*</td>
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</tbody>
</table>

*ABS 6291.0.55.003 – EQ06 – Employed persons by industry group of main job (ANZSIC), Sex, State and Territory, November 1984 onwards – Table 1 – sections: Agriculture, forestry and fishing; Food product manufacturing; Beverage and tobacco product manufacturing; Wholesale trade nfd (not further defined); Food retailing, and Food and beverage services
Agrifood, fibre, fisheries and forestry exports 2016/17

- Cereals and grains: $4065m (48%)
- Pulses, pastures and oilseeds: $1529m (18%)
- Meat and livestock products: $1240m (15%)
- Horticulture: $194m (2%)
- Fisheries: $533m (6%)
- Wool: $593m (7%)
- Food: $174m (2%)
- Dairy: $63m (1%)
- Forestry: $59m (1%)
- Apiculture: $3m (0%)

Total: $8454m
Agrifood, fibre, fisheries and forestry production and exports by industry 2016/17

- Food
- Forestry
- Fisheries
- Horticulture
- Pastures, pulses and oilseeds
- Cereals and grains
- Apiculture
- Wool
- Dairy
- Meat and livestock products

<table>
<thead>
<tr>
<th>Industry</th>
<th>Production</th>
<th>Export</th>
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<tr>
<td>Food</td>
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<td>Horticulture</td>
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<td>Pastures, pulses and oilseeds</td>
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<td>Cereals and grains</td>
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<td>Apiculture</td>
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<td>Wool</td>
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<td>Dairy</td>
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<tr>
<td>Meat and livestock products</td>
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$ Millions

$ Millions
Agrifood, fibre, fisheries and forestry production and exports 2012/13 to 2016/17

$ Millions

- 2012/13: Production $6500, Export $7000
- 2013/14: Production $7200, Export $8000
- 2014/15: Production $7500, Export $8500
- 2015/16: Production $7800, Export $9000
- 2016/17: Production $8000, Export $9500

Graph showing production and exports over the years.
Top 10 markets for Western Australian agrifood, fibre, fisheries and forestry products
Agrifood, fibre, fisheries and forestry exports by global region 2012/13 to 2016/17
6. Cereals

- The state produces 30–40% of Australia’s cereals in a rain-fed Mediterranean natural environment. The main cereals produced, in order of production volume, are wheat, barley and oats. Western Australian cereal exports have accounted for around 46% of Australian cereal exports over the past 10 years.

- The Western Australian cereal industry is a major contributor to the agricultural sector and the Australian economy with most cereals produced exported.

- About 4200 cereal farms, mainly family-owned and operated businesses, produce on average 12 million tonnes of cereals each year. Farm sizes range from 1000 to 15 000 hectares.

- 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 of shochu barley to Japan. The Middle East 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, which recently expanded. 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. Despite a patchy season and widespread frost, production in 2016/17 was valued at $3.5 billion, the same value as the previous season.

In 2016/17, the value of the state’s total cereal exports was $4.1 billion. Of these, 4.5% were processed products.

Wheat exports were valued at $2.5 billion in 2016/17, down 9% on the previous year, mainly due to lower prices. Barley exports were $1 billion and oat exports were $143 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 $175 million in 2016/17 and have been rising strongly since 2012/13, driven by strong demand in Asia, notably from Japan, South Korea, China and Taiwan.

• The top six markets for Western Australian wheat in 2016/17 were Indonesia, the Philippines, South Korea, Japan, Yemen and mainland China, accounting for 75% of all exports.

• The top six markets for Western Australian barley in 2016/17 were China, Japan, Saudi Arabia, Kuwait, the United Arab Emirates and Vietnam, with 98% of exports going to these markets.

• 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.
Pulses, pasture and oilseeds

- 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. Pastures are often grown as part of the cropping rotation and may be grazed or cut for hay.

- 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 attention as a 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.

- 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 coexist 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 recognised as the highest quality canola in Australia, with oil content often 2–4% higher than other states.

- Innovative plant breeding, research and market development are ensuring that 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 2016/17 was $1.7 billion, well up on the previous season’s harvest of $1.1 billion. Canola at $1.2 billion dominated production in 2016/17.

• Pasture hay production value increased by more than 60% due to higher yields and improved prices.

• Between 2012/13 and 2016/17, the value of pulse and oilseed exports increased strongly from $0.9 billion to $1.5 billion. 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 significantly higher in 2016/17 than in 2015/16, increasing from $746 million to $1.4 billion, mainly due to a larger crop as a result of better seasonal conditions.

• The top six Western Australian canola export markets in 2016/17 were Germany, Belgium, France, China, Denmark and Japan who accounted for 93% of the trade.

• The top six Western Australian export markets for pulses in 2016/17 were the Netherlands, South Korea, Japan, Malaysia, the Philippines and Bangladesh, who took 90% of all exports.
Pulses, pastures and oilseeds exports 2016/17

Top 10 Western Australian pulses, pastures and oilseeds markets 2016/17

- Lupins: $115m (8%)
- Pasture products: $28m (2%)
- Other pulses: $19m (1%)
- Other oilseeds: $5m (0%)
- Canola: $1362m (89%)

Total: $1529m

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Germany
Belgium
France
Mainland China
Belgium
Denmark
Japan
South Korea
Pakistan
Portugal
Netherlands

$ Millions

0 100 200 300 400 500 600 700 800
8. Meat and live animals

- Western Australia produces and exports a wide range of high-quality meat products (chilled and frozen), including beef, lamb, mutton, pork and goat.
- 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 further expansion.
- 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 a world leader in live exports with both cattle and sheep systems focused on export markets in Asia and the Middle East. All live animal exports from Australia are subject to the Australian Government’s Exporter Supply Chain Assurance System (ESCAS).
- The ESCAS ensures all livestock exported for slaughter are handled to agreed international (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 Western Australian cattle herd is relatively stable, with about half located in northern production systems and the other half in 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 with those in the north.
- The state’s beef herd comprised 2 million head at July 2017 and had a gross value of production of $833 million.
- Eighty-two per cent of Western Australian cattle are contained within herds of more than 500 head, on only 22% of the state’s cattle properties (2016 census).
• The gross value of production for beef cattle disposals (slaughter and live export) has increased 80%, from $463 million in 2012/13 to $833 million in 2016/17, largely due to stronger prices and the increased value of exports.
• Cattle can be sold via domestic slaughter, live export or interstate transfer.
• Of the cattle processed in Western Australia in 2016/17, 65% were consumed on the domestic market, and 35% were exported to 30 international markets.
• 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.
• Beef produced in Western Australia has a reputation for high quality based on Meat Standards Australia’s benchmarks.

Sheep industry
• Most Western Australian sheep are located in the southern agricultural zones of the state, with a small proportion (less than 2%) located in the southern rangelands.
• The Western Australia sheep flock numbered 14.2 million head at the end of 2016/17 and produced high-quality meat and wool for international markets.
• There are about 4500 sheep farms in Western Australia and about 82% have flocks of more than 500 sheep.
• Breeding ewes make up 53% 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.
• The gross value of production for sheep disposals (slaughter and live export) was $551 million in 2016/17, a 7% increase year-on-year. This was partly due to strong prices and an increase in the value of lamb exports from Western Australia.
• Of sheep disposed of in 2016/17, 65% were processed domestically, while 29% were exported live and 6% were transferred interstate.
• There are 16 abattoirs that process sheep in Western Australia, nine of which are export accredited. Most (80%) of the sheep processed in Western Australia were exported to international markets with the remaining 20% 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 Australia has 259,000 pigs with pork production worth $163 million in 2016/17.
- A single key abattoir processes around 95% of the state’s pig herd, supported by several smaller operations.
- 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.

Poultry

- The Western Australian poultry industry comprises 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 34 million dozen eggs valued at $87 million in 2016/17, an increase of 24% from the previous year. This may be attributed to stabilisation in free-range production.
- Most eggs are purchased fresh rather than processed.
- As of the 2016 census, 58% of the layer hens 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.
Meat and live animal exports

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

• Of the total $1.13 billion of meat and live animal exports (excluding horses and non-edible livestock products) in 2016/17, 54% consisted of meat and edible offal exports while 46% came from live animal exports.

• The value of Western Australian sheep meat exports has risen 17% from $323 million in 2015/16 to $377 million in 2016/17, 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 2016/17 were mainland China, the United States of America, the United Arab Emirates, Saudi Arabia and Jordan.

Meat and live animal product exports 2016/17

- Beef (meat and edible offal) $183m 15%
- Live sheep $203m 16%
- Other livestock products (edible & inedible) $109m 9%
- Pig meat (and edible offal) $37m 3%
- Sheep meat (and edible offal) $377m 30%
- Other meat $14m 1%
- Total $1240m

Value of production 2012/13 to 2016/17

- Meat and live animal exports 2012/13 to 2016/17
- Meat and live animal product exports 2016/17
• Of the Western Australian sheep disposed of in 2016/17, 29% were exported live to eight countries from the port of Fremantle.
• Western Australian live sheep exports were valued at $203 million in 2016/17, a year-on-year increase of 1%.
• The top five export markets for Western Australian live sheep in 2016/17 were Kuwait, Qatar, Jordan, the United Arab Emirates and Israel.
• The value of Western Australian beef exports (including edible offal) declined by 15% from a high of $215 million in 2015/16 to $183 million in 2016/17. This reduction reflects a decline in prices in more recent years, but remains above the five-year mean value of $163 million.
• The top five markets by value for beef exports in 2016/17 were Japan, Korea, the United States of America, mainland China and Indonesia.
• The value of live cattle exports decreased 15% from $371 million in 2015/16 to $317 million in 2016/17. This decline in value has been driven by lower prices for live cattle in more recent years; however, value remains above the five-year mean value of $265 million.
• The major export markets by value for Western Australian live cattle in 2016/17 were Indonesia, Vietnam, Israel, Turkey and Malaysia.
• Poultry meat and offal exports are relatively low at less than $1 million per year.
• Pork exports (meat and edible offal) reached $37 million in 2016/17, up 6% compared to the previous year, with most exports destined for Singapore.
Top 10 Western Australian beef export markets 2016/17

1. United States of America
2. South Korea
3. Mainland China
4. Indonesia
5. Malaysia
6. Singapore
7. Hong Kong
8. New Zealand
9. Vietnam
10. Japan

Top 10 Western Australian live cattle export markets 2016/17

1. Vietnam
2. Indonesia
3. Malaysia
4. Mainland China
5. Qatar
6. Brunei Darussalam
7. Jordan
8. Brunei Darussalam
9. Jordan
10. Kuwait

$ Millions
The Western Australian dairy industry is located predominantly in the south-west of the state around three main areas: Harvey, Margaret River and Denmark.

Dairy processing is dominated by three large multinational companies that process around 90% of the state’s milk production. More than 50 smaller processors of specialty dairy products, including organic operations, also operate in the state.

Milk production takes place all year round using free-range production systems.

While the average herd size (number of cows milked for at least three months) was 498, there was a wide range in herd size from 170 to 1575 cows, with only two farms milking more than 1000 cows.

With about 150 dairy farms, Western Australia produced about 4.2% (380 million litres) of Australia’s milk production in 2016/17.

Milk production in Western Australia remained stable in 2016/17, reflecting constant domestic demand conditions, compared to the national decrease of 5.5%.

The average milk price was slightly lower in 2016/17 although the average price (49.3 cents per litre compared to 52.3 cents per litre in 2015/16) does not necessarily reflect the wide range of prices received by farmers. Farm-gate milk prices varied from 44.6 to 58.7 cents per litre.

The seasonal nature of supply appears to bear little influence over prices received for milk. Individual agreements with processors had the greatest influence on the farm-gate price.

Western Australian dairy production was worth $192 million in 2016/17, a decrease of 5% compared to 2015/16 ($203 million). This may be due, in part, to the decrease in the average milk price.
• Unlike many countries, Australia has no legislative control over the price that milk processing companies pay farmers for their milk. Since deregulation in 2000/01, all prices within the industry are set by market forces. Dairy product exports increased by 10% in 2016/17 to $63 million, up from $57 million in 2015/16.

• Limited high-value processing is conducted in Western Australia, with milk and cream dominating at 98% of total exports.

• Milk and cream exports continue to increase, while exports in cheese and yoghurt products continue to decline as a result of global pricing pressure.

• The state’s close transport links to various trading 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.
Dairy exports by product 2012/13 to 2016/17

Top 10 Western Australian dairy markets 2016/17 by $million

- Maldives
- Cambodia
- Myanmar
- Taiwan
- Malaysia
- South Korea
- Hong Kong
- Philippines
- Mainland China
- Singapore
Wool

- There are around 14.2 million sheep and lambs in Western Australia, including 7.6 million breeding ewes run by 4500 sheep producers. Sheep are mostly co-located in the cropping regions across the south of the state, with some grazing in adjacent rangelands.

- The breeding ewe population is made up of 81% merino ewes, reflecting the importance of the wool enterprise to the state’s sheep industry.

- Western Australia produced 71 million kilograms of greasy wool in 2016/17, about 21% of the Australian clip. This is an increase of 9% compared to 2015/16.

- More than 95% of wool production in Western Australia is merino wool measuring less than 24.5 micron. Super fine wool (under 19.5 micron) accounted for 41% of Western Australian wool production in 2016/17.
• In 2016/17, Western Australia’s average wool fibre diameter was 20.1 micron compared to Australia’s average of 21.0 micron.
• The value of wool production in Western Australia was $826 million in 2016/17, a year-on-year increase of 25%.
• Exports in 2016/17 were valued at $593 million, an increase of 24% from 2015/16.
• The Western Australian wool clip is exported or transported interstate for processing. Western Australia’s major wool markets in 2016/17 were mainland China (83%), India (8%) and the Czech Republic (4%).
• Western Australia remains internationally cost competitive in wool production, handling and delivery. The local sheep industry maintains world-class animal health and welfare standards.

**Top 10 Western Australian wool markets 2016/17 by value**

- Mainland China
- India
- Czech Republic
- Italy
- Malaysia
- United States of America
- South Africa
- China
- Egypt
- United Kingdom
Horticulture

• Western Australia produces premium 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 production value of Western Australia’s horticulture in 2016/17 was $912 million, with $140 million worth of fresh horticulture products exported.

• Horticulture is an intensive production system. The gross value of production per hectare for horticulture was $28,315 compared to whole of agriculture at $107 per hectare.

• Among the three major horticulture categories (vegetables, fruits and nuts, and other horticulture) cutflower, nursery and turf industries had the highest per hectare value at $102,649.

• 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 32,225 hectares, with 1,512 businesses involved in production. Of this area:
  – fruits, including grapes, occupied 64% of the area and accounted for 60% of the total number of businesses
  – vegetables occupied 30% of the area and accounted for 25% of the number of businesses
  – nursery industries occupied 5% of the area and accounted for 14% of the number of businesses.

• During the five years from 2012/13 to 2016/17, exports of all four main categories under horticulture showed an increasing trend. Exports of fruits and nuts grew by 254%, vegetables by 63%, nursery products by 26% and essential oils by 143%, resulting in a total export increase of 92%.

• Compared to last year, horticultural industries had an export growth of 24%, where vegetable exports grew by 17%, fruits and nuts by 15%, nursery products by 70% and essential oils by 64%.

• Both fruit and vegetable exports were concentrated, with the top five destinations accounting for more than 70% of exports. The top five destinations for:
  – vegetables were the United Arab Emirates, Singapore, Malaysia, Saudi Arabia and Qatar
  – fruits were Singapore, the United Arab Emirates, Hong Kong, Thailand and Malaysia.

• Fifty-one industries were involved in fruit and vegetable processing.
Vegetables

- Vegetables were almost 55% of the total horticultural exports (including essential oils) from Western Australia.
- In 2016/17, vegetables had an estimated production value of $317 million and an export value of $95 million.
- Between 2012/13 and 2016/17, the export value of vegetables increased from $58 million to $95 million (63% increase). Exports increased by 17% (from $81 million to $95 million) from last year.
- There were 383 businesses with an area of 9669 hectares involved in vegetable production for human consumption.
- Carrots were the largest horticultural export industry, with an estimated export value of $75 million. Western Australian carrots were exported to more than 20 countries, and Western Australian exports comprised 83% of Australia’s carrot exports by value.
- Western Australia’s mushrooms and truffles have a well-established reputation for quality in premium markets.
- Western Australia exported 79% of Australia’s truffles and mushrooms, with most of the state’s truffle production from Manjimup. In 2016/17, $4.5 million truffles and mushrooms were exported compared with $3.5 million in 2015/16.
- Potatoes (all types) were the second largest export category after carrots, with a combined export value of $5.2 million.
- The United Arab Emirates was the major destination for our vegetables (27%), followed by Singapore (15%) and Malaysia (14%).

Fruits and other horticulture

- In 2016/17, the production value for fruits and nuts was $321 million, $169 million for nursery and turf, and $106 million for grapes (inclusive of wine grapes).
- There were 910 farm businesses producing fruit (including nuts and grapes) in an area of 20,913 hectares, and 219 businesses producing nursery products, cutflowers and cultivated turf in an area of 1643 hectares.
- The export value for fruits and nuts was $41 million, and $4 million for flowers and nursery products.
- The value of fruit exports has increased by 245% since 2012/13, while flowers and nursery exports have increased by 26%. Fruit and nuts exports increased by 15% and cutflower and nursery exports by 70% respectively, compared to 2015/16.
• Strawberries had an export value of $29 million, and accounted for 70% of total fruit exports from Western Australia and 88% of total strawberry exports from Australia. The major export destinations were Singapore, the United Arab Emirates, Kuwait, Thailand and Malaysia.
• Oranges are a fast-growing export – from just $0.15 million in 2012/13 to $2.5 million in 2016/17.
• Western Australia has a seasonal advantage in strawberry production, with our production counter-seasonal to major producing countries.
• Nursery, flowers and turf exports were dominated by floriculture, with Japan taking 55% of flowers exported from Western Australia.
• Singapore was our major export destination for fruits (24%), followed by the United Arab Emirates (20%) and Hong Kong (11%).
• Global demand for quality and nutritious honey, honey products and healthy disease-free bees is strong. The demand for specialist pharmaceutical honey products is also gaining momentum. Honeybees play an important role in the pollination of many horticultural and agricultural crops.

• Western Australian honey is renowned for its superior quality as it is sourced from the state’s pristine hardwood forests and coastal wildflowers. Local honeybees are free of many important pests and diseases found in eastern Australia. Western Australia is also free of serious exotic bee mites.

• There are 2670 registered beekeepers in Western Australia.

• The total number of registered hives in Western Australia is estimated at 41 000, which represents 9% of Australia’s total.

• 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 2016/17, the Western Australian apiculture industry exported $3.4 million of honey and bee products.

• Honey made up to 83% of all bee products exported, (predominantly into China), followed by 11% of live bees (mainly to Canada) and 6% of beeswax (mainly to Germany).

• The export of apiculture products declined 32% from 2015/16, possibly due to unusual seasonal activity resulting in reduced quantities of Western Australia’s premium food export ‘Jarrah honey’.

• Honey, honeybees (including live bees) and second-hand hive equipment are banned from entering the state due to stringent biosecurity measures.
Apiculture product exports 2016/17

- Beeswax: $0.2m, 6%
- Live bees: $0.4m, 11%
- Honey: $2.8m, 83%
- Total: $3.4m

Top 10 markets for Western Australian apiculture products 2016/17

- Mainland China
- Mauritius
- Canada
- Malaysia
- Singapore
- Germany
- Hong Kong
- Japan
- Qatar
- Vietnam

Bar chart showing the $ millions of export for each market.
13. 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 premium 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 2016/17 were valued at more than $533 million, including $433 million from one of the most valuable fish species in Australia – western rock lobster.
- A slight strengthening in the Australian dollar may have contributed to the $20 million drop in the value of lobster exports from a high of $453 million in 2015/16 to $433 million in 2016/17.
- Other key features of the Western Australian fishing industry include:
  - a pearl production industry valued at $50 million in 2016/17
  - a prawn (shrimp) industry valued at $20 million in 2016/17
  - an aquaculture industry in the south of the state producing yields of freshwater 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 2016/17 were Vietnam, Hong Kong, mainland China, Japan and the United States of America.
- The top three markets for crustacean exports in 2016/17 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.
General issues affecting the sector in 2016/17

- High demand from China has resulted in Western Australia’s rock lobster exports continuing the strong growth that began in 2012/13.
- In 2016/17, rock lobster exports made up more than 80% of the total value of Western Australia’s fisheries exports.
- Investment in third-party sustainability certification, through the Marine Stewardship Council, continues, with eight fisheries now certified, comprising most of the state’s fisheries production by value.
- To promote the development of large-scale marine finfish aquaculture, the state government created two Aquaculture Development Zones – one in the Kimberley and the other in the Mid West, between Geraldton and the Abrolhos Islands. Aquaculture Development Zones provide an ‘investment-ready’ platform for aquaculture ventures. Another project to identify zones on the south coast that are suitable for large-scale shellfish grow-out is underway.
- The state government has built a multi-species shellfish hatchery near Albany to provide juvenile seed stocks to support the shellfish sector.

### Fisheries exports by type 2016/17

- Lobster: $433m (81%)
- Other Crustaceans (Prawn and Crab): $22m (4%)
- Molluscs (abalone and scallops): $20m (4%)
- Other fisheries products: $10.3m (1%)
- Pearls: $50m (9%)
- Fish meat: $7m (1%)
- Live fish: $0.3m (0%)
- Total: $532.7m

### Top 10 Western Australian fisheries markets 2016/17

- Vietnam
- Hong Kong
- United Arab Emirates
- United States of America
- Canada
- Switzerland
- Singapore
- Thailand
- Mainland China
- Japan
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 more than 1400 registered food businesses, including small-scale artisanal and start-up enterprises making value-added products. More than 25% of the state's food businesses are 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 more than 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 2016/17, Western Australian food and beverage manufacturing businesses had a total turnover of $5.9 billion, a nominal increase over the previous year.

Retail sales in the food industry averaged $1.1 billion per month in 2016/17, which equated to an annual turnover of more than $13.9 billion. This represented an increase of 2.3% from 2015/16. The food service industry had a turnover of $5.4 billion in 2016/17, an increase of 3.4% from the previous year.
• Western Australia exported $1.5 billion of processed agrifood and fisheries products in 2016/17, 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 $126 million and prepared animal feed products accounted for $20 million.

• Overall, exports of processed, value-added products increased by 59% between 2012/13 and 2016/17, assisted 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 2012/13 and 2016/17 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.

Wine

• Global demand for fine wines is growing rapidly driven by increasing population and incomes. The global trade in wine is about $32 billion per year with the fine wine segment representing about 30% by value.

• Although Western Australia produces only 5% of Australia’s total wine volume, it represents 12% of the total wine value and 30% of the fine wines.

• Western Australia’s fine wines are produced in nine diverse Geographic Indication regions in the state’s south-west. Each of the regions – from the hot climate Swan Valley in the north, through the temperate Mediterranean Margaret River to the cool climate Great Southern in the south – produces their own distinctive wine styles and varieties.
• There are about 500 winegrowers producing 70,000 tonnes of grapes on 11,800 hectares across 800 separate vineyards in these regions.

• About 400 wine producers make 45 million litres of wine in 350 wineries, with more than 200 cellar doors and associated restaurants and other tourist facilities.

• In 2016/17, the Western Australian wine industry exported $48.2 million of product to more than 60 countries. The top five export markets were China (36%), United Kingdom (17%), United States of America (10%), Singapore (8%) and Hong Kong (5%).

• Exports have grown strongly at an average of 10% per year over the past three years, driven by demand in China.
15. 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 supports the employment of more than 6000 people, mostly in regional Western Australia. Including secondary processing, the sector injects more than $1.4 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, most production involves arid timber found in remote locations in the Goldfields and Rangelands. A sandalwood plantation industry is now emerging, including around Kununurra in the north of the state
  - softwood (pine) plantations industry – ranges from Gingin (north of Perth) to Esperance (on the south coast)
  - 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 $359 million in 2016/17.
- In 2016/17, the value of hardwood plantations was $248 million. 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. In 2016/17, production of logs was valued at $58 million.
• The Forest Products Commission (FPC) is investing $21 million over five years to expand Western Australia's softwood estate. The investment aims to address the decline in the softwood estate, and the FPC works with the Western Australia softwood industry 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 production of high-quality furniture, flooring and joinery products. In 2016/17, the value of native timber logs produced was $31 million.

• 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 remain strong on the back of resource shortages in India and the Pacific Islands. In 2016/17, revenue from the sale of sandalwood logs and powder totalled $22 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 agrifood, fisheries and forest exports by commodities 2016/17

<table>
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<th>Commodity</th>
<th>WA ($m)</th>
<th>Australia ($m)</th>
<th>Proportion of WA to Aust %</th>
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</tbody>
</table>

**Total** | **8454** | **50538** | **17%**

**Commodity**       **WA ($m)** | **Australia ($m)** | **Proportion of WA to Aust %**
--- | --- | --- | ---
Other pulses        | 18 | 2821 | 1%
Other animal products | 17 | 286 | 6%
Wood and timber     | 16 | 155 | 10%
Abalone             | 12 | 187 | 6%
Pet food            | 11 | 181 | 6%
Stock food          | 9  | 158 | 6%
Other marine        | 8  | 283 | 3%
Molluscs            | 8  | 12  | 64%
Textiles            | 5  | 262 | 2%
Beverages           | 5  | 336 | 1%
Mushrooms and truffles | 5 | 6 | 79%
Other agrifood products | 4 | 366 | 1%
Other live animals  | 4  | 178 | 2%
Other cereals       | 4  | 32  | 12%
Sandalwood          | 4  | 4   | 98%
Flowers             | 3  | 5   | 57%
Crabs               | 3  | 8   | 38%
Honey               | 3  | 39  | 7%
Other oilseeds      | 1  | 6   | 14%
Nursery products    | 1  | 7   | 10%
Wood products       | 0.5| 3   | 19%
Oilseed products    | 0.3| 9   | 4%
Beeswax             | 0.2| 4   | 5%
Cereal products     | 0.1| 21  | 1%

**Total** | **8454** | **50538** | **17%**
## Value of agrifood, fisheries and forest exports to markets 2016/17

<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>Mainland China</td>
<td>1886</td>
<td>11647</td>
<td>16%</td>
</tr>
<tr>
<td>Indonesia</td>
<td>813</td>
<td>2953</td>
<td>28%</td>
</tr>
<tr>
<td>Vietnam</td>
<td>714</td>
<td>2188</td>
<td>33%</td>
</tr>
<tr>
<td>Germany</td>
<td>714</td>
<td>1057</td>
<td>68%</td>
</tr>
<tr>
<td>Japan</td>
<td>687</td>
<td>4937</td>
<td>14%</td>
</tr>
<tr>
<td>South Korea</td>
<td>467</td>
<td>2601</td>
<td>18%</td>
</tr>
<tr>
<td>Philippines</td>
<td>372</td>
<td>964</td>
<td>39%</td>
</tr>
<tr>
<td>Belgium</td>
<td>255</td>
<td>582</td>
<td>44%</td>
</tr>
<tr>
<td>Kuwait</td>
<td>225</td>
<td>409</td>
<td>55%</td>
</tr>
<tr>
<td>Yemen</td>
<td>204</td>
<td>292</td>
<td>70%</td>
</tr>
<tr>
<td>United Arab Emirates</td>
<td>187</td>
<td>916</td>
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</tr>
<tr>
<td>Malaysia</td>
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<td>1118</td>
<td>15%</td>
</tr>
<tr>
<td>Singapore</td>
<td>161</td>
<td>1242</td>
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<tr>
<td>Saudi Arabia</td>
<td>128</td>
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<td>26%</td>
</tr>
<tr>
<td>United States of America</td>
<td>124</td>
<td>3737</td>
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</tr>
<tr>
<td>India</td>
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<td>3012</td>
<td>4%</td>
</tr>
<tr>
<td>France</td>
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</tr>
<tr>
<td>Qatar</td>
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<td>244</td>
<td>42%</td>
</tr>
<tr>
<td>Hong Kong</td>
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<td>1495</td>
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</tr>
<tr>
<td>Israel</td>
<td>69</td>
<td>90</td>
<td>76%</td>
</tr>
<tr>
<td>Bangladesh</td>
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<td>790</td>
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<tr>
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<td>769</td>
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<tr>
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<tr>
<td>Taiwan</td>
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</tr>
<tr>
<td>Netherlands</td>
<td>58</td>
<td>385</td>
<td>15%</td>
</tr>
</tbody>
</table>

<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>Oman</td>
<td>48</td>
<td>104</td>
<td>46%</td>
</tr>
<tr>
<td>Jordan</td>
<td>45</td>
<td>115</td>
<td>40%</td>
</tr>
<tr>
<td>Turkey</td>
<td>40</td>
<td>215</td>
<td>19%</td>
</tr>
<tr>
<td>Pakistan</td>
<td>40</td>
<td>543</td>
<td>7%</td>
</tr>
<tr>
<td>Portugal</td>
<td>37</td>
<td>40</td>
<td>93%</td>
</tr>
<tr>
<td>Bahrain</td>
<td>28</td>
<td>97</td>
<td>29%</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>27</td>
<td>669</td>
<td>4%</td>
</tr>
<tr>
<td>Canada</td>
<td>25</td>
<td>456</td>
<td>5%</td>
</tr>
<tr>
<td>Czech Republic</td>
<td>25</td>
<td>118</td>
<td>21%</td>
</tr>
<tr>
<td>New Zealand</td>
<td>23</td>
<td>1600</td>
<td>1%</td>
</tr>
<tr>
<td>Switzerland</td>
<td>16</td>
<td>99</td>
<td>16%</td>
</tr>
<tr>
<td>Kenya</td>
<td>14</td>
<td>24</td>
<td>57%</td>
</tr>
<tr>
<td>Mauritius</td>
<td>13</td>
<td>90</td>
<td>15%</td>
</tr>
<tr>
<td>Nepal</td>
<td>13</td>
<td>47</td>
<td>28%</td>
</tr>
<tr>
<td>Italy</td>
<td>11</td>
<td>391</td>
<td>3%</td>
</tr>
<tr>
<td>Papua New Guinea</td>
<td>11</td>
<td>325</td>
<td>3%</td>
</tr>
<tr>
<td>Sri Lanka</td>
<td>8</td>
<td>167</td>
<td>5%</td>
</tr>
<tr>
<td>South Africa</td>
<td>8</td>
<td>93</td>
<td>9%</td>
</tr>
<tr>
<td>Uganda</td>
<td>8</td>
<td>9</td>
<td>90%</td>
</tr>
<tr>
<td>Egypt</td>
<td>7</td>
<td>245</td>
<td>3%</td>
</tr>
<tr>
<td>Republic of Myanmar</td>
<td>6</td>
<td>128</td>
<td>5%</td>
</tr>
<tr>
<td>Lebanon</td>
<td>6</td>
<td>29</td>
<td>21%</td>
</tr>
<tr>
<td>Other</td>
<td>106</td>
<td>1654</td>
<td>6%</td>
</tr>
</tbody>
</table>

**Total**                        | 8454    | 50538          | 17%                       |
<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Agricultural products or unprocessed agrifood products</strong></td>
<td>Refers to crops, livestock and livestock products, horticultural, viticultural and any other products raised or produced on farms</td>
</tr>
<tr>
<td><strong>Agrifood sector</strong></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><strong>Agrifood products</strong></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><strong>Gross value of agricultural production</strong></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><strong>Production value</strong></td>
<td>Refers to the gross value of agricultural production</td>
</tr>
<tr>
<td><strong>Pasture products</strong></td>
<td>Refers to swedes, mangolds (root vegetable), fodder roots, clover, sainfoin (hay crop), forage kale and similar forage products, in the form of pellets or not</td>
</tr>
<tr>
<td><strong>Pasture hay</strong></td>
<td>Refers to hay made from pasture that may or may not be seeded</td>
</tr>
<tr>
<td><strong>Seafood</strong></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 freshwater aquaculture on land). Used interchangeably with fisheries products</td>
</tr>
</tbody>
</table>
Important disclaimer

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