

Tasmanian Agri-Food

# SCORECARD 2021-22



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EXPERIENCE



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# HIGHLIGHTS



## KEY FACTS

Agriculture farm gate value  
**\$2.34 billion**

2%

Agri-food gross value  
**\$3.65 billion**

5%

Packed and processed food value  
**\$5.63 billion**

<1%

Overseas food exports  
**\$968 million**

11%

**5.0 times**  
more food 'produced' than  
'consumed' by resident Tasmanians

*Agriculture, seafood and food value adding are major contributors to the Tasmanian economy.*

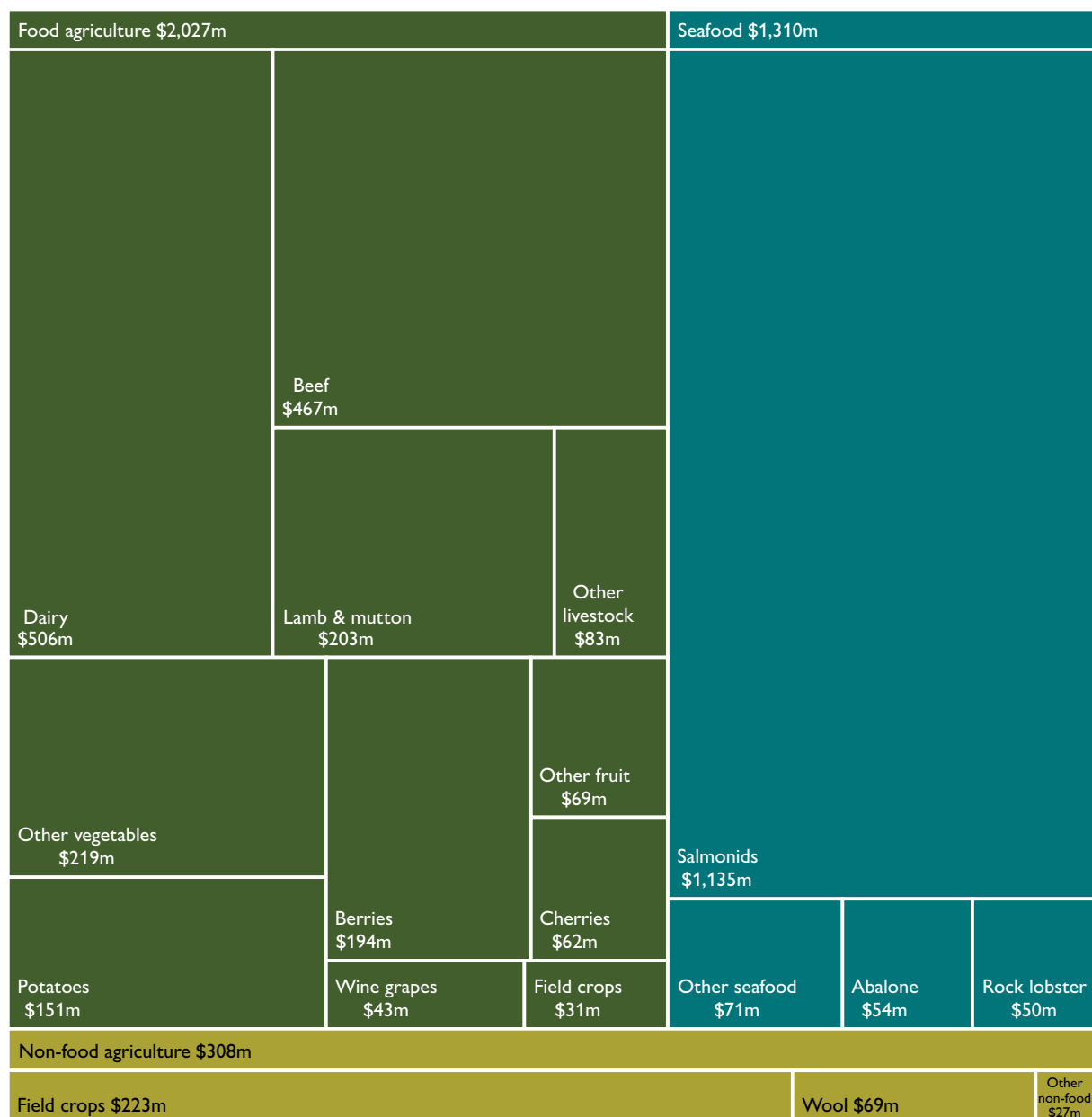
**Tasmanian agriculture experienced another year of growth in 2021–22.** The farm-gate value of the sector rose to \$2.34 billion, from an adjusted \$2.3 billion in 2020–21 which is a 2% increase on the previous year<sup>1</sup>. The State's gross agri-food value increased to \$3.65 billion during 2021–22. Favourable seasonal conditions during spring and cool temperatures leading into the summer enabled ample feed which were crucial to the continued strong performance of pasture-based industries, which accounted for about two-thirds of farm-gate value.

High milk and livestock prices underpinned the growth in farm-gate value of agriculture and total packed and processed food value (\$5.63 billion). Easing of disruptions to international trade and freight services due to COVID–19 increased food exports to \$968 million from \$874 million in 2020–21. During this period, the beach value of aquaculture continued its strong growth reaching \$1.3 billion up by 10%.

The **Tasmanian Agri-Food ScoreCard** measures and reports on the value and final market destinations of the State's agriculture, food and beverage production. The approach used to estimate the gross value of agriculture was updated and improved during 2018–19 to utilise the best available data, meaning the gross value of agriculture reported in the ScoreCard is not equal to the value reported by the Australian Bureau of Statistics (ABS). This change is explained further on pages 4 and 41.

<sup>1</sup> A correction was made to the 2020–21 Scorecard (after publication) due to a duplication of data in the calculation of table grapes. This error resulted in the farmgate value for 2020–21 being incorrectly reported as \$2.34 billion instead of \$2.3 billion

## Gross value of primary production at the farm gate or beach - \$3.65 billion



The gross value of Tasmanian agriculture reported in this ScoreCard is \$2.34 billion. This value is derived from the best available data sources including Horticulture Innovation Australia, Wine Tasmania, the ABS, the Tasmanian Institute of Agriculture and individual Tasmanian agribusinesses and is up by 2% from the \$2.3 billion in 2020–21.

Due to the ABS phasing out the farm survey and as a result, only producing farmgate value for a reduced number of commodities, the derived farmgate value can not be directly compared to the ABS value for this Scorecard. Furthermore, significant categories such as cherries, berries and vegetables were not reported for Tasmania by the ABS for the year 2021–22. However, other industry reliable data was sourced and used by AgriGrowth Tasmania to obtain the farmgate value. For further information on the inclusion of non-ABS data used, see page 41. A correction (after publication) was made to the 2020–21 ScoreCard due to duplicated data in table grapes which resulted in the farmgate value for 2020–21 being \$2.34 billion instead of \$2.3 billion.

The gross value of agri-food production (primary agriculture and seafood production) rose by 4.5% from 2021–22 to \$3.65 billion, with seafood contributing \$1.31 billion

## PRIMARY PRODUCTION

Agri-food gross value  
**\$3.65 billion<sup>2</sup>**



### AQUATIC

### LAND-BASED

Total agriculture gross value  
**\$2.34 billion**

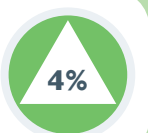


### Agroforestry

Seafood  
**\$1.31 billion**



Food agriculture  
**\$2.03 billion**



Non-food agriculture  
**\$0.31 billion**



Agroforestry  
**\$0.75 billion**



## VALUE ADDING

Food value after packing and processing  
**\$5.63 billion**



## INITIAL MARKET DESTINATIONS AND REVENUE

International direct exports  
**\$0.97 billion**



Net interstate sales  
**\$3.57 billion**



Retail and food service sales in Tasmania  
**\$4.80 billion**

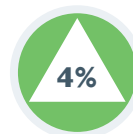


Gross food revenue  
**\$9.67 billion**



LESS FOOD IMPORTS

Net food revenue  
**\$8.27 billion**



<sup>2</sup> Percentage changes are compared against 2020–21. Agri-food production means combined fisheries and food and non-food agricultural production.



## ScoreCard Summary 2021-22 (\$ million)

	Field crops	Livestock	Dairy	Fruit	Vegetables	Seafood	Wine	Chocolate	Total <sup>3</sup>
<b>Food - farm gate/beach value</b>	31.0	753.1	505.6	324.7	370.0	1309.8	43.1	0.0	3337.3
Total farm gate/beach value	253.7	838.6	505.6	324.7	370.0	1309.8	43.1	0.0	3645.5
<b>Food - processed &amp; packed value</b>	318.6	744.3	892.2	427.0	752.7	1697.1	121.6	746.8	5632.4
<b>Overseas trade</b>									
Commodity exports	22.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	22.0
Commodity imports	5.7	0.0	0.0	0.0	0.0	0.0	0.0	0.2	5.8
Food exports	1.1	215.4	296.4	45.0	21.5	346.1	5.3	0.0	929.4
Food imports	19.6	0.3	0.0	0.1	5.5	0.2	0.2	0.2	26.0
<b>Net interstate trade</b>									
Net commodity exports	0.0	333.8	0.0	0.0	0.0	0.0	0.4	0.0	334.2
Net commodity imports	109.4	29.2	0.0	0.0	0.0	0.0	0.0	68.7	207.3
Net food exports	7.6	251.5	536.8	302.5	521.1	1172.7	62.1	797.8	3568.7
Net food imports	69.3	148.8	6.1	94.8	21.8	631.1	81.8	0.0	1152.4
<b>Tasmanian food sales</b>									
Retail sales									3574.9
Food service sales									1220.1
<b>Net food revenue</b>									8257.8
<b>Gross food revenue</b>									9649.3



<sup>3</sup> Totals may include items that do not fall into one of the eight categories listed (e.g., frozen meals, soft drinks, cooking ingredients).

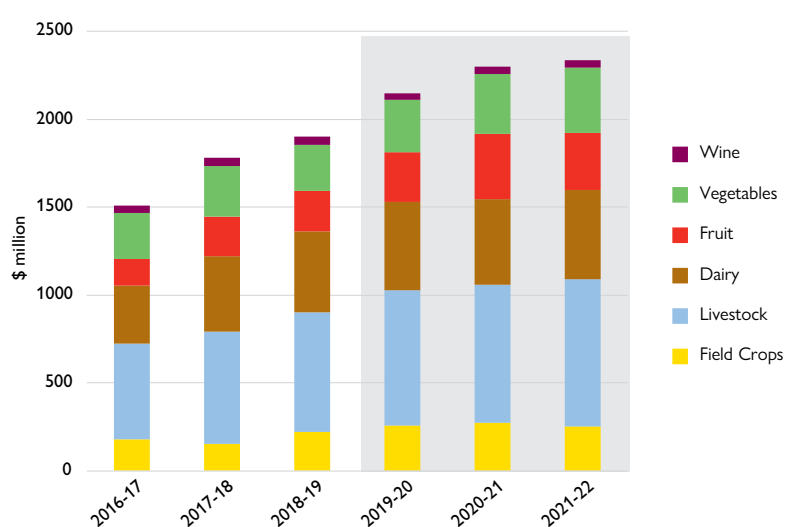
# AGRICULTURAL PRODUCTION



**Agricultural production** comprises output from food agriculture (products intended for human consumption) and non-food agriculture (e.g. wool, poppies and animal feeds).

- During 2021-22, the gross farm gate value of Tasmania's agricultural production rose by 2% over the previous 12 months to a total of \$2.34 billion.
- For the first time the value of food agriculture was over \$2 billion, a value of \$2.03 billion – up by 4%. The value of non-food agriculture decreased by 3 % to \$308 million.
- Conditions for most agricultural commodities during 2021-22 were excellent, however localised weather events such as floods and hail impacted individual producers and disrupted the harvesting of some crops.

**Gross farm gate value of food and non-food agriculture<sup>4</sup>**

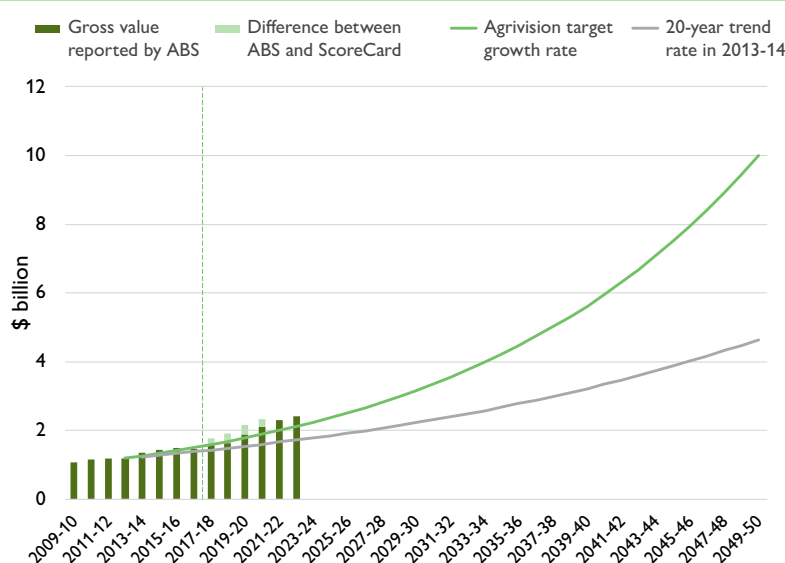


## AgriVision 2050

The Tasmanian Government and the State's agricultural industries have set a target to grow the farm-gate value of Tasmanian agriculture to \$10 billion by 2050.

Strong progress towards this target continues, with the gross value of agriculture reaching \$2.34 billion during 2021-22.

**Gross farm gate value of Tasmanian agriculture<sup>5</sup>**



<sup>4</sup> Shading denotes years where data is based on both ABS and complementary industry data sources.

<sup>5</sup> Gross farm-gate values to the right of the broken line show the difference between ABS reported value and the ScoreCard value combining ABS data and industry sources.

## Tasmanian agricultural production - quick facts<sup>6</sup>

- Low supply and strong demand for livestock for processing drove up prices and saw the value of the meat industry grow. The increase in milk prices offset lower milk production resulting in an increase in the value of the Tasmanian dairy industry during 2021–22.
- The value of vegetables increased despite lower production volumes. This was driven by higher prices for onions, carrots, and leafy greens (e.g. lettuce, rocket, and baby spinach).
- COVID-19 impacted agricultural production throughout 2021–22 through limited labour availability during peak times and disruptions to supply chains including domestic and international freight movements.



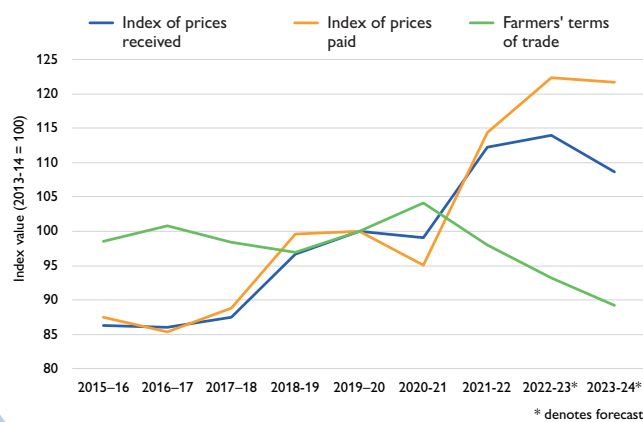
## Operational environment 2021–22

Farmers' terms of trade during 2021–22 decreased on the preceding year by 5.9%.

Strong demand and limited supply of livestock for both domestic and export markets drove up commodity prices, with prices for some field crops improving on the previous year. COVID-19 and geo-political tensions impacted on prices of agricultural inputs, with fuel and fertiliser prices rising in mid to late 2021–22.

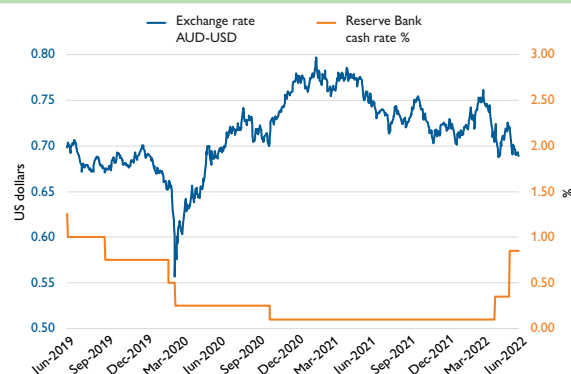
The average value of the Australian dollar fell by 2.8% to 72.58 US cents, making Tasmanian agricultural exports less expensive on the global market. The Reserve Bank increased the cash rate to a 0.85% in late 2021–22 in response to inflation induced by increasing global prices caused by supply implications of geo-political tensions.

Farmers' terms of trade<sup>7</sup>



Source: ABARES

Exchange rate and RBA cash rate



Source: RBA

<sup>6</sup> Percentages may not add to 100 due to rounding.

<sup>7</sup> Farmers' terms of trade graph is based on data from June 2022, with a reference year of 2019-20 = 100.



# SEASONAL CONDITIONS 2021-22

## 2021-22 summer was the fourth driest in 122 years of records.

Winter was warm and wet across the North and West, with some areas recording their lowest rainfall on record. Warm conditions continued during spring, but periods of higher rainfall across parts of the State assisted pasture growth.

Tasmania's spring rainfall was 18% above average overall but temperatures remained cool leading into summer which benefitted grazing livestock through ample available feed.

Tasmania had its fourth driest summer in 122 years of record, with warmer than average days and nights across the entire State underpinning the fifth warmest summer on record.

Localised weather events yielded mixed results in the horticulture and field crops sector. In particular pome, rubus and hay were impacted.

Cooler periods at the beginning of the season delayed the grape vintage in some wine growing areas, pushing the harvest further into the autumn months however reported quality was excellent

Seasonal summary		Rainfall	Deciles	Mean temperature
Jul	<ul style="list-style-type: none"> <li>Warm and wet in the North West and West.</li> <li>Average winter rains with warm conditions across the State.</li> </ul>	Jul-Sep 2021	Highest on record	Jul-Sep 2021
Aug				
Sep	<ul style="list-style-type: none"> <li>Above average rains in the South and Midlands and below average and warm conditions across East.</li> </ul>	Oct-Dec 2021	10 Very much above average	Oct-Dec 2021
Oct	<ul style="list-style-type: none"> <li>Above average rainfall across most of the State with warm conditions in the West and Northern Tasmania.</li> </ul>			
Nov	<ul style="list-style-type: none"> <li>Average conditions.</li> </ul>		8-9 Above average	
Dec	<ul style="list-style-type: none"> <li>Dry and warm across the State.</li> <li>West coast was dry and warm. The East had above average rain with warm conditions.</li> </ul>	Jan-Mar 2022	4-7 Average	Jan-Mar 2022
Jan	<ul style="list-style-type: none"> <li>Rainfall was below average across most of the State with above average temperatures across most of the State.</li> </ul>			
Feb			2-3 Below average	
Mar	<ul style="list-style-type: none"> <li>A drier autumn overall after a wet March along the East Coast.</li> <li>The West, and parts of the South and Midlands were particularly dry.</li> </ul>	Apr-Jun 2022	1 Very much below average	Apr-Jun 2022
Apr	<ul style="list-style-type: none"> <li>Slightly warmer-than-average temperatures.</li> </ul>			
May	<ul style="list-style-type: none"> <li>Above average across parts of the midlands and the south.</li> </ul>		Lowest on record	
Jun	<ul style="list-style-type: none"> <li>June had average temperatures except for King Island with warmer than average temperatures.</li> <li>Relatively average across the north and north west.</li> </ul>			

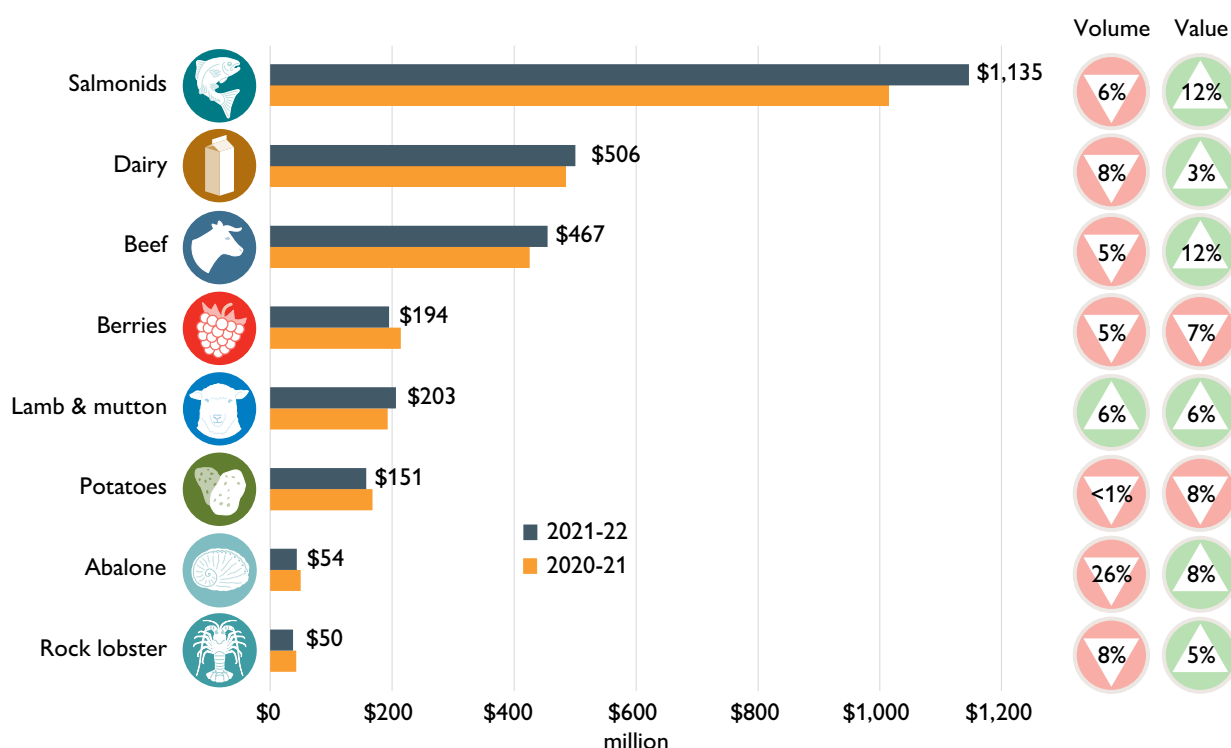
Source: Australian Bureau of Meteorology

# PRIMARY FOOD PRODUCTION



- The value of key agricultural products including red meat, dairy and lamb and mutton increased during 2021–22, while the value of potatoes dropped due to lower prices, and the value of berries reduced due to lower volume and price. Salmonids increased in value as prices rose, however the value of the rock lobster and abalone industries decreased as prices and volumes fell.
- Salmonids remained the highest-value food product, with the beach value increasing by 12%, setting a new record in value at \$1.14 billion.
- Dairy remained the highest-value agricultural category increasing to \$506 million at the farm gate, despite an 8% decrease in volumes, higher farm-gate milk price compensated the reduction in volume.
- The red meat industry continued its strong performance due to excellent market conditions despite reduced production volume.

Key contributors to gross food value



# INCREASING FOOD VALUE ALONG THE SUPPLY CHAIN

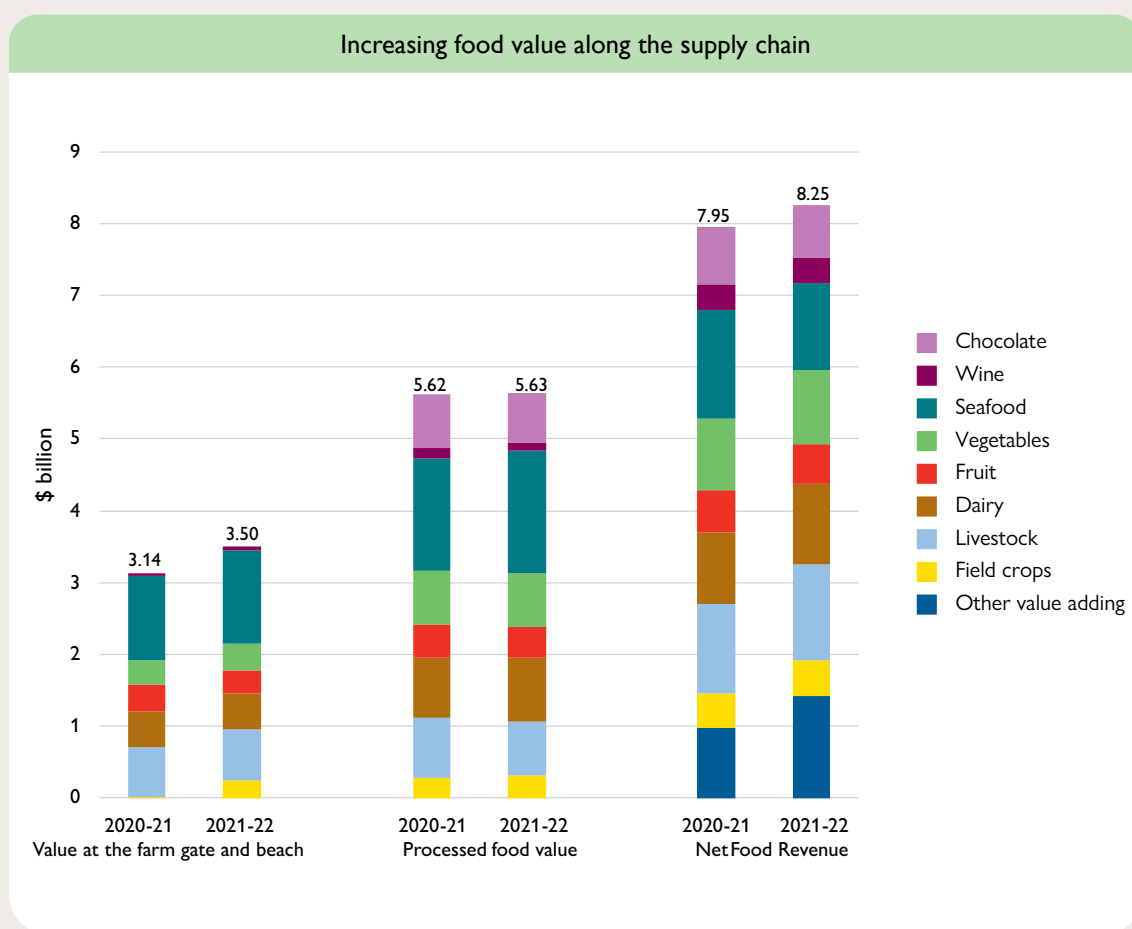


MAKE



EXPERIENCE

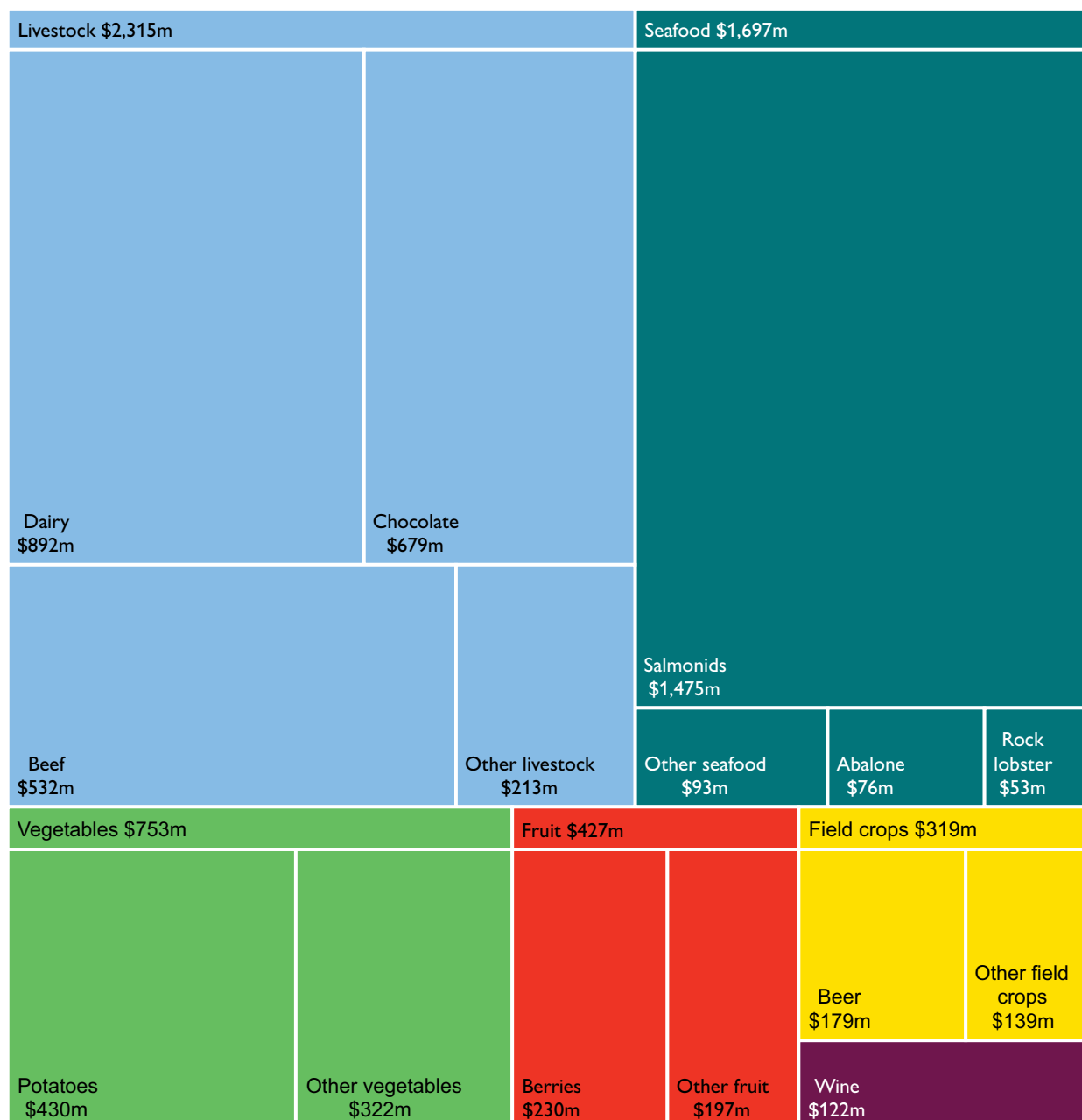
**Value is added** to food agriculture and seafood production through processing and packing. Processing can involve minimal transformation of food, such as producing premium cuts of meat, packaging honey, or grading and packing fresh cherries for export. Processing also may involve greater transformation through fermentation or other food manufacturing processes to produce, for example, cheese or chocolate from milk, beer or whisky from barley, or wine from grapes.

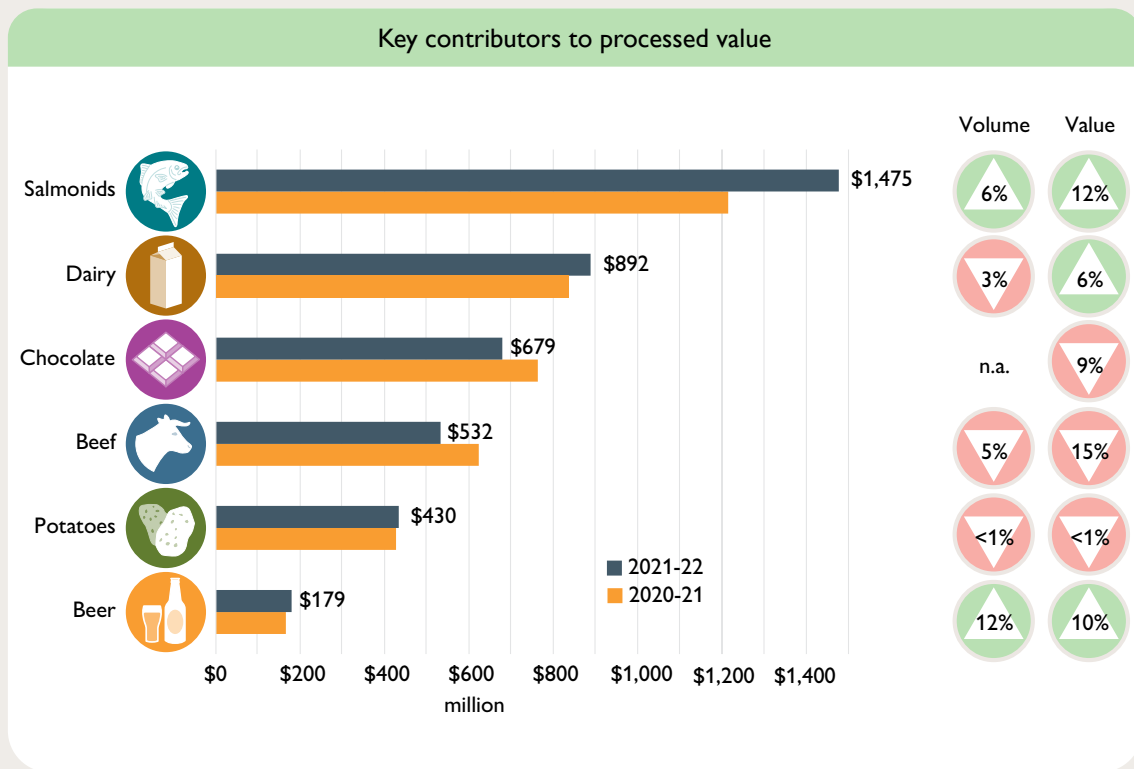


- Processing increased Tasmanian gross food value to a wholesale value of \$5.63 billion during 2021–22.
- Further value was added to food sold across Tasmania through retail and food service outlets. Net food revenue during 2021–22 reaching was \$8.25 billion.
- Field crops, vegetables, wine and chocolate increased their share of food value along the supply chain. This reflects the high proportion of value added in the manufacture of beer (field crops), chocolate, frozen potato chips and vegetables, and wine.
- Other value adding includes value added through retail and food service sales to visitors to the state.<sup>8</sup>

<sup>8</sup> 'Visitors to the state' means the number of non-Tasmanians in Tasmania per day less the number of Tasmanian residents outside the state per day over the course of the year.

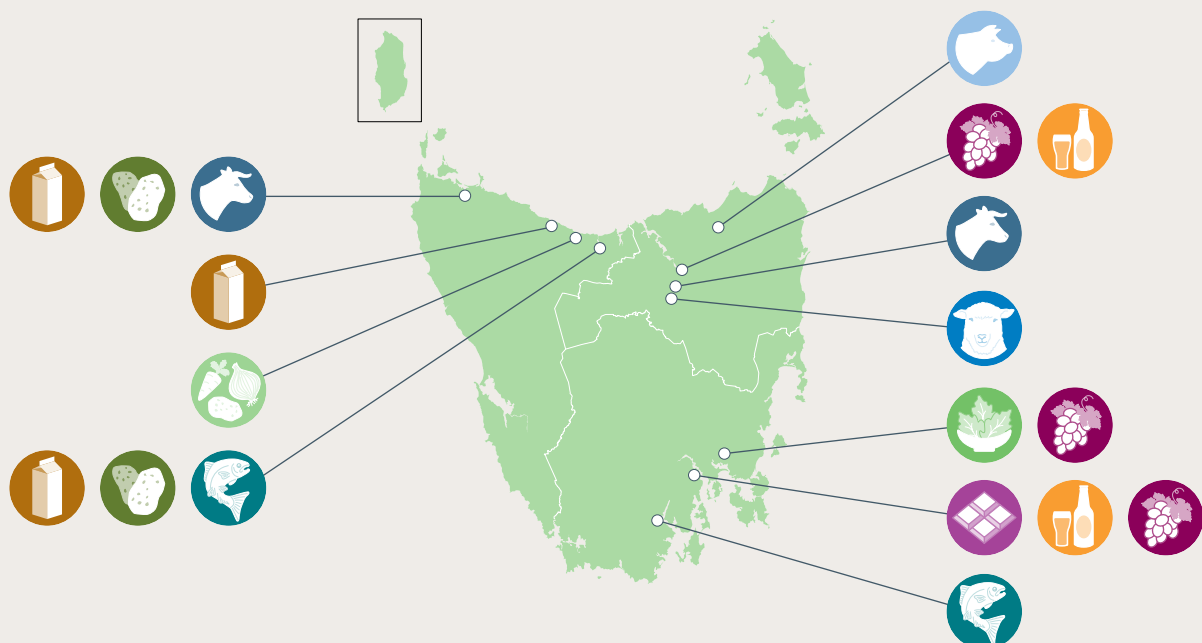
## Processed food value - \$5.63 billion





- Salmonids continued to be the highest value processed food with production volumes increasing during 2021–22.
- Despite a reduction in milk production volumes, the overall value of processed dairy products increased by 3.3% compared against the previous 12 months.
- A limited supply of cattle available for processing resulted in the processed value of beef decreasing by 17% to \$532 million.
- A lower volume of potatoes available for processing into frozen potato products resulted in a decrease in the processed value of potatoes.
- The continued easing of COVID-19 patronage restrictions on entertainment and food service venues and increasing number of visitors helped increase demand for higher-value craft beer and traditional lager during 2021–22, however demand did not return to pre-pandemic levels.

## Major food processing locations





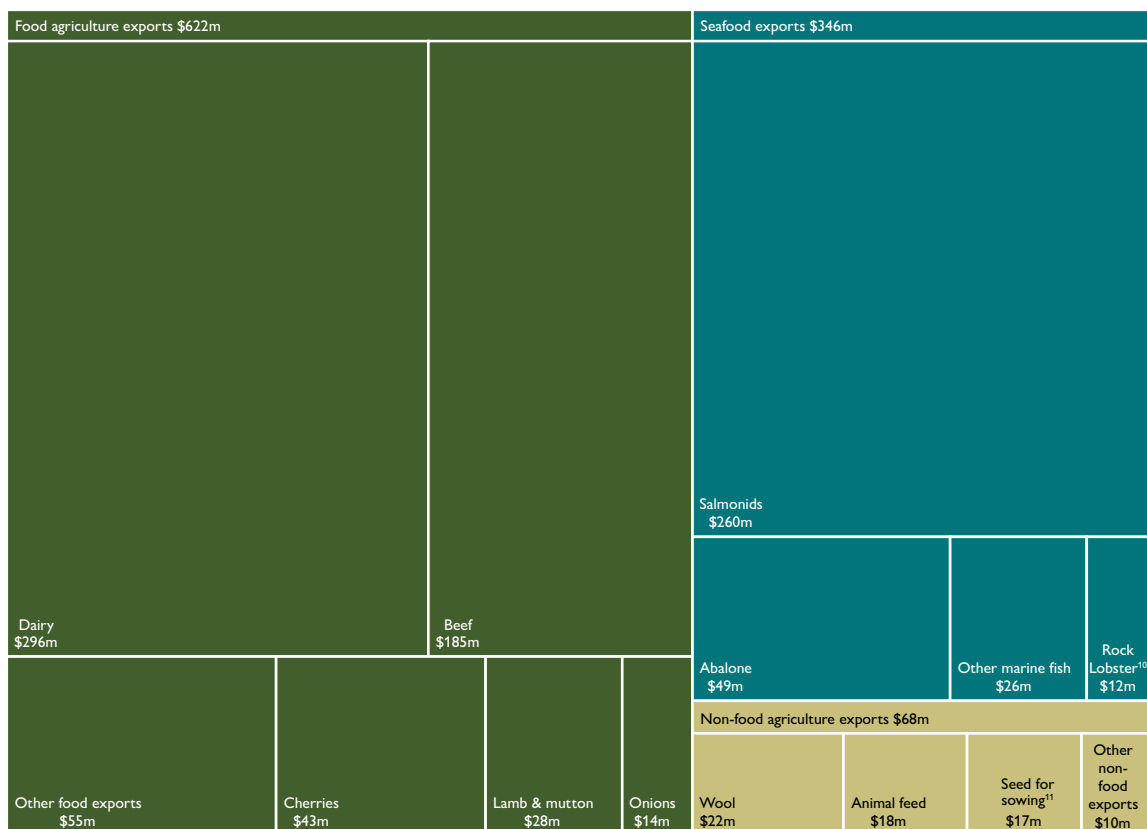
# MARKET DESTINATIONS AND TRADE

## INTERNATIONAL AGRI-FOOD EXPORTS

- Agri-food accounted for 21.9% of Tasmanian international merchandise exports.
- China remained the top destination by value for food exports.
- The value of agri-food exports rose by less than 1% from the previous year 2020–21 to \$968 million as the impacts of COVID-19 continued to curtail demand and disrupted global logistics supply.
- International food and food commodity imports totalled \$32 million.<sup>9</sup>

	Value (\$ million)	Nominal growth 2020–21 (%)	5-year real growth rate (%)
Seafood exports	346	31.4	5.5
Food agriculture and processed food exports	583	1.9	3.0
Total food exports	968	10.8	3.7
Non-food agricultural exports	68	-22.1	-9.3
Total agri-food exports	1,036	7.8	2.4

### International export value - \$968 million

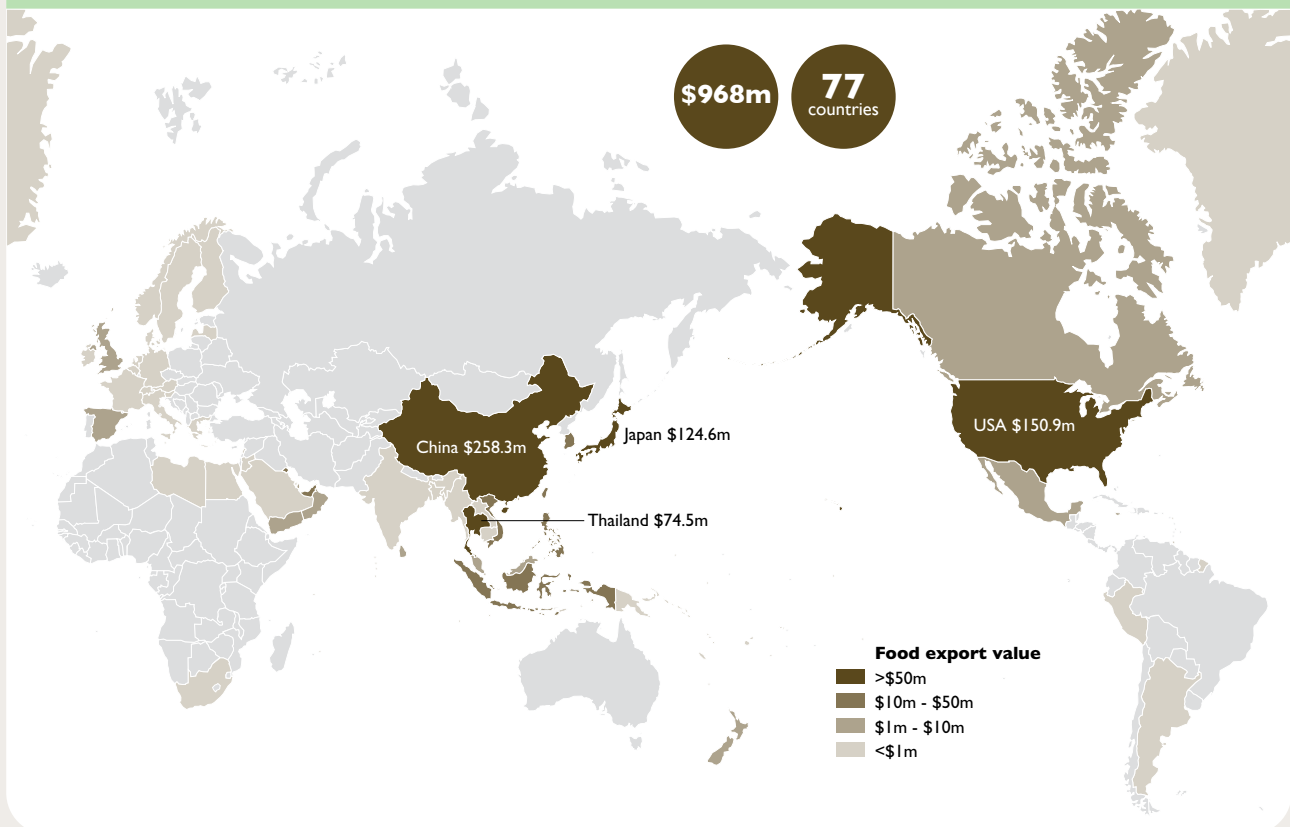


<sup>9</sup> Some Tasmanian commodities are consolidated into shipments interstate before being sent overseas as exports, and therefore may be excluded from the final export values reported.

<sup>10</sup> This chart shows rock lobster exported directly from Tasmania but excludes rock lobster exported after consolidation interstate.

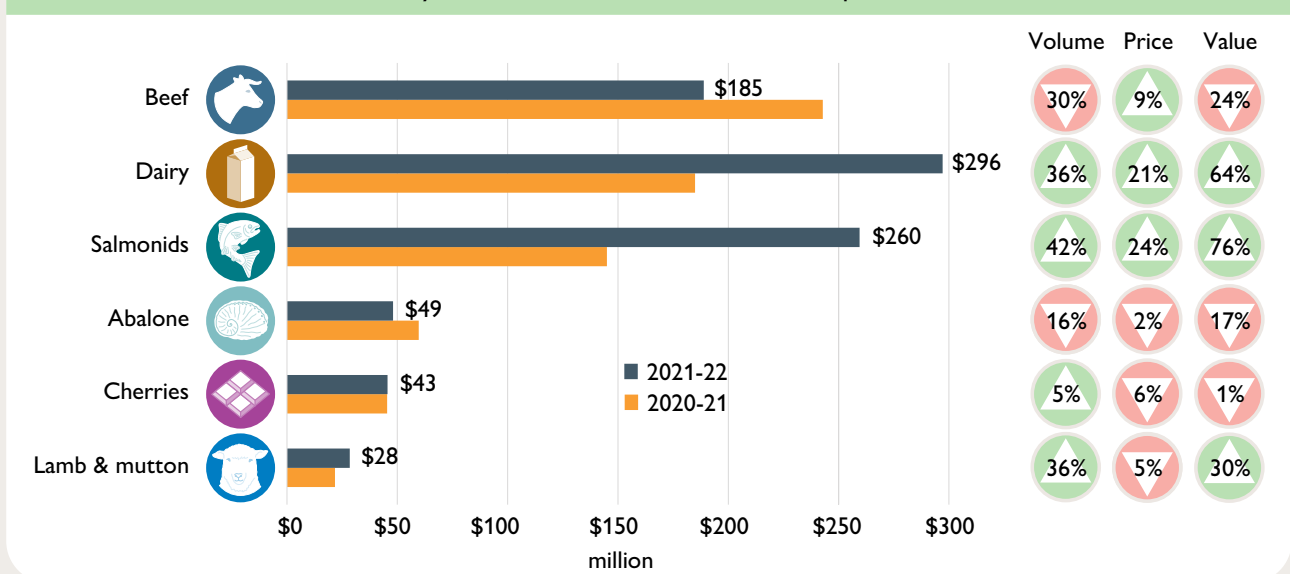
<sup>11</sup> Seed for sowing includes seed potato as well as pasture, vegetable and other seeds.

### Food export destination by value (\$ million)



- 2021–22 was the highest year for Tasmanian food exports after an increase of 11% from 2021–22 to \$968 million. The value of Tasmania's food exports grew for most commodities, primarily because of easing COVID-19 restrictions on global markets and freight services.<sup>12</sup>
- Dairy was the State's highest value food export, increasing by 64% in 2021–22.
- Salmonid export value rose by 76%, with exports demand being from the USA, China, Japan and the growing Southeast Asia region.
- The value of dairy exports reported by the ABS increased by 64% to a value of \$296 million. However, this figure does not reflect Tasmania's total export contribution, which Dairy Australia values at \$586 million after processing.

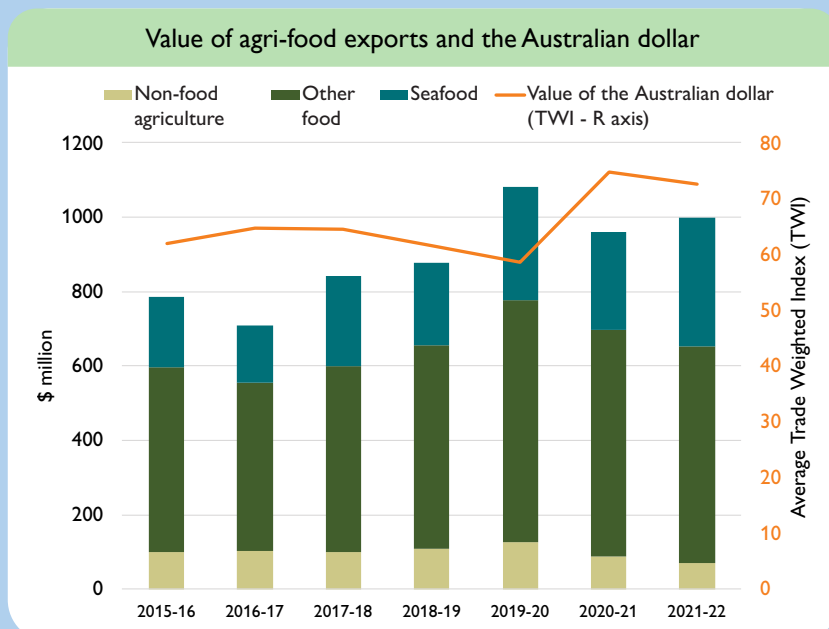
### Key contributors to international food exports



<sup>12</sup> Overseas food exports include food commodities such as dried hops and processed food.

## Exchange rate and exports

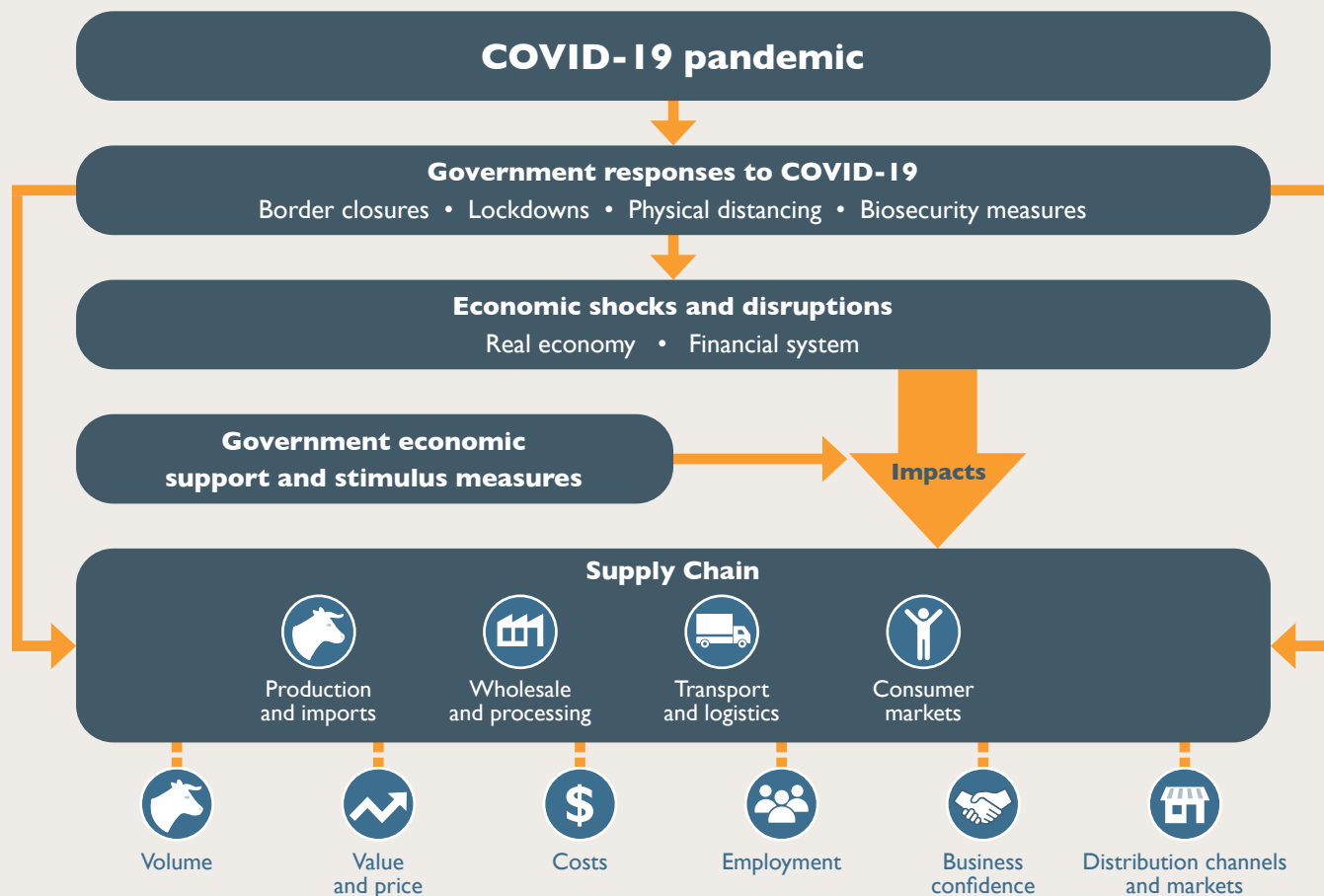
The average value of the Australian dollar declined relative to the currencies of its trading partners during 2021–22. This increased the competitiveness of Tasmanian products in international markets, the value of Tasmanian agri-food exports during 2021–22 was the second-highest on record.



## COVID-19 — TASMANIAN AGRIBUSINESS IMPACTS AND SUPPLY CHAIN

Throughout the world, responses to the COVID-19 pandemic impacted economic activity, increased freight costs, disrupted supply chains and restricted access to labour.

The Tasmanian agricultural sector has not been immune to these impacts, with lower demand for some agricultural commodities (particularly across retail and hospitality), significant disruptions to both domestic and international freight, reduced access to production and processing inputs leading to higher input prices, lower business confidence, and reduced availability of appropriate skills and labour. Easing of movement restrictions and government interventions through economic support and stimulus measures helped to ease these impacts.<sup>13</sup>

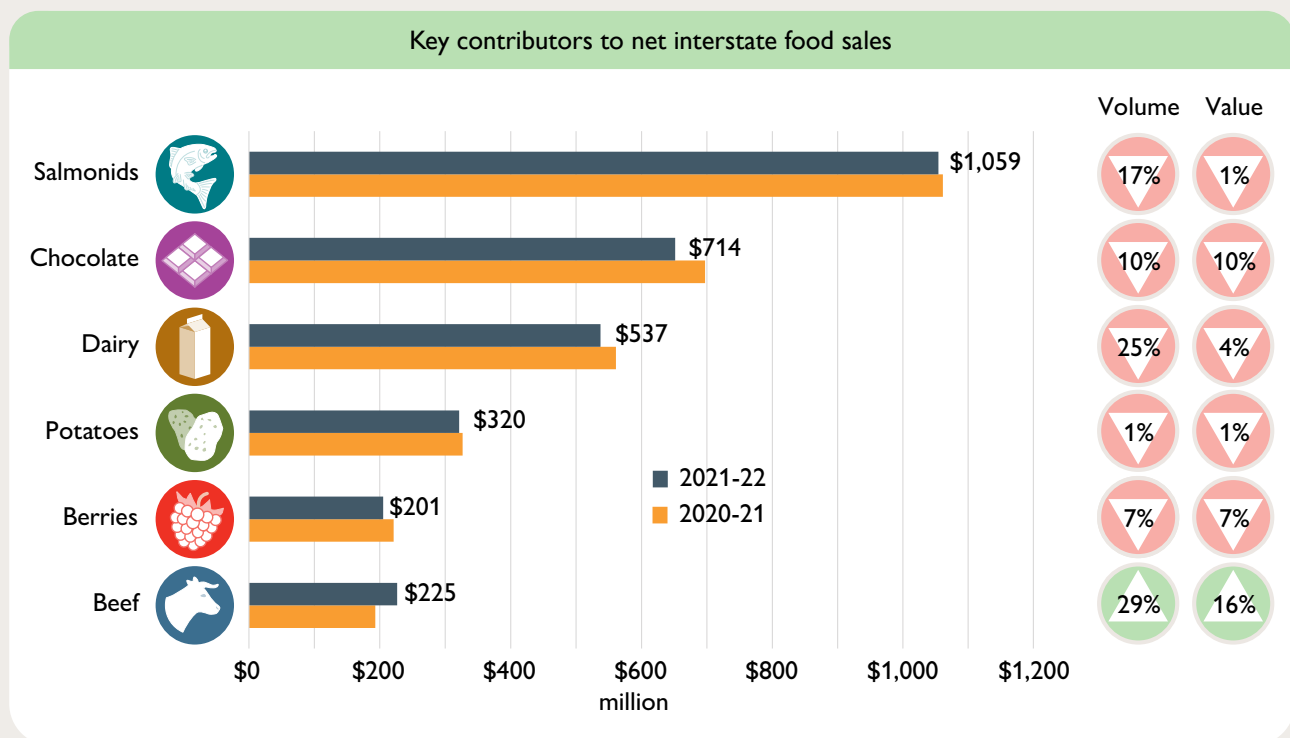


<sup>13</sup> Figure adapted from Ogier, E., Sen, S., Jennings, S., Magnusson, A., Smith, D. C., Colquhoun, E., Rust, S., Morison, J. (2021). *Impacts of COVID-19 on the Australian Seafood Industry: January-June 2020*. FRDC 2016-128. Canberra, Australia, Fisheries Research and Development Corporation (FRDC)

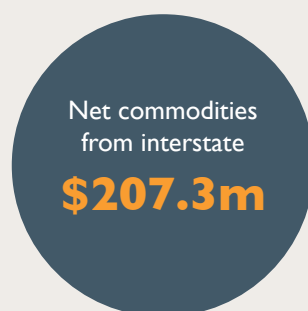
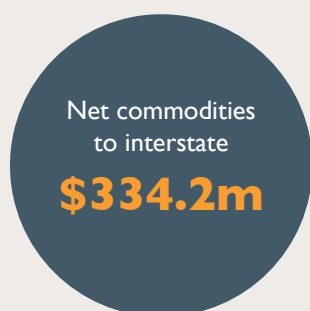
# MARKET DESTINATIONS AND TRADE

## INTERSTATE TRADE

**For most categories** of food produced in Tasmania, there is significant interstate trade into and out of Tasmania. The ScoreCard reports the net value of interstate food trade, which is the value of Tasmanian produced food sold interstate less the value of food purchased from interstate.<sup>14</sup>

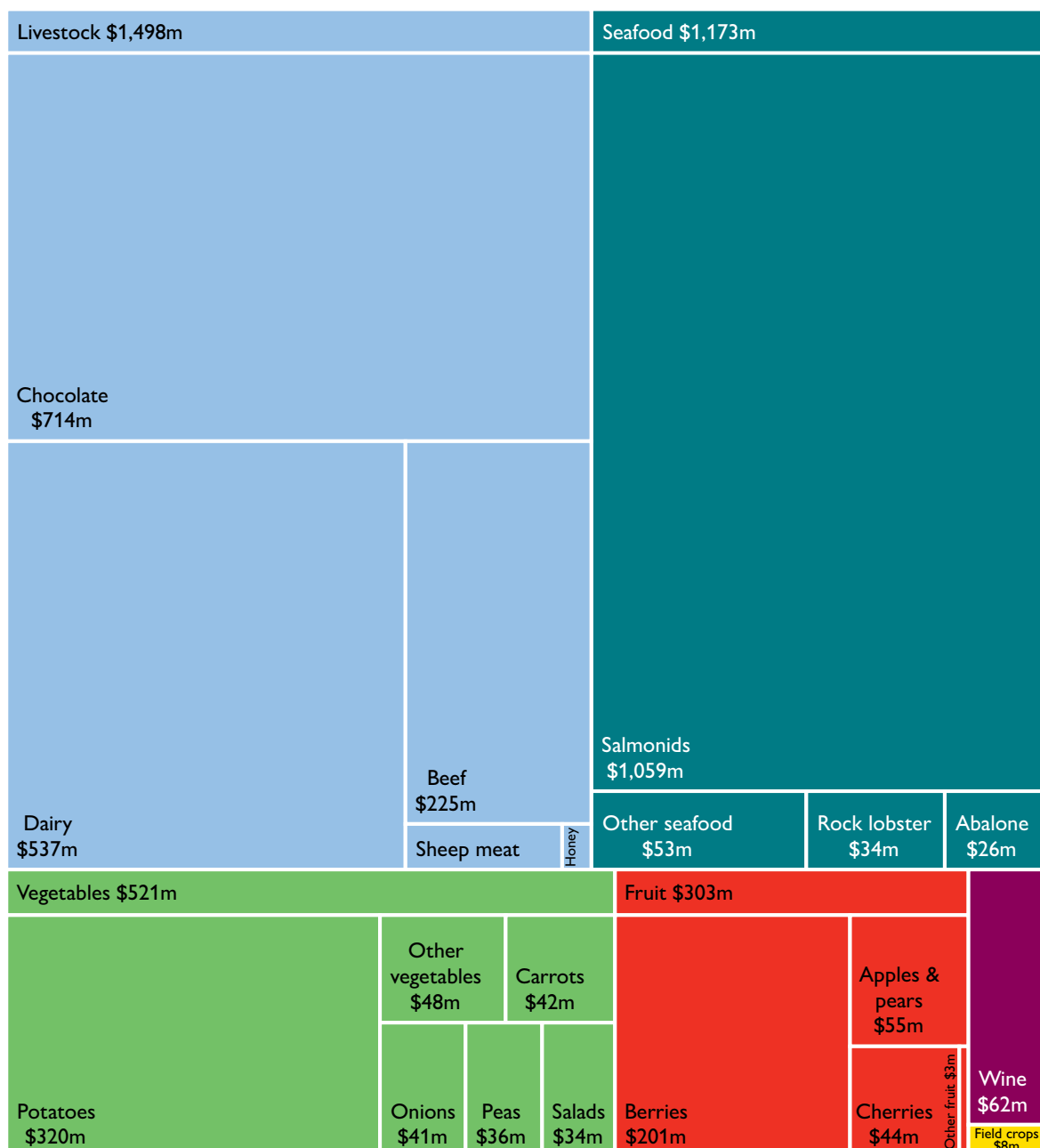


- Salmonids were the highest value interstate trade category worth \$1.06 billion, down in volume but price being higher than 2020-21.
- Tasmanian milk production underpins the manufacture of chocolate and dairy products, which together account for more than a third of net interstate sales.
- An increase in the volume of interstate traded beef resulted in the value increasing by 15.9% to \$225 million.
- Favourable seasonal conditions in spite of localised weather events and expansion of berry production continues to support growth in horticultural industries.



<sup>14</sup> Refer to 'About the ScoreCard' (pages 40-41) for further information on how net interstate trade is quantified. Note that interstate trade occurs both ways for most products, such as beer, cheese, and salmon. As a result, when products are grouped into categories (e.g. fruit or seafood) there will often be both a net export figure and net import figure for each category, as it is not always appropriate to compare different products within the same category. The ScoreCard does not report how much Tasmanian produce is sold interstate or how much interstate produce is sold in Tasmania.

# Net interstate food sales - \$3.57 billion





# MARKET DESTINATIONS AND TRADE

## FOOD CONSUMPTION IN TASMANIA

- Sales of food and beverages across Tasmania through all channels increased by 6.1% during the past year to \$4.8 billion.
- Tasmania's food and beverage retail sales grew by 3.5% to \$3.57 billion compared with 2020–21, when COVID-19 restrictions impacted sales.
- Sales through restaurants, cafes, pubs, food take-away businesses and other food service outlets were worth an additional \$1.22 billion, up 14.5% on the previous year, with Tasmanian residents supporting local businesses in the absence of international tourism and extended periods where borders were closed to other Australian states.
- Many businesses, such as cellar doors, farm shops, farmers' markets, craft breweries, and retail outlets at food processing establishments, exist directly as a result of Tasmanian agri-food production, providing jobs and enabling producers to sell directly to buyers.
- Visitation to the State increased by 39% during 2021–22 as border restrictions eased, for both domestic and international arrivals, continued in recovery from COVID-19.<sup>15</sup> These restrictions saw visitor numbers to wineries, breweries, distilleries, other cellar doors and agri-tourism enterprises all rise.
- Retail and food service sales includes sales to visitors to the State as well as sales to resident Tasmanians.

### Economic impacts of COVID-19 and ongoing recovery

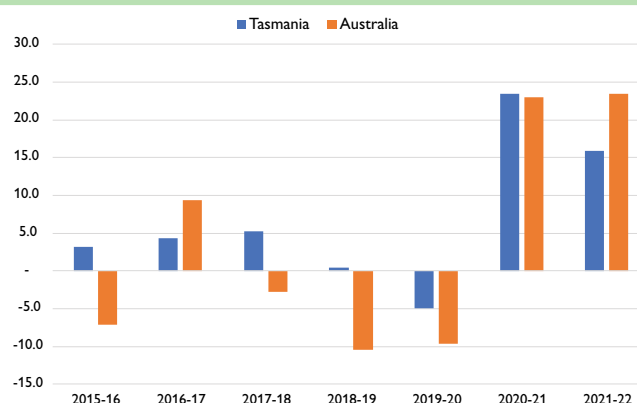
The onset of the COVID-19 pandemic during March 2020 resulted in the contraction of the Tasmanian and Australian economies by 7.0% and 8.0% respectively in the June 2020 quarter. The effects of COVID-19 on the economy continued with Tasmania experiencing a contraction of 1.2% and 0.9% in the December 2021 and March 2022 quarter respectively. Measures to mitigate the spread of the virus, including physical distancing, lockdowns and stay-at-home orders, and reduced social interactions, were gradually reduced and had impact on retail and hospitality sectors, which saw continued reduction in patronage and business. Economic improvements started to emerge in late 2022.

The overall value added by the agriculture, forestry and fishing sectors in 2020–21 recovered with a 21.1% increase in Tasmania compared with a 22.0% increase nationally. However, in 2021–22 value adding was 15.9%, still high compared to pre-COVID-19 as the sector recovered.

Gross domestic product and Gross state product<sup>16, 17</sup>



Industry value added - agriculture, forestry and fishing



<sup>15</sup> Tasmanian Visitor Survey.

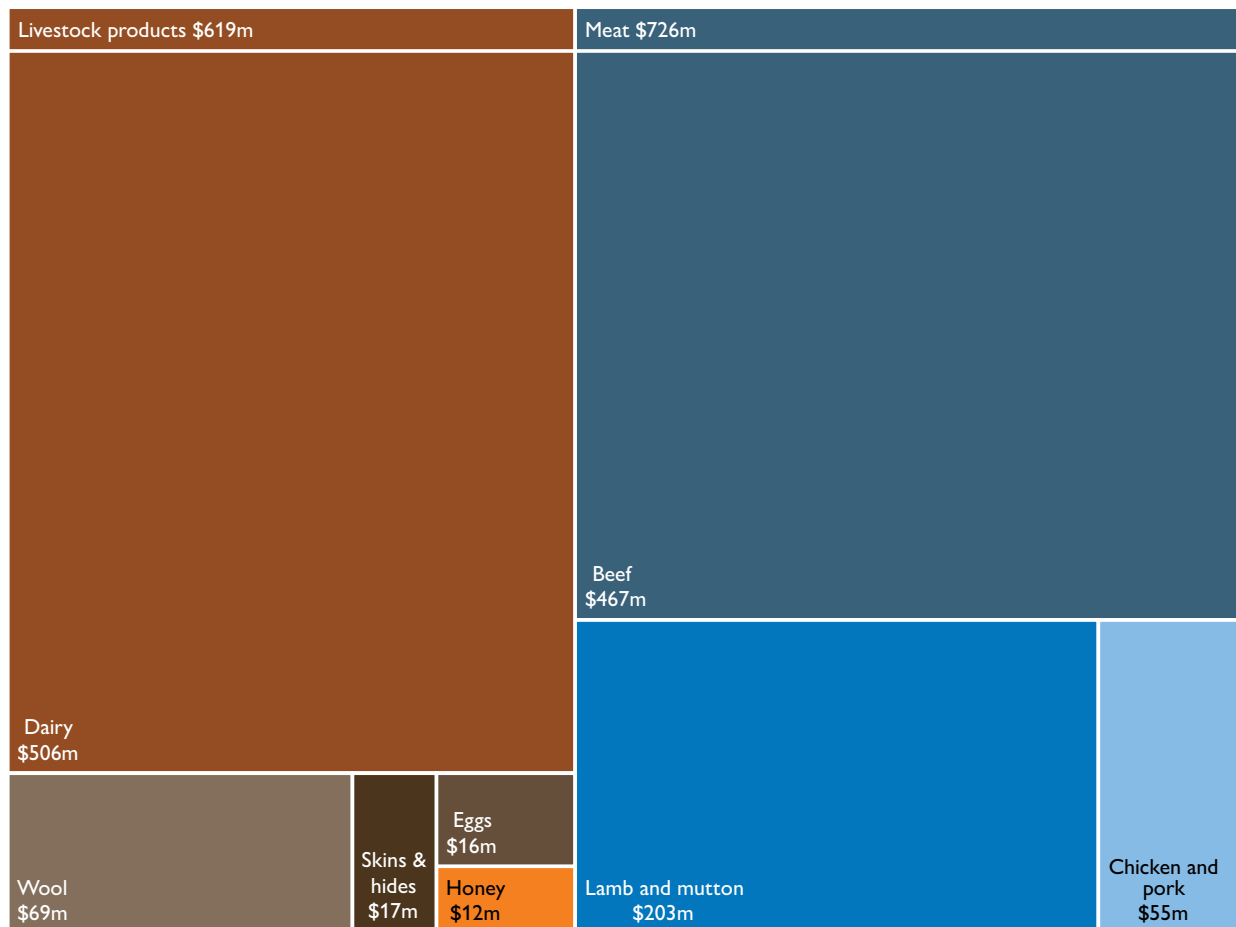
<sup>16</sup> Gross domestic product (GDP) refers to Australian production and Gross state product (GSP) refers to Tasmanian production.

<sup>17</sup> Shaded area refers to period since the onset of the COVID-19 pandemic across Australia and Tasmania.

# LIVESTOCK PRODUCTION

**Livestock production** comprises meat, food livestock products (dairy, eggs and honey) and non-food livestock products (wool, skins and hides).

## Gross value of livestock - \$1.34 billion



- Livestock production accounts for approximately 62% of the farm gate value of agriculture and 43.3% of total agri-food export value.
- Food livestock products contribute 93.6% and non-food livestock products contribute 6.4% to total livestock production value.
- Meat contributes 54% of livestock production value.

# MEAT



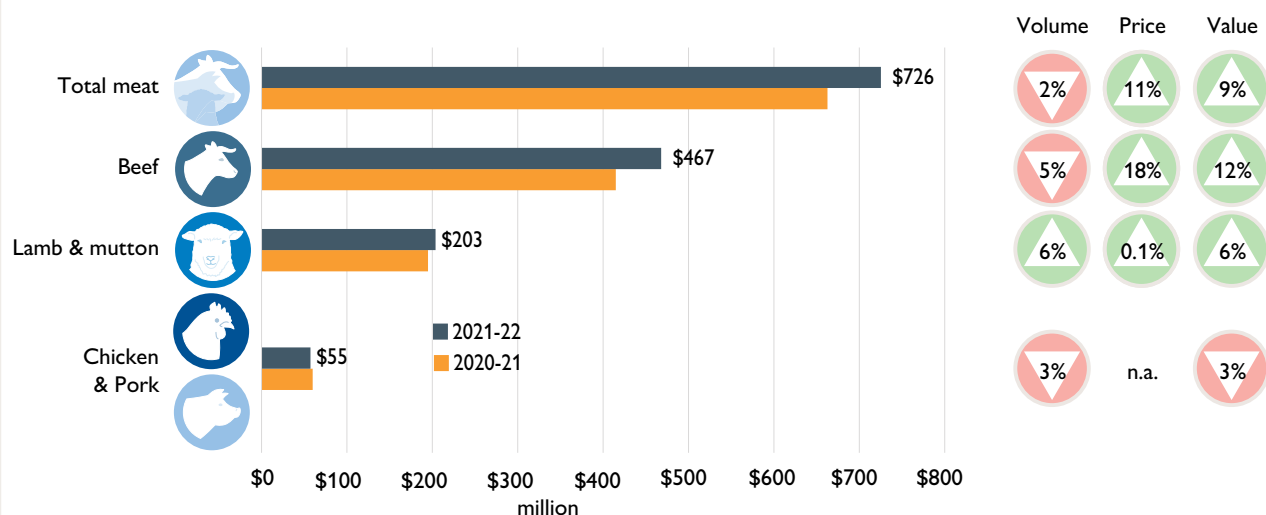
- Strong prices resulted in the farm-gate value of meat increasing by 9% to \$726 million during 2021–22.
- Meat accounts for 14.1% of processed food value and 30.5% of international food exports from Tasmania.
- Beef exports declined from the previous year; the \$185 million worth of beef exports recorded during 2021–22. The USA and Japan remained the highest-value overseas markets at \$110 million and \$28 million respectively.
- The net value of interstate sales of sheep and cattle increased by 32% to \$305 million, driven by higher prices and strong demand from mainland states for Tasmanian livestock.
- Lamb and mutton exports increased in 2021–22 by 27.2% to \$28 million as COVID restrictions eased in overseas markets.

Meat ScoreCard <sup>18</sup>	\$ million
<b>Food farm gate value</b>	<b>725.6</b>
<b>Processed food value</b>	<b>708.5</b>
<b>Overseas trade</b>	
Food exports	213.4
Food imports	0.3
<b>Net interstate trade</b>	
Net livestock exports	333.8
Net livestock imports	29.2
Net food exports	247.2
Net food imports	124.3

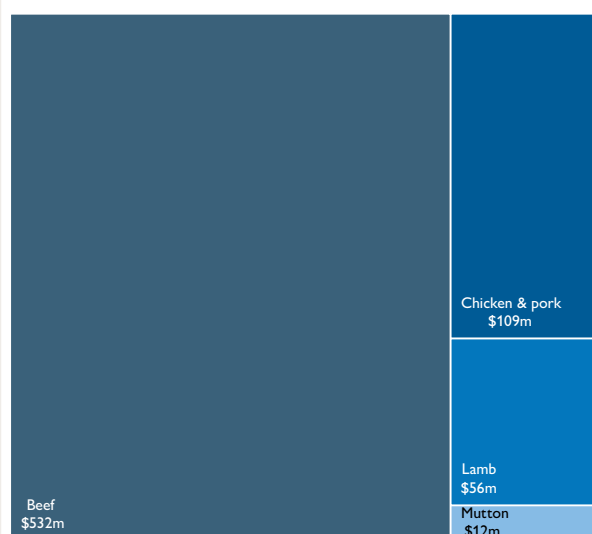


<sup>18</sup> Values are based on data sourced from the ABS and industry. The ABS reports a food farm gate value of \$581 million.

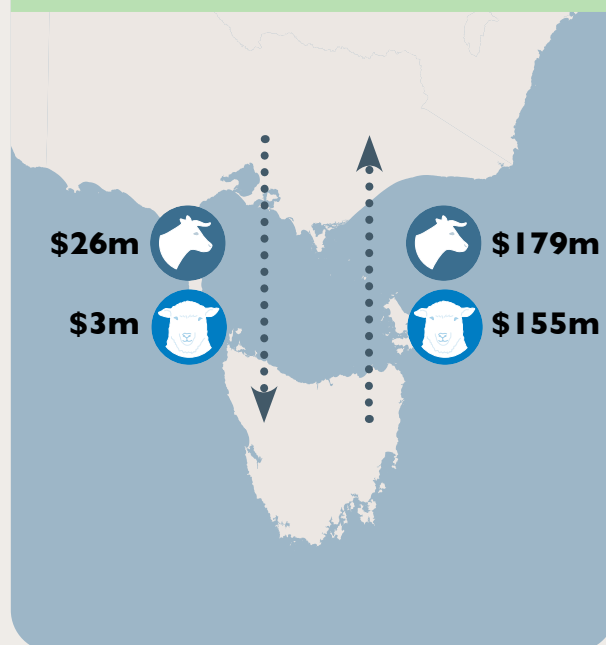
### Meat gross farm gate value



### Processed meat value - \$789 million



### Interstate trade in livestock

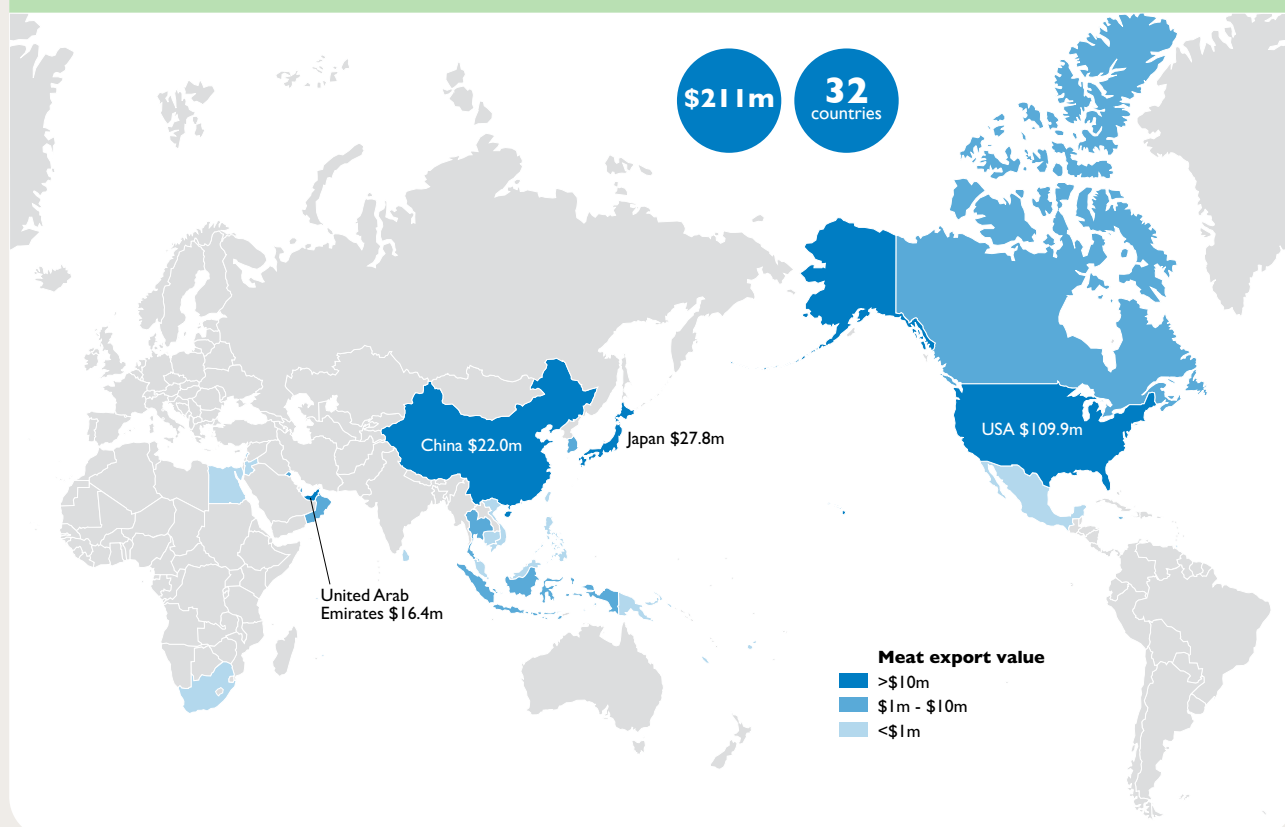


### Market destinations

	Production surplus (% volume)	Net interstate sales (\$ million)	International exports (\$ million)
<b>Beef</b>	58	226	185
<b>Lamb</b>	65	22	17
<b>Mutton</b>	86	1	11

Note: Production Surplus refers to the output that is in excess of Tasmania's food needs.

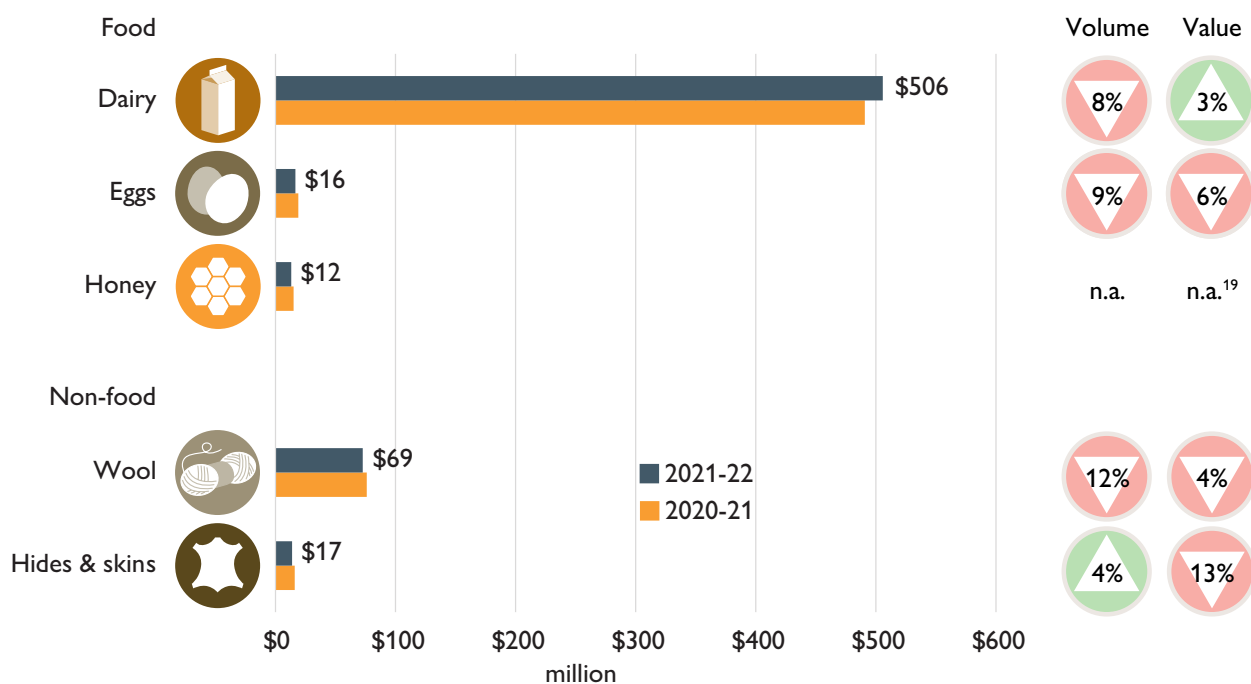
## Meat export destination by value (\$ million)





# LIVESTOCK PRODUCTS

Livestock products gross farm gate value



<sup>19</sup> 2020–21 figures for volume and value of honey were derived from an industry survey and are not comparable with 2019–20 figures, which are based on industry advice.



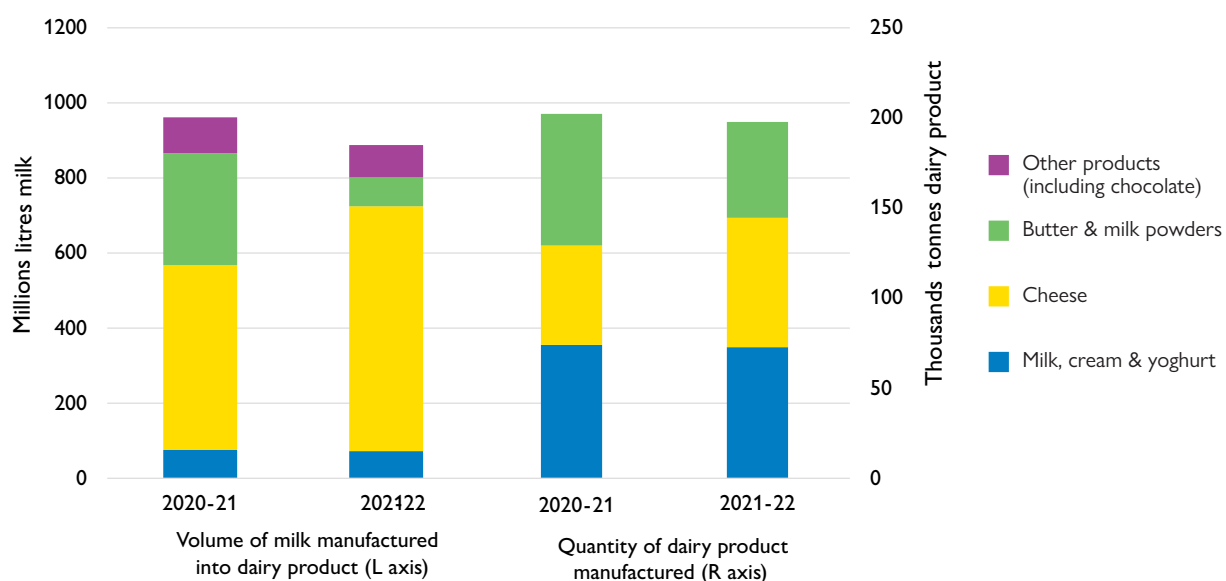
- The Tasmanian dairy industry continued to have a strong manufacturing and export focus with more than 90% of Tasmanian milk processed into milk powders, cheese, yoghurt and other value-added products.
- While Tasmania dairy had one of the lowest operating costs for dairy farms in the nation, rising cost for key inputs such as grain and fertiliser, and challenging seasonal conditions in Tasmania's largest dairy region, the north west impacted production 2021–22, the Tasmanian dairy industry produced 887 million litres of milk. A slight decline on the back of a record-breaking year in 2020–21.
- Despite decreased production, the overall farm gate value of the sector increased by 3.2% to \$506 million due to a 11.7% lift in Tasmanian milk prices.
- The Tasmanian dairy industry slightly declined its share of Australia's total milk volume to 10.4% down from 10.8% in the previous year.
- Cheese remains the most valuable processed dairy product, with a value of \$459 million during 2021–22.
- The ABS reported a Tasmanian export value of \$296 million for dairy products. This does not include a significant quantity of product shipped interstate, which undergoes consolidation or further processing. Dairy Australia estimates Tasmania's contribution to international dairy exports at \$586 million.

Dairy ScoreCard <sup>20</sup>	\$ million
<b>Food farm gate value</b>	<b>505.6</b>
<b>Processed food value</b>	<b>884.0</b>
<b>Overseas trade</b>	
Food exports	296.4
Food imports	0.0
<b>Net interstate trade</b>	
Net food exports	531.4
Net food imports	9.0



<sup>20</sup> Values are sourced from Dairy Australia, the Tasmanian Dairy Industry Authority and the ABS.

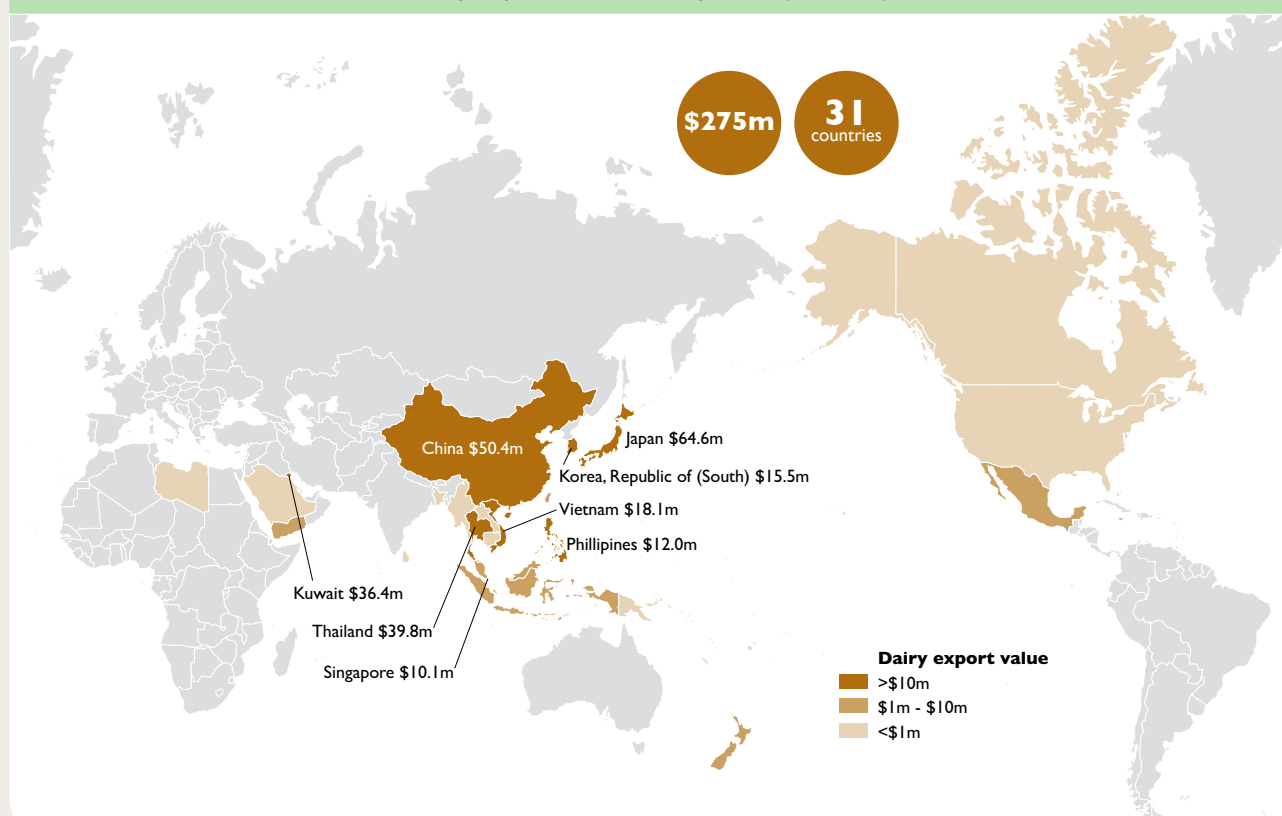
### Volume of milk manufactured into dairy products and quantity of dairy products manufactured



### Market destinations

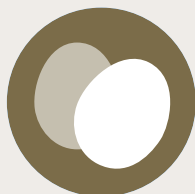
	Production surplus (% volume)	Net interstate sales (\$ million)	International exports (\$ million)
<b>Milk powders</b>	96	75	171
<b>Cheese</b>	90	439	96
<b>Milk, cream &amp; yoghurt</b>	23	18	4

### Dairy export destination by value (\$ million)



# OTHER LIVESTOCK PRODUCTS

## MARKET DESTINATIONS



### Eggs

Top market destination

Local  
(Tasmania)



### Honey

Exports worth

Top export destination

**\$2.0m**

Vietnam  
**\$0.4m**



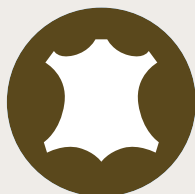
### Wool

Exports worth

Top export destination

**\$22.5m**

China  
**\$16.7m**



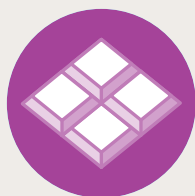
### Hides & skins

Exports worth

Top export destination

**\$1.8m**

China  
**\$1.8m**



### Chocolate<sup>21</sup>

Exports worth

Top export destination

**n.a**

**n.a**

<sup>21</sup> As with other dairy products, during 2021–22 a significant quantity of chocolate was shipped interstate and underwent consolidation or further processing. As a result, no direct overseas chocolate exports were reported from Tasmanian during 2021–22.

# FRUIT



- Localised weather events caused a 12.5% decrease in the farm-gate value of fruit to \$325 million during 2021–22.
- Berries were again the highest-value fruit but decrease in value by 7.1% to \$194 million due to a decrease in price and 5.1% decrease in production volume following localised weather events.
- Rubus (including raspberries and blueberries) are the highest value berries, accounting for 58.8% of the farm-gate value of berries. Strawberries account for 56.1% of production by volume.
- Lower prices and reduction in apple production, led to a decrease in the value of apples to \$50 million.
- Lower production volumes and prices resulted in the farm-gate value of cherries falling by 14.7% to \$62 million during 2021–22.
- Despite impacts on international freight services associated with COVID-19, cherries remained the most valuable commodity.

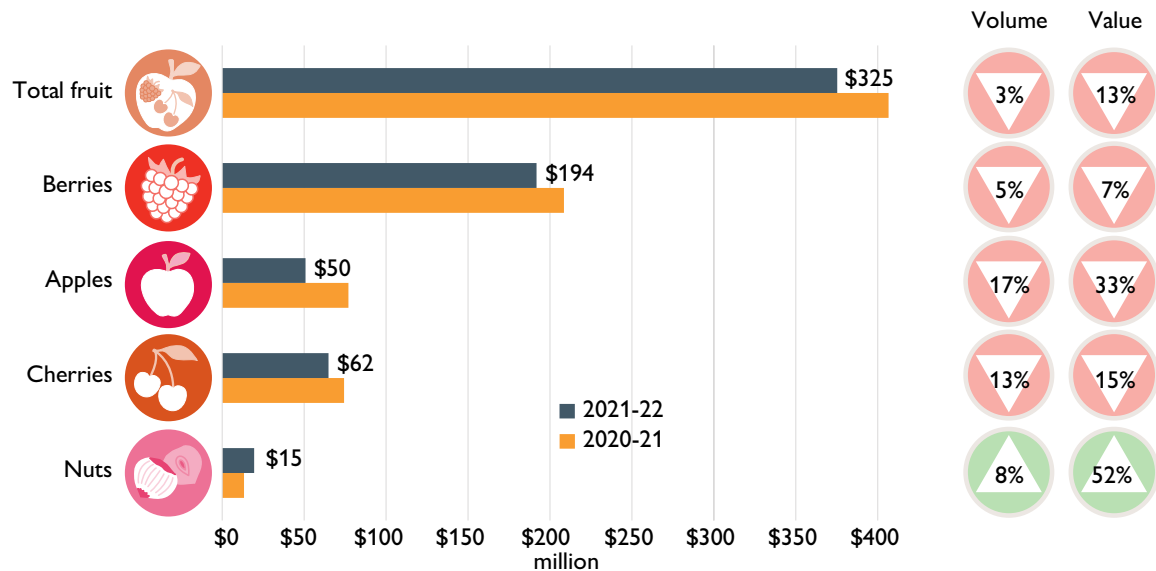
<b>Fruit ScoreCard<sup>22</sup></b>	<b>\$ million</b>
<b>Food farm gate value</b>	<b>324.7</b>
<b>Processed food value</b>	<b>427.0</b>
<b>Overseas trade</b>	
Food exports	45.0
Food imports	0.1
<b>Net interstate trade</b>	
Net food exports	302.5
Net food imports	94.8



<sup>22</sup> Values are sourced from Hort Innovation and the ABS.



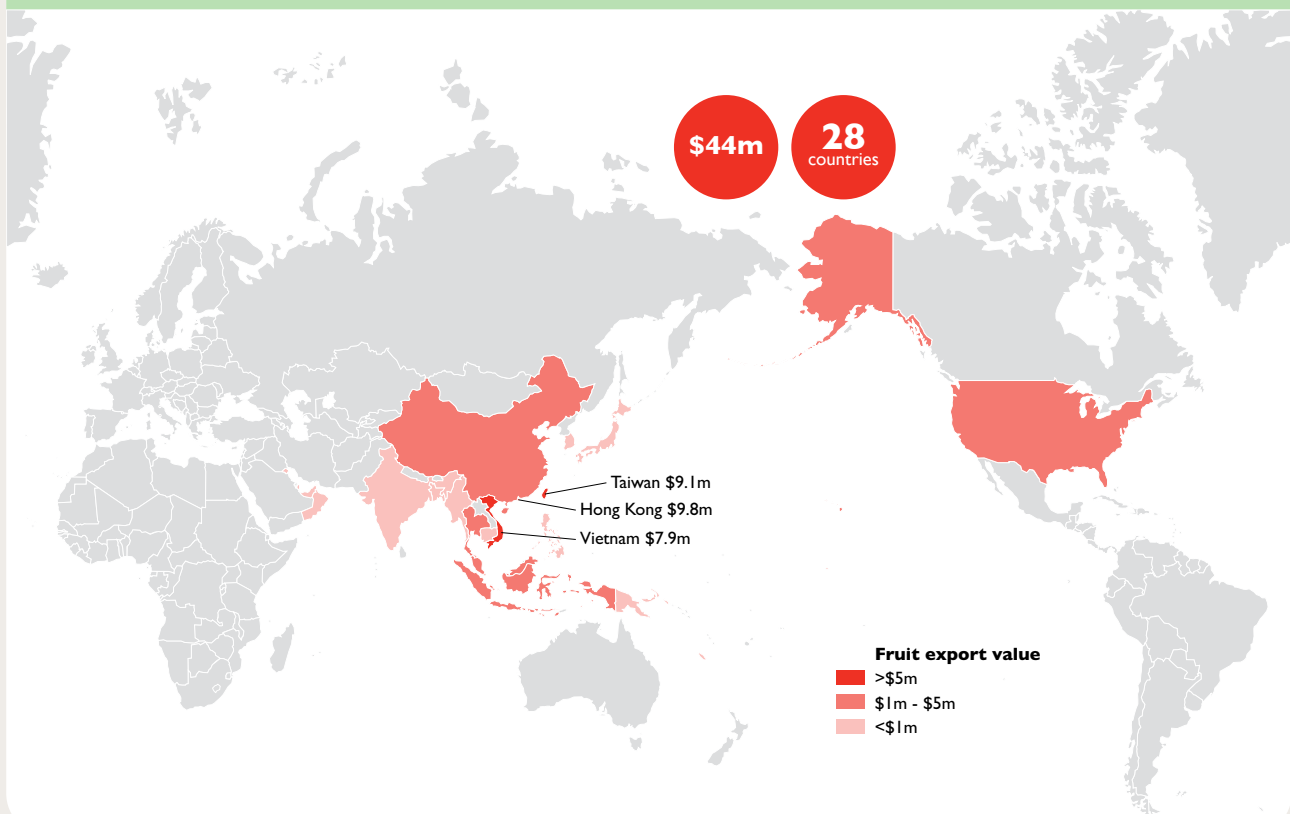
### Fruit gross farm gate value



### Market destinations

	Production surplus (% volume)	Net interstate sales (\$ million)	International exports (\$ million)
<b>Cherries</b>	96	57	43
<b>Apples</b>	77	49	1
<b>Berries</b>	86	219	<1

### Fruit export destination by value (\$ million)



# VEGETABLES



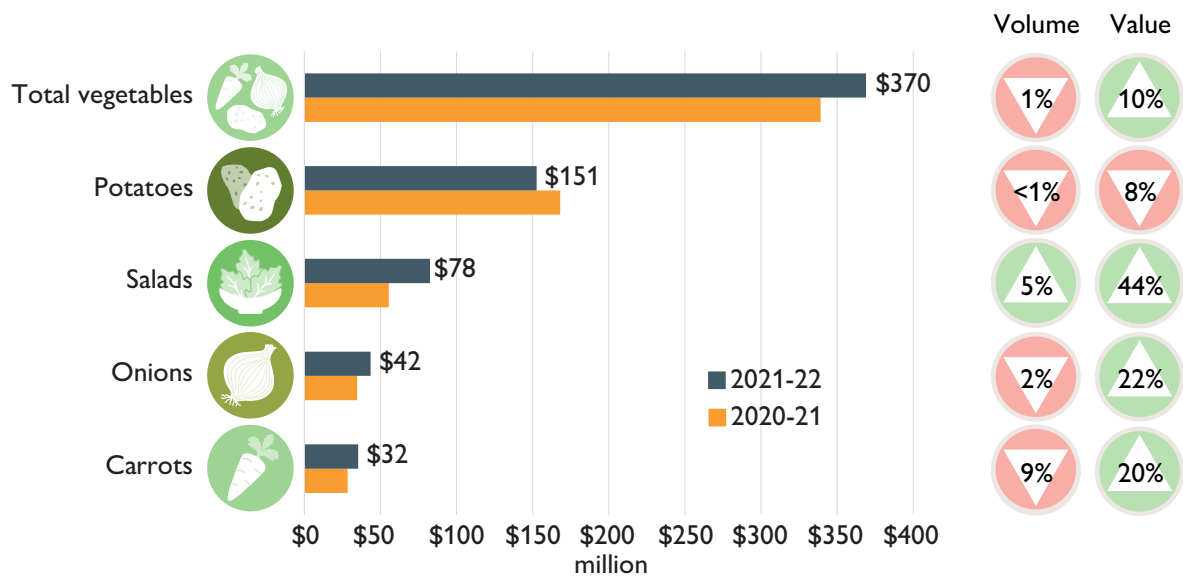
- Potatoes are the State's highest value vegetable with Tasmania the largest producing state during 2021–22, accounting for 31.3% of national production. Seasonal conditions saw the farm-gate value decrease by 8.5% to \$151 million, with a processed value of \$430 million.
- Leafy green crops (e.g. lettuce, rocket, and baby spinach) remain the second-highest-value vegetable commodity, increasing in value by 44.4% to \$78 million as demand remains strong for ready-to-eat products, particularly in mainland interstate markets.
- Tasmania is a major national producer of frozen vegetables with three processing plants, two of which produce frozen potato chips and a third that produces frozen vegetables other than potatoes — mainly peas and beans.
- Interstate markets are the primary destination for Tasmanian vegetables, accounting for 71.4% of processed production.
- The State's top two international vegetable exports are onions (\$14.5 million) and carrots (\$2.4 million).

Vegetable ScoreCard <sup>23</sup>	\$ million
<b>Food farm gate value</b>	<b>370.0</b>
<b>Processed food value</b>	<b>752.7</b>
<b>Overseas trade</b>	
Food exports	21.5
Food imports	5.5
<b>Net interstate trade</b>	
Net food exports	521.1
Net food imports	21.8



<sup>23</sup> Values are based on data from Hort Innovation and industry.

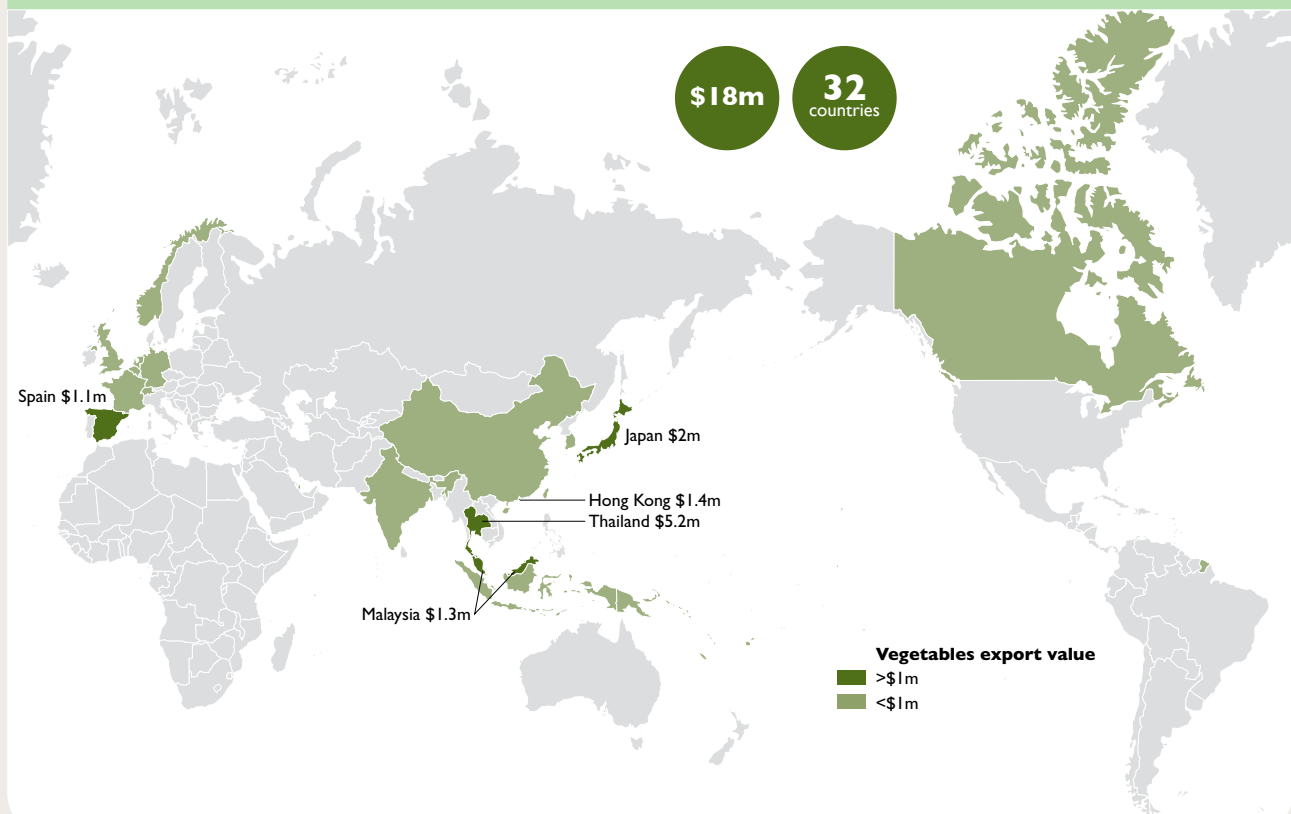
### Vegetable gross farm gate value



### Market destinations

	Production surplus (% volume)	Net interstate sales (\$ million)	International exports (\$ million)
<b>Potatoes</b>	86	320	<1
<b>Carrots</b>	92	42	2
<b>Onions</b>	92	41	14

### Vegetable export destination by value (\$ million)

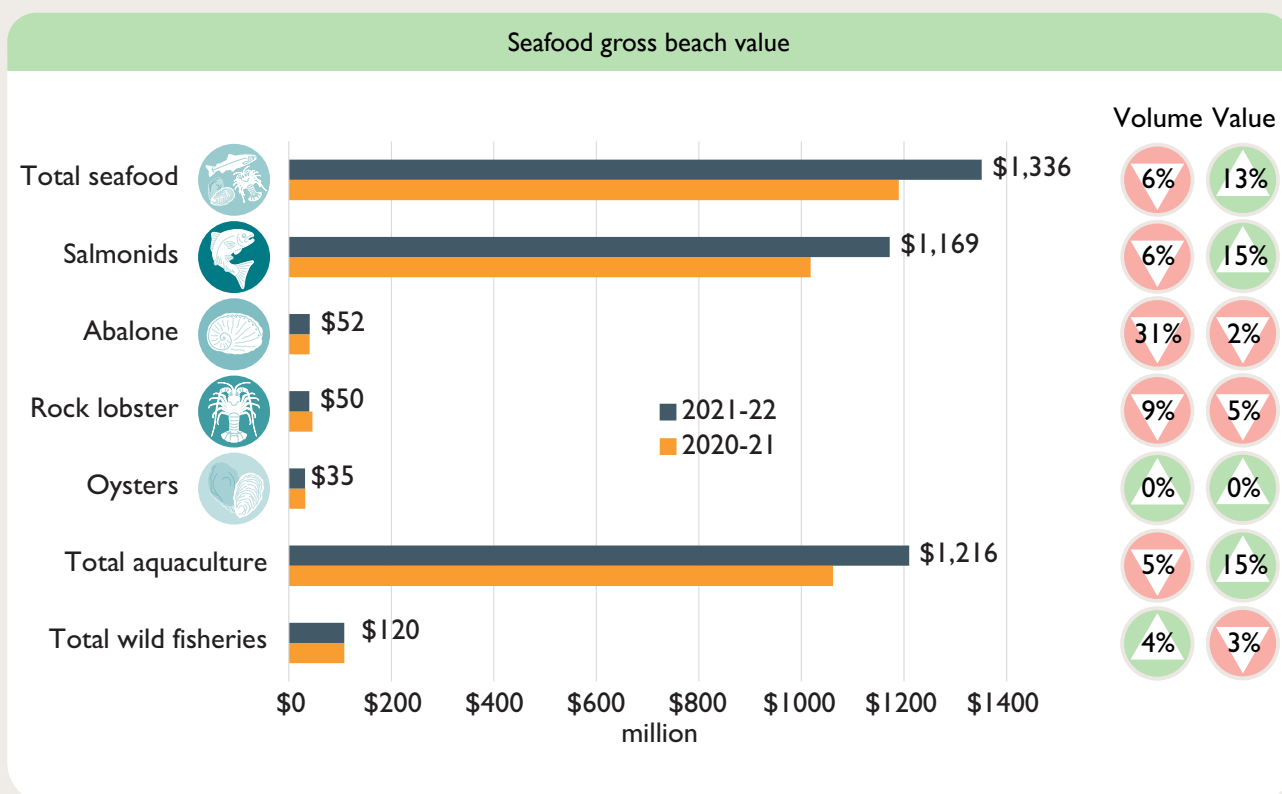






# SEAFOOD

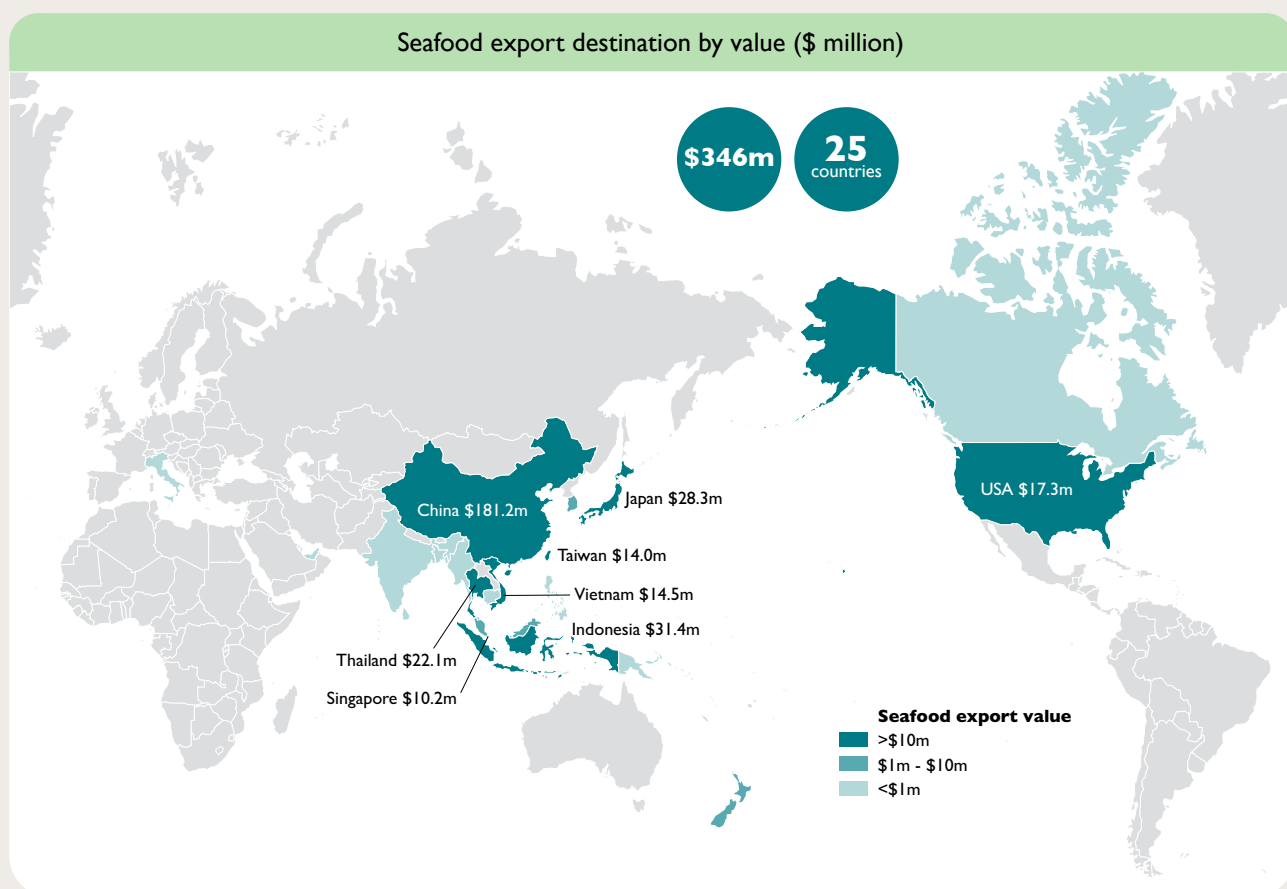


- Seafood production is dominated by salmonid aquaculture, which accounted for more than 85% of production value during 2021–22. Though production volumes declined 6.2% the value of salmonids increased by 15%.
- Most commercial wild fisheries production is managed by quotas to maintain sustainable wild fish stocks. Food service is an important market channel for wild-caught fish and ongoing restrictions in the domestic and international hospitality industries due to COVID-19 reduced demand and lowered prices, leading to an overall increase in value for wild fisheries during 2021–22.
- Higher export volumes of salmonids, particularly to markets in Southeast Asia, were accompanied, with the value of international salmonid exports increasing by 76%.
- China remains the highest-value market for abalone, accounting for more than 80% of export value.
- COVID-19 continued to impact the export of other seafood commodities such as rock lobster, with the value falling by nearly 22% due to depressed prices and despite higher export volumes.

Seafood ScoreCard	\$ million
<b>Food beach value</b>	<b>1,336.1</b>
<b>Processed food value</b>	<b>1,735.1</b>
<b>Overseas trade</b>	
Food exports	346.1
Food imports	0.2
<b>Net interstate trade</b>	
Net food exports	1,199.1
Net food imports	630.5



Market destinations				
		Production surplus (% volume)	Net interstate sales (\$ million)	International exports (\$ million)
Salmonids		97	1091	260
Abalone <sup>24</sup>		98	27	49
Rock lobster <sup>24</sup>		88	34	12
Oysters		91	42	<1



<sup>24</sup> The export value of rock lobster and abalone only includes direct international exports from Tasmania and does not include product that is consolidated interstate before export. Most abalone and rock lobster are ultimately exported overseas; for example, industry estimates about 90% of Tasmanian rock lobsters are exported.





- Tasmanian wine grapes attract a price premium for their exceptional quality, with an average farm-gate price of \$3,240 per tonne compared with the national average declining from \$701 to \$630 per tonne.
- The 2021–22 vintage decreased by 8.7% to 13,323 tonnes, despite cooler conditions resulting in some growing areas delaying picking.
- Pinot Noir and Chardonnay accounted for 71.6% of the total crush. Table wines account for 62.6% of all wine produced, with remainder being sparkling wine.
- Labour shortages, due to COVID-19, impacted production with some growers having difficulty sourcing pickers during the busier harvest periods.
- Strong global demand for premium Tasmanian wines resulted in a 17% increase in value of wine exports with overall volume increasing by 87%.
- The imposition of increased trade tariffs on Australian wine continued to have minimal impact on Tasmanian wine exports, however it may result in a greater volume of Australian wines being redirected to the domestic market.

Wine ScoreCard <sup>25</sup>	\$ million
<b>Food farm gate value</b>	<b>43.1</b>
<b>Processed food value</b>	<b>121.6</b>
<b>Overseas trade</b>	
Food exports	5.3
Food imports	0.2
<b>Net interstate trade<sup>26</sup></b>	
Net commodity exports	0.4
Net commodity imports	0.0
Net food exports	62.1
Net food imports	81.8

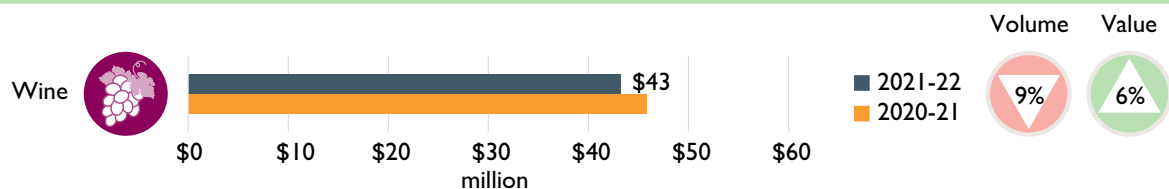


<sup>25</sup> Data sourced from Wine Tasmania wine producer survey. The food farm gate value of \$45.5 million is 28.5% higher than that reported by ABS.

<sup>26</sup> For the purposes of net interstate trade, wine is classified as 'premium' and 'non-premium' and treated as two separate and distinct commodities based on price (above/below \$15 retail).



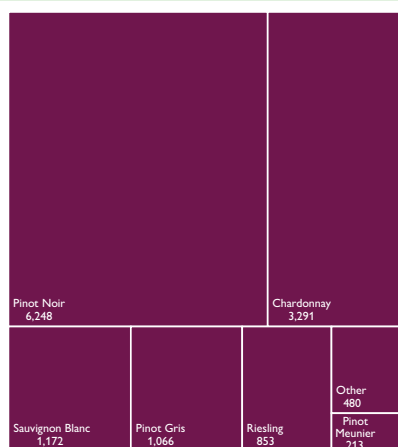
## Wine grapes gross farm gate value



## Market destinations

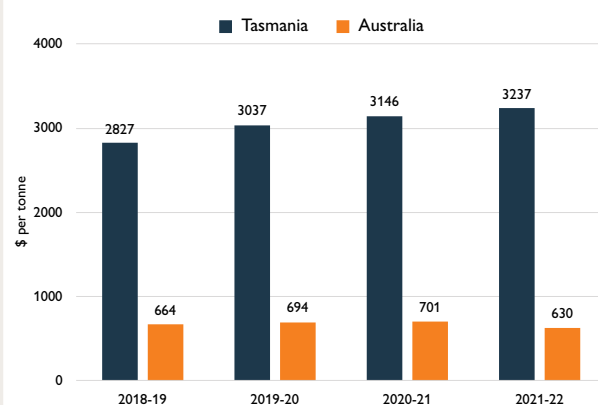
	Production surplus (% volume)	Sales to visitors to Tasmania (\$ million)	Net interstate sales (\$ million)	International exports (\$ million)
<b>Premium wine</b>	77	42	62	5

## Wine grape harvested by variety (tonnes)



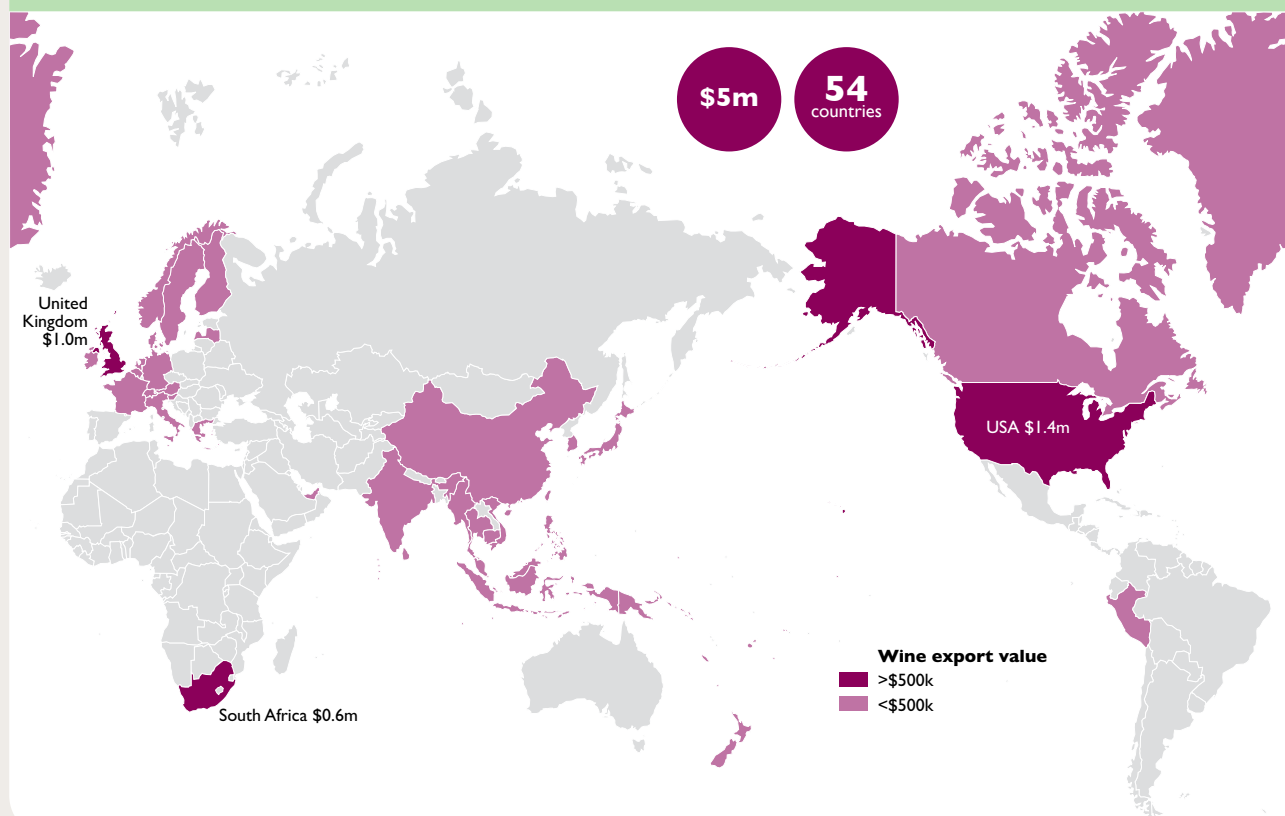
Source: Wine Tasmania

## Average wine grape price



Source: Wine Tasmania

## Wine export destination by value (\$ million)



# FIELD CROPS



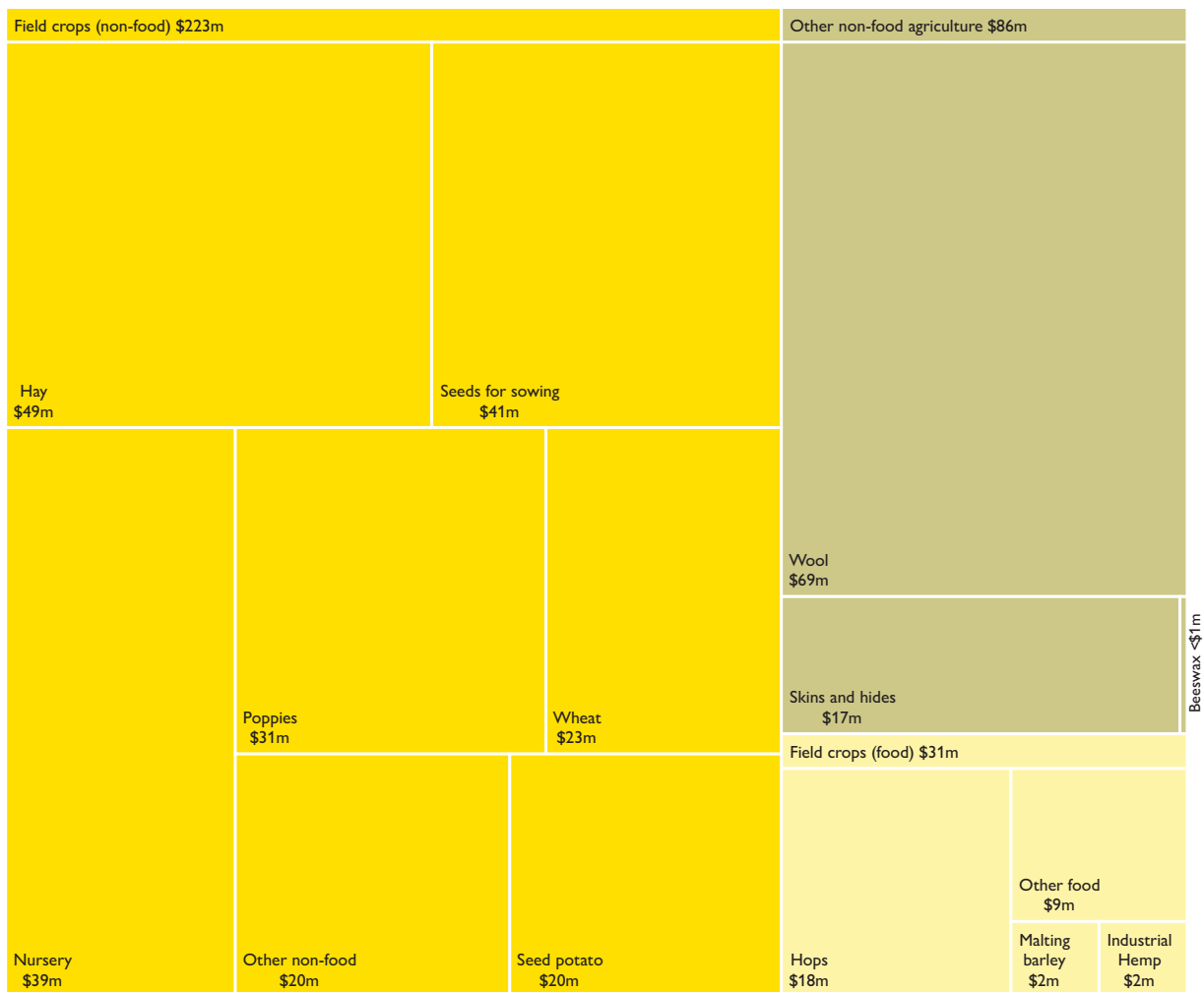
- The field crops category covers all crops not included in the fruit, vegetables or wine categories.
- It includes food products such as hops and industrial hemp, as well as non-food products such as poppies, fodder crops (including wheat), seed crops, cut flowers, pyrethrum and essential oil crops. Some crops such as wheat, barley, industrial hemp and canola are sold into both food and non-food markets.
- Field crops contribute to processed food value through the production of beer and spirits. The easing of COVID-19 restrictions for hospitality venues helped increase demand for beer compared with 2021–22, with value increasing 11.9% to \$179 million.
- The volume and value of Tasmanian spirits increased during 2021–22 taking the total value to \$44 million.
- Hops accounts for most of the food value of field crops, with a larger production area increasing the farm gate value by 37% to \$18 million during 2021–22. The export value of hops increased from \$8 million to \$22 million due to higher export volumes and prices.

Field Crops food ScoreCard <sup>27</sup>	\$ million
<b>Food farm gate value</b>	<b>31.0</b>
<b>Total farm gate value</b>	<b>253.7</b>
<b>Processed food value</b>	<b>318.6</b>
<b>Overseas trade</b>	
Food & commodity exports	23.2
Food & commodity imports	25.3
<b>Net interstate trade</b>	
Net food & commodity exports	7.6
Net food & commodity imports	178.7



<sup>27</sup> Values are based on a combination of data from both the ABS (such as wheat, hops, hay, silage, nursery and turf data), TIA, NRE Tas and industry sources for crops such as poppies, hemp and seed crops.

## Gross farm gate value of field crops & non-food agriculture - \$339 million<sup>28</sup>



<sup>28</sup> This chart reflects ABS and industry data for field crops and includes the contribution of poppies, hops, seeds for sowing (i.e. pasture, vegetable and other seeds), industrial hemp and wheat based on industry data. 'Other non-food' field crops include the non-food portion of crops such as barley, canola and industrial hemp.

# NON-FOOD AGRICULTURE



- The gross farm-gate value of non-food agricultural production was \$308 million, and non-food agricultural exports were worth \$70 million.<sup>29</sup>
- Wool prices rose in the second half of 2021–22 after lower prices in the first half as a result of the impact of COVID-19 control measures on consumer demand and the clothing supply chain. The farm-gate value of wool fell by 4.3% to \$69 million, with some woolgrowers struggling to obtain shearers. The value of wool exports rose by 18.4% to \$22.5 million.
- Hay and silage were worth \$49 million at the farm gate, down by 14% on the previous year due to adverse seasonal conditions effecting the total volume produced.
- Poppies were worth \$30.5 million at the farm gate, a 32.2% decrease from 2020–21. Poppy production is subject to global market control by the International Narcotics Control Board, which during recent years reduced Australia's poppy cultivation allocation in response to a global oversupply and reduced demand for narcotic raw material. This was further compounded by the COVID-19 pandemic with elective surgeries requiring pain relief being cancelled.
- The value of the pasture and vegetable seed production industry was \$40.5 million. A wet harvest had some impact on yields, and prices for pasture seeds were slightly down compared with 2020–21 when the industry was valued at \$42 million.
- After animal feeds, wool was the state's highest value non-food agricultural export, worth \$22.5 million, followed by seeds at \$16.9 million.

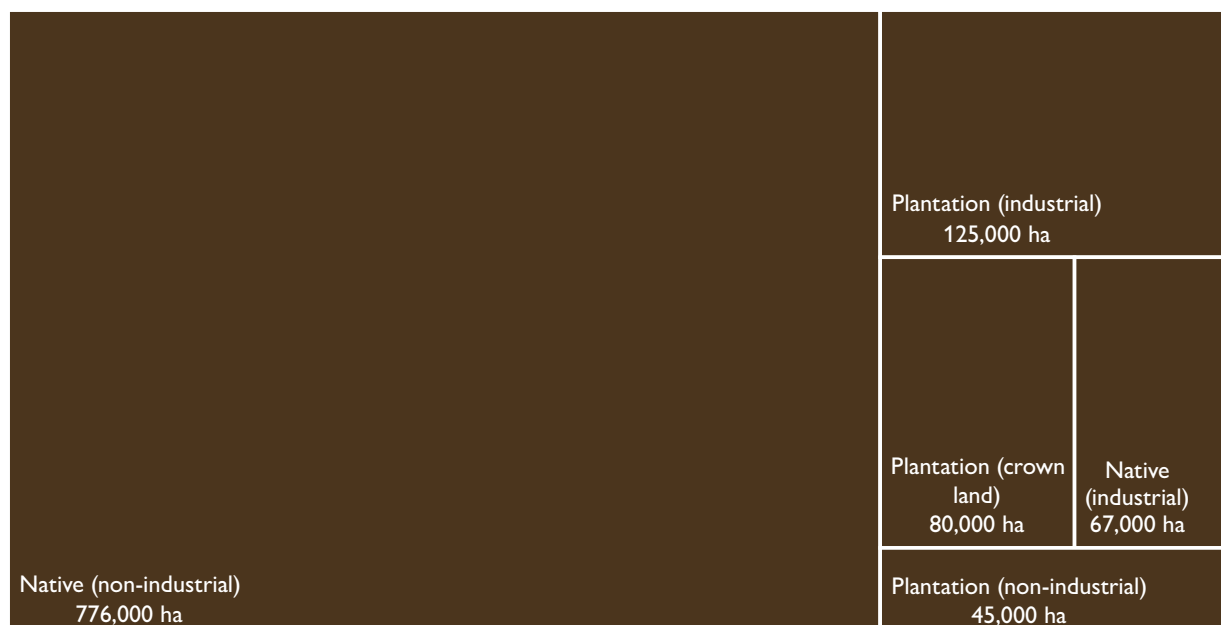


<sup>29</sup> The value of non-food production is based on ABS data with complementary data sourced from NRE Tas and industry.



- There are 43,000 hectares of privately-owned,<sup>30</sup> non-industrial plantation forest estate in Tasmania, the vast majority of which consists of agroforestry — trees that have been integrated into the farming landscape for enhanced productivity, profit and conservation.<sup>31</sup>
- The value of agroforestry at stumpage was estimated at \$31 million for 2021–22, with a mill-door value of \$75 million.<sup>32</sup>
- A significant fraction of agroforestry products is also sold locally and milled into timber and other wood products for either domestic or export markets, with smaller amounts processed locally into newsprint and lightweight coated paper for export.
- The direct value of agroforestry comes from the sale of wood products, carbon credits and co-products such as biofuel, oils and honey.
- Agroforestry also provides indirect benefits to farming enterprises. For example, agroforestry improves land amenity and value and provides environmental benefits to Tasmanian farms by preventing erosion, improving water quality, ameliorating salinity, improving biodiversity and providing a habitat for native species. By sequestering carbon, the use of trees on farms also provides a tool to offset on-farm greenhouse gas (GHG) emissions.<sup>33</sup>
- Trees on farms also improve overall farm productivity by providing shade shelter and protection from the wind for crops and livestock.<sup>34</sup> Wind speed reduction can also help to prevent property damage by bushfires.

## Privately owned or managed forest in Tasmania - 1.09 million hectares



<sup>30</sup> Nearly half of Tasmania is covered by forest. Approximately 33% of this forest area is privately owned.

<sup>31</sup> 85.7% of the agroforestry estate is hardwood (*Eucalyptus globulus* and *E. nitens*) with the remainder softwood (*Pinus radiata*).

<sup>32</sup> Stumpage refers to the net price received by the farmer for standing trees. Mill-door price will be higher than stumpage and includes the value-adding activities of harvest planning, harvesting and haulage to the mill door.

<sup>33</sup> See step 9 of Dairy Tasmania's Reducing the carbon footprint of Tasmanian dairying, available at [https://www.treealliance.com.au/\\_data/assets/pdf\\_file/0004/288931/A\\_10\\_Step\\_Summary.pdf](https://www.treealliance.com.au/_data/assets/pdf_file/0004/288931/A_10_Step_Summary.pdf)

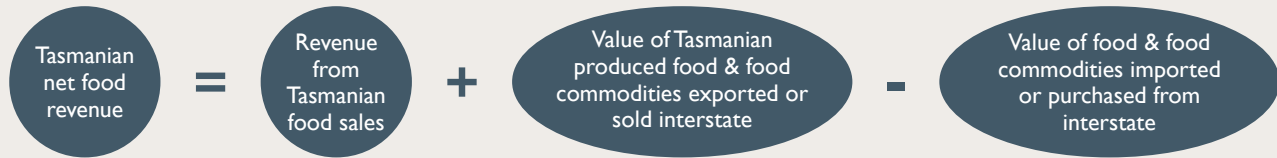
<sup>34</sup> Case studies conducted in Tasmania have shown pasture productivity gains of 30% in the portion of paddocks sheltered by trees.



## About the ScoreCard

**What is the net revenue** of Tasmania's food, food agriculture and fishing industries? Given the importance of the sector to the State's economy, it might be expected there would be a precise answer:

Gross food revenue is the sum of food retailed and sold through food service in Tasmania, plus the value of Tasmanian produced food and food commodities sold interstate and overseas. Food and food commodities imported from interstate and overseas are subtracted from this figure to derive net food revenue



Net food revenue cannot be readily calculated because two key pieces of data are not reported:

- the value of food processed and packed in Tasmania; and
- the value of interstate trade.

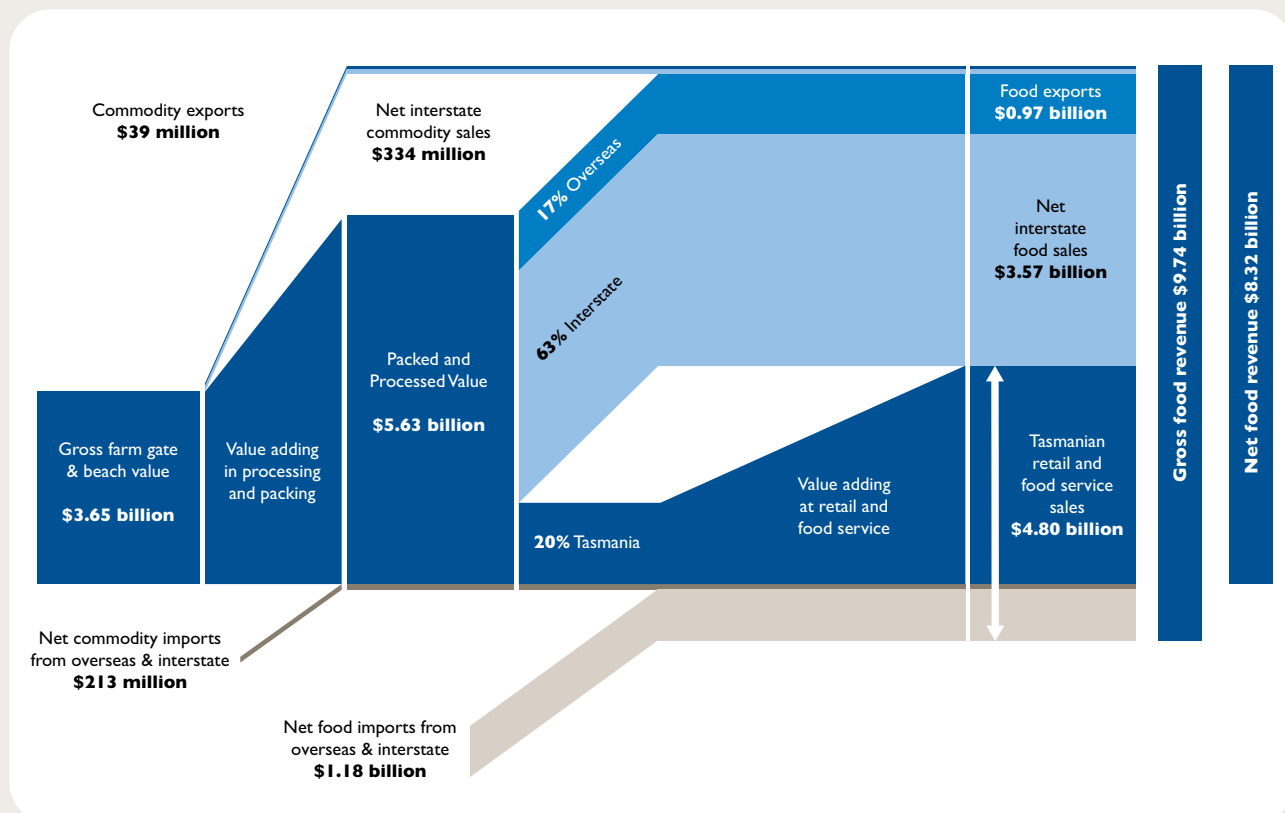
The ScoreCard uses the Food Industry ScoreCard methodology developed by the South Australian Department of Primary Industries and Regions, South Australia (PIRSA) to estimate packed and processed food value and the value of interstate trade so in order to estimate that net food revenue can be estimated.

Using gross value and volume data reported by ABS and ABARES, along with data from industry, and average wholesale price data, the processed food value is calculated for about 60 individual categories of food to derive the total packed and processed value of Tasmanian produced food.

Using this information along with export and import data, food retail and food service sales, food consumption data and the Tasmanian population statistics reported by ABS, along with data sourced from industry, it is possible to calculate:

**Net interstate trade = (Tasmanian production + imports) – (Tasmanian consumption + exports)**

These calculations are undertaken for more than 60 individual food categories and are combined with retail data to derive the ScoreCard summary table on page 6. The values shown in the right hand 'Total' column of the table on page 6 are depicted in the figure below.





Starting at the left-hand side of the figure, the gross value of primary food production at the farm gate and beach is shown as \$3.65 billion. \$334 million worth of this production is sold interstate or overseas as commodities.<sup>35</sup> For example, sheep and cattle are sold interstate and hops are exported internationally. An estimated net \$213 million worth of food commodities are also purchased from interstate and overseas as inputs to food processing.

Moving across the figure to the right, the processed and packed value is calculated to be \$5.63 billion. This is the wholesale value of food or beverage products when they leave the Tasmanian processor.

The next step involves determining the market destinations of the processed food. The quantity of food required to meet local (Tasmanian) demand is estimated using per capita food consumption statistics from ABS and ABARES. It is important to remember this is not the actual quantity of Tasmanian produced food sold in Tasmania — it provides an estimate of the magnitude of the production surplus in order to calculate net interstate sales.

The quantity and value of international food exports is derived from international trade data purchased from ABS and the value is shown in the figure as \$0.97 billion. The net quantity and wholesale value of interstate trade is calculated using the equation above. The value of net interstate food sales is \$3.57 billion.

Retail and food service sales data reported by ABS provide the value of Tasmanian food sales of \$4.80 billion. The quantity of food sourced from Tasmania is used to determine the quantity sourced from outside the State. These calculations are reconciled with a variety of data sources, including household consumption statistics and quantities of freight shipped across Bass Strait.

At the right of the figure, gross food revenue is the sum of Tasmanian food sales, net interstate sales of food and commodities and international food and commodity exports. This gives a gross food revenue of \$9.74 billion.

Commodity and food purchases from interstate and overseas are shown in grey at the bottom of the figure. The quantity and value of overseas imports derived from ABS trade data are known to be worth \$39 million. The remaining shortfall in food purchased in Tasmania is sourced from interstate, the net value of which is calculated to be \$1.15 billion. The combined value of net interstate food purchases and overseas imports is shown as \$1.18 billion. Commodity and food imports are subtracted from the gross net revenue to give an estimated net revenue of \$8.32 billion.

Net food revenue is not the same as the value-added contribution to gross state product (i.e., to the economy). In particular, the value of intermediate inputs to production purchased from elsewhere (e.g., fuel, energy, plant and equipment etc.) have not been subtracted from this value. However, the ScoreCard does provide an indication of trends in food production and provides metrics that are key performance indicators for the Tasmanian Government and measure progress against the Tasmanian Agri-Food Plan.<sup>36</sup>



<sup>35</sup> Contributing values may not sum to totals due to rounding.

<sup>36</sup> **DISCLAIMER:** The information contained in this document provides general information relating to the state's agricultural sector and food production. The Crown in Right of the State of Tasmania, its officers, employees and agents do not accept liability, however arising, including liability for negligence, for any loss arising from the use or reliance upon the content of this document. No liability or responsibility is accepted for the consequences of any inaccuracy in this document, and persons relying upon it do so at their own risk absolutely.

# GLOSSARY

**Agri-food** production means combined fisheries and food and non-food agricultural production.

**Agroforestry** describes the use of trees in the farming landscape, and for the purposes of the ScoreCard is defined as private, non-industrial, plantation forests.

**Beach value** means the gross value of fisheries and aquaculture products at the point of production. It is determined by the price of the product realised in a wholesale market.

**Commodity** means an unprocessed or partially processed good that is traded in a market.

**EVAO** is estimated value of agricultural operations.

**Food** means a product that is ready for human consumption. It may be fresh or processed and includes beverages.

**Food agricultural production** is agricultural production consumed as or manufactured into food and beverage products for human consumption.

**Food farm gate value** means the gross farm gate value of agricultural production that is consumed as or manufactured into food and beverages for human consumption. For example, in beef production the farm gate value of hides is excluded from the total farm-gate value of production to obtain the food farm-gate value.

**Farm business** means a business with an estimated value of agricultural operations (EVAO) of \$40,000 or more in relation to ABS data.

**Farm gate value** means the gross value of agricultural products (food or non-food) at the point of production. It is determined by the price of the product realised in a wholesale market.

**Farmers' terms of trade** is the ratio of prices received by farmers to prices paid by farmers. It is reported by ABARES as the ratio of a weighted index of prices received to a weighted index of prices paid.

**Gross food revenue** is the sum of food retailed and sold through food service in Tasmania and the value of Tasmania produced food and food commodities sold interstate and overseas.

**Mill door value** refers to the value of harvested wood products at the point of delivery to the mill for processing.

**NRE Tas** the Tasmanian Department of Natural Resources and Environment Tasmania.

**Net food revenue** is the gross food revenue less the value of food commodities and foods purchased from interstate and overseas.

**Non-food agricultural production** is all agricultural production other than that consumed as or manufactured into food and beverage products for human consumption. It includes crops for stock-feed, wool, hides and skins, crops for oil extraction, pyrethrum and poppies.

**Non-industrial** private forest owners include farmers, individuals and family or investment companies who own native or plantation forests and usually sell their wood for processing by other parties. By contrast, 'industrial' private forest owners are companies that own native or plantation forestry and arrange for the processing of their own timber.

**Nominal value** literally means the number value. In the context of monetary values, it is the historical dollar value which has not been adjusted for inflation. Nominal growth refers to the increase in value without any adjustment for inflation.

**Production surplus** is the quantity (or percentage) of Tasmanian production in excess of the total amount required to meet Tasmanian consumption.

**Real growth** refers to the change in value after adjustment for inflation. Real growth only occurs (is positive) if the increase in nominal value is greater than any increase due to inflation.

**Real value** is the dollar value adjusted to allow for inflation. Real values in this publication refer to values expressed in 2020–21 dollars.

**Stumpage** refers to the net price received by the farmer for standing trees after transport and harvest costs are subtracted from the mill door price (see *mill door value*).

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