

# Prospects Update

December 2007



## At a glance

In 2007–08, the total value of Queensland’s primary industry commodities (comprising gross value of production at the farm gate and first-round processing) is forecast at approximately \$12.5 billion.

This forecast is:

- 3% higher than DPI&F’s final estimate for 2006–07.

### Gross value of production at the farm gate

In 2007–08, the gross value of production of Queensland’s primary industry commodities at the farm gate is forecast at \$9.68 billion.

This is:

- 4% higher than DPI&F’s final estimate for 2006–07.

Forecasts that have been revised **up** from DPI&F’s initial forecasts for 2007–08 are:

- poultry—up from \$255 million to \$280 million
- milk—up from \$230 million to \$245 million
- pineapples—up from \$65 million to \$70 million

- potatoes—up from \$40 million to \$45 million
- tomatoes—up from \$205 million to \$215 million
- sugarcane—up from \$730 million to \$735 million
- wheat—up from \$250 million to \$380 million
- barley—up from \$40 million to \$50 million
- grain sorghum—up from \$340 million to \$400 million
- maize—up from \$50 million to \$60 million.

Forecasts that have been revised **down** from DPI&F’s initial forecasts for 2007–08 are:

- eggs—down from \$100 million to \$95 million
- mangoes—down from \$65 million to \$55 million
- strawberries—down from \$140 million to \$130 million.

Commentary is also included on cattle and calves, sheep and lambs and lifestyle horticulture.

### First-round processing

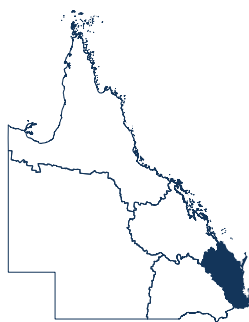
In 2007–08, the value of first-round processing (or value-added production) is forecast at \$2.84 billion.

This is:

- 1% lower than DPI&F’s final estimate for 2006–07.

## The contribution from Queensland’s regions in 2007–08

### South East Queensland



More than one-third (36%) of the total value of Queensland’s primary industries (including farm gate value and first-stage processing) is expected to come from the south-east corner of the state.

#### At the farm gate

The largest contributor in the region (in dollars) is the cattle and calf industry, followed by fruit, vegetables and amenity horticulture.

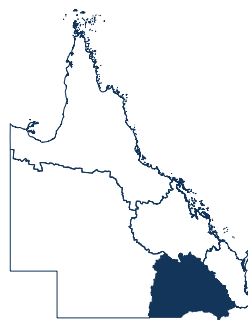
This region also accounts for:

- 80% of Queensland’s total forestry and logging farm gate value
- 70% of Queensland’s total poultry and egg farm gate value
- 60% of Queensland’s total milk farm gate value.

### First-stage processing

South East Queensland is expected to account for almost two-thirds (62%) of the value of first-stage processing in Queensland in 2007–08.

### South Queensland



20% of the total value of Queensland’s primary industries (including farm gate value and first stage processing) is expected to come from Queensland’s south region.

#### At the farm gate

The largest contributor in the region (in dollars) is the cattle and calf industry, followed by cereal grains.



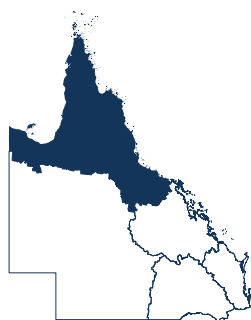
This region also accounts for:

- 80% of Queensland's total cotton farm gate value
- 55% of Queensland's total pig farm gate value
- 50% of Queensland's total cereal grains farm gate value.

### First-stage processing

South Queensland is expected to account for 14% of the value of first-stage processing in Queensland in 2007–08.

### North Queensland



20% of the total value of Queensland's primary industries (including farm gate value and first stage processing) is expected to come from Queensland's north region.

#### At the farm gate

The largest industries in the region (in dollars) are fruit, sugarcane, cattle and calves and vegetables.

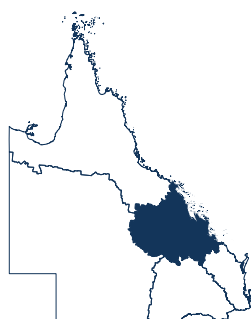
This region also accounts for:

- 65% of Queensland's total sugarcane farm gate value
- 55% of Queensland's total fruit farm gate value
- 40% of Queensland's total vegetable farm gate value
- 40% of Queensland's total fisheries farm gate value.

### First-stage processing

North Queensland is expected to account for 12% of the value of first-stage processing in Queensland in 2007–08.

### Central Queensland



16% of the total value of Queensland's primary industries (including farm gate value and first stage processing) is expected to come from Queensland's central region.

#### At the farm gate

The largest contributor in the region (in dollars) is the cattle and calf industry, followed by cereal grains.

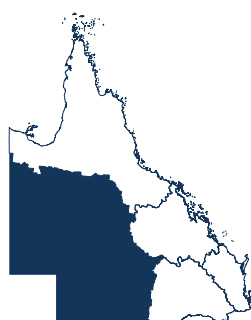
This region also accounts for:

- 40% of Queensland's total cereal grains farm gate value.

### First-stage processing

Central Queensland is expected to account for 10% of the value of first-stage processing in Queensland in 2007–08.

### West Queensland



8% of the total value of Queensland's primary industries (including farm gate value and first stage processing) is expected to come from Queensland's west region.

#### At the farmgate

Queensland's west is heavily reliant on the livestock industry. Most of the farm gate value in this region is forecast to come from the cattle and calf industry.

This region also accounts for:

- 70% of Queensland's total sheep and lamb and wool farm gate value.

Note: Data are based on DPI&F's September 2007 forecasts and 2000–01 ABS agricultural census data. These data are subject to change.

## Summer/autumn 2007–08 climate forecast

### Summer outlook optimistic

Queensland's primary industries have welcomed recent storms and rain. The rains were still fairly patchy, but the summer outlook for Queensland is optimistic (see Figure 1).

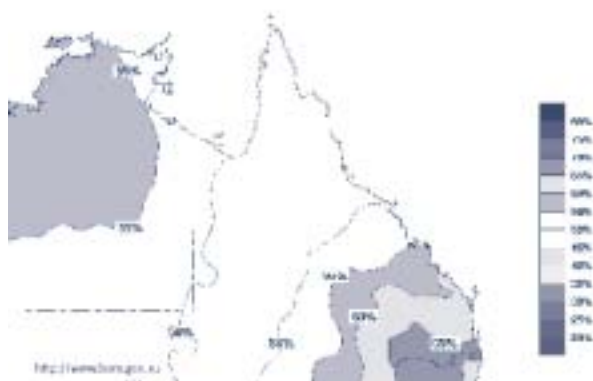


Figure 1. Chance of exceeding the median rainfall November 2007 to January 2008 (Product of the National Climate Centre)  
Source: Bureau of Meteorology

Currently (as at 04 December 2007), the 30 day average of the Southern Oscillation Index (SOI) is plus 8.8.

The 30 day average of the SOI remained positive through November, and was plus 9.9 for the month. The SOI phase for November was 'consistently positive' (phase 2). The outlook for December to February shows a 50 to 70 per cent chance of above median rainfall for much of Queensland.

Some regions, including the Atherton area and Fraser Coast, have a 70 to 80 per cent chance of exceeding median rainfall. North-western regions and some isolated regions have a 40 to 50 per cent chance of exceeding their median rainfall. For more information, visit [www.longpaddock.qld.gov.au](http://www.longpaddock.qld.gov.au)

It's important to note that any probability forecast is just that—a probability. A 60 per cent chance of above median rainfall also means a 40 per cent chance of not receiving median rainfall.

# Livestock disposals

## Cattle and calf disposals

The gross value of Queensland’s cattle and calf disposals (both those sold for slaughter and live exports) in 2007–08 is forecast at more than \$3.7 billion, which is 3% higher than DPI&F’s final estimate for 2006–07.

### Cattle and calves sold for slaughter (not including live exports)

#### Forecast

The gross value of production of Queensland’s cattle and calves sold for slaughter in 2007–08 is forecast at more than \$3.6 billion.

#### Discussion

In the first quarter of 2007–08 (i.e. July to September), Queensland cattle and calf slaughter numbers were 7% lower than at the same time in 2006, and the average price per head was 6% lower<sup>1</sup> (Figure 2).

The fall in slaughter numbers in the first quarter of 2007–08 compared to the same time in 2006–07 can be attributed to:

- lower prices
- an increase in the number of stock available from southern states (which meant Queensland processors needed fewer cattle)
- fewer cattle in feedlots, resulting in lower turnoff
- slower turnoff of cattle.

Slaughter numbers are likely to pick up in the latter part of 2007–08; cattle held back for finishing on grass will then reach the market, albeit later than expected.

As the Eastern Young Cattle Indicator (Figure 3) shows, prices in 2007–08 have been generally lower than at the same time in the previous two years, but higher than 2002–03. Meat and Livestock Australia (MLA) expects the price to pick up in early 2008.

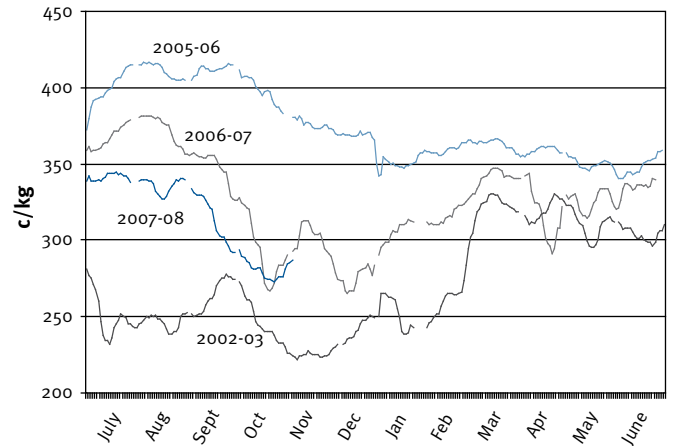


Figure 3. Eastern Young Cattle Indicator (ECYI)  
Source: MLA

1 Australian Bureau of Statistics unpublished data.

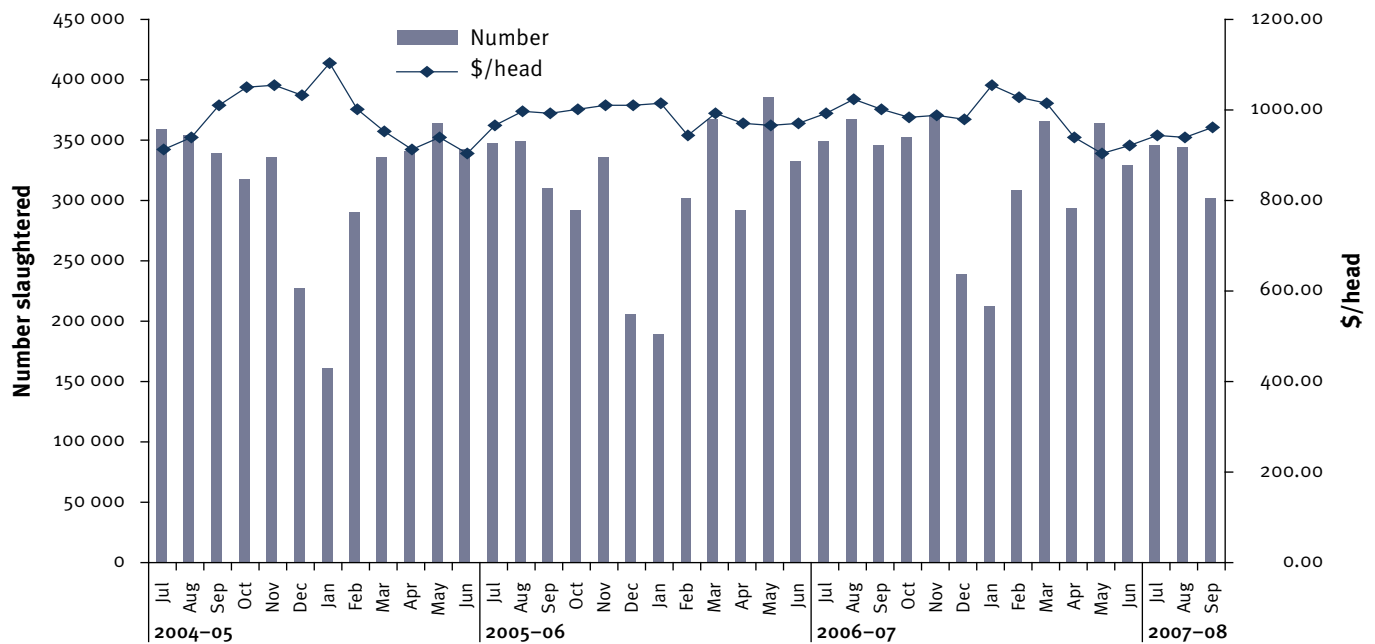


Figure 2. Queensland cattle and calf slaughtering and average price  
Source: ABS

As indicated in Figure 4, the number of cattle on feed has decreased significantly. In Queensland, turnoff in the September quarter of 2007 was 18% lower than turnoff in the same quarter of the previous year. Many cattle that would have been finished on grain have been returned to properties to be finished on grass, thereby taking longer to reach the market.

### Feedlots

Between June and September 2007, the number of cattle on feed fell from 427 933 to 365 372—a decline of 15% (see Figure 4). This was the lowest quarterly result since December 2005. A decline in the number of cattle on feed is expected again in the December 2007 quarter. Unlike the period between December 2005 and March 2006, when there was a large increase in the number of cattle on feed, MLA predicts even further falls rather than a recovery.

### Live cattle exports

#### Forecast

The gross value of Queensland’s live cattle exports is forecast at \$70 million in 2007–08, which is approximately three times the estimate for the previous year.

#### Discussion

Shipments of live cattle from Queensland in 2007–08 are expected to reach 85 000 head. Between July and September 2007, more than 22 000 live cattle were exported from Queensland. Exports in the December quarter 2007 are expected to reach 20 000.

Reasons for the increase in live exports include:

- strong demand from Indonesia
- lower cattle prices in Queensland than Darwin
- drought and high grains prices
- low feedlot demand.

### Sheep and lambs

#### Forecast

The gross value of sheep and lamb production in 2007–08 is forecast at \$55 million, which is 22% higher than DPI&F’s final estimate for 2006–07.

#### Discussion

Figures from the Australian Bureau of Statistics (ABS) suggest that the initial forecast for sheep and lambs should be revised upwards. However, market reports indicate that while slaughter numbers increased during the first quarter of 2007–08, prices have generally fallen compared to the previous quarter and the same time last year. Demand has been stabilised by increased exports of lamb during August. It is expected that prices will rise slightly again in the second quarter of 2007–08. Mutton prices have also fallen recently as a result of continuing dry conditions across much of the state. Summer rainfall will determine the supply and prices of both lambs and older sheep in the coming months.

### Poultry

#### Forecast

The gross value of poultry production in 2007–08 is now forecast at \$280 million, which is 17% higher than DPI&F’s final estimate for 2006–07.

#### Discussion

The Australian poultry industry is protected from international competition due to quarantine restrictions on fresh chicken meat. As a result, the industry can increase prices to absorb the increasing costs of feed grain. Since September, the high feed grain costs have risen by another 30%, leading to an overall increase in total costs of 15%. Price adjustments are currently in place for a 15% increase in the price per chicken.

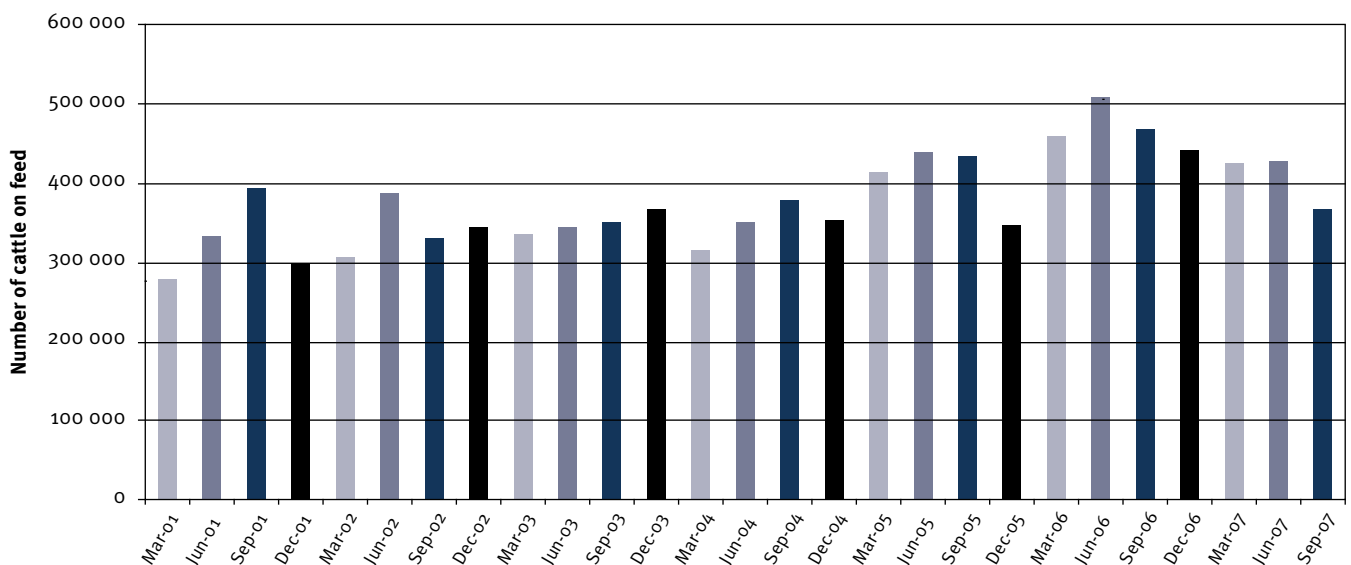


Figure 4. Number of cattle on feed in Queensland  
Source: MLA

## Livestock products

### Milk

#### Forecast

Queensland's gross value of milk production in 2007–08 is now forecast at \$245 million, which is 23% higher than DPI&F's final estimate for 2006–07.

#### Discussion

Queensland milk production figures for the 2006–07 financial year have been adjusted with the introduction of a new production data collection system; based on postcodes, it is a more accurate method to account for cross-border movements of milk.

With this adjustment factored in, production for South East Queensland in 2006–07 was approximately 419 million litres, which is 20.9 million litres less than previously reported (see Table 1). Three-year contracts are now being offered by processors in an attempt to lock in suppliers and ensure future supply.

High grain prices are still impacting on the industry, with many producers trying to reduce and substitute the use of grain. High prices for other inputs, such as fertiliser and fuel, are also dampening optimism in the industry.

All the major processors have recently announced further farm gate price increases—between 20% and 25% over the last four months. The average farm gate price is estimated at 47 cents per litre to 55 cents per litre. Such price increases will assist producers to offset drought-related costs to some extent.

### Eggs

#### Forecast

The gross value of egg production in 2007–08 is now forecast at \$95 million, which is 5% lower than DPI&F's final estimate for 2006–07.

#### Discussion

There is currently an excess of eggs supplied from the industry in Queensland. As a result, eggs are being sold at a price below cost, and prices will remain low until supplies are depleted. This oversupply indicates that the industry does not have a great deal of capacity for growth in the short- to medium-term.

## Horticulture

### Fruit and nuts

#### Pineapples

##### Forecast

The gross value of pineapple production in 2007–08 is now forecast at \$70 million.

##### Discussion

Despite a fall in production, a technical correction has resulted in the current forecast. Prices for fresh fruit have been adjusted due to a correction in the calculation of prices paid to farmers, and also partly due to a fuller recognition of the value of new sweet hybrid varieties.

On this basis, the estimate for 2006–07 has been changed to \$65 million.

#### Mangoes

##### Forecast

The gross value of mango production in 2007–08 is now forecast at \$55 million, which is 31% lower than DPI&F's final estimate for 2006–07.

##### Discussion

Following heavy flowering, there have been heavy losses of immature fruit, leading to a sharp decline in the production forecast. The season this year is expected to be late and short.

#### Strawberries

##### Forecast

The gross value of strawberry production in 2007–08 is now forecast at \$130 million, which is 8% higher than DPI&F's final estimate for 2006–07.

##### Discussion

The forecast value of strawberry production is lower than DPI&F's initial forecast for the year, as poor weather conditions reduced both yield and quality in September.

Table 1. Queensland milk production 2004–05 to 2007–08

|                                | 2004–05<br>million litres (e) | 2005–06<br>million litres (e) | 2006–07<br>million litres (e) | 2007–08<br>million litres (f) | % change<br>2006–07 to 2007–08 |
|--------------------------------|-------------------------------|-------------------------------|-------------------------------|-------------------------------|--------------------------------|
| South East Queensland          | 492                           | 486                           | 419                           | 377                           | -10                            |
| Far North Queensland (Malanda) | 89                            | 88                            | 82                            | 80                            | -2                             |
| Central Queensland             | 38                            | 36                            | 33                            | 31                            | -8                             |
| <b>Total Queensland</b>        | <b>619</b>                    | <b>610</b>                    | <b>534</b>                    | <b>488</b>                    | <b>-9</b>                      |

(e) Estimate.

(f) Forecast.

Source: Dairy Australia

## Vegetables

### Potatoes

#### Forecast

The GVP of potato production in 2007–08 is now forecast at \$45 million, which is 13% higher than DPI&F's final estimate for 2006–07.

#### Discussion

Plantings in the north occurred later than usual due to unseasonably high rainfall. Additional losses were expected following winter frosts. Yield losses were less severe than anticipated, and harvests in the north also appear to have been larger than average. Fresh market prices have remained firm due to water shortages in potato-growing regions throughout Australia.

### Tomatoes

#### Forecast

The GVP of tomato production in 2007–08 is now forecast at \$215 million, which is 8% higher than DPI&F's final estimate for 2006–07.

#### Discussion

The significance of high tomato prices in late winter/early spring was underestimated by DPI&F in the initial forecast for 2007–08. Our revised forecast reflects this underestimate. While somewhat lower, the expected effect of firm prices for tomatoes continues.

## Lifestyle horticulture

The September edition of *Prospects* had forecast a slight fall for the value of the lifestyle horticulture industry compared to the previous year.

Level 6 water restrictions in the south-east will not directly affect residential water users—the forecasts made in September remain the same for all sectors. The Queensland Water Commission, however, has also advised that Level 6 residential water restrictions will be reviewed if the Target 140 strategy begins to falter, particularly over the warmer months. Businesses will also be subject to increased enforcement and formalising of previous restrictions. It is expected that by this time most residential users and lifestyle horticulture businesses have adjusted to water restrictions and are now 'working smarter'.

### Amenity horticulture (production sector)

**Flower** growers are less affected by water restrictions than other sectors, as the export of cut flowers (particularly native, wild-harvested flowers) is increasing.

Despite some recent good rain, **turf** producers do not expect to see a significant improvement in the industry until major water supplies are replenished and residential watering restrictions are lifted.

### Lifestyle horticulture services (service sector)

**Landscapers** have reported a slight increase in business during recent weeks. The September to December period is often their busiest time, however, as businesses aim to have projects completed before Christmas. Many major infrastructure projects are also under construction, so demand is expected to stay strong in this sector for at least the next six months.

## Other field crops

### Sugarcane

#### Forecast

The gross value of the 2007 Queensland sugarcane crop is forecast at \$735 million, which is 32% lower than DPI&F's final estimate for 2006–07.

#### Discussion

The current forecast is slightly higher than DPI&F's initial forecast for the year because of improved prospects for CCS (commercial cane sugar—a measure of sugar content). The 2007 crop is expected to yield 32 million tonnes of sugarcane, at an average CCS of 13.8. Price expectations remained static, resulting in an expected crop value of \$735 million.

However, the uncertainty associated with the forecast is greater than usual at this time of year. A substantially delayed start to the harvesting season in much of Queensland means finishing dates in major cane growing regions towards the end of December—a time when the probability of rain interruptions is increasing.

## Other crops

### Chickpeas

#### Forecast

Chickpeas gross value of production in 2007–08 is forecast at \$50 million, which is 43% higher than DPI&F's final estimate for 2006–07.

#### Discussion

The current forecast is higher than DPI&F's initial forecast for the year due to a combination of higher-than-expected yields and slightly higher average prices. Production of chickpeas in 2007–08 is now forecast at around 90 000 tonnes.

### Peanuts

#### Forecast

Peanuts gross value of production in 2007–08 is forecast to be \$30 million, which is double DPI&F's final estimate for 2006–07.

#### Discussion

The current forecast is lower than DPI&F's initial forecast for the year, due to a lower forecast area planted. Some growers are expected to plant sorghum or maize instead of peanuts due to the lower risk of these crops and the current high grain prices.

## Winter cereal grains

### Wheat

#### Forecast

The gross value of production of wheat in 2007–08 is forecast at \$380 million, which is 58% higher than DPI&F's final estimate for 2006–07.

#### Discussion

The current forecast is higher than DPI&F's initial forecast for the year due to a combination of higher-than-expected yields and sustained high prices. Production is now forecast at around 980 000 tonnes in 2007–08. Average prices were expected to ease in 2007–08 due to large winter crop production in southern states. Due to unfavourable weather conditions during the southern states' growing season, however, yields deteriorated and high domestic prices for grain continued.

## Barley

### Forecast

Barley gross value of production in 2007–08 is forecast at \$50 million in 2007–08, which is double DPI&F's final estimate for 2006–07.

### Discussion

The current forecast is higher than DPI&F's initial forecast for the year due to a combination of slightly higher-than-expected yields and sustained high prices. Production is now forecast at around 144 500 tonnes in 2007–08. Average prices were expected to ease in 2007–08 due to large winter crop production in southern states. However, due to unfavourable weather conditions during the growing season in the southern states, yields deteriorated resulting in continued high prices for grain domestically.

## Summer cereal grains

### Grain sorghum

#### Forecast

The gross value of grain sorghum production in 2007–08 is forecast at \$400 million, which is more than double DPI&F's final estimate for 2006–07.

#### Discussion

Area and production forecasts have remained almost constant, with production forecast at around 1.33 million tonnes. The increase in GVP is primarily due to higher average prices expected for sorghum in 2007–08; the deterioration of winter crop production estimates in the southern states has kept feed grain prices high.

## Maize

### Forecast

The gross value of production of maize in 2007–08 is forecast at \$60 million, which is more than double DPI&F's final estimate for 2006–07.

### Discussion

Expected area planted to maize in 2007–08 has been revised down slightly, as rain received in recent months has not provided significant relief from dry soil conditions. The yield forecast remains similar, but further summer rain is required to ensure dryland maize yields are reasonable. Due to lower forecast area planted, production of maize in 2007–08 is now forecast at around 185 000 tonnes. The 2007–08 average price for maize has continued to increase and is now forecast at \$325 per tonne, primarily due to the deterioration of production estimates from the southern states' winter crop.

## Key assumptions

When calculating these forecasts, the department follows the convention used by all government forecasting agencies: that 'normal' seasonal conditions will occur across Queensland throughout the forecast year (2007–08) or that part of the forecast year yet to be completed. This sets a benchmark for measuring variations from 'normal' as the season unfolds.

The prices of all internationally traded commodities are responsive to changes in the exchange rate of the Australian dollar, relative to the currencies of our trading partners. Prices to primary producers (and therefore gross unit values) decline when the A\$ exchange rate increases and vice versa.

## Glossary

**Gross value of commodities produced (GVP).** GVP is a measure of economic output. In this publication, GVP relates to the output of primary industry commercial operations only. The GVP is the value of recorded production at wholesale prices realised in the market place (e.g. cattle sold at saleyards, sugarcane at the mill door, fruit and vegetables at the wholesale market). It is derived by multiplying the output from each primary industry by the average wholesale price paid to producers.

**Value-added production** is measured as the value of the output produced minus the costs of the intermediate inputs.

## Acknowledgements

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## Find out more

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The December 2007 Prospects update is also available on the DPI&F website at [www.dpi.qld.gov.au/prospects](http://www.dpi.qld.gov.au/prospects)

Note: On page 42 of the September 2007 *Prospects* report, the key to data in Figure 14 is incorrect. The blue parts of the bars refer to South Queensland and the purple parts of the bars refer to Central Queensland. This has been amended in the pdf of *Prospects*, which is available for download from the above website. We apologise for any inconvenience.

The Department of Primary Industries and Fisheries (DPI&F) seeks to maximise the economic potential of Queensland's primary industries on a sustainable basis.

While every care has been taken in preparing this publication, the State of Queensland accepts no responsibility for decisions or actions taken as a result of any data, information, statement or advice, expressed or implied, contained in this report.

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Table 2. Gross value of production, first-round processing and total primary industry estimates and forecasts 2005–06, 2006–07 and 2007–08

| Commodity GVP (a)   | 2005–06 (c)   | 2006–07 (c)   | 2007–08 (d)   | change 2006–07<br>to 2007–08<br>% |
|---|---------------|---------------|---------------|-----------------------------------|
|   | \$m           | \$m           | \$m           |                                   |
| <b>Livestock disposals</b>  |               |               |               |                                   |
| Cattle and calves   | 3675          | 3625          | 3730          | 3                                 |
| Sheep and lambs   | 50            | 45            | 55            | 22                                |
| Pigs  | 220           | 210           | 210           | 0                                 |
| Poultry   | 230           | 240           | 280           | 17                                |
| Other livestock   | 10            | 10            | 10            | 0                                 |
| <b>Total livestock disposals</b>  | <b>4185</b>   | <b>4130</b>   | <b>4285</b>   | <b>4</b>                          |
| <b>Livestock products</b>   |               |               |               |                                   |
| Wool  | 110           | 110           | 120           | 9                                 |
| Milk (all purpose)  | 210           | 200           | 245           | 23                                |
| Eggs  | 100           | 100           | 95            | -5                                |
| <b>Total livestock products (e)</b>   | <b>420</b>    | <b>410</b>    | <b>460</b>    | <b>12</b>                         |
| <b>Total livestock</b>  | <b>4605</b>   | <b>4540</b>   | <b>4745</b>   | <b>5</b>                          |
| <b>Horticulture</b>   |               |               |               |                                   |
| <b>Fruit and nuts</b>   |               |               |               |                                   |
| Bananas   | 300           | 400           | 450           | 13                                |
| Pineapples  | 40            | 65            | 70            | 8                                 |
| Mangoes   | 60            | 80            | 55            | -31                               |
| Mandarins   | 75            | 90            | 95            | 6                                 |
| Strawberries  | 120           | 120           | 130           | 8                                 |
| Avocados  | 45            | 75            | 65            | -13                               |
| Macadamias  | 55            | 40            | 25            | -38                               |
| Apples  | 35            | 35            | 45            | 29                                |
| Table grapes  | n/a           | n/a           | 40            | n/a                               |
| Other fruit and nuts  | 55            | 95            | 105           | 11                                |
| <b>Total fruit</b>  | <b>785</b>    | <b>1000</b>   | <b>1080</b>   | <b>8</b>                          |
| <b>Vegetables</b>   |               |               |               |                                   |
| Potatoes  | 35            | 40            | 45            | 13                                |
| Tomatoes  | 165           | 200           | 215           | 8                                 |
| Capsicums & chillies (f)  | 80            | 100           | 100           | 0                                 |
| Other vegetables  | 460           | 470           | 430           | -9                                |
| <b>Total vegetables</b>   | <b>740</b>    | <b>810</b>    | <b>790</b>    | <b>-2</b>                         |
| <b>Total fruit and vegetables</b>   | <b>1525</b>   | <b>1810</b>   | <b>1870</b>   | <b>3</b>                          |
| <b>Amenity horticulture</b>   |               |               |               |                                   |
| Nurseries (c)   | 645           | 375           | 375           | 0                                 |
| Turf (c)  | 90            | 65            | 65            | 0                                 |
| Cut flowers (c)   | 130           | 115           | 115           | 0                                 |
| <b>Total amenity horticulture</b>   | <b>865</b>    | <b>555</b>    | <b>555</b>    | <b>0</b>                          |
| <b>Total horticulture</b>   | <b>2390</b>   | <b>2365</b>   | <b>2425</b>   | <b>3</b>                          |
| <b>Other field crops</b>  |               |               |               |                                   |
| Sugar Cane (g)  | 1000          | 1075          | 735           | -32                               |
| Cotton (raw) (h)  | 395           | 120           | 50            | -58                               |
| Other crops   | 350           | 260           | 360           | 38                                |
| <b>Total other crops</b>  | <b>1745</b>   | <b>1455</b>   | <b>1145</b>   | <b>-21</b>                        |
| <b>Cereal grains</b>  |               |               |               |                                   |
| Wheat   | 275           | 240           | 380           | 58                                |
| Barley  | 45            | 25            | 50            | 100                               |
| Grain sorghum   | 140           | 185           | 400           | 116                               |
| Maize   | 35            | 25            | 60            | 140                               |
| Other cereal grains   | 15            | 15            | 10            | -33                               |
| <b>Total cereal grains</b>  | <b>510</b>    | <b>490</b>    | <b>900</b>    | <b>84</b>                         |
| <b>Total crops</b>  | <b>4645</b>   | <b>4310</b>   | <b>4470</b>   | <b>4</b>                          |
| <b>Total agriculture</b>  | <b>9250</b>   | <b>8850</b>   | <b>9215</b>   | <b>4</b>                          |
| <b>Fisheries (c) (i)</b>  |               |               |               |                                   |
| Trawl   | 100           | 85            | 85            | 0                                 |
| Non Trawl   | 85            | 105           | 105           | 0                                 |
| Aquaculture   | 65            | 65            | 75            | 15                                |
| <b>Total fisheries</b>  | <b>250</b>    | <b>255</b>    | <b>265</b>    | <b>4</b>                          |
| <b>Forestry and logging (c) (j)</b>   |               |               |               |                                   |
| <b>Total Primary Industries (Farm Gate)</b>                                 | <b>9690</b>   | <b>9305</b>   | <b>9680</b>   | <b>4</b>                          |
| <b>First-round processing value-added (k)</b>                               |               |               |               |                                   |
| Meat processing (c)   | 985           | 980           | 1010          | 3                                 |
| Sugar Processing (c)  | 420           | 450           | 310           | -31                               |
| Milk and cream processing (c)   | 115           | 110           | 135           | 23                                |
| Fruit and vegetables processing (c)   | 150           | 175           | 185           | 6                                 |
| Flour mill and feed processing (c)  | 95            | 95            | 170           | 79                                |
| Seafood processing (c)  | 25            | 20            | 20            | 0                                 |
| Log sawmilling and timber dressing and plywood and veneer manufacturing (c) | 330           | 345           | 345           | 0                                 |
| Lifestyle Horticulture services (c)   | 615           | 665           | 660           | -1                                |
| Cotton ginning (c)  | 45            | 15            | 5             | -67                               |
| <b>Total Primary Industries (first-round processing)</b>                    | <b>2780</b>   | <b>2855</b>   | <b>2840</b>   | <b>-1</b>                         |
| <b>Total Primary Industries</b>   | <b>12 470</b> | <b>12 160</b> | <b>12 520</b> | <b>3</b>                          |

(a) See glossary for definition of gross value of commodities produced.

(b) ABS final estimates, unless otherwise indicated. Note: (b) does not appear in this table as ABS has not yet released final estimates for 2005–06.

(c) DPI&F estimates.

(d) DPI&F forecasts.

(e) Excludes minor commodities, such as honey, beeswax, mohair.

(f) ABS estimate includes chillies.

(g) Gross value of sugarcane at mill door.

(h) Includes value of cotton seed and lint.

(i) Includes catches from Commonwealth-managed (including Torres Strait, Gulf of Carpentaria and east coast 'tuna' fisheries) and state waters.

(j) ABARE estimates.

(k) See glossary for definition of value-added.