

THE CONTRIBUTION OF PRIMARY INDUSTRIES TO THE NSW ECONOMY

KEY DATA 2012

All Primary Industries 2009-10

| | NSW \$m | Aust. \$m | NSW % |
|---|------------------|--------------------|-----------|
| Gross Value of Production | | | |
| Agriculture | 8,359.2 | 39,645.1 | 21 |
| Fisheries | 155.6 | 2,178.7 | 7 |
| Forestry (sawn logs delivered) | 381.0 | 1,746.0 | 22 |
| Minerals | 16,505.0 | 153,488.0 | 11 |
| All primary industry | 25,400.8 | 197,057.8 | 13 |
| Gross State Product NSW, current prices | 410,774.0 | 1,293,380.0 | 32 |
| Gross value agriculture as % gross state product | 2.0 | 3.1 | |
| Gross value primary industries as % gross state product | 6.2 | 15.2 | |

Primary Industry Exports 2009-10

| | NSW \$m | Aust \$m | NSW % |
|--|----------|-----------|-------|
| Contribution to exports | | | |
| Agriculture | 6,053.0 | 32,027.0 | 19 |
| Fish/seafood | 22.0 | 987.7 | 2 |
| Forest products (excl board, paper and pulp) | 177.7 | 1,177.3 | 15 |
| Minerals, metals and coal | 13,516.0 | 138,212.0 | 10 |
| Estimated value primary industry exports | 19,768.7 | 172,404.0 | 11 |
| All merchandise exports | 31,173.0 | 200,758.0 | 16 |
| Primary industry exports as % of merchandise exports | 63.4 | 85.9 | |

| Total Employment (full-time) 2006 | Persons NSW | Persons Aust | NSW % |
|---|--------------------|---------------------|--------------|
| Agriculture and Services | 73,420 | 259,098 | 28.3 |
| Fishing and Services | 1,815 | 9,735 | 18.6 |
| Forest Industry and Services | 2,522 | 8,929 | 28.2 |
| Mining and Services | 20,318 | 106,905 | 19.0 |
| All primary industry | 98,075 | 384,667 | 25.5 |
| Full-time employed all industries | 2,909,448 | 9,104,187 | 32.0 |
| Percent in primary industries | 3.4 | 4.3 | |
| Percent in primary industries non metro areas | 11.3 | 11.6 | |

Metro areas are counted as all capital cities plus Newcastle, Wollongong and the Gold Coast. Non metro, regional, is the balance.

The importance of Primary Industry production and employment in the NSW economy

The primary outputs of NSW primary industries contribute directly to the output of other businesses and industries in NSW. The value of these direct and indirect outputs can be estimated to show this overall contribution of primary industries to the economy of NSW. The estimate is reached by applying the multiplier coefficients calculated by ABS for different industry sectors, and are shown in the table below:

Gross Value of Production, Primary Industries, NSW, 2009-10 (\$ million)

| Sector | Primary output (GVP) | Multiplier | Extended total |
|--------------------------------------|----------------------|------------|-----------------|
| Agriculture | 8,359.2 | 2.178 | 18,206.3 |
| Commercial Fishing | 155.6 | 2.485 | 386.7 |
| Forestry and Logging | 381.0 | 2.485 | 946.8 |
| Mining | 16,505.0 | 2.136 | 35,254.7 |
| Total | 25,400.8 | | 54,794.6 |
| Gross State Product (GSP) NSW | | | |
| GSP | 410,774.0 | | |
| GV Primary Industries as % GSP | 6.2 | | |
| Extended GV PI, as % GSP | 13.3 | | |

Employment

ABS has published separate multipliers (Type 2A) to estimate the overall effect upon employment in Australia by the operation of primary industries. These are applied to NSW labour data to estimate the extended influence of PI on employment in NSW. This method of simple estimation was endorsed by the Centre for Policy Studies at Monash University who operate the *Monash Model*.

Employment data are collected by ABS in two ways: annually by survey, and every five years in a census. For small sectors, the results are different as samples in the surveys are relatively small. Because of this, "Key Data" only refers to census data for consistency.

Employment, Primary Industries, NSW, persons, 2006 census (detailed employment data only available in census years)

| Sector | Employment | Multiplier | Extended total |
|--|---------------|----------------|---------------------|
| Agriculture and services | 73,420 | 1.828 | 134,212 |
| Commercial Fishing | 1,815 | 2.424 | 4,399 |
| Forestry and Logging | 2,522 | 2.424 | 6,113 |
| Mining and services | 20,318 | 3.977 | 80,805 |
| Total | 98,075 | | 225,529 |
| | | All NSW | Regional NSW |
| Total employed | 2,909,448 | | 686,759 |
| PI employed | 98,075 | | 77,804 |
| PI employment as % all employment | 3.4 | | 11.3 |
| Extended employment PI | 225,529 | | 168,525 |
| Extended employment PI, as % total NSW | 7.8 | | 24.5 |

Note: Regional NSW is defined as the whole state less the metro areas of Sydney, Newcastle, and Wollongong. Location of employed persons is enumerated by the place of residence.

Agriculture 2009-10

| | NSW | Aust | NSW % | Avg NSW 2001-10 |
|------------------------------------|-----|------|-------|-----------------|
| Agricultural land (million ha) | 59 | 399 | 15 | na |
| Non-agricultural land (million ha) | 22 | 371 | 6 | na |
| Total area of NSW (million ha) | 80 | 769 | 10 | na |

Number of Farms
(ABS has changed the basis on which it categorises and enumerates businesses, from its own categorisation of census farms to the Australian Business Register, available since 2000 with the advent of ABN registration)

| | | | | |
|---------------------------------|---------------|----------------|-----------|---------------|
| Flower and nursery | 591 | 1,904 | 31 | 811 |
| Fruit and vegetable | 4,351 | 16,254 | 27 | 4,497 |
| Livestock for meat and wool | 21,306 | 57,468 | 37 | 21,451 |
| Grain and mixed grain/livestock | 8,356 | 25,608 | 33 | 9,437 |
| Dairy cattle farming | 1,425 | 8,594 | 17 | 1,407 |
| Other agriculture production | 7,086 | 24,356 | 29 | |
| All farms | 43,115 | 134,184 | 32 | 41,634 |

Stock numbers ('000)

| | | | | |
|--------------------------|--------|--------|----|--------|
| Cattle and calves (beef) | 5,107 | 24,008 | 21 | 5,804 |
| Sheep and lambs | 24,366 | 68,085 | 36 | 31,921 |

Production, '000 tonnes

| | | | | |
|-------------------------------|-------|--------|----|-------|
| Wheat | 5,350 | 21,834 | 25 | 5,841 |
| Barley | 1,236 | 7,865 | 16 | 1,330 |
| Rice | 195 | 197 | 99 | 551 |
| Canola | 281 | 1,907 | 15 | 357 |
| Sugar cane (cut for crushing) | 1,905 | 31,235 | 6 | 2,294 |
| Cotton (lint) | 214 | 352 | 61 | 270 |
| Oranges | 192 | 391 | 49 | 216 |
| Apples | 33 | 264 | 13 | 53 |
| Beef and Veal | 477 | 2,109 | 23 | 459 |
| Mutton and Lamb | 140 | 574 | 24 | 173 |
| Wool | 116 | 353 | 33 | 167 |
| Whole Milk (million litres) | 1,074 | 9,019 | 12 | 197 |
| Wine (million litres) | 380 | 1,132 | 34 | 400 |

Gross value agric products 2009-10 (\$m)

| | | | | average 2001-10 \$m real |
|-----------------------------|--------------|---------------|-----------|--------------------------|
| Wheat for grain | 1,155 | 4,765 | 24 | 1,490 |
| Barley | 230 | 1,356 | 17 | 282 |
| Rice | 89 | 90 | 99 | 182 |
| Canola | 123 | 840 | 15 | 157 |
| Cotton | 453 | 754 | 60 | 610 |
| Fruit and nuts (inc grapes) | 648 | 4,060 | 16 | 844 |
| Cattle and calves | 1,488 | 7,268 | 20 | 1,718 |
| Sheep and lambs | 584 | 2,627 | 22 | 558 |
| Pork | 215 | 903 | 24 | 311 |
| Poultry | 577 | 1,785 | 32 | 552 |
| Wool | 641 | 1,928 | 33 | 980 |
| Milk | 522 | 3,371 | 15 | 502 |
| Other | 1,635 | 9,899 | | |
| Total Agriculture | 8,359 | 39,645 | 21 | 9,515 |

Main agricultural exports (\$m)

| | | | |
|-----------------------------------|--------------|---------------|-----------|
| Wool | 731 | 2,222 | 33 |
| Wheat | 1,024 | 4,178 | 25 |
| Beef | 987 | 4,369 | 23 |
| Wine | 723 | 2,125 | 34 |
| Total agricultural exports | 5,070 | 32,027 | 16 |

Agricultural exports for calendar year 2010.



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Fisheries 2009-10

| | NSW | Aust | NSW % |
|---|---------------|----------------|----------|
| Length of coastline (km) | 2,007 | 35,877 | 6 |
| Number of fishing businesses 2009 (Australian Business Register, 2007-09) | 1,252 | 6,743 | 19 |
| Fisheries production by location of catch (tonnes) | | | |
| Tuna | 1,053 | 10,957 | 10 |
| Other fish | 15,281 | 151,650 | 10 |
| Prawns | 1,199 | 21,653 | 6 |
| Rock lobster | 122 | 9,628 | 1 |
| Abalone | 73 | 4,981 | 1 |
| Other crustaceans and molluscs | 6,250 | 40,233 | 16 |
| Aquaculture production (tonnes) | | | |
| Edible oysters | 4,960 | 14,804 | 34 |
| Trout | 150 | 31,915 | 0 |
| Silver perch | 194 | 294 | 66 |
| Prawns | 165 | 5,381 | 3 |
| Other aquaculture | 247 | 21,148 | 1 |
| Total production, wild and aquaculture | 29,694 | 312,644 | 9 |
| Gross value fish & aquaculture products (\$m) | | | |
| Marine fish other than tuna | 65.3 | 830.1 | 8 |
| Oysters | 43.0 | 99.8 | 43 |
| Prawns | 16.2 | 324.1 | 5 |
| Tuna | 8.1 | 125.3 | 6 |
| Abalone | 1.9 | 173.6 | 1 |
| Other | 21.1 | 625.9 | 2 |
| Total fish & aquaculture | 155.6 | 2,178.7 | 7 |
| Main fishery exports (\$m) | | | |
| Prawns | 4.6 | 61.5 | 8 |
| Fish | 9.9 | 258.4 | 4 |
| Abalone | 2.0 | 216.4 | 1 |
| Rock Lobster | 5.3 | 399.7 | 1 |
| Other seafood exports | 0.2 | 51.8 | 2 |
| Total seafood exports | 22.0 | 987.7 | 2 |

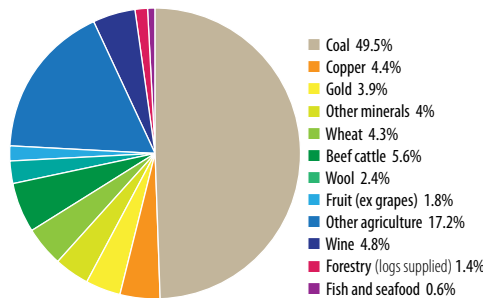
Forestry 2009-10

| Area of Forest, 2010 ('000 ha) | NSW | Aust | NSW % Aust |
|---|---------------|----------------|------------|
| Open forest and woodland | 25,703 | 143,127 | 18 |
| Closed forest | 505 | 4,270 | 12 |
| Plantation forest | 383 | 2,020 | 19 |
| Total Forest | 26,591 | 149,417 | 18 |
| Total Land Area | 80,064 | 769,202 | 10 |
| Sawnwood production, 2009-10 ('000 cu m) | | | |
| Coniferous (Softwood) | 4,327 | 14,436 | 30 |
| Eucalypt (Hardwood) | 1,608 | 10,697 | 15 |
| GV Forestry Products (\$m) | | | |
| Gross value of logs delivered | 381 | 1,746 | 22 |
| Main forestry exports, 2009-10 (\$m) | | | |
| Sawnwood | 23 | 125 | 19 |
| Roundwood | 36 | 137 | 27 |
| Woodchips | 111 | 855 | 13 |
| Misc. forest and wood products | 6 | 59 | 11 |
| Total forest product exports | 177 | 1,177 | 15 |

Minerals 2009-10

| | NSW | Aust | NSW % |
|--|---------------|---------------|-----------|
| Operations | | | |
| Coal mines | 62 | 123 | 50 |
| Gold mines | 6 | 33 | 18 |
| Other major mines | 10 | na | |
| Production ('000 tonnes) | | | |
| Black coal (saleable) | 145,368.00 | 361,941.00 | 40 |
| Copper (content) | 155.00 | 819.00 | 19 |
| Zinc (content) | 102.00 | 1,362.00 | 7 |
| Silver (content) | 0.08 | 1.81 | 4 |
| Lead (content) | 77.00 | 617.00 | 12 |
| Gold (content) | 0.0280 | 0.2400 | 12 |
| Gross value minerals (\$m) | | | |
| Coal | 13,216 | 36,447 | 36 |
| Copper | 1,176 | 6,506 | 18 |
| Zinc | 232 | 2,214 | 10 |
| Silver | 51 | na | |
| Lead | 183 | 1,833 | 10 |
| Gold | 1,037 | na | |
| other minerals and gems | 610 | na | |
| Total value mineral production | 16,505 | na | |
| Metallic mineral & coal exports 2009-10 (\$m) | | | |
| | Estimate NSW | Aust | NSW % |
| Coal | 11,224 | 36,447 | 31 |
| Copper | 456 | 4,526 | 10 |
| Zinc | 4 | 1,237 | 0 |
| Silver | 10 | \$253 | 4 |
| Lead | 117 | \$998 | 12 |
| Gold | 1,705 | 13,675 | 12 |
| Other | | 38,329 | |
| Total value these exports | 13,516 | 95,465 | 14 |

Principal NSW primary industry products by value 2009-10



Note: NSW exports are estimated as proportion of national exports corresponding to NSW proportion of national production. NSW also processes and exports aluminium, iron and steel and petroleum from bauxite, iron and oil mined in other states, but does not produce the raw materials.

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