

# 2011

WESTERN AUSTRALIA'S AGRIFOOD, FIBRE, FISHERIES AND FORESTRY INDUSTRIES  
at a glance



GOVERNMENT OF  
WESTERN AUSTRALIA

Department of  
Agriculture and Food





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WESTERN AUSTRALIA'S AGRIFOOD, FIBRE, FISHERIES AND FORESTRY INDUSTRIES

# 2011

## at a glance

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# FOREWORD



Western Australian agriculture and food businesses continue to work closely with industry and consumers around the world to build the State's reputation as a trusted supplier of quality products. The year 2010 presented many challenges for primary producers to overcome as dry conditions placed pressure on grains, livestock and other food production. Despite this, the agrifood industry continues to make a major contribution to the WA economy. The value of our agrifood and forestry exports in 2009–10 were \$4.8 billion driven by the markets in North Asia, the Middle East and South East Asia.

The international market remains critical to the success of Western Australia's agrifood industry. With the State's industry exporting up to 80 per cent of annual production, it is important to continually encourage new markets. The State makes a significant contribution to national rural export earnings, accounting for nearly 18 per cent of the total Australian agriculture and food exports to the world. Through the Department of Agriculture and Food, we are working to consolidate expansion in key export markets, further develop emerging markets as well as identify and remove trade barriers to boost export performance.

The Government is committed to sustainable development of food and agriculture industries in Western Australia. The State has one of the most innovative and successful agriculture and food industries in the world but we have to continually improve to remain internationally competitive. That means taking an integrated approach by working throughout the supply chain to capture emerging, new

and traditional markets. It also means continually cutting red-tape and investing in world-class research and development. Getting our research and development priorities right will ensure WA industry continues to lead the way on new technologies, farming techniques and processing. We are also committed to helping Western Australian companies access international markets so as to grow their businesses as well as broaden the State's export base.

The department will continue to progress leading scientific research and look at innovative ways for the agrifood sector to evolve for the long term sustainability and profitability of the industry.

As the world's demand for food and fibre grows, the Government will support sustainable growth and continue to ensure that Western Australia remains an important supplier of products for both local and international markets.

A stylized, handwritten signature in black ink, appearing to be 'Terry Redman'.

**Hon Terry Redman, MLA**  
**Minister for Agriculture and Food; Forestry; Corrective Services**



High quality fisheries and pristine waters have given Western Australia an international reputation as a producer of premium quality seafood.

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

Commercial fishing, including pearling and aquaculture, contributes around A\$1 billion to the State's economy each year, providing direct employment for 5000 Western Australians with many more in associated service industries.

The State's waters are also a playground for more than 600,000 recreational fishers. This sector injects over A\$570 million in economic activities annually to the State's economy and supports an estimated 7000 jobs.

Most of Western Australia's seafood is exported, with the majority being sold to China/Hong Kong. Much of this produce is destined for some of the world's best restaurants.

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

A stylized, handwritten signature in black ink, appearing to read 'Norman Moore'.

Hon Norman Moore, MLC  
Minister for Mines and Petroleum; Fisheries; Electoral Affairs





# PROFILE

## DEPARTMENT OF AGRICULTURE AND FOOD

The Department of Agriculture and Food is driving the development of Western Australia's A\$5 billion agrifood sector and ensuring the production of safe and quality food and fibre products for domestic and international markets.

The department's pivotal role involves supporting and developing all aspects of food production and the supply chain through innovative research and development, marketing, extension and regulation.

Highly skilled staff are based throughout the State, delivering a diverse range of quality services and products from up to 50 regional locations. These responsibilities cover more than 100 million hectares devoted to the State's agricultural and pastoral production.

The department's focus, in line with the Government's five key strategies for agriculture and food, includes improving the long term profitability of the sectors; developing effective natural resource management policies to manage land assets, climate variability and biosecurity; building industry capacity to adapt and grow; improving market access for WA product; and promoting a positive profile of the WA food and agriculture sectors.

The department works closely with industry and is finalising Plans to Support Industry Development for Grains, Horticulture, Livestock and Food to ensure it provides the services that are most needed to achieve the best results. The plans are the cornerstone to maximising the opportunities for these industries to prosper and grow.

While the department is primarily involved in economic development, its widespread activities also generate considerable social, community and environmental benefits. It undertakes research and development in the areas of climate, land management, nature conservation, salinity, soil acidity, water management and the environment.

Through its commitment to biosecurity, the department aims to minimise the impact of diseases, pests and weeds on the agricultural and pastoral industries. This helps to maintain Western Australia's relative freedom from pests and diseases.

The department's responsibility for food brings together agriculture, food production, manufacturing and marketing under the one Government agency. In this area, product innovation and consumer demand are key focus areas and supporting the development of value-added products is paramount to deliver real opportunities for the State's agrifood sector.

The department is also involved in promoting Western Australian products overseas, facilitating trade alliances, providing global business linkages and project management at an international level.

**For further information  
visit [www.agric.wa.gov.au](http://www.agric.wa.gov.au)**





## DEPARTMENT OF FISHERIES

The Department is responsible for the conservation, development and sharing of the Western Australia's fish and other aquatic resources for the benefit of current and future generations. The Department's work covers a range of areas including:

- sustainable management of fisheries, aquaculture and aquatic resources;
- environmental management and protection; and
- developing industry and community partnerships.

The Department licenses and regulates commercial fisheries, which includes rock lobster, pearling, prawns, scallops, abalone and finfish and is worth about A\$500 million annually, with a further estimated A\$450 million in related economic activity.

It manages a State-wide recreational fishery accessed by more than 600,000 people and generating in excess of A\$570 million in economic activities annually.

The Department's infrastructure includes a head office in Perth, a marine research facility at Hillarys, an operations centre at Fremantle and 23 other offices across the State.

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

Internationally, officers from the Department have undertaken project work coordinated by a number of development and management agencies, including AusAID, the Australian Centre for International Agricultural Research, the Asian Development Bank, the Food and Agriculture Organisation of the United Nations, the Norwegian Agency for Development and Cooperation, the International Fund for Agricultural Development, the Canadian International Development Agency and the Forum Fisheries Agency. Projects have been delivered in a range of countries around the Indian Ocean rim and western Pacific.

The Department carries out fisheries research, management, surveillance and enforcement, and education along the State's 12,500 kilometre coastline. It also works with the Commonwealth Government of Australia in waters adjacent to Western Australia in Australia's Exclusive Economic Zone, which extends 200 nautical miles (370 kilometres) from the State's coast.

**For further information, visit [www.fish.wa.gov.au](http://www.fish.wa.gov.au)**



## FOREST PRODUCTS COMMISSION

The Forest Products Commission is a Government trading enterprise established in 2000 as a Statutory Authority for the purpose of developing and marketing Western Australia's renewable timber resources.

The Commission operates three business segments, South West Forests, Arid Forests and Mature Plantations. Each segment has its own operating conditions, market demands and financial characteristics.

The Commission's operations include the commercial functions of;

- Harvesting and selling forest products from State-owned native forests and plantations and
- Regeneration (replanting) of State-owned native forests and plantations,
- Management and harvesting of tree farms in partnership with landowners; and;
- Identifying new ways of facilitating plantations in low-to-mid rainfall areas

In addition to growing millions of seedlings each year, the Commission invests in research and development to maximise financial returns on a variety of commercial species including radiata pine maritime pine, sandalwood, jarrah and marri.

The Commission is currently identifying the means by which traditional uses of timber can be extended to provide value-added commercial opportunities.

The Commission is involved in the marketing of WA timber products in conjunction with organisations such as the Furnishing Industry Association.

The agency also assists in promoting the unique features of the State's timbers (e.g. the value of sandalwood in pharmaceutical products and the growth of karri and jarrah in export furniture and manufacturing markets).

Sustainable forest management is the Commission's commitment to delivering economic, environmental and social benefits for the community.

While Western Australia is home to a diverse range of unique timbers from native forests and plantations, the Commission does not harvest in forests designated as old growth. Rather, the policy is to practice long-term conservation and expansion of Western Australian's plantation and native timbers.

**For further information visit [www.fpc.wa.gov.au](http://www.fpc.wa.gov.au)**




# FACTS AND FIGURES



Gross State Product (GSP):	A\$187.8billion
GSP growth rate:	4.3 per cent (2009–10)
Population:	2.30 million (June 2010)
Imports:	A\$27.9 billion
Exports:	A\$83.3 billion
Land area:	2,532,400 km <sup>2</sup>
Life expectancy at birth:	
Males	78 years
Females	83 years
Unemployment rate:	4.6 per cent (Nov 2010)
Inflation rate:	3.4 per cent (2009–10)
Average weekly earnings:	A\$1,080 (Annual increase 5.3%, Aug 2010)
Western Australia's contribution to Australian exports:	42 per cent

# LAND AND SEA USE – AN OVERVIEW



Western Australia is the largest Australian State. It occupies a third of Australia spanning 2400 kilometres from north to south, with an area of more than 2,500,000 square kilometres.

From its tropical north, to the temperate areas in its south-west corner, Western Australia experiences a variety of climatic conditions. As the distance from the coast increases inland, the rainfall decreases and the temperature variations become more varied.



Western Australia's vast area provides soils and climates suited to a variety of agricultural production from open range grazing and broad acre cereal cropping to irrigated pastures and horticulture, orchards and vineyards.

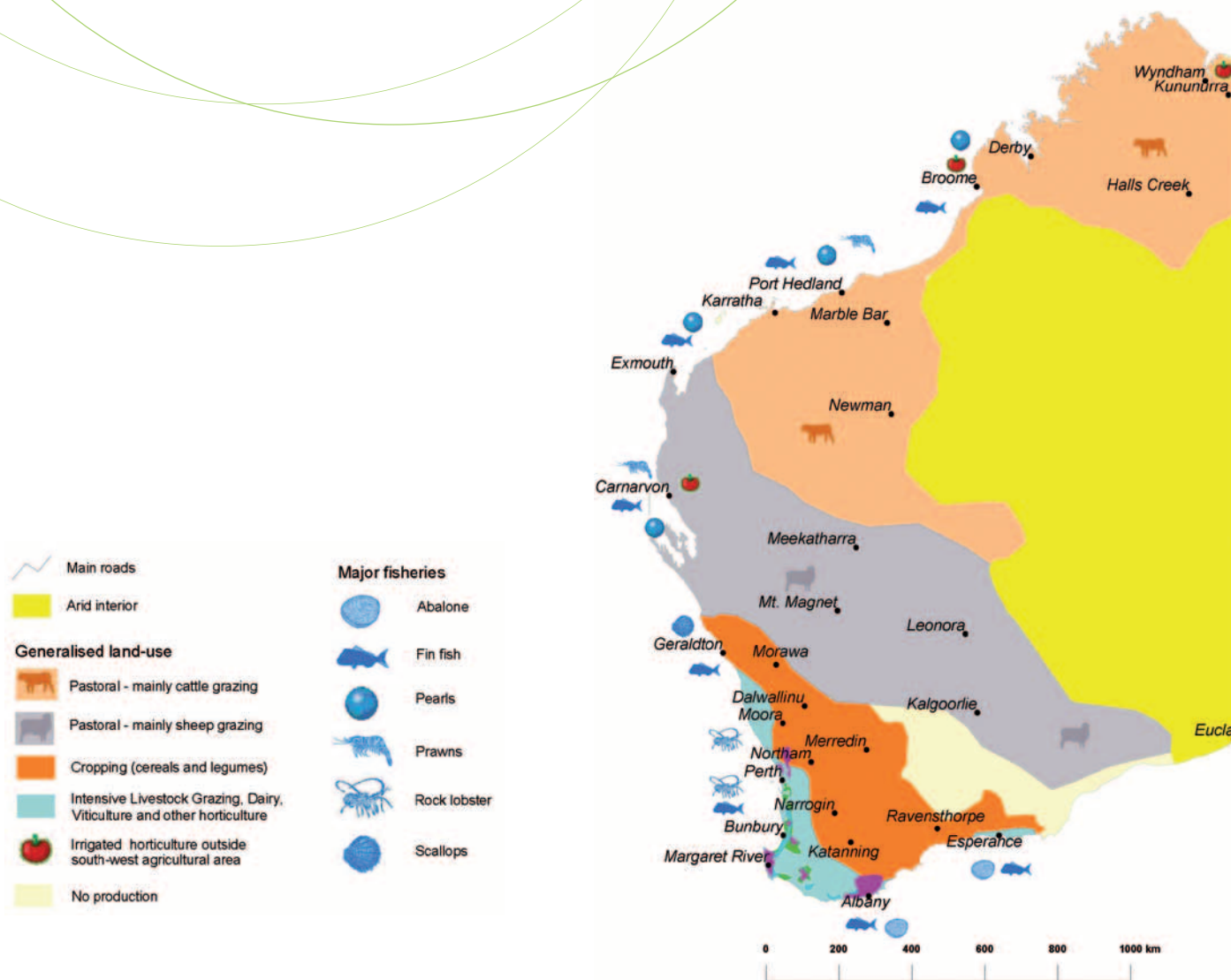
Grain, wool, meat and fish are the major industries. Tropical and temperate horticultural and food products are also important.

The diverse and efficient agriculture sector provides the raw material for a growing range of processed exports. Instead of being just a primary producer, Western Australia is now increasing its range of value added products and manufactured goods.

Western Australia's fisheries are major world suppliers of lobsters, prawns and pearls. With a decline in fish stocks in other parts of the world, the steadily growing aquaculture industry is successfully providing high value products to specialist markets.

A major east-west rail line carries freight and passengers between Western Australia and other Australian States. An extensive public rail network, services agriculture and industry in the State's south-west. In the north-west, private rail lines carry ore from inland mines to coastal ports.

International shipping can be accessed at Fremantle; the State's main port which handles 85 per cent by value of the Western Australia's seaborne imports and 25 per cent by value of Western Australia's seaborne exports. The eight regional ports Albany, Broome, Bunbury, Carnarvon, Dampier, Esperance, Geraldton and Port Hedland are linked to major agricultural and mineral producing areas.



# AGRICULTURAL PRODUCTION AND EXPORTS – AN OVERVIEW

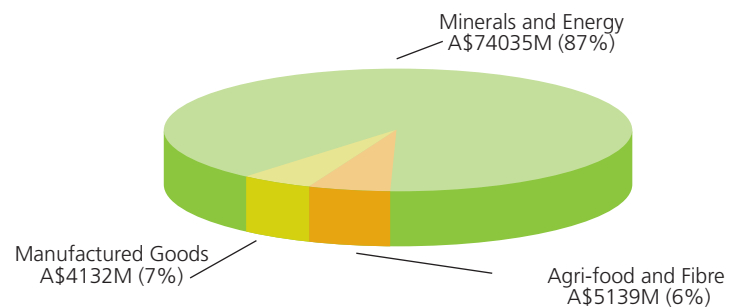


- Western Australia is an important producer and supplier of high-quality grains, wool, meat, live animals and fish in the international arena.
- The State exports 80 per cent of its agricultural production and has an international reputation for meeting the specific requirements of overseas customers.
- Western Australian farmers are world leaders in sustainable agricultural production.
- Western Australia is a world leader in dryland farming and now exports this technical expertise.
- Western Australia is one of the most pest and disease-free agricultural production areas in the world. Strict quarantine requirements ensure this status is maintained for the benefit of local producers and consumers around the world.
- Western Australia is well positioned to take advantage of growing world consumer demand for safe quality food.
- The subtropical and tropical areas of Carnarvon and Kununurra are noted for the production of a wide range of tropical fruits, sugar cane and other irrigated crops.
- Western Australia's southern hemisphere location means that the State is well placed to take advantage of seasonal export opportunities into northern hemisphere markets.
- Agri-food, fibre, fisheries and forestry contribute six per cent to total WA exports. Minerals and energy is the largest export sector accounting for 87 per cent.



### Western Australian exports by sector, 2009–10 (A\$ million)

Total: A\$83,306 million

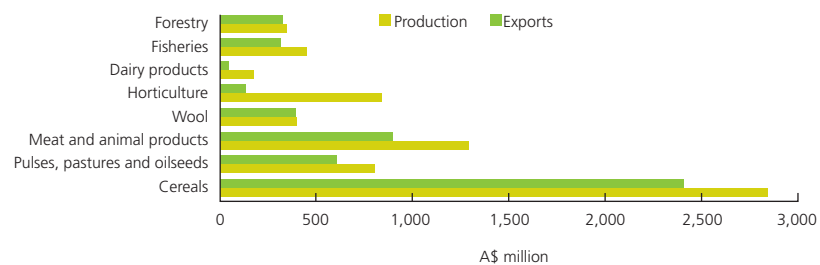


Source: ABS/DAFWA

### WA agriculture, fisheries, forestry production and exports, 2009–10

Total Production A\$7,154 million

Total Exports A\$5,139 million

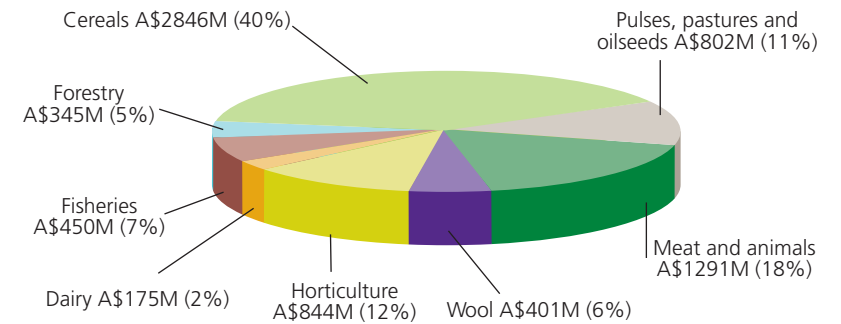


Source: ABS/DAFWA



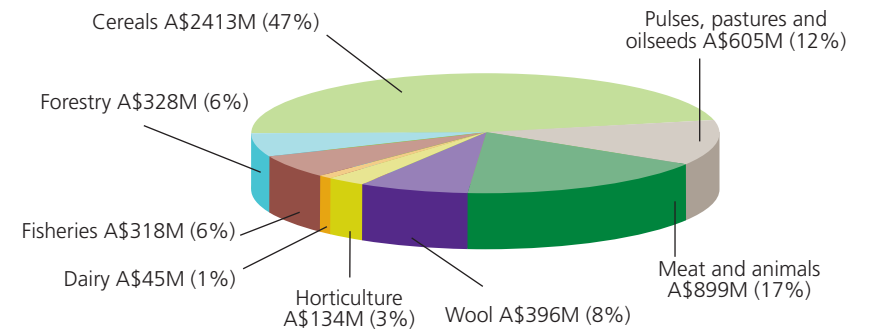


**WA agriculture, fisheries and forestry production, 2009–10 (A\$ million)**  
**Total: A\$7,154 million**



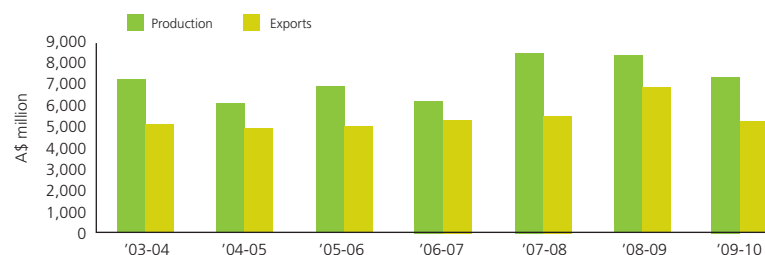
Source: ABS/DAFWA

**WA agriculture, fisheries and forestry exports, 2009–10 (A\$ million)**  
**Total: A\$5,139 million**



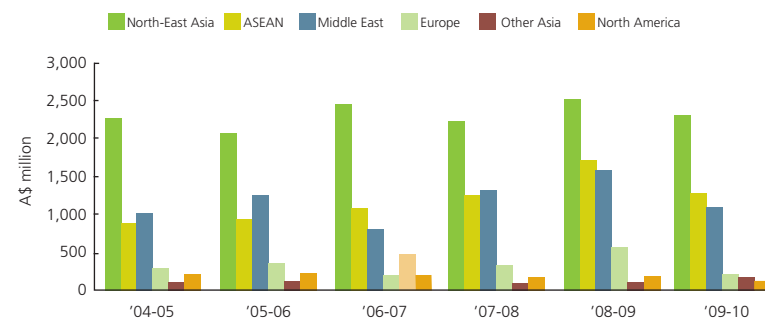
Source: ABS/DAFWA

### WA agriculture, fisheries and forestry export trends, 2003–04 to 2009–10 (A\$ million)



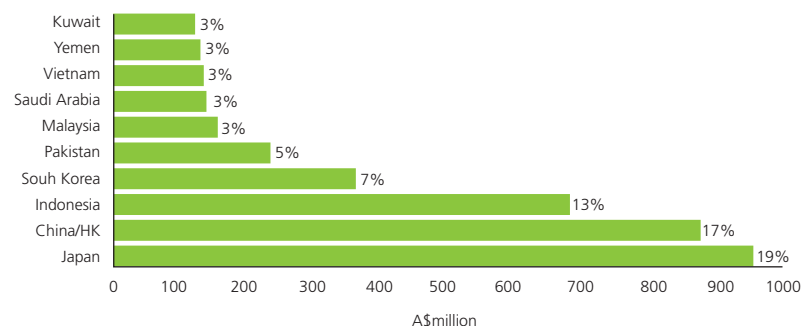
Source: ABS/DAFWA

### WA agriculture, fisheries and forestry export markets by region, 2003–04 to 2009–10



Source: ABS/DAFWA

### Top ten markets for agriculture, fisheries and forestry exports, 2009–10 (A\$ million)



Source: ABS/DAFWA

- Agrifood and fibre contribute six per cent to total exports.
- The majority of agricultural commodities and fish products are exported including 83 per cent of grain production, 70 per cent of livestock production, 69 per cent of production from fisheries and 16 per cent of horticulture production. Therefore all agrifood and fibre industries are highly export focused.
- Over the six years from 2003–04 and 2009–10, the largest export region for Western Australia has consistently been North East Asia. Exports to the Association of Southeast Asian Nations (ASEAN) and the Middle East region are the second and third most important export regions respectively. Since 2002–03 the Asian continent has accounted for almost 70 per cent of Western Australian agrifood exports.
- In 2009–10, the top export markets for Western Australia agrifood products were China, Indonesia, Japan and South Korea.
- Western Australia has a unique freight advantage as it is very close to the Asian markets.

# CEREALS

- The Western Australian cereal industry is a significant contributor to the agricultural sector and the Australian economy.

- The cereal industry is the largest agricultural sector in Western Australia and wheat is the dominant crop.

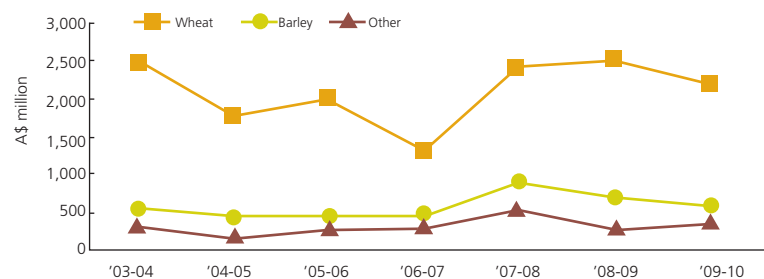
- There are approximately 5000 cereal farms which are predominantly family owned and operated businesses. Farm sizes range from 1000 to 15,000 hectares. On average, Western Australia produces 10 million tonnes of cereals per year.
- The State produces on average 43–53 per cent of Australia's cereals under a rain-fed agricultural system.
- It produces a range of cereals which are designed for specific end use products such as biscuits, noodles, breads, beverages and animal food. These cereals include wheat, barley, triticale and oats.
- Cereal production is highly mechanised and requires low pesticide inputs, which make production cost efficient.
- The cereals industry in Western Australia continues to focus on producing high quality wheat, barley and oats suitable for quality discriminating markets.
- Western Australia has become the world's major supplier of wheat for Japanese white salted udon noodles.
- The State is a major producer of malting and feed barley worldwide. It is the top supplier of malting barley to China and one of the major suppliers of feed barley to the Middle East.

- Western Australia has the largest barley malt house in the southern hemisphere.
- It is proud of its high quality milling oats and is home to Australia's largest miller.
- Western Australian cereal exports account for approximately 50 per cent of Australian wheat and barley exports, and 63 per cent of Australian oats exports.
- Wheat exports were A\$1,683 million in 2009–10. Wheat exports increased significantly in 2008–09 to A\$2,732 million but decreased in 2009–10. In 2009–10 barley exports were A\$360 million which is down from the previous two years. In 2006–07 and 2007–08, barley exports increased substantially and were A\$618 and A\$686 million respectively. Oat exports in 2009–10 were A\$42 million, which is down from 2008–09 when oat exports were A\$49 million.
- The top five markets for wheat in 2009–10 were Indonesia, Japan, South Korea, Yemen and Malaysia.
- The top five markets for barley in 2009–10 were China, Japan, Saudi Arabia, UAE and Oman.
- The top five markets for oats in 2009–10 were China, Mexico, Japan, India and Malaysia.



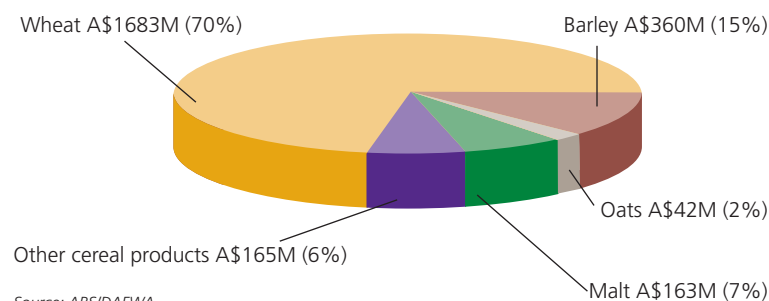


WA cereal production, 2003–04 to 2009–10 (A\$ million)



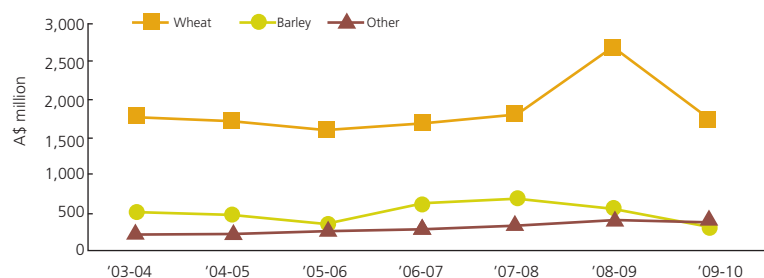
Source: ABS/DAFWA

WA cereal exports, 2009–10 (A\$ million) (Total: A\$2,413M)



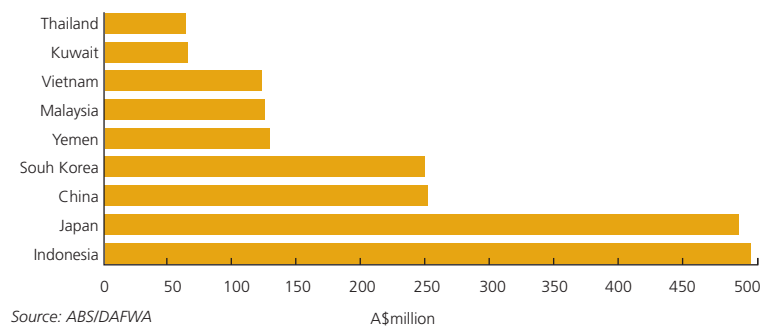
Source: ABS/DAFWA

WA cereal exports, 2003–04 to 2009–10 (A\$ million)



Source: ABS/DAFWA

Major WA cereal markets, 2009–10 (A\$ million)



Source: ABS/DAFWA

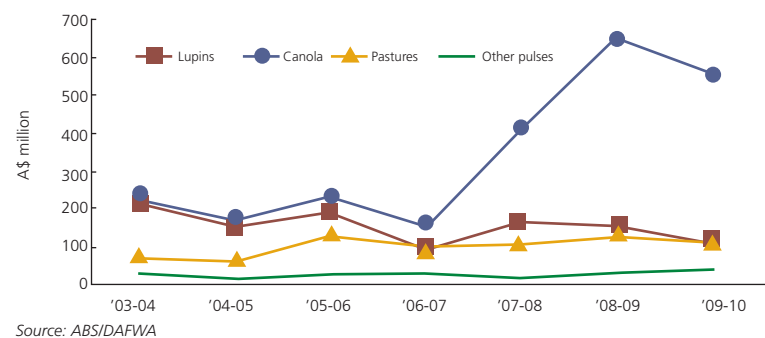
# PULSES AND OILSEEDS



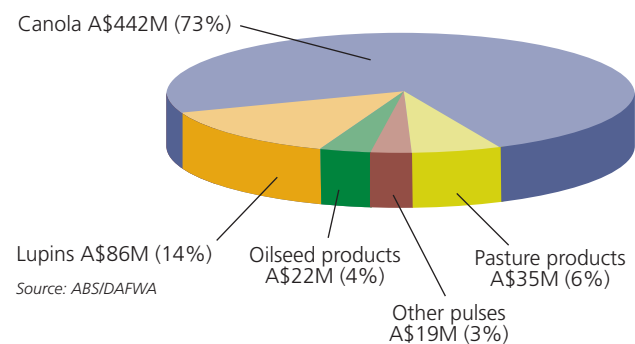
- Western Australia is the world's largest producer and exporter of lupins in the world.
- Other pulses such as chickpeas, Albus lupins and field peas are expanding in production and will form an important source of high quality pulses seed for overseas markets.
- The State has become the major canola producing State in Australia and produces between 40–60 per cent of total canola production in Australia.
- Canola in Western Australia is now recognised as the highest quality canola in Australia with the average oil content 2–4 per cent higher than other States.
- The introduction of lupins and other pulses crops has contributed valuable nitrogen additions to soil in Western Australia's agricultural areas and has created a significant export market for protein feed.
- Plant breeding, research and market development are ensuring Western Australian maintains its position as Australia's biggest producer and exporter of pulses and canola.
- The Western Australian lupin has recently been approved for human consumption and is now available in speciality breads.
- In 2010, Genetically Modified canola was grown for the first time.
- From 2003–04 to 2009–10, pulse and oilseed exports increased from A\$415 million to A\$570 million. This was mainly due to increase in canola plantings over the past two years.
- The top five Western Australian lupin export markets in 2009–10 were South Korea, Spain, Japan, Netherlands, and Egypt.
- The top five Western Australian other pulses export markets in 2009–10 were Bangladesh, Malaysia, Pakistan, and Philippines.
- The top five Western Australian canola export markets in 2009–10 were Pakistan, Japan, Belgium, Bangladesh and UAE.



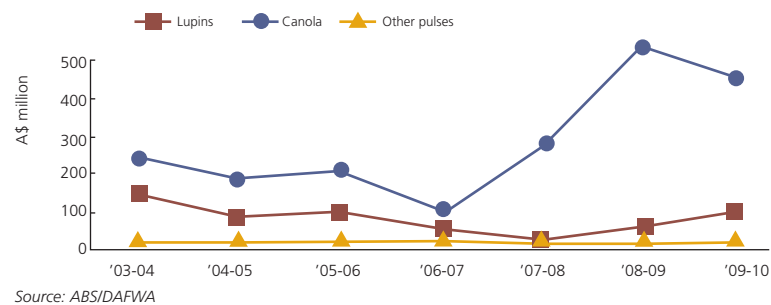
WA pulse, pasture and oilseed production, 2003–04 to 2009–10  
(A\$ million)



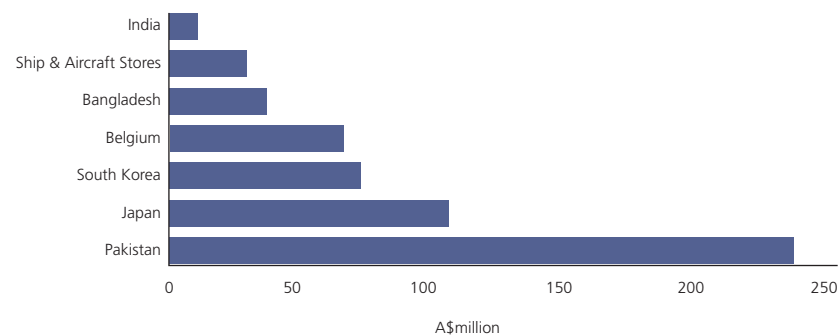
WA pulse, oilseed and pasture exports, 2009–10 (A\$ million)  
(Total: A\$605M)



WA pulse, oilseed and pasture exports, 2003–04 to 2009–10  
(A\$ million)



Major WA pulse and oilseed markets, 2009–10 (A\$ million)



# MEAT AND LIVE ANIMALS



- Western Australia produces and exports a wide range of meat products, both chilled and frozen, including beef, lamb, mutton, pork and goat meat.
- The sheep industry comprised about 14.7 million head at 30 June 2010, producing high quality meat and wool for world markets.
- The State's beef herd has remained relatively stable, 2.2 million at 30 June 2009.
- Western Australia's pig industry produced 34,300 tonnes of pig meat in 2009–10 for both the domestic market and South East Asia.
- The poultry industry in Western Australia has 8.5 million birds and is mainly domestic market focused.

## MEAT PRODUCTION IN WESTERN AUSTRALIA, 2009–10

Product	Quantity '000 Tonnes	Contribution to Australian Production
Beef	112.7	5 per cent
Mutton	28.6	18 per cent
Lamb	43.8	11 per cent
Pig meat	34.3	10 per cent

- Western Australia has invested significantly in the development of animal welfare practices, particularly in the sheep sector. LiveCorp's livestock export program is proactively and effectively addressing animal welfare issues in key markets. The day-to-day care given to sheep and cattle during transport has kept the industry well within the regulatory benchmarks set by the Australian Federal Government.
- The National Livestock Identification Scheme (NLIS) was implemented in July 2005 for cattle and in July 2010 for sheep and goats. This scheme involves electronic recording of cattle movements, providing a robust whole-of-life traceability system. This system is underpinned by State and Commonwealth legislation and is being introduced for sheep and goats.

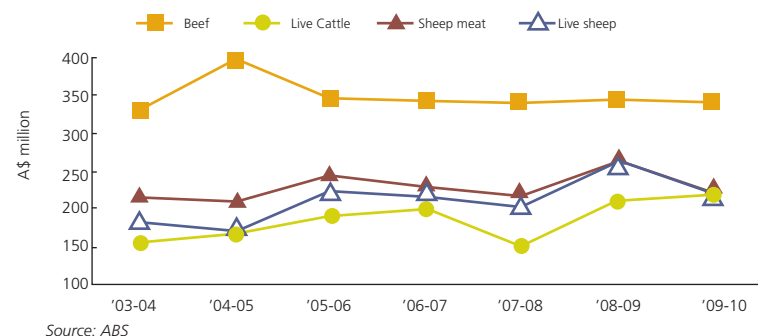
## MEAT EXPORTS FROM WESTERN AUSTRALIA, 2009–10

Product	Quantity Tonnes	Contribution to Australian Exports
Beef / Veal / Buffalo	23,132	3 per cent
Mutton	18,000	16 per cent
Lamb	19,600	12 per cent
Pig meat	7,753	24 per cent
Goat meat	3,755	14 per cent

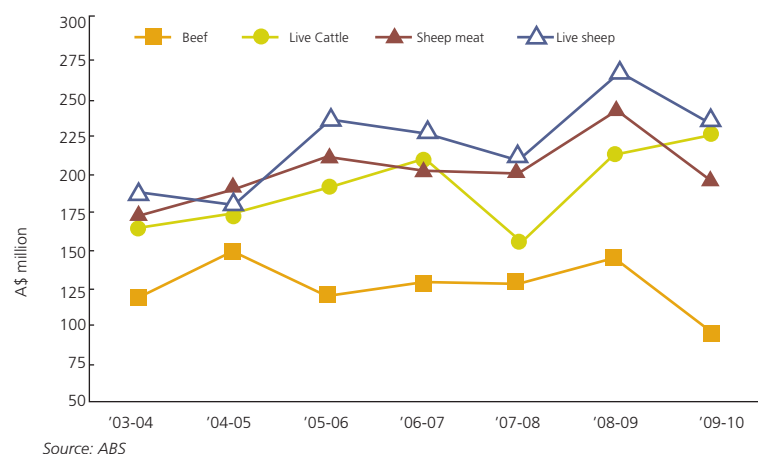


- Beef exports have decreased from A\$119 million in 2003–04 to A\$96 million in 2009–10. Sheep meat exports have increased from A\$170 million in 2003–04 to A\$190 million in 2009–10.
- Exports of live cattle have fluctuated over the same time period with exports valued at A\$160 million in 2003–04 and A\$226 million in 2009–10.
- The major export markets for Western Australian live cattle in 2009–10 were Indonesia (65 per cent), Israel, Egypt, Jordan and Libya.
- The top five markets for Western Australian beef exports in 2009–10 were Indonesia, Japan, South Korea, New Zealand and USA.
- The top five export markets for Western Australian live sheep in 2009–10 were Kuwait, Qatar, Saudi Arabia, Jordan and Bahrain.
- The major markets for Western Australian lamb and mutton in 2009–10 were UAE, Saudi Arabia, USA and Jordan.

**WA animal and meat production, 2003–04 to 2009–10 (A\$ million)**

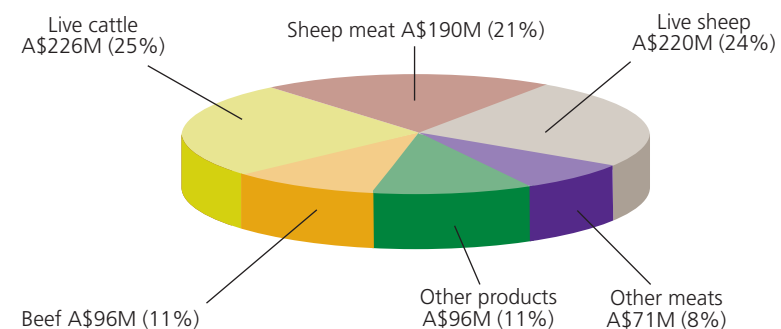


**WA animal and meat exports, 2003–04 to 2009–10 (A\$ million)**



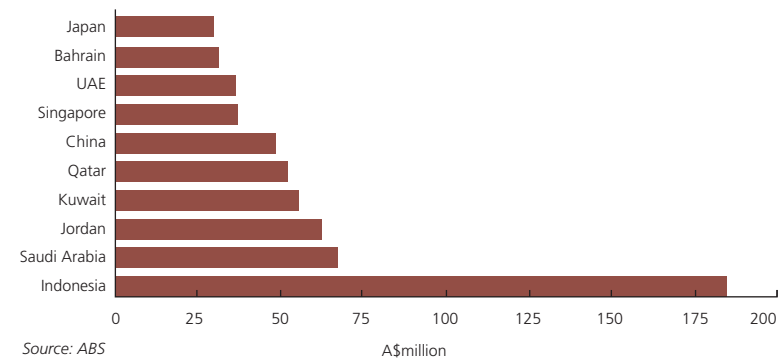


**WA animal and meat product exports, 2009–10 (A\$ million)**  
(Total: A\$889M)



Source: ABS

**WA animal and meat export markets, 2009–10 (A\$ million)**



Source: ABS

# APICULTURE



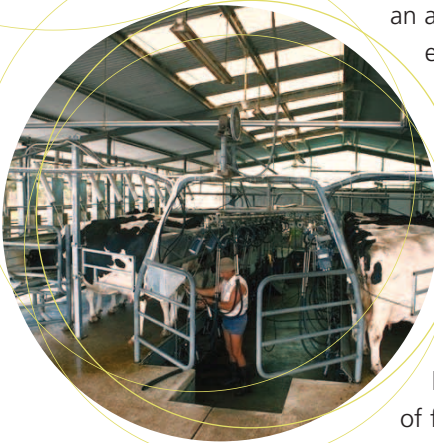
- The Western Australian apiculture industry is recognised for its high quality honey, and beeswax products.
- In 2009–10, the apiculture industry;
  - produced about 2,500 tonnes of honey with an estimated farm gate value of A\$9 million;
  - exported about 30 per cent of the State's annual honey production;
  - comprised approximately 840 beekeepers with around 31,500 beehives; The majority of the beekeepers are amateurs owning fewer than 10 beehives with some 100 commercial or semi commercial beekeepers who own more than 100 beehives.
- The Western Australian beekeeping industry has access to the State's famous pristine forests and coastal wildflowers, which are essential for honey production and sustainability of the industry. These areas are free from chemical contamination, which ensures that Western Australian hive products are clean and safe for the consumer. Western Australia has some unique floral resources resulting in the ability to produce honeys that are not found elsewhere in the world.



- The apiculture industry in Western Australia is committed to quality assurance and ensuring that products are clean, safe and free from chemical contamination. This commitment offers the apiculture industry a distinct trade advantage in exporting honey, beeswax, bee pollen, package bees, nucleus beehives and queen bees.
- Several initiatives have been introduced to maintain quality standards and to ensure the State's bees remain free of bee diseases. A surveillance and monitoring system has been established with funding assistance from the bee industry – Beekeepers Producers' Committee.
- A national surveillance program is used at ports to monitor ships and cargo for exotic bees and also at Perth Airport. A State surveillance program is used for inspection and monitoring of apiaries. Early detection of potential threats of exotic bee pests or diseases allows Western Australia to maintain its productivity and quality assurance. The disease free status provides an advantage for the export of hive products, package bees and queen bees around the world.



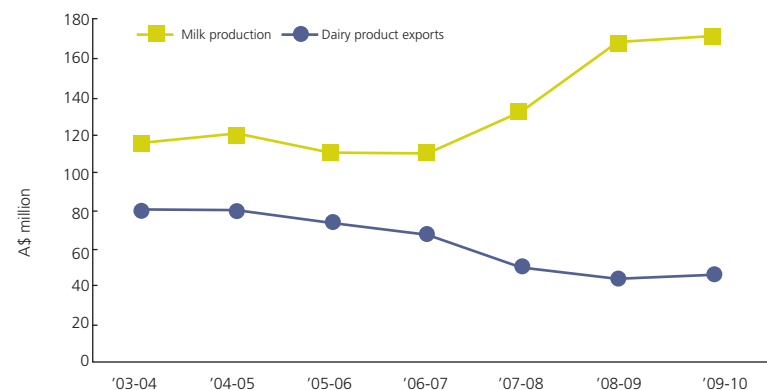
# DAIRY



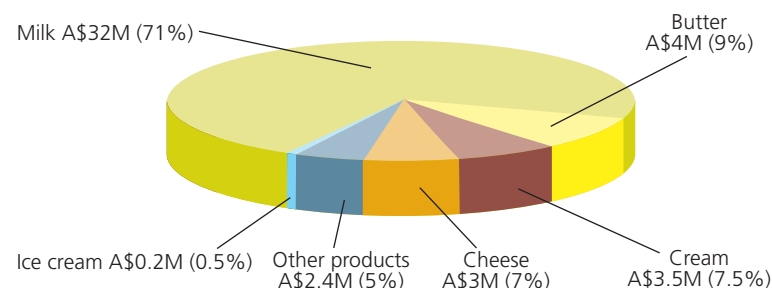
- Western Australia's dairy industry is an efficient producer of high quality milk sold to the local and South-East Asian markets.
- Milk production in Western Australia takes place all year round and has internationally competitive production costs. The Western Australian dairy industry has 170 dairy farmers with an average of more than 350 cows each which equates to a total of approximately 60,000 milking cows.
- The dairy industry in Western Australia produced 350 million litres of milk in the financial year ending June 2010 accounting for less than four per cent of total Australian production.
- Western Australian processors are at the leading edge of technology in the transport of fresh and extended shelf life milk products.
- Western Australia has state-of-the-art processing facilities owned by local and international companies.
- The state's fast and efficient transport links are a key to delivering high quality fresh products in the shortest possible time to its domestic and international customers.
- Western Australian milk has been identified as some of the cleanest and highest quality in Australasia. Quality attributes include low bacterial counts and good flavour and colour. There are several farms producing milks with specific added health benefits.
- Western Australia has a very high herd health status. The state is free of diseases such as Foot and Mouth Disease (FMD) and Bovine Spongiform Encephalopathy (BSE).
- Western Australia has good access to the markets in Asia and the Middle East, which are large consumers of dairy products.
- Exports of fresh liquid milk account for 80 per cent of Western Australia's exported dairy products.
- The major markets for Western Australia's dairy exports in 2009–10 were Singapore, Hong Kong, Malaysia and Taiwan.



WA dairy production and exports, 2003–04 to 2009–10  
(A\$ million)

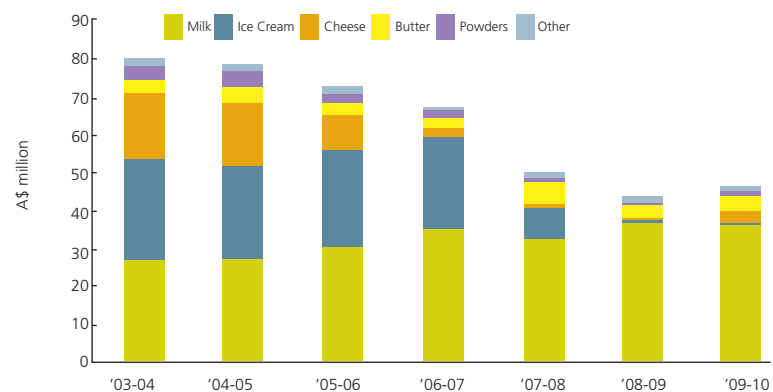


WA dairy exports by product, 2003–04 to 2009–10 (A\$ million)  
(Total: A\$45.6M)

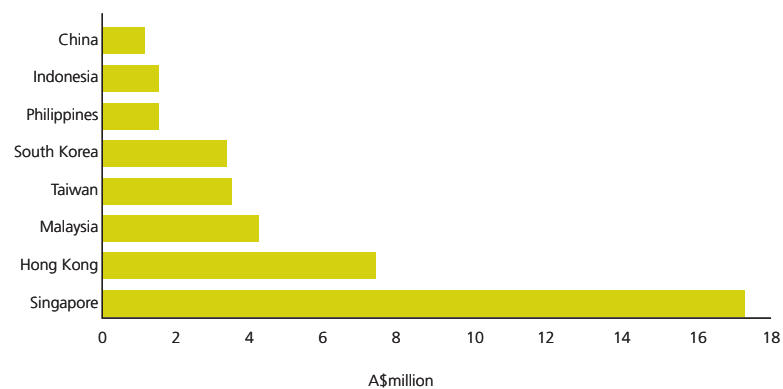


Source: ABS

WA dairy production and exports, 2003–04 to 2009–10  
(A\$ million)




Major WA dairy markets 2009–10 (A\$ million)



Source: ABS

# WOOL

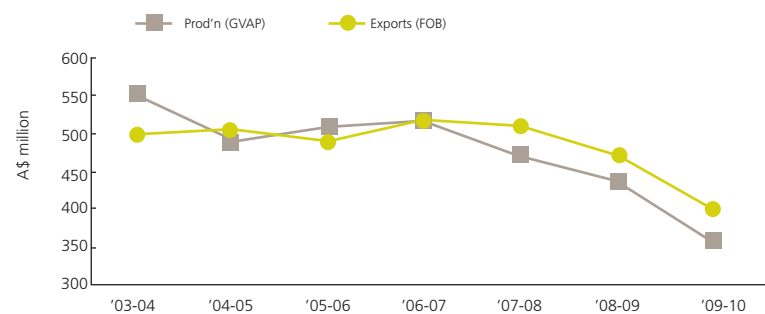


Sheep were introduced into Western Australia in the early 1830s, with the first flocks grazing on natural vegetation.

- Western Australia has 14.7 million sheep run by 6,300 wool growers on properties ranging from the high rainfall south-west to the pastoral regions.
- Western Australia's wool production has fallen from 112,000 tonnes in 2003–04 to 75,000 tonnes in 2009–10, mainly due to the reduction in sheep numbers.
- Western Australia is the third largest wool producing State in Australia.
- Western Australia produces 20 per cent of the total Australian wool clip generating around A\$354 million annually.
- More than 95 per cent of wool production in Western Australia is pure Merino wool measuring less than 24 micron (which is considered to be fine wool). Super fine wool (under 19.5 micron) accounted for 45 per cent of production.
- In 2009–10 Western Australia's average wool fibre diameter was 20.0 micron compared to Australia's average of 21.2 micron.
- More than 75,000 tonnes of raw wool is produced each year in Western Australia representing 14 per cent of the world's fine wool production.
- The State is internationally cost competitive in wool handling and delivery.
- The State's wool industry is geographically located close to the growing Indian and South East Asian textile industries.
- The value of Western Australia's wool exports remained stable between 2000–01 and 2007–08 at around A\$500 million, but have declined to A\$396 million in 2009–10 due to a reduction in the flock, and subsequently, wool production.
- Western Australia's major wool markets in 2009–10 were China (85%), India (7%), and Czech Republic (5%).

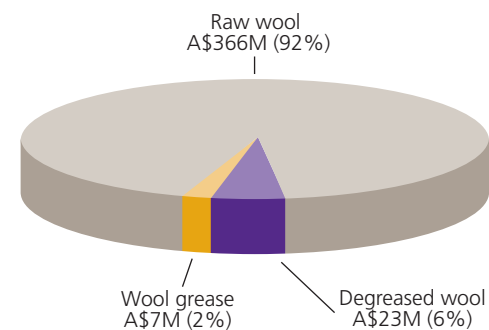


WA wool production and exports by value, 2003–04 to 2009–10 (A\$ million)



Source: ABS

WA wool exports, 2009–10 (A\$ million) (Total A\$396M)



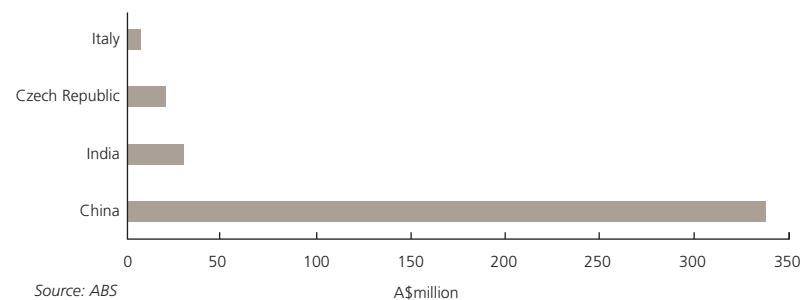
Source: ABS

WA wool production and exports by volume, 2003–04 to 2009–10



Source: ABS

Major WA wool markets, 2009–10 (A\$ million)



Source: ABS

# HORTICULTURE

- Western Australia produces a wide range of horticultural products including vegetables, orchard fruit, grapes, flowers and nursery products.

- Western Australian horticulture production was valued at A\$835 million in 2009–10 but official statistics significantly undervalue the industry.

- By value, horticulture production comprised;
  - 39 per cent vegetables;
  - 30 per cent fruit;
  - 11 per cent grapes (wine and table grapes); and
  - 20 per cent flowers and nursery products.
- Australian Bureau of Statistics (ABS) production data consistently under estimate the level of horticultural production largely due to underreporting by industry in ABS surveys. This underestimation varies by industry and region. Horticulture Australia estimates the value of production to be approximately 40 per cent higher than official statistics.
- Western Australian horticulture production represents around 20 per cent of Australian horticulture production.
- Western Australian horticultural industries involve significant value adding.
- The total value added contribution of horticulture to Western Australia is estimated at A\$1,970 million.

- The main horticultural production regions in Western Australia are the:
  - Kimberley region (Ord River Irrigation Area);
  - Gascoyne region (Carnarvon Irrigation Area);
  - Perth region (Swan Coastal Plain and Hills);
  - South West region; and
  - Great Southern region.
- Western Australia's horticultural export advantages include:
  - counter season production to the northern hemisphere;
  - a reputation for supplying safe, quality assured products;
  - diverse climatic regions ranging from a temperate climate in the south to sub-tropical conditions in the north, supporting a wide range of crops and creating an extended production season;
  - strong export culture;
  - short sea freight delivery times to many Asian and Middle East markets; and
  - being a leader in native flower species accounting for around 50 per cent of Australia's cut flower exports.
- Western Australia is the leading State in Australia for vegetable exports, aided by large scale carrot, potato and mixed vegetable farms.
- The State maintains its position as a supplier of high quality, vegetables to the Middle East and South East Asian markets.

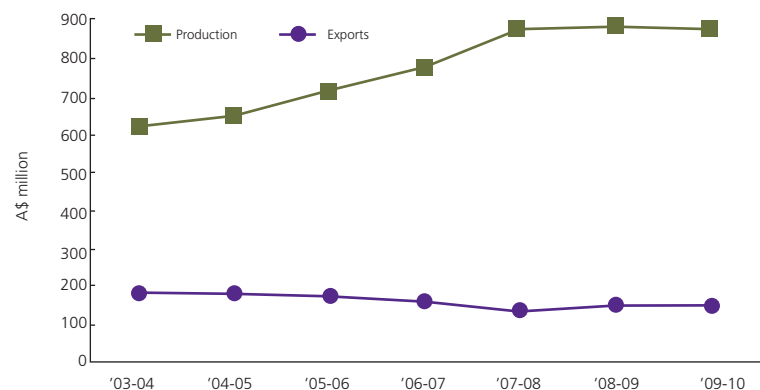
- Western Australia's wine industry has a focus on producing premium quality wine grape varieties for the speciality (super premium, ultra premium, and icon) wine market segments of Eastern States, domestic and export markets. Wine exports have declined in recent years due to a combination of stronger competition in major markets, the global economic crisis affecting demand for wine and the stronger Australian dollar.
- Fruit exports have been declining in recent years due to the impact of a stronger Australian dollar, market access issues and lower production as growers adjust orchards to new varieties of apples and plums. Strawberries remain Western Australia's highest value fruit export crop, accounting for around 66 per cent of Australia's strawberry exports in 2009–10.
- Exports of fruit and vegetables are in some years affected by strong sales to Eastern Australian domestic markets to meet shortfalls in production. For example in 2001–02, approximately 75 per cent of WA carrots were exported with the remainder supplying the WA domestic market. In 2009–10, 67 per cent were exported, 12 per cent were sold to the eastern states and the remainder consumed locally.

- During the period 2000–01 to 2007–08, vegetable exports to overseas markets fell from A\$88 million to A\$43 million but increased to A\$58 million in 2009–10. Fruit exports fell from A\$54 million to A\$15 million and remained at a similar level in 2009–10. Exports of flowers fell from A\$15 million to A\$6 million in 2009–10. Wine exports showed a strong upward trend until 2006–07 reaching A\$52 million but have declined to A\$35 million in 2009–10. Overall the horticulture exports to overseas markets have fallen from A\$190 million to A\$134 million during the past nine years.
- Strong growth is occurring in the avocado, citrus and mango industries due to significant new plantings which will lead to new export opportunities. Other new or proposed new crops such as truffles and green tea are expected to expand the range of horticulture products available from Western Australia.
- The major destinations in 2009–10 for horticultural crops were Singapore, followed by UAE, Malaysia, the UK, China and Japan.



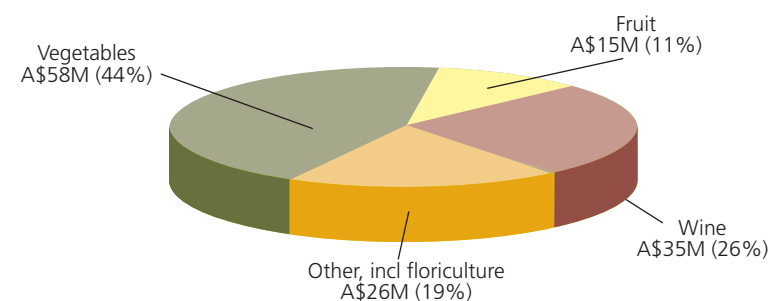


WA horticulture production and exports, 2003–04 to 2009–10 (A\$ million)



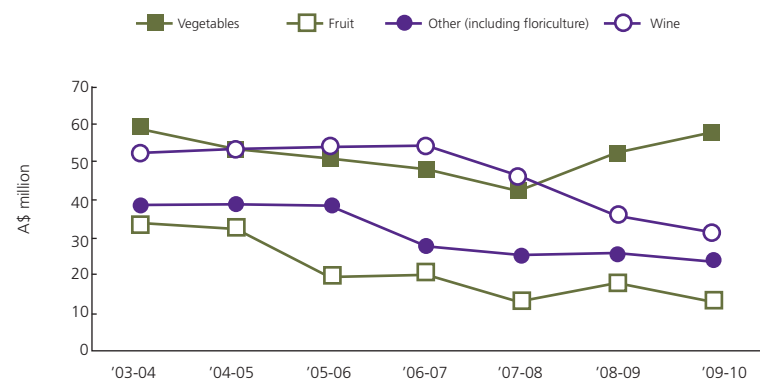
Source: ABS

WA horticulture industries exports, 2009–10 (A\$ million) (Total: A\$134M)



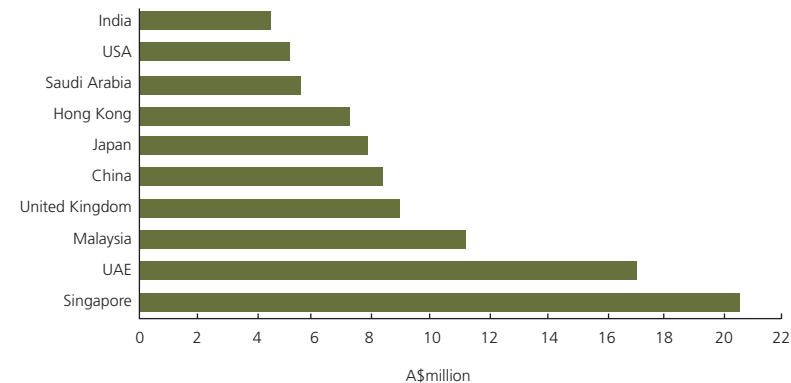
Source: ABS

WA horticulture industries exports, 2003–04 to 2009–10 (A\$ million)



Source: ABS

Major WA horticultural markets, 2009–10 (A\$ million)



Source: ABS



# FOOD



- Western Australia's internationally competitive agricultural and food industries provide premium quality food and beverage products to customers throughout the world.
- The turnover of the Western Australian food industry in 2007–08 was A\$5.5 billion.
- The food manufacturing industry in Western Australia represents a major proportion (14 per cent) of the value of the State's total manufacturing sector.
- Western Australia represents 7 per cent of the turnover of the Australian food processing industry.
- Western Australia's food industry is comprised of approximately 900 processing companies employing a labour force of approximately 19,500, with more than two-thirds of the companies clustered around the metropolitan and south-western regions of the State.
- More than half of Western Australia's medium and small scale food processing operations are regionally based.
- The responsibility of supporting the development of the food industry rests with the Department of Agriculture and Food. The Department is driving a supply chain approach to assisting the development of the industry.
- The Western Australian Government, in collaboration with various State and National agencies, universities and businesses in the private sector, provides support to developing food industry enterprises. The Government offers advice and networks in research and development, investment attraction, export development and food integrity systems.

- The food processing industry has expanded to supply a number of high value niche export markets, especially for wine, condiments and dairy products.
- Western Australia is a well established food supplier to the Asian region.
- Total unprocessed and processed food and beverage exports for 2009–10 were valued at A\$3.9 billion, processed food exports comprised A\$982 million, a fall of 14 per cent from 2008–09. The high proportion of unprocessed food exports remains a substantial opportunity to develop value-adding enterprises in Western Australia.
- One of the advantages of WA processed food is the safety and quality of the State's production systems, where food sold from Western Australia must meet stringent quality and safety standards.



# FISHERIES

- Western Australia has some of the finest and most sought after seafood in the world ranging from rock lobster, crab, prawns (shrimps), marron and yabbies to abalone and scallops.

- Western Australia also produces the globally renowned South Sea Pearls.

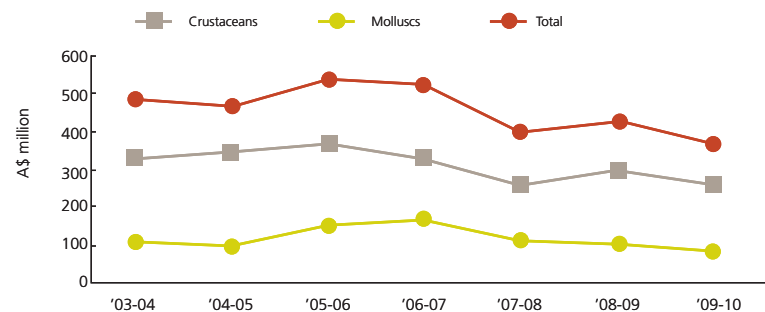
- High quality and unspoiled waters have given Western Australia an international reputation as a supplier of superb seafood.
- Western Australia has a fantastic diversity of marine life and provides opportunities for recreational and commercial fishing, pearling, aquaculture, charter boat opportunities and tourism.
- The Western Australian fishing industry comprises:
  - a rock lobster industry with an average annual commercial value in the order of A\$300 million;
  - a pearl production industry valued at A\$51 million per annum;
  - a prawn (shrimp) industry valued at A\$11 million per annum;
  - a scallop industry that varies in value from A\$5 million to A\$40 million per annum;
  - a fresh water aquaculture industry producing yields of marron, yabbies and finfish in the State's south;
  - a small but growing marine aquaculture industry sector producing finfish and abalone, and exploring the production of valuable new species such as octopus; and

- the farming of the marine algae species *Dunaliella salina*, north of Geraldton, from which beta-carotene, a naturally occurring food colouring, is extracted.

- Western Australia's major export destinations for fisheries products in 2009–10 were China (including Hong Kong), USA, Japan, Taiwan and Singapore.
- The top three markets for crustacean exports in 2009–10 were China (Hong Kong), Japan and the USA.
- The top three export markets for Western Australian molluscs in 2009–10 were China (Hong Kong), USA and Singapore.

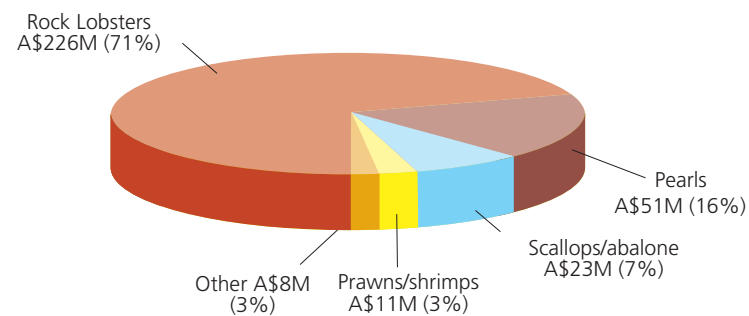


WA fisheries exports, 2003–04 to 2009–10 (A\$ million)



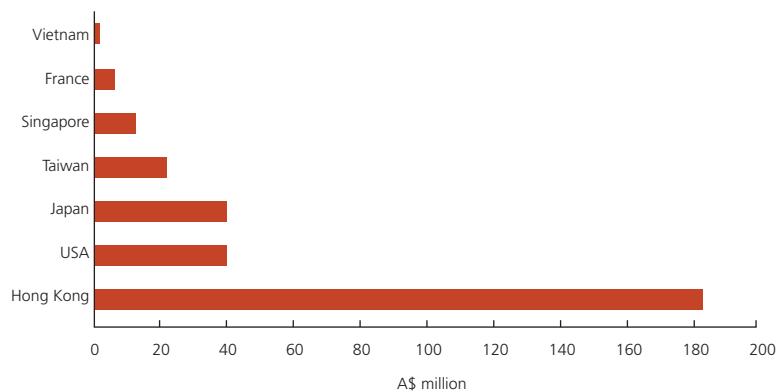
Source: ABS

WA fisheries exports, 2009–10 (A\$ million)  
(Total: A\$318M)



Source: ABS

Major WA fisheries markets, 2009–10 (A\$ million)



Source: ABS





# FORESTRY

Sustainable management is the cornerstone of the Western Australian forestry industry and the guiding principle for economic, environmental and social benefits to the community.

The forestry industry in Western Australia has received international acclaim for sustainability and environmental certification. Timber harvested from native forests is independently audited and certified under the Australian Forestry Standard and the Environmental Management System.

Forestry is not only a method for countering carbon dioxide omissions, reversing land degradation and restoring biodiversity. It is also very important in delivering employment opportunities in regional areas. A comprehensive report conducted by Cooperative Research Centre for Forestry in 2005–06 found the forestry industry in Western Australia provided employment to more than 5500 workers and delivered economic benefits to the state of up to one billion dollars annually.

In 2009–10, the total value of forest products exported from Western Australia was A\$328 million which equates to approximately one-third of the total industry value.

## **WA forest exports, 2009–10 (total A\$328 million)**

- A\$285 million – woodchips
- A\$24 million – log wood
- A\$19 million – processed timber

## **NATIVE TIMBERS**

Western Australia's forest and woodlands are home to a variety of unique tree species which produce stunning timbers. Jarrah is a premium world-class furniture timber. Its attractive grain and strength are the reason why manufacturers choose jarrah for manufacturing the finest furniture creations.

Beautiful timbers such as Western Australian sheoak and marri are also used to produce outstanding furniture, while exquisite timbers such as beefwood, gimlet and western myall from arid areas appeal to craftsmen for their array of colours and textures.

Sandalwood is a highly valued arid timber and although predominately harvested for its oil content, the timber is often used for intricate wood turnings and other craft items.

In 2009–10, the total log production for native timbers was 536 566 tonnes, worth approximately A\$52 million delivered to local sawmills and processing centres.

- 254 435 tonnes – sawlogs
- 144 806 tonnes – chip logs
- 129 730 tonnes – fuel wood
- 2571 tonnes – sandalwood for oil
- 5024 tonnes – other materials (for example, craft wood, burls)

## **PLANTATION TIMBERS**

Timber is acknowledged as a renewable resource.

Western Australia has a total of 416,000 hectares of plantation forest. Traditional plantation species are radiata pine (*Pinus radiata*), maritime pine (*Pinus pinaster*) and Tasmanian blue gum (*Eucalyptus globulus*). Pine is commonly used in structural applications as well as for fencing and furniture, while Tasmanian blue gum is chipped, exported and manufactured into pulp and paper.

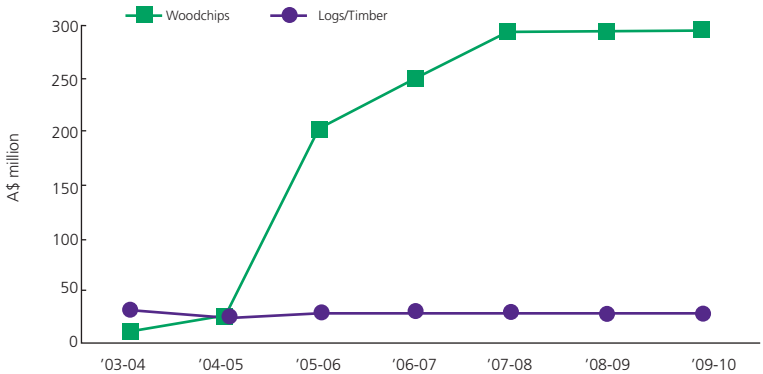


Other species such as Sydney blue gum (*Eucalyptus saligna*), sugar gum (*Eucalyptus cladocalyx*) and sandalwood (*Santalum spicatum*) are also being cultivated for sawlogs. Many of these species have been integrated into farming systems in the wheatbelt on previously cleared land and are successfully serving the environment by reducing global warming, mitigating salinity, improving water quality and enhancing biodiversity.

In 2009–10, total log production delivered to local sawmills and processing centres for plantations timbers, excluding chip logs, was approximately one million tonnes worth approximately A\$52 million.

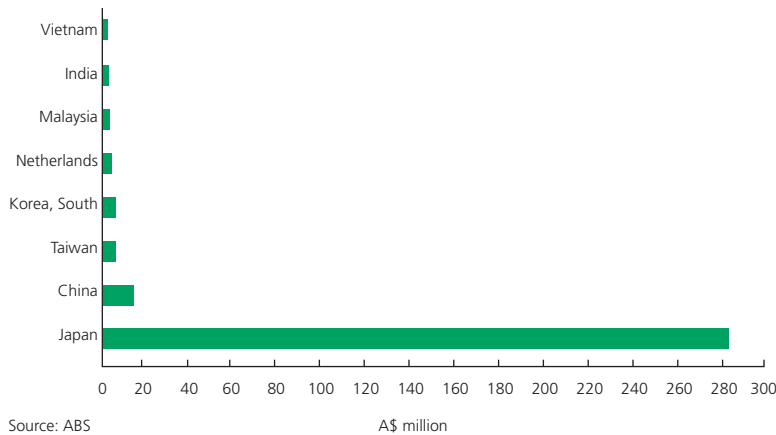
The export value of woodchips during 2009–10 was A\$285 million which accounted for 89 per cent of forest product exports. Japan was the main export market. The significant increase in woodchip exports from 2004 was the result of Tasmanian blue gum plantations reaching maturity and the higher prices that plantation owners were able to negotiate for timber exports.

WA forest exports, 2003–04 to 2009–10 (A\$ million)



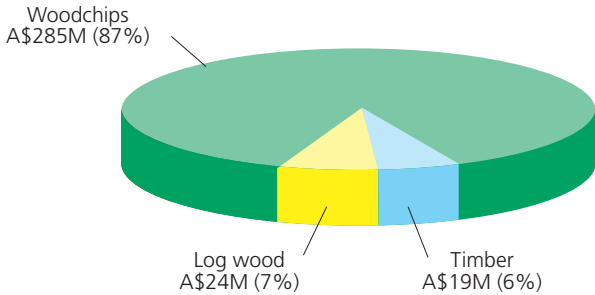
Source: ABS

Major WA forest product markets, 2009–10 (A\$ million)



Source: ABS

WA forest exports, 2009–10 (A\$ million)  
(Total: A\$328M)



Source: ABS

# SERVICES

## TRADE AND INVESTMENT SERVICES

The Department of Agriculture and Food specialises in attracting investment in the food and fibre industries from national and international companies.

Staff provide a range of services to assist businesses including:

- product and supplier sourcing;
- detailed information on investment and trade opportunities;
- arranging meetings and tours of industries;
- assisting with pre-feasibility studies to assess new opportunities;
- coordinating the approval process through Government;
- supplying contacts such as project managers, joint venture partners, financiers etc;
- advising on Government incentive schemes;
- access to research and development; and
- information on lifestyle, community and social issue.

An example of a current project to facilitate investment attraction to WA's primary industries is the ongoing development of the 'Find Your Farm' website <http://spatial.agric.wa.gov.au/findyourfarm/>. The website provides integrated property and regional level publicly available information for intending investors for example:

- Infrastructure and physical data including:
  - water draw down points and details;
  - roads;
  - three phase power;
  - temperature heat indices;
  - topography.
- Socioeconomic data including:
  - property details;
  - land values;
  - community facilities and so much more.

The website's 'Further Planning and Investment' tab hosts overview investment information on the sheep, wheat, grains / hay, northern beef and dairy industries in DAFWA's 'Invest' series of documents .

This tab also provides links to:

- Agrifood Infonet at [www.agric.wa.gov.au/agrifoodinfonet](http://www.agric.wa.gov.au/agrifoodinfonet) for business and market intelligence in the WA agri-food industry, and
- Landgate at [www.landgate.wa.gov.au/corporate.nsf](http://www.landgate.wa.gov.au/corporate.nsf) for detailed data on recent land sales

## AGWEST INTERNATIONAL

AGWEST International is a consultancy organisation based in Perth, Western Australia. Our strength is in providing expertise, knowledge and skills covering all aspects of agriculture, natural resource management, agribusiness and related disciplines.

AGWEST International is an integral part of DAFWA charged with management and implementation of its international portfolio.

AGWEST International has a dedicated team of staff, access to DAFWA's 800 skilled professionals and in addition draws upon a wealth of skills and expertise from Western Australian Universities, agribusinesses, and other Australian government agencies through collaborative arrangements. This enables us to provide a comprehensive range of high level expertise to suit the needs of our international clients.

AGWEST International has proven capability and international experience including: Development of sustainable integrated agricultural systems; Legislation and policy review and development; Natural resource management services; Food security; Food safety and quality assurance programs; Animal and crop research and industry development; Agricultural industry resource protection (Biosecurity); Arid-land management; and Participative rural, community and regional development.

AGWEST International works in partnership with government departments, international funding agencies and organisations in Asia, the Middle East and Africa to provide: Project management; specialist professional and technical services; organisational capacity building; and customised training packages.

## Our Recent Experience

**Morocco (2010)** – AGWEST International is assisting the Ministry of Agriculture review, benchmark and modernise their Research, Development and Extension strategies to enhance the restructure of the agriculture sector through their Plan Vert.

**Libya (2010–2013)** – In conjunction with Kings Park Biodiversity Conservation Centre and Murdoch University, AGWEST International is assisting the Libyan Government to investigate the causes of a decline syndrome in Juniper forest in north eastern Libya and approaches for mitigation and restoration.

**Botswana (2010–2012)** – AGWEST International in partnership with Ministry of Agriculture Botswana has developed a two year capacity building project to assist the Ministry to develop a national biosecurity strategy for Botswana.

**Libya (2008–2013)** – AGWEST International has been appointed by the General People's Committee for Agriculture, Animal and Marine Wealth in the Great Socialist People's Libyan Arab Jamahiriya, new technologies and land use systems including a science-based approach to develop sustainable land use systems; pasture research to select and evaluate new plant types a program of extension and capacity building.

**Africa (2011)** – AGWEST International with AusAID funding is conducting a short term agriculture training assistance program for livestock activities. The program involves the provision of study tours and training course in livestock production and the supply chain. The countries included are: Djibouti, Ethiopia, Ghana, Rwanda and Uganda.

For more information visit: [www.agwestinternational.wa.gov.au](http://www.agwestinternational.wa.gov.au)



## BIOSECURITY

Biosecurity is the protection of the economy, environment and human health from the negative impacts of pests, weeds and diseases.

Western Australia's biosecurity systems are designed to maintain the state's market access for our animal and plant industries, to protect the environment and human health from biological threats and harmful chemical residues and to set appropriate animal welfare standards.

Western Australia is free from many market-sensitive animal and plant pests, diseases and weeds. Consequently Western Australian animal and plant industries have a competitive edge over those in countries where a major disease outbreak or pest incursion can result in the loss of billion-dollar global markets as well as loss of confidence in those countries' plant or animal products.

While the state's geographic isolation and few entry points makes the process of preventing entry of pests and diseases easier, this is not sufficient to maintain Western Australia's high biosecurity status.

Western Australia also employs a comprehensive suite of policies and operational measures to maintain and prove our freedom from market-sensitive pests and diseases.

Western Australia's market access and high biosecurity status are maintained by the following measures:

- prevention and exclusion
- auditable surveillance that proves freedom from particular pests and diseases
- rapid diagnosis and response systems
- effective traceability systems
- pest and disease management
- chemical use management
- appropriate animal welfare standards.

Encouraging risk management practices, particularly through the use of internationally recognised quality assurance systems, is a priority as continued market access for Western Australian agriculture relies on industry's ability to manage threats to production systems, sustainability, product safety and quality, and rural infrastructure.



# AGRIBIOTECHNOLOGY



Genetically modified plants are a major application of biotechnology – a technology that is strictly controlled.

Use of genetic modification (GM) is strictly regulated throughout Australia with only four crops permitted to be grown by the Office of the Gene Technology Regulator. These are cottons (of which 95 per cent is now GM to provide insecticide and herbicide resistance), two herbicide-resistant canolas, four blue carnations and a single blue rose which was approved in June but not yet grown commercially.

Because they are consumed by humans, cotton and canola are more controversial than the flowers. Cottonseed oil is used in frying and canola oil is widely used in cooking.

The Genetically Modified Crops Free Areas Act in WA placed a moratorium on the cultivation of GM crops 2004 but exemptions have been granted, often for research. In 2008 Minister for Agriculture and Food Terry Redman granted exemptions for the commercial cultivation of cotton on the Ord River Irrigation Area and for limited commercial trials of GM canola.

A major reason for the exemptions was to offer WA farmers better access to new technologies. No GM cotton was grown commercially in 2009 because of a lack of infrastructure and low international prices but opportunity is now available.

Roundup Ready® canola, produced by Monsanto, contains two genes from a soil bacterium which confer tolerance to glyphosate, Australia's most widely used broad spectrum herbicide. This allows the weeds to be killed, while leaving the crop unaffected.

About 860 hectares of GM canola were grown at 20 sites including 17 farmer properties to compare its performance with other forms and to establish whether successful segregation from non-GM canola was possible. The Department played a supervisory role with authorised officers visiting each trial site at least three times over the growing season to ensure that correct procedures were followed.

Results will be available following harvest and delivery. The GM canola will be sold overseas.

Four seed companies provided varieties carrying the Roundup Ready genes in 2009, and more will become available in a few years. Extension of available GM technology to other crops and for additional traits such as frost and drought resistance is anticipated within a few years but will be carefully regulated.





# VALUE OF EXPORTS – 2009–10

Commodity	Aust A\$M	WA A\$M	Prop WA to Aust %
Wheat	3,636	1,683	46%
Canola	583	442	76%
Raw (greasy wool)	1,772	366	21%
Barley	702	360	51%
Woodchips	861	285	33%
Live cattle	701	226	32%
Crayfish	401	226	56%
Live sheep	298	220	74%
Malt	391	163	42%
Lamb	933	118	13%
Cereal hay	215	113	52%
Beef	4,144	96	2%
Lupins	108	86	80%
Mutton	461	72	16%
Pearls	244	51	21%
Carrots	51	48	93%
Timber and logs	313	43	14%
Oats	53	42	79%
Wine	2,188	35	2%
Milk	121	32	27%
Pig meat	113	27	23%
Rolled oats	41	26	63%
Sheep skins	316	24	8%
Lucerne meal	33	23	71%
Degreased wool	133	23	17%
Pet food	402	20	5%
Cattle hides	454	19	4%
Field peas	65	17	26%

Commodity	Aust A\$M	WA A\$M	Prop WA to Aust %
Canola oil	98	15	15%
Scallops	30	14	47%
Goat meat	104	13	12%
Offal cattle	391	12	3%
Animal fat (excl cattle)	187	11	6%
Prawns	61	10	17%
Essential oils	79	10	12%
Abalone	154	9	6%
Forage products	10	9	91%
Offal sheep	87	9	10%
Animal fat cattle	70	8	11%
Oats prepared	14	8	56%
Wool grease	14	7	50%
Potatoes	46	7	16%
Flowers	9	6	68%
Meat other	91	6	6%
Cereals other	472	6	1%
Strawberries	8	6	68%
Olive oil	32	5	17%
Grain sorghum	116	5	4%
Food preparations	713	4	1%
Butter	133	4	3%
Crabs	14	4	28%
Cereal straw	17	4	22%
Cream	21	3	17%
Other animal prods	41	3	8%
Other	5,466	63	1%
<b>Total</b>	<b>28,900</b>	<b>5,139</b>	<b>18%</b>

Market	Aust A\$M	WA A\$M	Prop WA to Aust %
Japan	5,000	958	19%
China/Hong Kong	5,156	879	17%
Indonesia	1,898	685	36%
South Korea	1,449	364	25%
Pakistan	340	236	70%
Malaysia	690	158	23%
Saudi Arabia	437	139	32%
Vietnam	536	135	25%
Yemen	187	129	69%
Kuwait	265	124	47%
Singapore	731	121	17%
UAE	537	82	15%
Thailand	638	81	13%
Belgium	199	78	39%
USA	2,427	77	3%
India	510	75	15%
Taiwan	701	75	11%
Jordan	127	62	49%
Qatar	109	60	55%
Bangladesh	350	60	17%
Philippines	324	57	18%
Iraq	193	52	27%
Bahrain	112	47	42%
Egypt	271	40	15%
Israel	39	25	63%
Sudan	200	22	11%
Oman	45	20	44%
Czech Republic	59	19	33%

Market	Aust A\$M	WA A\$M	Prop WA to Aust %
Libya	31	19	62%
Mexico	99	19	19%
South Africa	121	17	14%
New Zealand	1,354	17	1%
Italy	279	16	6%
United Kingdom	809	16	2%
Iran	49	14	29%
Russian Federation	218	12	5%
France	75	11	15%
Mauritius	88	11	12%
Netherlands	173	11	6%
Sri Lanka	161	10	6%
Spain	34	8	22%
Switzerland	59	7	11%
Brunei	19	6	30%
Papua New Guinea	213	6	3%
Myanmar	54	5	10%
Christmas Island	6	4	73%
Canada	352	4	1%
Germany	122	4	3%
Fiji	107	3	3%
Trinidad and Tobago	14	3	19%
Cambodia	13	2	14%
Jamaica	16	2	10%
Cote d'Ivoire	2	2	70%
Ship & Aircraft Stores	54	31	58%
Other	849	19	2%
<b>Total</b>	<b>28,900</b>	<b>5,139</b>	<b>18%</b>



# WESTERN AUSTRALIAN INTERNATIONAL TRADE & INVESTMENT OFFICES

## CHINA

### Shanghai

Regional Director  
Western Australian Trade and Investment Office  
Room 2208  
CITIC Square  
1168 Nanjing Road West  
SHANGHAI, 200041  
PEOPLE'S REPUBLIC OF CHINA  
Tel: +86 21 5292 5899  
Fax: +86 21 5292 5889  
Website: [www.westernaustralia.cn](http://www.westernaustralia.cn)

### Hangzhou

Representative  
Western Australian Trade and Investment Office  
Room 1705  
World Trade Centre Office Plaza  
Zhejiang World Trade Centre  
122 Shuguang Road  
HANGZHOU, 310007  
PEOPLE'S REPUBLIC OF CHINA  
Tel: +86 571 8795 0296  
Fax: +86 571 8795 0295  
Website: [www.westernaustralia.cn](http://www.westernaustralia.cn)

## EUROPE

### London

Agent General  
Government of Western Australia  
5th Floor, Australia Center  
Corner of Strand & Melbourne Place  
LONDON WC2B 4LG  
UNITED KINGDOM  
Tel: +44 20 7240 2881  
Fax: +44 20 7240 6637  
Website: [www.wago.co.uk](http://www.wago.co.uk)

## INDIA

### Mumbai

Regional Director  
Western Australian Trade Office  
93, Jolly Maker Chambers No 2  
9th Floor, Nariman Point  
MUMBAI, 400 021 INDIA  
Tel: +91 22 6630 3973  
Fax: +91 22 6630 3977

## INDONESIA

### Jakarta

Regional Director  
Western Australian Trade Office  
Wisma Budi, 5th floor,  
Jl. HR. Rasuna Said, Kav C-6,  
Kuningan,  
JAKARTA, 12940 INDONESIA  
Tel: +6221 5290 2860  
Fax: +6221 8296 2722

## JAPAN

### Tokyo

Commissioner  
North Asia Agency  
Department of the Premier  
and Cabinet  
Government of Western Australia  
13th Floor, Fukoku Seimei Bldg  
2-2-2 Uchisaiwai-cho  
Chiyoda-ku  
Tokyo 100-0011 Japan  
Tel: +81 3 5157 8281  
Fax: +81 3 5157 8286  
Website: <http://wajapan.net>

### Kobe

Regional Director  
Government of Western Australia  
Kobe Office  
6F Golden Sun Bldg  
4 chome 3-6 Nakayamate-dori  
Chuo-ku  
Kobe  
Hyogo 650-0004  
Japan  
Tel: +81 78 242 7705  
Fax: +81 78 242 7707

## MALAYSIA

### Kuala Lumpur

Regional Director  
Western Australian Trade Office  
4th Floor, UBN Tower  
10 Jalan P Ramlee,  
KUALA LUMPUR, 50250 MALAYSIA  
Tel: +603 2031 8175  
Fax: +603 2031 8177

## MIDDLE EAST

### Dubai

Regional Director  
Western Australian Trade Office  
Suite 106, Emarat Atrium Building  
Sheikh Zayed Road,  
DUBAI, UNITED ARAB EMIRATES  
Tel: +971 4 343 3226  
Fax: +971 4 343 3238

## SOUTH KOREA

### Seoul

Regional Director  
Government of Western Australia,  
Trade & Investment Office  
Unit 702, 7th Floor  
Kwanghwamoon Building  
211 Sejongno, Jongno-gu  
Seoul 110-730, Korea  
Tel : +82 2 722 1217  
Fax: +82 2 722 1218  
Website: [www.westernaustralia.or.kr](http://www.westernaustralia.or.kr)

# NEED FURTHER INFORMATION?



## VISIT AGRIFOOD INFONET – YOUR ESSENTIAL ONLINE INFORMATION RESOURCE FOR MARKET AND BUSINESS INTELLIGENCE IN THE AGRIFOOD INDUSTRY ON [www.agric.wa.gov.au/agrifoodinfonet](http://www.agric.wa.gov.au/agrifoodinfonet)

Agrifood Infonet provides an efficient way to find all relevant agrifood industry and market information. Accessible online via the DAWFA's website, users can easily view and download customized data in an instant.

### What information is available?

- Latest agribusiness market news and upcoming events.
- Trade, production and sales statistics for WA and Australia.
- Market Information resources such as market research reports and country profiles.
- Contact and business details for Western Australian agrifood organizations.
- Grants to help your business grow.

### News

*Need to keep abreast of latest agrifood industry developments?*  
Access latest market news sourced from a variety of online news wires. Agrifood Infonet ENews is also direct e-mailed to registered clients on a fortnightly basis. E-mail [agrifood@agric.wa.gov.au](mailto:agrifood@agric.wa.gov.au) for inclusion on the ENews mailing list.

### Business Contacts

*Doing business in Western Australia?*  
Sourcing agrifood products and services? Then use the Business Contacts database to find details for more than 2000 Western Australian food businesses. Access contact details, information on core business activities and descriptions of products and services supplied.

### FoodNET

DAFWA is providing a new helpline service to provide technical and scientific information, networking opportunities and knowledge transfer to support the WA food and beverage industry. If you are a small to medium sized food company (SME) or a regionally based food manufacturer and lack in-house technical resource or time is a limiting factor, then FoodNET can answer queries or provide networking opportunities.

### Statistics

*Planning to expand your business?*

Need to quantify opportunities? Access current and historic trade, production and sales statistics for all States of Australia. Includes imports and exports by product and country, production estimates based on census data and sales figures for selected products.

### Market Information

*Conducting market research?*

Determining market entry strategies? Use Agrifood Infonet to access international market research reports, trade opportunities and country briefs.

