



Department of
Agriculture and Food



Department of
Agriculture and Food

2013

Western Australia's
Agrifood, Fibre,
Fisheries and
Forestry Industries



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

2013

foreword	2	■
profile - agriculture and food	4	■
profile - fisheries	5	■
profile - forest products commission	6	■
facts and figures	7	■
land and sea use - an overview	8	■
agricultural production and exports - an overview	10	■
cereals	14	■
pulses and oilseeds	16	■
meat and live animals	18	■
apiculture	21	■
dairy	22	■
wool	24	■
horticulture	26	■
fisheries	30	■
food	32	■
forestry	33	■
services	34	■
agribiotechnology	37	■
value of exports by commodity, 2011-12	38	■
value of exports by country, 2011-12	39	■
western australian international trade & investment offices	40	■

Foreword



Western Australia's agriculture and food sector is world-renowned for producing high-quality, safe and healthy agricultural, food and fibre products.

In the current era of opportunity, with an increasing global population and growing demand for agrifood products, Western Australia is in a position to build on its reputation as a reliable supplier of premium-quality food.

About 60 per cent of the world's population lives within Western Australia's time zone, making us ideally placed to capitalise on opportunities.

Western Australia places a high value on overseas markets and works to drive innovation to deliver better outcomes for our customers in Australia and overseas.

Approximately 80 per cent of our agricultural production is exported to international markets. In spite of the recent global economic downturn, Western Australia's agrifood and forestry exports remained strong in 2011-12, valued at \$5.5 billion.

The Western Australian government supports the State's agrifood industries to develop new export markets and consolidate existing international trade relationships, particularly with our key markets in Asia and the Middle East.

Our trade relationships are fostered by industry and government, and our agrifood sector is increasingly focused on providing high-quality, value-added foods that meet consumer requirements.

Western Australia's recent strategy and trade negotiation experience values inbound and outbound investment.

Our enviable biosecurity status reflects our strict quarantine and freedom from major animal and plant pests and diseases. This status provides access for our agrifood products in high value markets throughout the world.

Through the Department of Agriculture and Food, the Western Australian government has invested in research and development to drive product innovation.

One such investment is in the new Australian Export Grains Innovation Centre. Its national and international collaboration on grains research and development will cultivate market opportunities for Australian grain and satisfy growing and changing demand from consumers in Asia and the Middle East.

Hon Ken Baston MLC

**Minister for Agriculture and Food,
Western Australia**



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.

Western Australia's western rock lobster fishery was the first commercial fishery in the world to receive sustainable fisheries certification from the Marine Stewardship Council. The fishery has been re-certified twice, providing the tick of approval that is increasingly becoming the standard expected by consumers and the seafood retail industry across the globe.

Embracing Marine Stewardship Council certification as an opportunity for our commercial fisheries, the Western Australian Government has committed \$14.5 million to assist the State's 47 other commercial fisheries achieve sustainability certification.

Government and industry partnerships, along with management arrangements developed in consultation with all user groups, are ensuring the State's fisheries remain in excellent health for future generations.

Hon Troy Buswell MLA

Minister for Fisheries

Department of Agriculture and Food

The Department of Agriculture and Food works with industries and businesses throughout the agriculture, food and fibre sector in Western Australia, helping them identify and capitalise on opportunities that drive development and overcome obstacles.

The department also has a pivotal role in helping to protect and enhance our precious natural resources and valuable biosecurity status, and minimise the impact of climate variability.

In 2012 the focus was on maximising opportunities, including international demand for high-quality and safe food and fibre products, particularly from our neighbours in Asia.

The department's essential role involves supporting all aspects of food production throughout the supply chain through market knowledge, innovative research and development, international marketing and extension programs, and regulation that ensures the production of high-quality, safe and healthy food for our customers.

Highly skilled staff throughout Western Australia deliver a diverse range of services over more than 100 million hectares devoted to agricultural and pastoral production. The result is meaningful outcomes for agrifood industries and communities.

The department collaborates with partners throughout the world to drive long-term profitability and generate innovation, knowledge and excellence in the sector.

Five key investment priorities guide activities in the sector: improving long-term profitability; building a sustainable sector; building industry capacity; improving markets and trade; and promoting a positive profile of the WA food and agriculture sectors.

While the department's primary role is economic development, its activities also generate significant social and environmental benefits through research and development in the areas of land and water management, nature conservation, salinity, soil acidity and climate.

Our long-term commitment to biosecurity and efforts to minimise the impact of diseases, pests and weeds on agricultural and pastoral industries have helped maintain Western Australia's relative freedom from pests and diseases. Our resulting biosecurity status provides a vital advantage in export markets.

The department's responsibility for food includes agriculture and food production, manufacturing and marketing and it aims to drive increased opportunities through product innovation, the development of value-added foods and meeting consumer demand.

Improved international markets and trade are paramount to the development of agriculture, food and fibre industries and are achieved via market knowledge, the promotion of products and investment opportunities overseas, trade and research alliances, and project management within international markets.

For further information, visit agric.wa.gov.au



Image: CBH

Department of Fisheries

The Department of Fisheries is responsible for the conservation, development and sharing of 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
- developing industry and community partnerships.

The department licenses and regulates commercial fisheries, which include 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 16 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.

The department carries out fisheries research, management, surveillance and enforcement, and education along the state's 12,500 km 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 km) from the state's coast.

For further information, visit fish.wa.gov.au



Image: Department of Fisheries

Profile

Forest Products Commission

The Forest Products Commission is a statutory authority established in 2000 to commercially harvest and manage Western Australia's renewable timber resources. The principles of sustainable forest management are imbedded in the culture of the commission and our commitment to continuous improvement and management planning are integral to our everyday operations and delivering economic, environmental and social benefits for the community.

The commission has three core business units: South West Forests, Plantations and Sandalwood. Each segment has its own operating conditions, market demands and financial characteristics. Our operations include:

- harvesting and selling forest products from state-owned native forests and plantations
- regeneration (replanting) of state-owned native forests and plantations
- supporting the long-term viability of the timber industry.

The commission is actively involved in the marketing and promotion of Western Australia's diverse range of timbers. The unique properties of jarrah, karri and marri are sought for applications such as furniture, flooring, decking and joinery. Quality pine timbers are used in new and renovated housing construction and furniture making while high grade oil is extracted from sandalwood for use in the perfumery, cosmetic and pharmaceutical markets.

Western Australia's 'old growth' forests are permanently protected and only areas of regrowth forest are harvested.

Our forest operations are independently audited and certified to comply with sustainable forest

management practices through the Australian Forestry Standard (AS 4708) and the international standard ISO 14001 for its Environmental Management System (EMS).

For further information, visit fpc.wa.gov.au



Images: Forest Products Commission

Facts and figures – WA

Gross state product (GSP)	A\$194.2 billion
Economic growth rate	6.0%, highest for Australia (2011-12)
Population	2.43 million (June 2012)
Imports	A\$35.1 billion
Exports	A\$120.5 billion
Land area	2,532,400 km ²
Life expectancy at birth:	
Males	78 years
Females	83 years
Unemployment rate	4.3% (Nov 2012)
Inflation rate	1.1% (2011-12)
Average weekly earnings	A\$1,516 (Aug 2012)
WA's contribution to Australian exports	46%



Land and sea use – an overview

Western Australia is the largest Australian state. It occupies a third of Australia, spanning 2,400 km from north to south, with an area of more than 2.5 million 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 extreme.

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

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

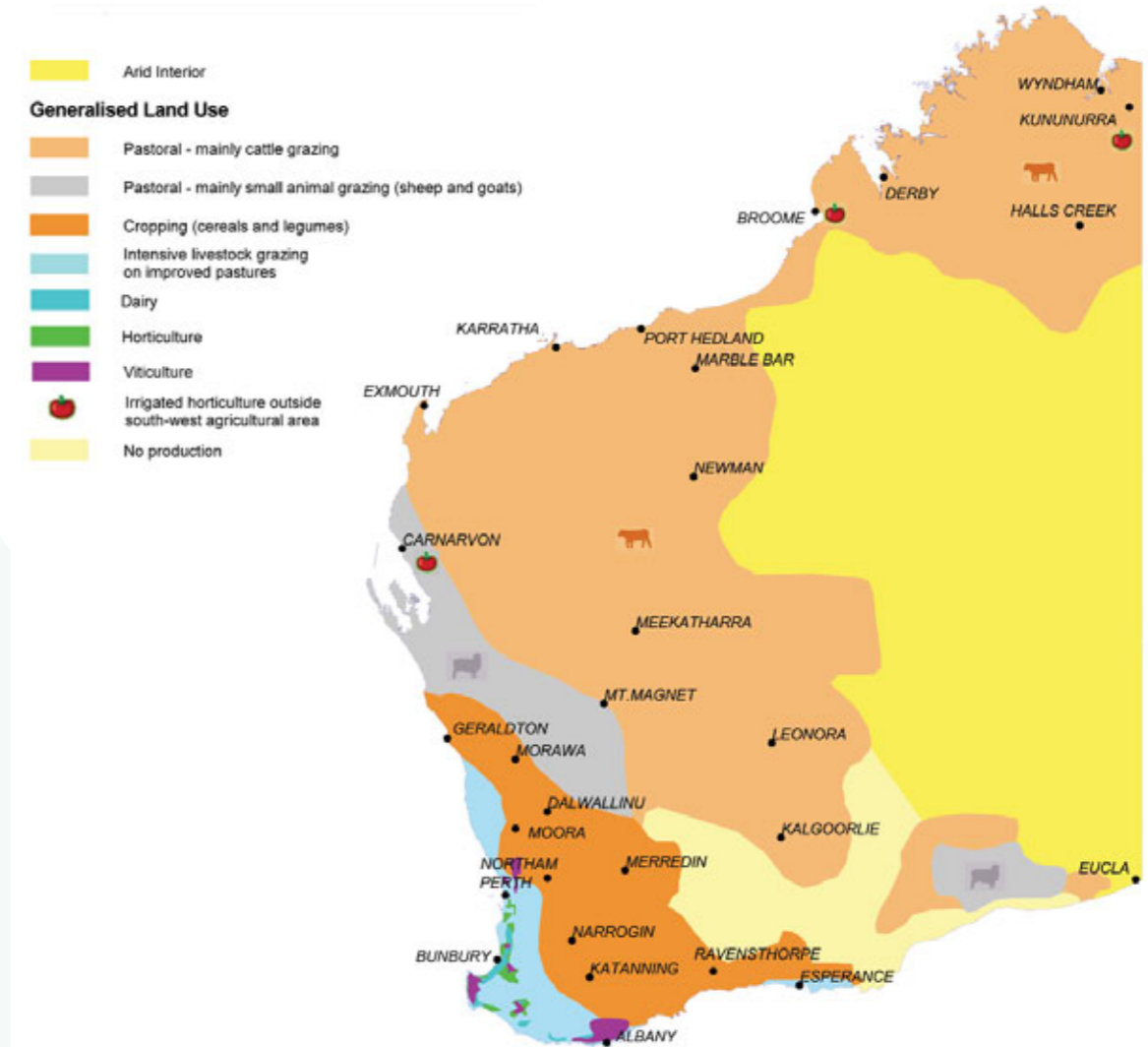
The diverse and efficient agriculture sector provides the raw material for a rapidly growing range of processed exports. These include wine, ice-cream, barley malt, noodles and fine leather. Instead of being just a primary producer, Western Australia is now increasing its range of value-added products and manufactured goods.

WA'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 containerised shipping can be accessed at Fremantle, the state's main port which handles 85 per cent by value of Western Australia's seaborne imports and 25 per cent by value of Western Australia's seaborne exports. The nine regional ports—Albany, Broome, Bunbury, Dampier, Esperance, Geraldton, Kwinana, Port Hedland and Wyndham—are linked to major agricultural and mineral producing areas.

There are regular international air services linking Perth to Singapore, Malaysia, Indonesia, Thailand, Hong Kong, China and the Middle East.

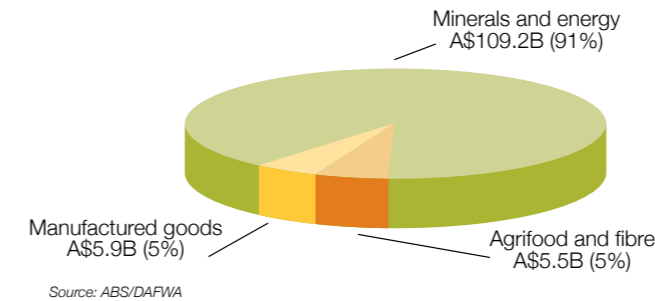


Agrifood, fisheries and forestry production & exports – an overview

- Western Australia is an important producer and supplier of safe, high-quality agriculture products such as grains, meat, fruit and vegetables, dairy products and processed foods as well as live animals and seafood to international markets.
- The state exports up to 80 per cent of its agricultural production and has an international reputation that meets 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-free and disease-free agricultural production areas in the world. Strict quarantine requirements ensure this status is maintained for the benefit of local producers and consumers around the world.
- Western Australia is well positioned to take advantage of growing world consumer demand for clean, safe and high-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 tropical 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.
- The majority of agricultural, fishery and forest products are exported, including 92 per cent of total crop production, 73 per cent of livestock production, 64 per cent of production from fisheries and 86 per cent of forest production. This makes Western Australian businesses highly export focused.
- Over the five years from 2007-08 to 2011-12, the largest export region for Western Australian agricultural, fishery and forest products has been North-East Asia—comprising China, Japan, South Korea and Taiwan. This is followed by the South-East Asian markets (Indonesia, Singapore, Thailand, Malaysia and the Philippines) and the Middle East (Saudi Arabia, United Arab Emirates, Qatar, Yemen and Iraq).
- In 2011-12 the top export markets for WA agrifood products were China/Hong Kong, Japan, Indonesia, South Korea, The Netherlands, Thailand and Saudi Arabia.
- Western Australia's proximity to the leading markets in Asia and the Middle East (with excellent sea and airfreight connections) gives the state a comparative advantage.

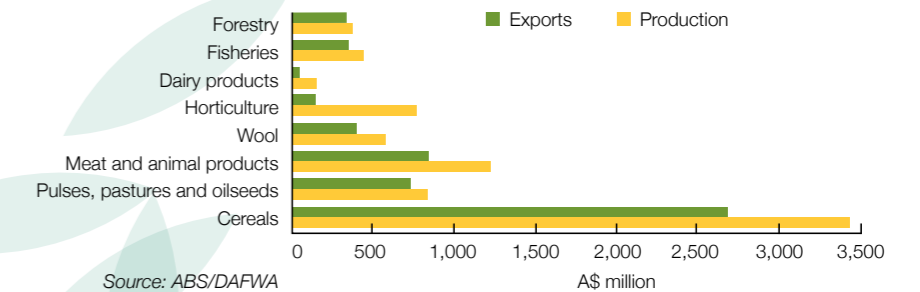


Western Australian exports by sector, 2011-12 (A\$ billion)
Total: A\$120.6 billion



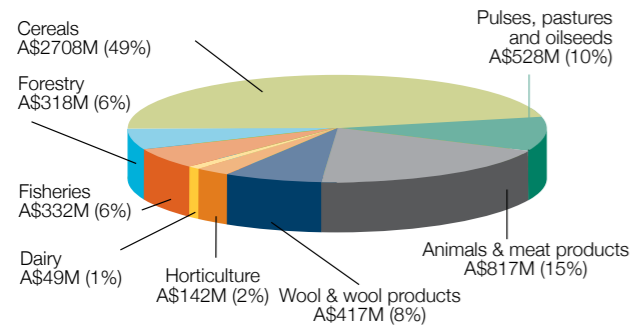
WA agriculture, fisheries and forestry production and exports, 2011-12

Total production: A\$7,865 million
Total exports: A\$5,502 million



Agrifood, fisheries and forestry production & exports – an overview (continued)

WA agriculture, fisheries and forestry exports, 2011-12 (A\$ million)
Total: A\$5,502 million



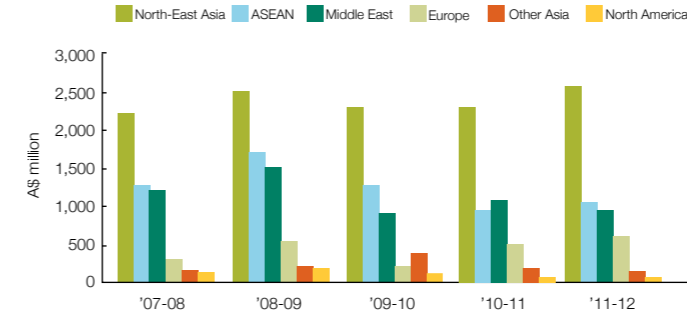
Source: ABS/DAFWA

WA agriculture, fisheries and forestry production and exports, 2005-06 to 2011-12 (A\$ billion)



Source: ABS/DAFWA

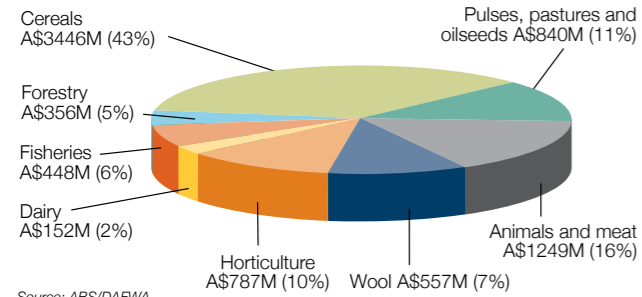
WA agriculture, fisheries and forestry exports by region, 2007-08 to 2011-12 (A\$ million)



Source: ABS/DAFWA



WA agriculture, fisheries and forestry production, 2011-12 (A\$ million)
Total: A\$7,865 million

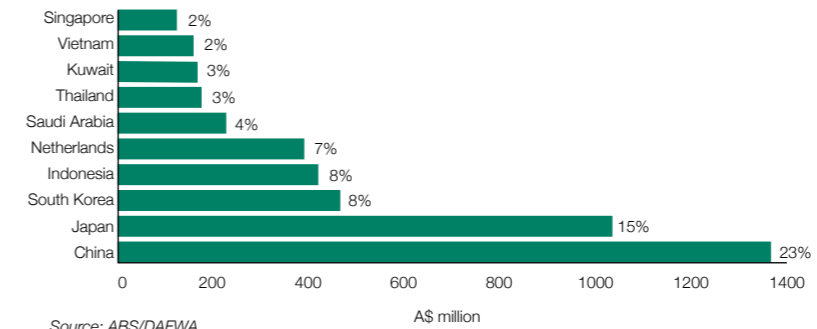


Source: ABS/DAFWA



Image: CBH

Top 10 markets for agriculture, fisheries and forestry exports, 2011-12 (A\$ million)

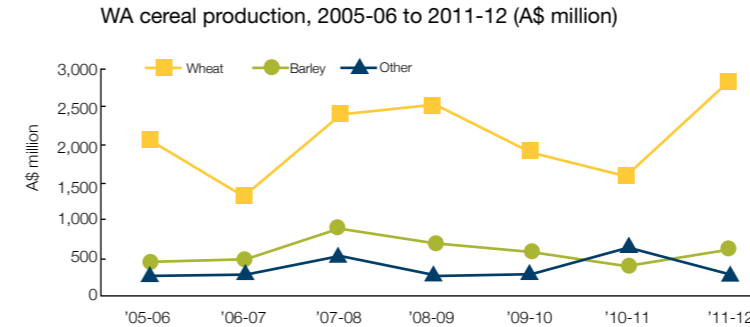


Source: ABS/DAFWA

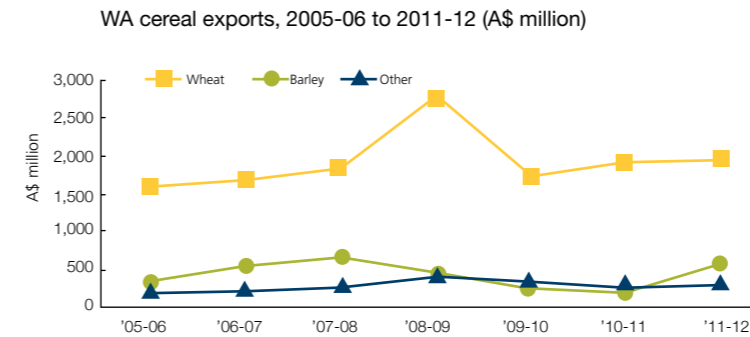
Cereals

- 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 WA with wheat being the dominant crop.
- About 4,700 cereal farms, primarily family owned and operated businesses, produce on average 10 million tonnes of cereals per year. Farm sizes range from 1,000 to 15,000 hectares.
- The state produces on average 30-40 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 noodles, breads and baked goods, beverages and animal feed. These cereals include wheat, barley, oats and triticale.
- Cereal production is highly mechanised and requires low agrichemical inputs, which make production competitively cost efficient.
- The cereals industry in Western Australia continues to focus on producing high-quality wheat, barley and oats suitable for developing quality discriminating markets.
- Western Australia is the world's major supplier of wheat for Japanese white salted udon noodles.
- The state is a major producer of malting and feed barley and plays a major role in the world trade of malting barley. It is the top supplier of malting barley to China and shochu barley to Japan and is a major supplier of feed barley to the Middle East.

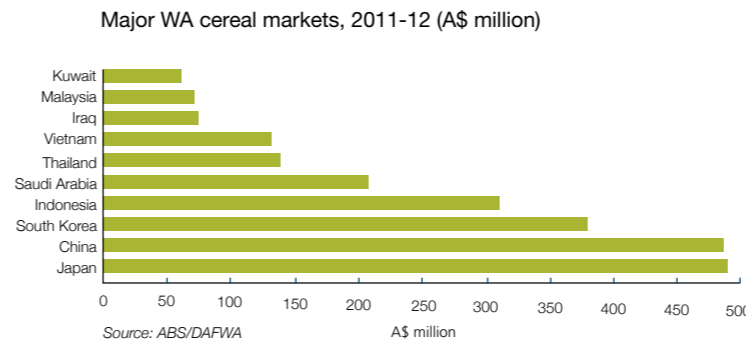
- Western Australia has the largest barley malting facility in the southern hemisphere.
- It is proud of its high-quality milling oats and is home to Australia's largest miller.
- Western Australian cereal exports account for one third of Australian wheat exports, and 30 per cent of Australian barley and oat exports.
- Wheat exports were valued at A\$1,881 million in 2011-12. Wheat exports reached a record in 2008-09 at A\$2,732 million.
- In 2011-12 barley exports were A\$547 million and oat exports were A\$18 million, which are up from previous years.
- The top six markets for WA wheat in 2011-12 were China, Indonesia, Japan, South Korea, Thailand and Vietnam.
- The top six markets for WA barley in 2011-12 were Saudi Arabia, China, Japan, Kuwait, UAE and Iran.



Source: ABS/DAFWA



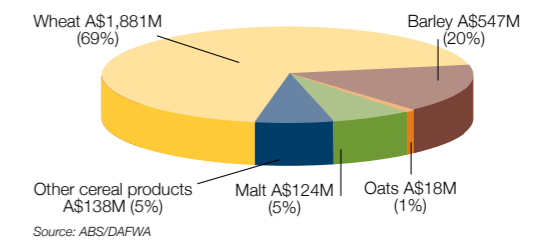
Source: ABS/DAFWA



Source: ABS/DAFWA



WA cereal exports, 2011-12 (A\$ million)
Total: A\$ 2,708M

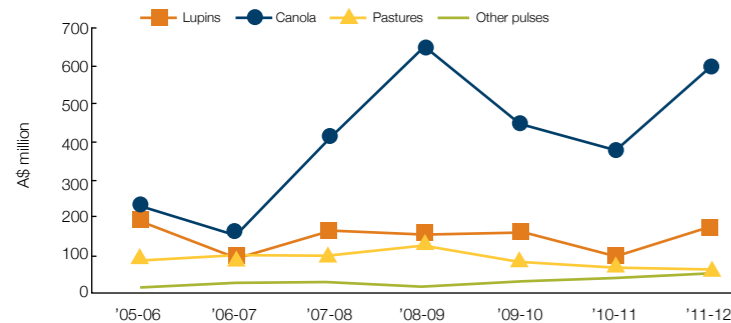


Source: ABS/DAFWA

Pulses and oilseeds

- Western Australia is the world's largest producer and exporter of Australian sweet white lupin. Due to its unique nutritional value and chemical composition, lupin is attracting increasing attention as a new and healthy potential 'super food'.
- Western Australia also grows and exports for human consumption other pulses such as field pea, chickpea, albus lupin and faba bean.
- The production of lupin and other pulse crops has contributed valuable nitrogen additions to soil in Western Australia's agricultural areas and these crops are important for rotating with cereal crops in our farming systems.
- Western Australia is the major canola producing state in Australia and grows between 40 and 60 per cent of total canola production in Australia.
- Western Australian canola is now recognised as the highest quality canola in Australia with the average oil content 2-4 per cent higher than other states.
- Plant breeding, research and market development are ensuring Western Australia maintains its position as Australia's biggest producer and exporter of pulses and canola.
- Between 2004-05 and 2011-12, pulse and oilseed exports increased from A\$310 million to A\$708 million.
- The top four Western Australian lupin export markets in 2011-12 were South Korea, Spain, Japan and the Netherlands.
- The top four Western Australian export markets for other pulses in 2011-12 were India, Malaysia, Pakistan and the Philippines.
- The top four Western Australian canola export markets in 2011-12 were the Netherlands, Belgium, Germany and Japan.

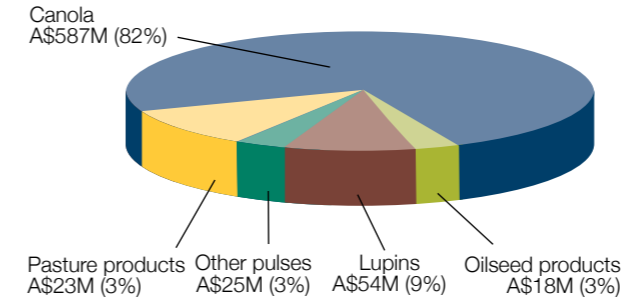
WA pulse, pasture and oilseed production, 2005-06 to 2011-12 (A\$ million)



Source: ABS/DAFWA

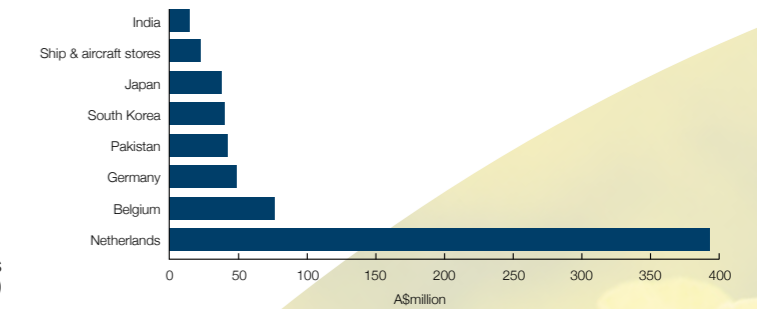


WA pulse, pasture and oilseed exports, 2011-12 (A\$ million)
Total: A\$708M



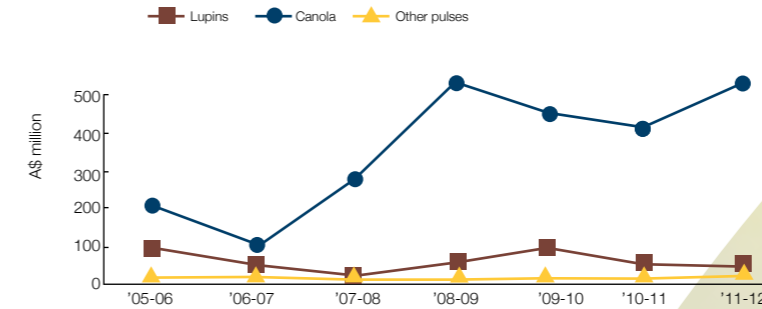
Source: ABS/DAFWA

Major WA pulse, pasture and oilseed markets, 2011-12 (A\$ million)



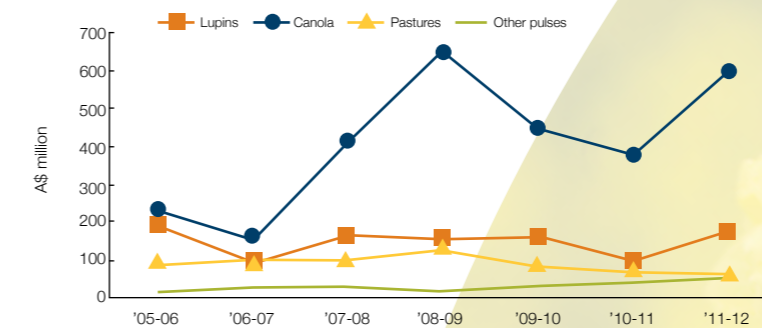
Source: ABS/DAFWA

WA pulse, pasture and oilseed exports, 2005-06 to 2011-12 (A\$ million)



Source: ABS/DAFWA

WA pulse, pasture and oilseed production, 2005-06 to 2011-12 (A\$ million)



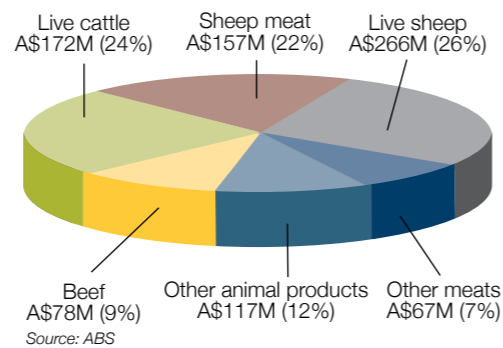
Source: ABS/DAFWA

Meat and live animals

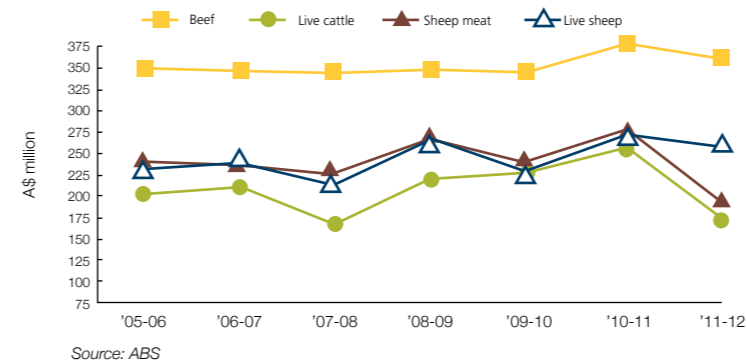
- Western Australia produces and exports a wide range of meat products, both chilled and frozen, including beef, lamb, mutton, pork and goat meat.
- The sheep industry comprised about 14 million head at 30 June 2012, producing high-quality meat and wool for world markets.
- The state's beef herd comprised 1.86 million head at 30 June 2012.
- Western Australia's pig industry produced 37,100 tonnes of pig meat in 2011-12, of which 20 per cent valued at A\$24M was exported to South-East Asia.
- The poultry industry in Western Australia has 11.6 million birds and is mainly domestic market focused; however it is a strong growth industry.
- Western Australia has invested significantly in development of improved animal welfare practices, particularly in the live animal export sector and in alternative housing for breeding sows.
- The Australian Government's Exporter Supply Chain Assurance System (ESCAS) has been introduced to ensure all livestock exported for slaughter are handled to internationally agreed (OIE) animal welfare standards and are able to be traced through the supply chain.
- The National Livestock Identification Scheme (NLIS), underpinned by state and Commonwealth legislation, provides a robust whole-of-life traceability system.
- Beef exports have fallen from A\$121 million in 2005-06 to A\$78 million in 2011-12. Sheep meat exports peaked at A\$266 million in 2008-09 and 2010-11 before falling slightly to A\$244 million in 2011-12.

- Exports of live cattle were down 30 per cent to \$172 million in 2011-12. Market disruptions occurred during this period.
- The major export markets for Western Australian live cattle in 2011-12 were Indonesia, Israel, Egypt, Turkey, and the Russian Federation.
- The top five markets for Western Australian beef exports in 2011-12 were Indonesia, Japan, South Korea, New Zealand and USA.
- The top five export markets for Western Australian live sheep in 2011-12 were Kuwait, Qatar, Bahrain, Jordan and Turkey.
- The major markets for Western Australian lamb and mutton in 2011-12 were USA, Saudi Arabia, Mexico, China, Jordan and UAE.

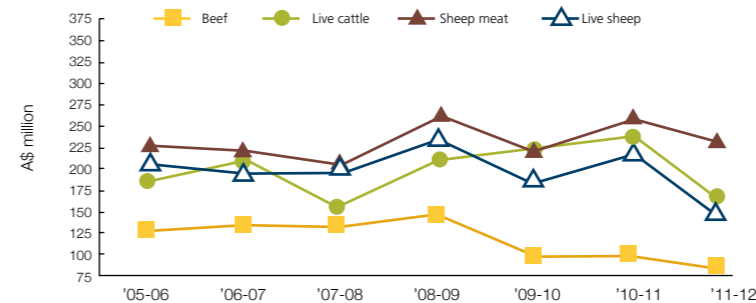
WA animal and meat product exports 2011-12 (A\$ million)



WA animal and meat production 2005-06 to 2011-12 (A\$ million)

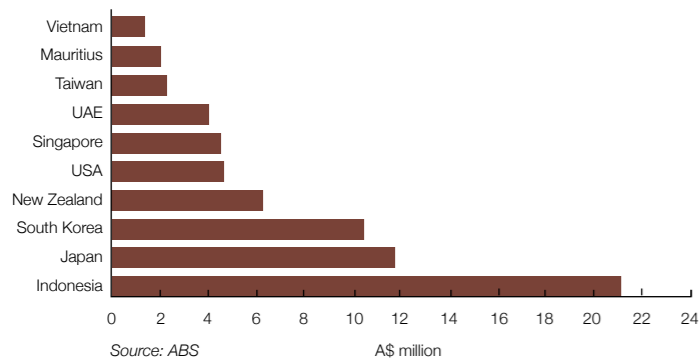


WA animal and meat exports 2005-06 to 2011-12 (A\$ million)

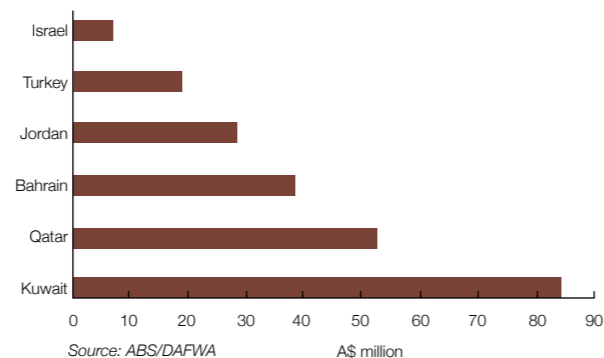


Meat and live animals (continued)

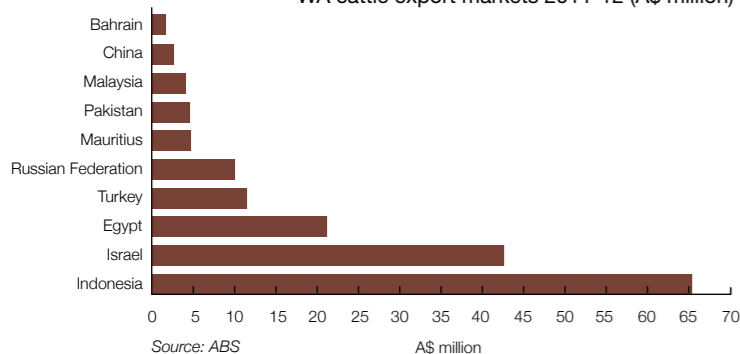
WA beef export markets 2011-12 (A\$ million)



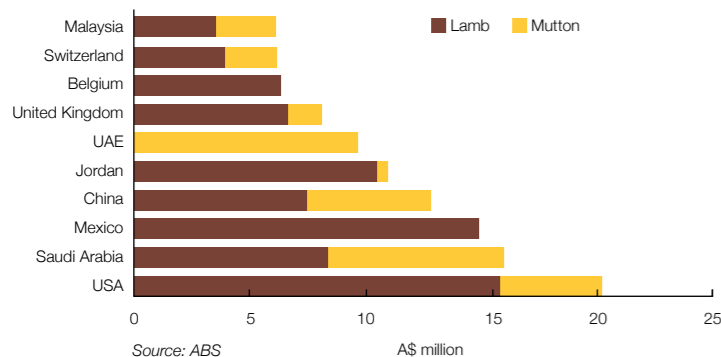
WA live sheep export markets 2011-12 (A\$ million)



WA cattle export markets 2011-12 (A\$ million)



WA sheep meat markets 2011-12 (A\$ million)



Apiculture

- The Western Australian apiculture industry is recognised for its high-quality honey, and beeswax products.
- In 2011-12 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 its annual honey production
 - comprised about 960 beekeepers managing around 29,000 hives (many owning fewer than 10 hives with some 100 commercial or semi-commercial beekeepers who own more than 100 hives).
- The Western Australian industry has access to the state's famous pristine forests and coastal wildflowers which are essential for honey production and industry sustainability. These areas are free from chemical contamination, ensuring hive products are clean and safe for the consumer.
- Western Australia's unique floral resources result in delicious honeys not found elsewhere in the world.
- The apiculture industry is committed to quality assurance. Initiatives include a surveillance and monitoring system established with funding assistance through the Agricultural Produce Commission Beekeepers Producers' Committee and the quality assurance program, B-Qual.
- A national surveillance program monitors ships and cargo for exotic bee pests at ports and Perth airports. A state surveillance program is used for inspection and testing of apiaries. Early detection of potential threats of exotic bee pests or diseases allows Western Australia to maintain its productivity and quality assurance.

- This commitment offers a distinct trade advantage in exporting hive products (honey, beeswax and bee pollen), package bees, nucleus hives and queen bees around the world.

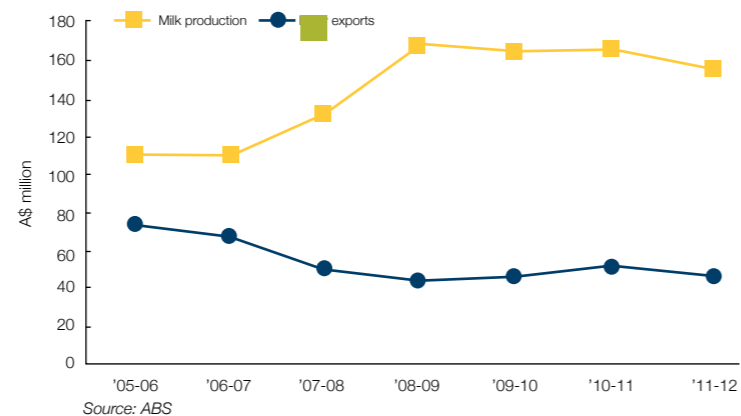


Dairy

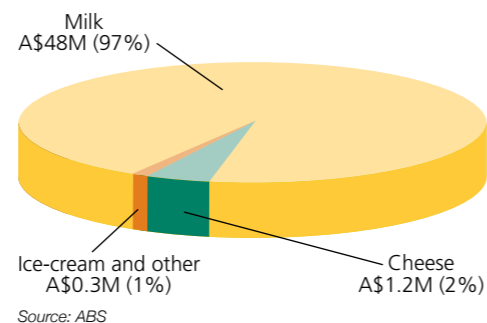
- Western Australia's dairy industry is an efficient producer of high-quality milk sold to the local and South-East Asian markets.
- Milk production takes place all year round and has internationally competitive production costs. The Western Australian dairy industry has 170 dairy farmers with an average of more than 350 cows each which equates to a total of about 60,000 milking cows.
- The dairy industry in Western Australia produced 338 million litres of milk in the financial year ending June 2012 compared with an Australian total of 10 billion litres.
- Western Australian processors are at the leading edge of technology in the transport of fresh and extended shelf life milk products.
- Western Australia has modern 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 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 markets in Asia and the Middle East, which are large and rapidly growing consumers of dairy products.

- Exports of fresh liquid milk account for 97 per cent of Western Australia's dairy exports.
- The major markets for Western Australia's dairy exports in 2011-12 were Singapore, Taiwan, South Korea, and Hong Kong.

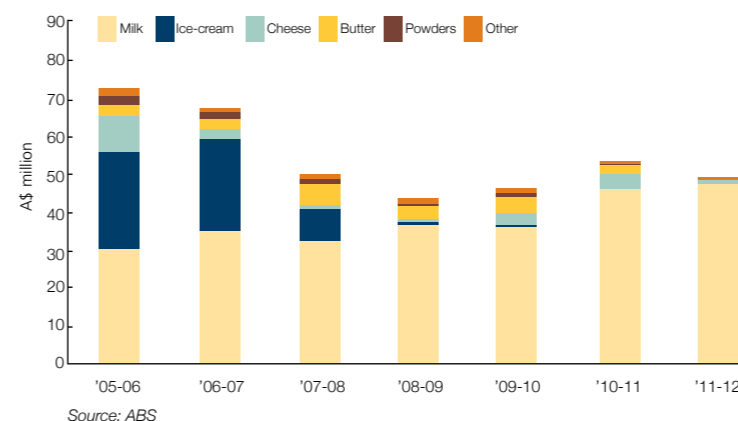
WA dairy production and exports 2005-06 to 2011-12 (A\$ million)



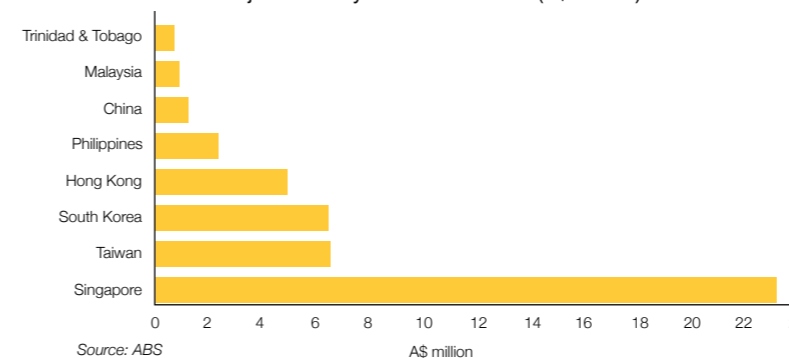
WA dairy exports 2011-12 (A\$ million) Total: A\$457M



WA dairy exports by product 2005-6 to 2011-12 (A\$ million)



Major WA dairy markets 2011-12 (A\$ million)



Wool

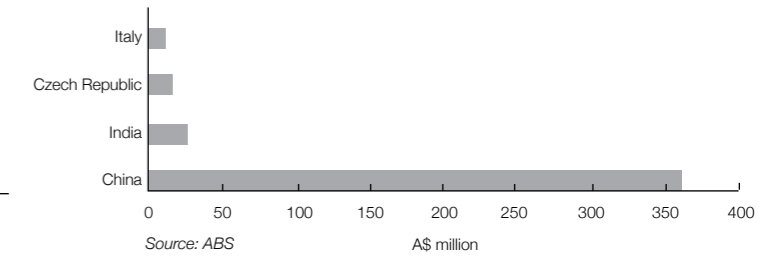
- Western Australia has more than 14 million sheep run by 6,300 sheep producers. They are mostly located in the agricultural region of the state.
- Western Australia produced 67 million kilograms of greasy wool in 2011-12, about 20 per cent of the Australian clip.
- Western Australia's major wool markets in 2011-12 were China (86%), India (6%) and Czech Republic (4%).
- The gross value of agricultural production for wool produced in Western Australia was A\$496 million, including \$417 million in export value (FOB). The drop in volume exported due to reduced production was partially offset by an increase in average price per kilogram (greasy) from 730 cents to 850 cents in 2011-12.
- In 2011-12 Western Australia's average wool fibre diameter was 20 micron compared to Australia's average of 21.5 micron. More than 95 per cent of wool production in Western Australia is pure Merino wool measuring less than 24 micron. Super fine wool (under 19.5 micron) accounted for 45 per cent of all production.
- The state is internationally cost competitive in wool handling and delivery.



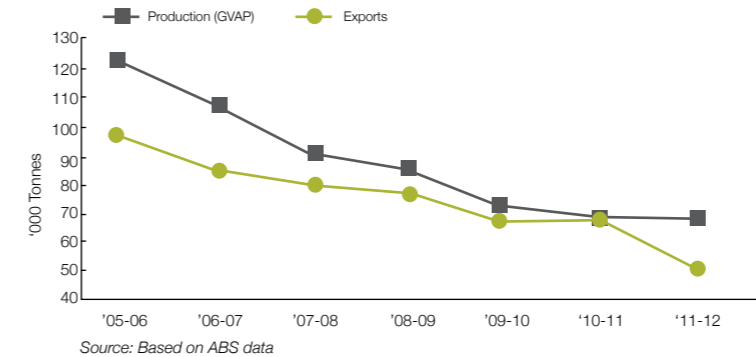
WA wool production and exports by value, 2005-06 to 2011-12 (A\$ million)



Major WA wool markets 2011-12 (A\$ million)



WA wool production and exports by volume, 2005-06 to 2011-12 (A\$ million)



NOTE: The difference between production and export reflects transfers between years, and movement of wool to eastern Australia for processing and/or export.



Horticulture

- Western Australia produces a diverse range of top-quality horticultural products from delicious mangoes and other tropical crops from the Ord River Irrigation Area in the north, to crisp, crunchy vegetables on the coastal sands near Perth, and outstanding wines and delicious fruit from the south-west. Besides local sales, much of this bounty is marketed interstate and exported worldwide.
- The total value-added contribution of horticulture to Western Australia's economy is estimated at A\$2 billion.
- Our horticultural export advantages include:
 - reputation for reliability of supply and safe, quality-assured products counter-seasonal to the northern hemisphere which provides windows of opportunity in specific markets
 - strong export culture
 - short sea freight delivery times to many Asian and Middle East markets.
- Horticultural production was valued at A\$780 million in 2011-12 by the Australian Bureau of Statistics, but Horticulture Australia Ltd estimates the value of production to be around 40 per cent higher. This is supported by case studies of individual industries.

Vegetables

- Western Australia is a leading Australian state for vegetable exports, using advanced growing systems and a high degree of mechanisation.
- Carrots are the top export crop, and are available throughout the year. Exports have expanded steadily in the past five years with Western Australia providing 93 per cent of the Australian total by value. Carrot exports of about 65,000 tonnes are valued at more than \$47 million per year. The largest export destination is the United Arab Emirates followed by Singapore.

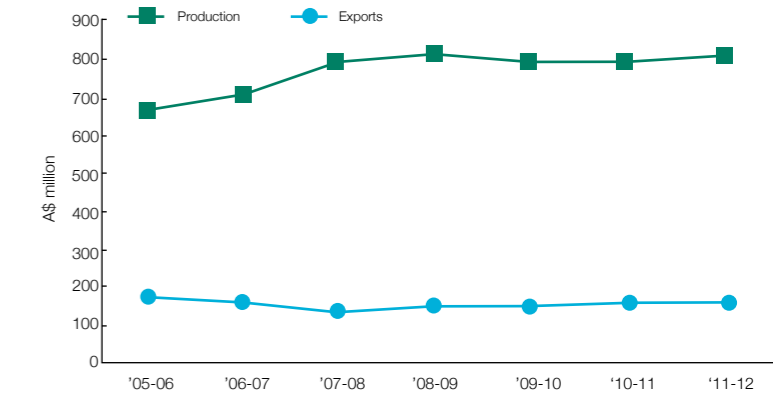
- Singapore is a sophisticated and discerning market where Western Australian carrots are preferred by many customers, despite the landed price being higher than Chinese carrots. Strategic alliances are being built with importers to provide year-round supplies from WA.
- The growth trend in seed potato exports is continuing, particularly to Indian Ocean and South-East Asian markets, helped by the industry's reputation for high quality production in a 'clean, green' environment.
- Due to the efforts of a Western Australian exporter and his Indonesian importer, the Indonesian Agricultural Quarantine Agency has agreed to pre-shipment inspection of Western Australian seed potatoes in Perth rather than Jakarta with the risk of an expensive rejection always present. Pre-shipment inspection means this risk is removed, which benefits the trade in seed potatoes between WA and Indonesia.

Wine, fruits and flowers

- Wine exports have been a big improver in the past year despite the strength of the Australian dollar, which makes Australian wines seem expensive compared to those from other countries.
- The largest customer was China (including Hong Kong), with sales worth almost A\$18 million in 2011-12, from total Western Australian sales of A\$43.8 million. The next most important market was the United Kingdom, but at A\$7.2 million, the British thirst was about 40 per cent of the Chinese.

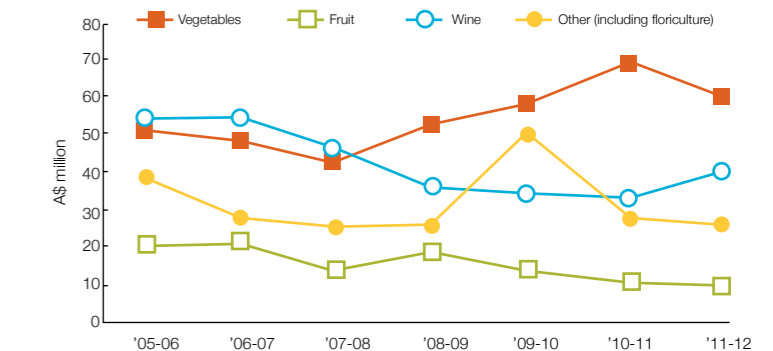
- Western Australia's wine industry is largely located in the south-west, and produces some outstanding table wines that have achieved notable success at international wine shows. The industry is small compared with interstate plantings but focuses on premium quality varieties for the speciality market segments of local, interstate and export markets.
- Among fruits, strawberries remained Western Australia's highest value export, valued at about A\$4.3 million in overseas sales in 2011-12, around two-thirds of total Australian exports. The key markets were Singapore and New Zealand followed by Thailand, Hong Kong, Malaysia and the United Arab Emirates.
- The main strawberry growing areas are close to Perth where the season peaks from August to October each year. Early statistics for these months in 2012 show that the value of export sales to some important markets has already exceeded sales for the whole of 2011-12, reflecting the quality and reputation of Western Australian fruit.
- Steady growth is occurring in the avocado, citrus and mango industries due to additional plantings.
- Western Australia leads commercial production of native flower species, mostly from its own unique flora. This accounts for about half of Australia's cut flower exports, with Japan the most important market.

WA horticulture production and exports, 2005-06 to 2011-12 (A\$ million)



Source: ABS

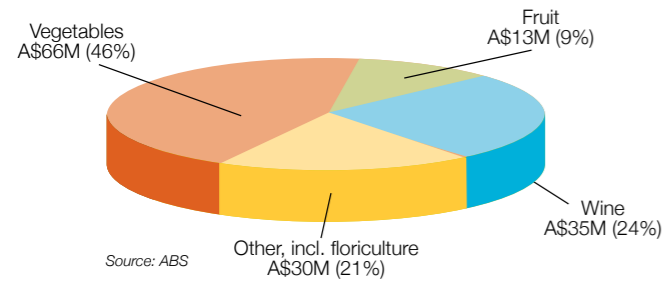
WA horticulture industries exports, 2005-06 to 2011-12 (A\$ million)



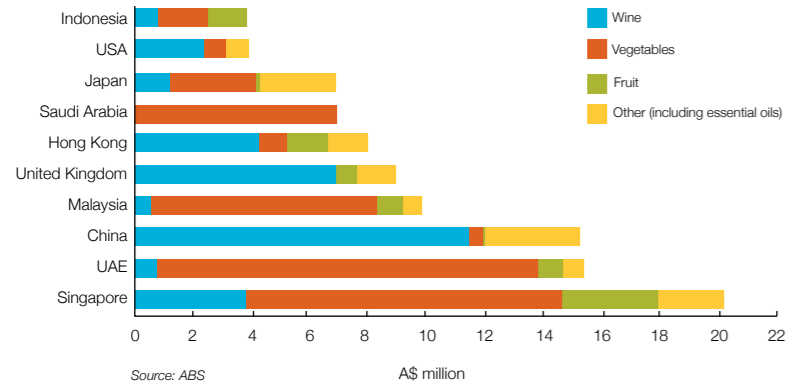
Source: ABS

Horticulture (continued)

WA horticulture industries exports, 2011-12 (A\$ million)
Total: A\$142 million



Major WA horticulture markets, 2011-12 (A\$ million)



Fruit – WA seasonality chart

Full supply Limited supply CS Cold store CA Controlled atmosphere

Fruit	Jan	Feb	Mar	April	May	June	July	Aug	Sept	Oct	Nov	Dec
Apples - Granny Smith	CA				CS	CS		CA		CA		
Apples - Pink Lady	CA					CS	CS	CA		CA		
Apples - Royal Gala				CS				CS				
Apples - Sundowner	CA				CS	CS	CA	CA		CA		
Apricots												
Avocado												
Banana												
Cherries												
Grapefruit - Ruby Red												
Grapefruit - White												
Honeydew melon												
Lemons												
Mandarins												
Mango												
Nashi												
Nectarines												
Oranges - Navel												
Oranges - Valencia												
Peaches												
Pears - Bartlett												
Pears - Packham												
Plums												
Rockmelon												
Strawberries												
Table grapes												
Watermelon												

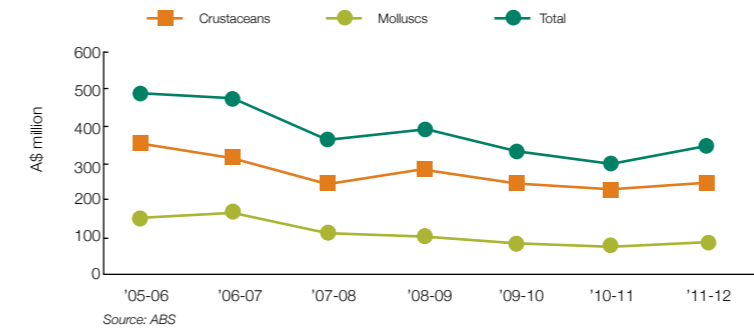
Fisheries

- 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 of about A\$300 million
 - a pearl production industry valued at A\$95 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 freshwater aquaculture industry producing marron, yabbies and finfish in the state's south
 - a small but growing marine aquaculture industry sector producing finfish, abalone and pearls, and exploring the production of valuable new species such as corals, octopus and artemia
 - the farming of marine algae north of Geraldton, for the production of betacarotene—a naturally occurring food colouring and—in the Pilbara, the establishment of an innovative project

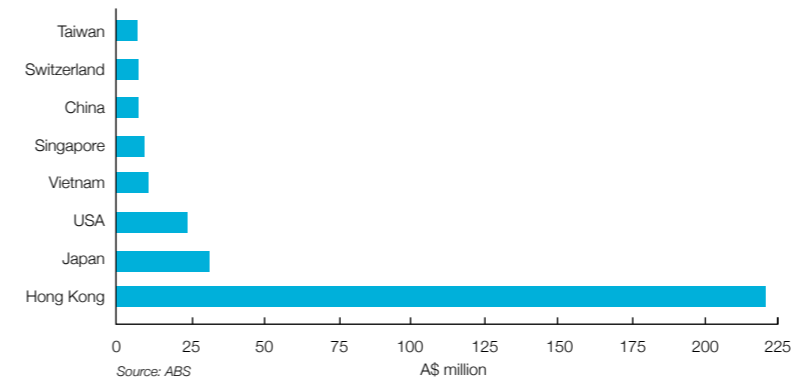


- growing marine algae for the production of biofuel and by-products, including omega-3 oils for human consumption and protein biomass.
- Western Australia's major export destinations for marine products in 2011-12 were China (including Hong Kong), Japan, USA, Vietnam and Singapore.
- The top three markets for crustacean exports in 2011-12 were China (including Hong Kong), Japan and Vietnam.
- The top three export markets for Western Australian molluscs in 2010-12 were Hong Kong, USA and Singapore.

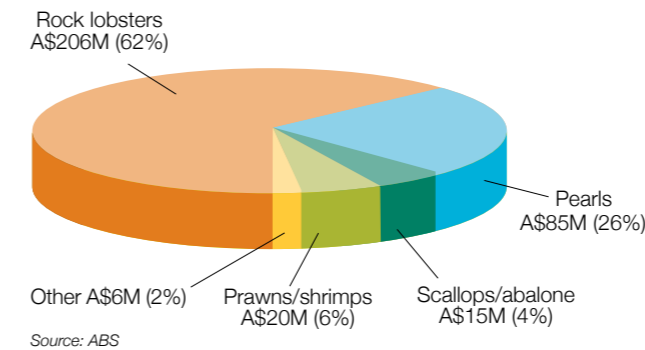
WA fisheries exports, 2005-06 to 2011-12 (A\$ million)



Major WA fisheries markets, 2005-06 to 2011-12 (A\$ million)



WA fisheries exports, 2011-12 (Total: A\$332M)



Food

- Western Australia's internationally competitive agricultural and food industries provide premium quality food and beverage products to customers throughout the world, particularly to the Asian region.
- The food industry comprises about 900 processing companies employing a labour force of about 19,500, with more than two-thirds of companies clustered in the metropolitan and south-western regions. More than half of Western Australia's medium and small-scale food processing operations are regionally based.
- The turnover of the Western Australian food retail industry averaged \$960 million per month for 2011-12, which equates to an annual turnover of more than \$11 billion.
- Food manufacturing represents around 14 per cent by value of the state's manufacturing sector.
- Total food and beverage exports for 2011-12 were valued at A\$5.5 billion with processed food exports worth A\$665 million. The high proportion of unprocessed food exports provides substantial opportunity to develop value-adding enterprises in Western Australia.
- The food processing industry has expanded to supply a number of high-value niche export markets, especially for wine, condiments and dairy products.
- One of the advantages of the state's processed foods is the safety and quality of production systems, where food sold must meet stringent standards.
- The State Government, in collaboration with various state and national agencies, universities and private sector businesses, provides support to developing food industry

enterprises through advice and networks in research and development, investment attraction, export development and food integrity systems.

- The responsibility for supporting development of the food industry rests with the Department of Agriculture and Food. The department is driving a supply chain approach, helping food businesses to capitalise on opportunities by understanding relationships and constraints within the industry.



Forestry

Sustainable management is the cornerstone of the WA forestry industry and the guiding principle for economic, environmental and social benefits to the community. Timber harvested from our native forests is independently audited and certified under the Australian Forestry Standard (AFS) and the Environmental Management System (EMS) ISO 14001.

Timber is a renewable, recyclable resource and is a 'greener' alternative than other building materials, such as steel and concrete that require larger amounts of fossil fuels to be produced. In addition, timber products store the carbon that the growing trees have removed from the air.

Native timbers

Western Australia's forests and woodlands are home to a variety of unique tree species that produce stunning timbers. Jarrah (*Eucalyptus marginata*) is a premium world-class furniture timber valued by designers and manufacturers for its attractive features and durable properties. Beautiful timbers such as marri (*Corymbia calophylla*) and sheoak (*Allocasuarina fraseriana*) also appeal to craftsmen for their array of colours, textures and characteristics. The strength qualities of karri (*E. diversicolor*) are widely sought for flooring and decking.

WA sandalwood (*Santalum spicatum*) is a highly valued rangeland timber and, although predominately harvested for its oil content, the timber is used for intricate wood turnings and religious ceremonies.

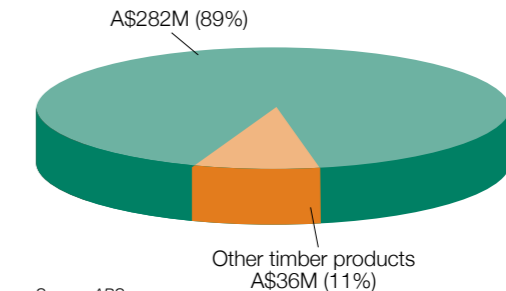
Plantation timbers

Western Australia has about 413,000 hectares of plantation forest. Traditional plantation species are radiata pine (*Pinus radiata*), maritime pine (*P. pinaster*) and Tasmanian blue gum (*E. globulus*). Pine is commonly used in construction and manufacturing materials as well as furniture, while Tasmanian blue gum is chipped, exported and manufactured into pulp and paper.

Eucalypt oil mallee species have been integrated into farming systems in the wheatbelt for carbon sequestration and biomass for fuel. They provide a range of environmental and on-farm benefits, such as improving water quality and assisting with dryland salinity.

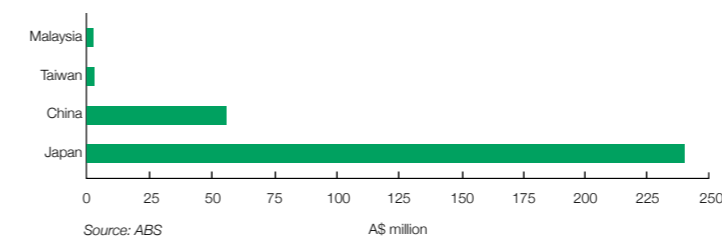
Demand for sandalwood oil and wood, particularly in Asia, has been strong for centuries and continues to increase. Currently WA sandalwood is harvested almost exclusively from natural 'wild' stands in the rangelands. However, future supply is expected to be complemented by sandalwood sourced from plantations established by the Forest Products Commission, private companies and individual farmers.

WA forest exports, 2011-12 (Total: A\$318M)



Source: ABS

Major WA forest product markets, 2011-12 (A\$ million)



Source: ABS

A\$ million

Services

Investment attraction and facilitation in Agriculture and Food

The Department of Agriculture and Food plays an active role in attracting and facilitating investments in the agriculture and food sector from national and international companies.

Services to assist businesses and potential investors include:

- information on sectoral and specific investment opportunities
- assisting businesses to be 'investment attractive'
- assisting the assessment of new investment opportunities
- assisting investors by coordinating approval processes for new investment through Government
- supplying contacts such as consultants, project managers, joint venture partners and financiers
- access to research and development
- access to information on lifestyle, community and social issues.

A current project to facilitate investment attraction to WA's primary industries is the 'Find Your Farm' website <http://spatial.agric.wa.gov.au/findyourfarm/>.

The website provides integrated property and regional information for intending investors, such as:

- infrastructure and physical data including:
 - water drawdown 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. This tab also provides links to:

- Agrifood Infonet at agric.wa.gov.au/agrifoodinfonet for business and market intelligence in the WA agrifood industry, and
- Landgate at landgate.wa.gov.au/corporate.nsf for detailed data on recent land sales.



AGWEST Food Security (formerly AGWEST International)

AGWEST Food Security works in partnership with government agencies, international funding agencies and organisations in Africa, the Middle East and Asia to provide capacity building, project management, specialist professional and technical services and customised training packages.

The Department of Agriculture and Food's expertise is in rain-fed cropping systems, minimum tillage, climate adaptation, animal production, pasture development, plant and animal health, food security, biosecurity, natural resource management, land-use planning, and participative rural community development.

AGWEST Food Security draws upon this wealth of expertise from within the department as well as from Western Australian universities, agribusinesses

and other government agencies under collaborative arrangements. As such, AGWEST Food Security is able to provide a comprehensive range of high-level expertise to international clients. AGWEST Food Security is currently carrying out projects in Brunei, Iraq and Africa.

Recent projects

Brunei (2011-2013) In partnership with Brunei's Ministry of Industry and Primary Resources, AGWEST Food Security has been contracted to conduct a study of the nutritional status of animal and livestock feeds in Brunei Darussalam. AGWEST Food Security are to survey and inventorise the local stockfeed resources, develop a database of information on the resources and improve the capacity of the feed analysis laboratory.

Botswana (2011-2012) AGWEST Food Security assisted the Ministry of Agriculture, through the formation of a biosecurity taskforce and capacity building activities in increased integration of plant, animal and wildlife biosecurity and the development of a National Biosecurity Strategy for Botswana.

Iraq (2012) Under the AusAID funded Iraq Partnership Facility AGWEST Food Security provided training to 20 Iraqi national from the Ministry of Agriculture in tackling rust in wheat.

Morocco (2011-2014) Following a signed Memorandum of Understanding with the National Ovine and Caprine Breeders Association of Morocco (ANOC), AGWEST Food Security is assisting ANOC with the planning and implementation of an integrated project for the development of sheep in the Middle Atlas region and reviewing genetic improvement, nutrition, carcass composition, meat quality, and training.

Morocco (2011-2014) Working with the Directorate of Education, Training and Research at the

Moroccan Ministry of Agriculture, AGWEST Food Security is reviewing national institutions in charge of agriculture research, education and training. The evaluation will improve management and help to develop a National Research and Agriculture Education system for Morocco, which is heavily dependent on agriculture and fishing.

Africa (2012) AGWEST Food Security provided training in drought policies to participants from Morocco, Tunisia and South Africa. The training aimed to help farm businesses and rural communities to survive drought and also contribute to food security in Africa. AusAID funded the training under the Australian Leadership Awards Fellowship program. The main objective was to equip the respective governments with policies to improve preparedness for drought. Well-developed policies can potentially mitigate climate change, encourage sustainable farming and enhance food and water security.



Biosecurity

'Biosecurity' is the management of the risks to the economy, the environment, and the community of pests and diseases entering, emerging, establishing or spreading. Biosecurity safeguards valuable resources from biological threats.

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.

Market access is critical for Western Australia's agrifood sector as 80 per cent of our agricultural production is exported.

WA is free from many market-sensitive animal and plant pests, diseases and weeds. Consequently, our 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. Globalisation has increased the trade of goods and movement of people around the world. New opportunities increase our exposure to the spread of pests, diseases and weeds.

Western Australia also employs comprehensive 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.

Our role is critical to ensure biosecurity systems evolve, ensuring Western Australia is best equipped to reduce risks to agrifood and other businesses, maintain food quality and integrity; and capture market benefits for the state's economy and community.

Sustainable agriculture

Responsible management of the state's land and water resources is essential for Western Australia's agriculture and food sector to meet current and future demand.

Sustainable agricultural production is achieved by maintaining and improving the condition of natural resource assets.

The Department of Agriculture and Food works with a number of stakeholders and experts to protect and improve the productive capacity of the state's land and water resources. This is based on extensive assessment and monitoring across the state, led by the department.

The department also works with stakeholders to develop new tools and strategies to enhance the condition of natural resource assets.

For Australia to be able to compete internationally, it is important for our grains industry to have access to the latest global innovations in agriculture, including genetic modification (GM).

The use of GM is strictly regulated throughout Australia by the Office of the Gene Technology Regulator (OGTR), who has only permitted four GM crops to be grown. 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 has been approved but not yet grown commercially.

The Regulator's controls are designed to ensure that GM plants and trials will not harm human health or safety, or the environment.

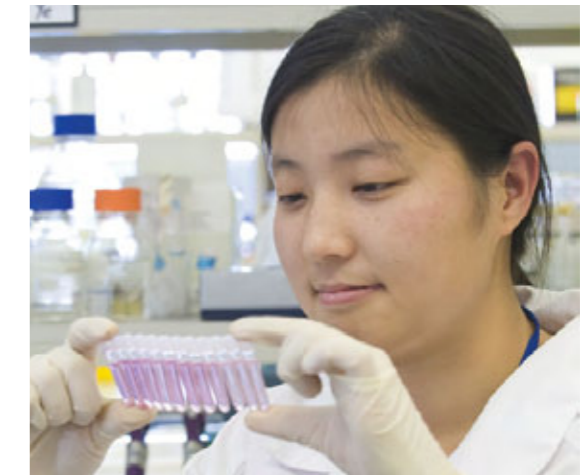
The *Western Australian Genetically Modified Crops Free Areas Act 2003* underpins a prohibition on the commercial cultivation of GM crops in WA. In 2008 an exemption was granted for the commercial cultivation of cotton in the Ord River Irrigation Area (ORIA). Since the exemption order, a lack of infrastructure and low international prices has led to only small plantings of GM cotton in the area.

Roundup Ready® canola contains two genes from a soil bacterium that provides tolerance to glyphosate, Australia's most widely used broad spectrum herbicide. This allows the weeds to be killed, while leaving the crop unaffected as the plant is able to neutralise the herbicide.

In 2009 an exemption order permitted limited commercial size trials of GM canola. Around 860 hectares of GM canola was grown at 20 sites, including 17 grower properties, in order to compare its performance with other varieties and to establish if successful segregation from non-GM canola was possible. The Department of Agriculture and Food

played a supervisory role with authorised officers visiting each trial site at least three times during the growing season to ensure growers complied with the exemption order conditions. It was demonstrated that the WA grains industry could effectively segregate non-GM from GM canola and that Roundup Ready® canola was suitable for local farming conditions.

In 2010 approval was given for the commercial cultivation of GM canola in WA where 317 growers chose to plant around 72,000 hectares. In 2011, 326 growers chose to plant more than 90,000 hectares of GM canola and in 2012 industry sources estimated that approximately 120,000 hectares of GM canola was planted. The WA grains industry has continued to effectively segregate non-GM from GM canola and enabled the export of Western Australian non-GM canola into GM-sensitive markets such as the European Union.



Value of agrifood, fisheries and forest exports, 2011-12

Commodity	WA A\$M	Aust A\$M	Proportion WA to Aust %	Commodity	WA A\$M	Aust A\$M	Proportion WA to Aust %
Wheat	1,881	6,353	30	Essential oils	14	88	16
Canola	587	1,344	44	Animal fat, cattle	14	215	6
Barley	547	1,633	33	Meat, other	13	107	12
Wool, greasy	403	2,449	16	Wool, degreased	12	133	9
Woodchips	282	687	41	Offal, cattle	12	447	3
Sheep	244	345	71	Canola oil	12	136	9
Crayfish	206	407	51	Scallops	10	15	65
Cattle	172	651	26	Offal, sheep	7	120	6
Malt	124	352	35	Potatoes	7	46	16
Lamb	101	1,093	9	Pasture products	6	11	56
Pearls	85	216	39	Goat meat	6	114	5
Beef	78	4,715	2	Animal fat, other	6	136	4
Cereal hay	77	217	35	Cereal straw	6	22	25
Mutton	56	403	14	Stockfood, other	6	114	5
Lupins	65	85	76	Abalone	5	197	3
Carrots	48	51	93	Strawberries	4	6	72
Milk fresh	44	102	43	Oilseeds, other	4	15	27
Wine	44	1,910	2	Cream	4	13	29
Processed oats	41	59	69	Flowers	3	5	66
Other timber products	36	341	11	Crabs	3	11	29
Skins, sheep	33	434	8	Pasta	3	8	35
Skins, cattle	24	549	4	Confectioneries	3	192	1
Pig meat	22	117	19	Wool grease	3	10	28
Field peas	19	94	21	Chick peas	3	384	1
Prawns	19	66	29	Lucerne hay	3	6	46
Oats	18	56	33	Cereal meal	2	75	3
Pet food	18	361	5	Other	43	10,125	0
Lucerne meal	14	27	53	Total	5,502	37,868	15

Market	WA A\$M	Aust A\$M	Proportion WA to Aust %	Market	WA A\$M	Aust A\$M	Proportion WA to Aust %
China	1,238	8,190	15	Egypt	32	405	8
Japan	835	4,970	17	South Africa	31	221	14
South Korea	446	2,070	22	Ship & aircraft stores	25	53	47
Indonesia	413	2,281	18	United Kingdom	20	637	3
Netherlands	394	764	52	New Zealand	15	1,414	1
Saudi Arabia	234	845	28	Czech Republic	15	93	16
Thailand	160	1,019	16	Russian Federation	14	401	4
Kuwait	153	358	43	Italy	14	424	3
Vietnam	145	953	15	Mauritius	14	82	17
Singapore	117	911	13	Switzerland	13	76	17
Malaysia	114	889	13	Spain	12	43	28
Belgium	85	438	19	Bangladesh	12	349	3
Iraq	77	168	46	Mexico	9	46	20
UAE	77	577	13	Oman	9	132	7
Philippines	75	686	11	France	8	97	8
USA	61	2,283	3	Sri Lanka	7	169	4
Qatar	61	174	35	Nepal	7	16	45
India	59	521	11	Canada	4	337	1
Pakistan	57	316	18	Cambodia	3	10	28
Yemen	54	252	21	Myanmar	3	70	4
Germany	51	283	18	Papua New Guinea	3	295	1
Israel	50	71	71	Christmas Island	2	4	67
Bahrain	48	127	38	Brunei	2	21	11
Taiwan	44	780	6	Libya	2	11	17
Sudan	43	254	17	Lithuania	2	4	41
Iran	41	183	23	Trinidad and Tobago	2	14	11
Jordan	41	166	25	Other	16	1,794	1
Turkey	36	145	25	Total	5,502	37,868	15

Need further information?

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