



AUSTRALIAN  
**FOOD &  
GROCERY**  
COUNCIL



# STATE OF THE INDUSTRY 2018: Data Annex

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*Sustaining Australia*



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# CONTENTS

A Data.....	5
B Methodology.....	35
C Detailed sector definition .....	39
D Full list of products .....	43
E Glossary .....	54

# A Data<sup>1, 2</sup>

**Table 1: Turnover, by Food and Beverage Manufacturing Industry, nominal, \$ million**

	FY08	FY09	FY10	FY11	FY12	FY13	FY14	FY15	FY16	FY17	FY17 Change
	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	%
Meat and meat product manufacturing	18,574	20,111	19,922	20,693	22,901	22,842	25,537	29,320	29,615	27,954	-5.6
Dairy product manufacturing	13,571	12,522	13,011	13,332	12,182	13,132	13,573	13,694	13,749	14,028	2.0
Fruit and vegetable processing	4,867	5,168	5,485	5,611	5,410	5,601	5,575	5,370	5,219	5,387	3.2
Oil and fat manufacturing	2,091	3,314	2,716	2,687	1,333	1,634	1,626	1,765	1,880	2,179	15.9
Bakery product manufacturing	7,231	7,684	8,126	7,862	8,444	8,007	8,602	8,144	8,064	7,992	-0.9
Grain mill and cereal product manufacturing	4,904	5,301	6,451	5,217	5,462	5,548	5,662	6,050	5,848	6,284	7.5
Sugar and confectionery manufacturing	6,991	7,221	7,489	7,994	8,378	8,313	8,995	9,213	9,202	9,643	4.8
Seafood processing	1,212	1,386	1,407	1,093	1,137	1,100	1,221	916	964	926	-3.9
Other food product manufacturing	8,276	9,417	9,519	9,393	10,500	10,465	10,683	11,158	11,929	11,952	0.2
Soft drink, cordial and syrup manufacturing	4,365	4,423	4,966	4,760	4,975	5,713	5,715	5,754	6,019	5,651	-6.1
Beer manufacturing	3,871	4,199	4,423	4,391	4,271	4,551	4,722	4,905	4,611	4,341	-5.9
Wine and other alcoholic beverage manufacturing	5,219	5,725	5,779	5,166	5,438	5,273	5,110	5,338	6,005	5,780	-3.7
<b>Total</b>	<b>81,172</b>	<b>86,471</b>	<b>89,294</b>	<b>88,199</b>	<b>90,431</b>	<b>92,179</b>	<b>97,021</b>	<b>101,627</b>	<b>103,105</b>	<b>102,117</b>	<b>-1.0</b>

<sup>1</sup> The sum of individual items in addition to the decimals displayed for percentage changes in this section may not equal the totals due to rounding.

<sup>2</sup> Totals at the State and Territory level may not align with totals at the National level or Industry level due to ABS redactions. Specifically, due to confidentiality and identification issues, some data points for certain jurisdictions and industries are not made available by the ABS and thus the totals provided by State may be (for some variables) divergent from totals reported in sections referring to the industry level.

Table 2: Turnover, by Food and Beverage Manufacturing Industry, real (2016-17), \$ million

	FY08	FY09	FY10	FY11	FY12	FY13	FY14	FY15	FY16	FY17	FY17 Change
	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	%
Meat and meat product manufacturing	21,874	22,554	21,974	22,076	24,247	24,051	26,545	29,855	30,092	27,954	-7.1
Dairy product manufacturing	15,982	14,043	14,351	14,223	12,898	13,827	14,109	13,944	13,971	14,028	0.4
Fruit and vegetable processing	5,732	5,796	6,050	5,986	5,728	5,898	5,795	5,468	5,303	5,387	1.6
Oil and fat manufacturing	2,462	3,717	2,996	2,867	1,411	1,721	1,690	1,797	1,910	2,179	14.1
Bakery product manufacturing	8,516	8,618	8,963	8,387	8,940	8,431	8,941	8,293	8,194	7,992	-2.5
Grain mill and cereal product manufacturing	5,775	5,945	7,115	5,566	5,783	5,842	5,885	6,160	5,942	6,284	5.8
Sugar and confectionery manufacturing	8,233	8,098	8,260	8,528	8,870	8,753	9,350	9,381	9,350	9,643	3.1
Seafood processing	1,427	1,554	1,552	1,166	1,204	1,158	1,269	933	980	926	-5.5
Other food product manufacturing	9,746	10,561	10,499	10,021	11,117	11,019	11,105	11,362	12,121	11,952	-1.4
Soft drink, cordial and syrup manufacturing	5,140	4,960	5,477	5,078	5,267	6,016	5,941	5,859	6,116	5,651	-7.6
Beer manufacturing	4,559	4,709	4,878	4,684	4,522	4,792	4,908	4,994	4,685	4,341	-7.3
Wine and other alcoholic beverage manufacturing	6,146	6,421	6,374	5,511	5,758	5,552	5,312	5,435	6,102	5,780	-5.3
<b>Total</b>	<b>95,592</b>	<b>96,976</b>	<b>98,489</b>	<b>94,093</b>	<b>95,745</b>	<b>97,060</b>	<b>100,850</b>	<b>103,481</b>	<b>104,766</b>	<b>102,117</b>	<b>-2.5</b>

Table 3: Turnover, by Grocery Industry, nominal, \$ million

	FY08	FY09	FY10	FY11	FY12	FY13	FY14	FY15	FY16	FY17	FY17 Change
	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	%
Sanitary paper product manufacturing	2,147	2,235	2,237	2,389	2,297	2,267	2,173	2,209	2,200	2,020	-8.2
Human pharmaceutical and medicinal product manufacturing	7,523	8,223	9,571	9,328	9,521	9,453	8,732	9,748	8,903	8,564	-3.8
Cleaning compound manufacturing	2,059	2,337	2,492	2,528	1,976	1,747	1,721	2,026	2,157	1,973	-8.5
Cosmetic and toiletry preparation manufacturing	886	750	845	954	827	846	901	1,178	1,364	1,325	-2.9
Polymer film and sheet packaging material manufacturing	2,872	2,438	2,465	2,147	2,139	1,913	2,171	2,181	2,241	2,176	-2.9
<b>Total</b>	<b>15,487</b>	<b>15,983</b>	<b>17,610</b>	<b>17,346</b>	<b>16,760</b>	<b>16,226</b>	<b>15,698</b>	<b>17,342</b>	<b>16,865</b>	<b>16,058</b>	<b>-4.8</b>

Table 4: Turnover, by Grocery Industry, real (2016-17), \$ million

	FY08	FY09	FY10	FY11	FY12	FY13	FY14	FY15	FY16	FY17	FY17 Change
	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	%
Sanitary paper product manufacturing	2,528	2,507	2,467	2,549	2,432	2,387	2,259	2,249	2,235	2,020	-9.6
Human pharmaceutical and medicinal product manufacturing	8,860	9,222	10,557	9,951	10,081	9,954	9,077	9,926	9,046	8,564	-5.3
Cleaning compound manufacturing	2,425	2,621	2,749	2,697	2,092	1,840	1,789	2,063	2,192	1,973	-10.0
Cosmetic and toiletry preparation manufacturing	1,043	841	932	1,018	876	891	937	1,199	1,386	1,325	-4.4
Polymer film and sheet packaging material manufacturing	3,382	2,734	2,719	2,290	2,265	2,014	2,257	2,221	2,277	2,176	-4.4
<b>Total</b>	<b>18,238</b>	<b>17,925</b>	<b>19,424</b>	<b>18,505</b>	<b>17,746</b>	<b>17,086</b>	<b>16,319</b>	<b>17,658</b>	<b>17,136</b>	<b>16,058</b>	<b>-6.3</b>

Table 5: Turnover, by Fresh Produce Industry, nominal, \$ million

	FY08	FY09	FY10	FY11	FY12	FY13	FY14	FY15	FY16	FY17	FY17 Change
	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	%
Under Cover Vegetable Growing in Australia	463	443	487	504	506	532	507	568	598	626	4.6
Outdoor Vegetable Growing in Australia	3,436	3,718	3,741	3,976	3,973	4,418	4,124	3,982	4,767	6,033	26.6
Apple, Pear and Stone Fruit Growing in Australia	1,081	1,281	584	1,113	1,171	753	782	931	1,079	1,285	19.1
Grape Growing in Australia	1,975	1,391	1,259	1,082	1,091	1,218	1,036	1,153	1,319	1,218	-7.7
Citrus Fruit, Nut and Other Fruit Growing in Australia	2,409	2,010	2,764	2,006	1,895	2,914	2,388	2,578	3,332	3,196	-4.1
Egg Farming in Australia	545	512	485	605	610	676	718	755	817	815	-0.3
<b>Total</b>	<b>9,909</b>	<b>9,355</b>	<b>9,320</b>	<b>9,286</b>	<b>9,246</b>	<b>10,511</b>	<b>9,555</b>	<b>9,967</b>	<b>11,912</b>	<b>13,173</b>	<b>10.6</b>

Table 6: Turnover, by Fresh Produce Industry, real (2016-17), \$ million

	FY08	FY09	FY10	FY11	FY12	FY13	FY14	FY15	FY16	FY17	FY17 Change
	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	%
Under Cover Vegetable Growing in Australia	546	497	537	538	535	561	527	578	608	626	2.9
Outdoor Vegetable Growing in Australia	4,047	4,170	4,126	4,242	4,207	4,652	4,287	4,055	4,844	6,033	24.5
Apple, Pear and Stone Fruit Growing in Australia	1,273	1,437	644	1,188	1,239	792	813	947	1,096	1,285	17.2
Grape Growing in Australia	2,325	1,560	1,389	1,154	1,155	1,282	1,077	1,174	1,340	1,218	-9.2
Citrus Fruit, Nut and Other Fruit Growing in Australia	2,837	2,255	3,048	2,140	2,007	3,068	2,482	2,625	3,386	3,196	-5.6
Egg Farming in Australia	642	575	535	645	645	711	746	769	830	815	-1.9
<b>Total</b>	<b>11,670</b>	<b>10,494</b>	<b>10,279</b>	<b>9,907</b>	<b>9,788</b>	<b>11,066</b>	<b>9,932</b>	<b>10,148</b>	<b>12,104</b>	<b>13,173</b>	<b>8.8</b>



Table 7: IVA, by Food and Beverage Manufacturing Industry, nominal, \$ million

	FY08	FY09	FY10	FY11	FY12	FY13	FY14	FY15	FY16	FY17	FY17 Change
	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	%
Meat and meat product manufacturing	4,144	4,359	4,240	4,535	4,428	4,753	5,575	6,395	5,822	5,220	-10.3
Dairy product manufacturing	2,367	2,039	2,328	2,211	2,190	2,449	2,371	2,233	2,704	2,755	1.9
Fruit and vegetable processing	1,336	1,301	1,239	1,352	1,218	1,359	1,169	1,406	1,408	1,312	-6.8
Oil and fat manufacturing	254	333	174	220	236	240	201	232	227	203	-10.6
Bakery product manufacturing	3,140	3,323	3,319	3,116	3,643	3,516	3,179	2,988	3,124	3,213	2.8
Grain mill and cereal product manufacturing	949	954	1,170	1,297	1,325	1,316	1,260	1,333	1,300	1,360	4.6
Sugar and confectionery manufacturing	1,966	2,238	1,873	2,527	2,307	2,130	2,361	2,130	2,336	2,601	11.3
Seafood processing	155	234	305	256	214	214	183	177	202	167	-17.3
Other food product manufacturing	1,758	1,769	2,183	2,240	2,512	2,563	2,468	2,512	3,049	2,858	-6.3
Soft drink, cordial and syrup manufacturing	1,524	1,617	1,791	1,542	1,907	2,050	1,981	1,935	2,099	1,780	-15.2
Beer manufacturing	1,436	1,863	1,586	1,628	2,011	1,808	1,938	1,958	2,041	1,765	-13.5
Wine and other alcoholic beverage manufacturing	1,347	1,136	1,395	1,251	1,632	1,675	1,633	1,655	1,703	1,414	-17.0
<b>Total</b>	<b>20,376</b>	<b>21,166</b>	<b>21,603</b>	<b>22,175</b>	<b>23,623</b>	<b>24,073</b>	<b>24,319</b>	<b>24,954</b>	<b>26,015</b>	<b>24,648</b>	<b>-5.3</b>

Table 8: IVA, by Food and Beverage Manufacturing Industry, real (2016-17), \$ million

	FY08	FY09	FY10	FY11	FY12	FY13	FY14	FY15	FY16	FY17	FY17 Change
	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	%
Meat and meat product manufacturing	4,880	4,889	4,677	4,838	4,688	5,005	5,795	6,512	5,916	5,220	-11.8
Dairy product manufacturing	2,788	2,287	2,568	2,359	2,319	2,579	2,465	2,274	2,748	2,755	0.3
Fruit and vegetable processing	1,573	1,459	1,367	1,442	1,290	1,431	1,215	1,432	1,431	1,312	-8.3
Oil and fat manufacturing	299	373	192	235	250	253	209	236	231	203	-12.1
Bakery product manufacturing	3,698	3,727	3,661	3,324	3,857	3,702	3,304	3,043	3,174	3,213	1.2
Grain mill and cereal product manufacturing	1,118	1,070	1,291	1,384	1,403	1,386	1,310	1,357	1,321	1,360	3.0
Sugar and confectionery manufacturing	2,315	2,510	2,066	2,696	2,443	2,243	2,454	2,169	2,374	2,601	9.6
Seafood processing	183	262	336	273	227	225	190	180	205	167	-18.6
Other food product manufacturing	2,070	1,984	2,408	2,390	2,660	2,699	2,565	2,558	3,098	2,858	-7.8
Soft drink, cordial and syrup manufacturing	1,795	1,813	1,975	1,645	2,019	2,159	2,059	1,970	2,133	1,780	-16.5
Beer manufacturing	1,691	2,089	1,750	1,737	2,129	1,904	2,014	1,993	2,074	1,765	-14.9
Wine and other alcoholic beverage manufacturing	1,586	1,274	1,539	1,335	1,728	1,764	1,697	1,685	1,730	1,414	-18.3
<b>Total</b>	<b>23,996</b>	<b>23,737</b>	<b>23,830</b>	<b>23,658</b>	<b>25,013</b>	<b>25,350</b>	<b>25,277</b>	<b>25,409</b>	<b>26,435</b>	<b>24,648</b>	<b>-6.8</b>



Table 9: IVA, by Grocery Industry, nominal, \$ million

	FY08	FY09	FY10	FY11	FY12	FY13	FY14	FY15	FY16	FY17	FY17 Change
	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	%
Sanitary paper product manufacturing	667	761	731	777	597	619	670	630	598	499	-16.6
Human pharmaceutical and medicinal product manufacturing	1,885	2,386	2,711	2,316	2,767	2,271	2,402	2,507	2,290	2,363	3.2
Cleaning compound manufacturing	666	769	884	942	581	511	579	664	743	659	-11.3
Cosmetic and toiletry preparation manufacturing	294	237	292	293	263	244	304	414	451	351	-22.2
Polymer film and sheet packaging material manufacturing	901	845	776	702	751	624	666	632	671	733	9.2
<b>Total</b>	<b>4,413</b>	<b>4,998</b>	<b>5,394</b>	<b>5,030</b>	<b>4,959</b>	<b>4,269</b>	<b>4,621</b>	<b>4,847</b>	<b>4,753</b>	<b>4,605</b>	<b>-3.1</b>

Table 10: IVA, by Grocery Industry, real (2016-17), \$ million

	FY08	FY09	FY10	FY11	FY12	FY13	FY14	FY15	FY16	FY17	FY17 Change
	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	%
Sanitary paper product manufacturing	786	853	806	829	632	652	696	641	608	499	-17.9
Human pharmaceutical and medicinal product manufacturing	2,220	2,676	2,990	2,471	2,930	2,391	2,497	2,553	2,327	2,363	1.6
Cleaning compound manufacturing	784	862	975	1,005	615	538	602	676	755	659	-12.7
Cosmetic and toiletry preparation manufacturing	346	266	322	313	278	257	316	422	458	351	-23.4
Polymer film and sheet packaging material manufacturing	1,061	948	856	749	795	657	692	644	682	733	7.5
<b>Total</b>	<b>5,197</b>	<b>5,605</b>	<b>5,949</b>	<b>5,367</b>	<b>5,250</b>	<b>4,495</b>	<b>4,803</b>	<b>4,936</b>	<b>4,830</b>	<b>4,605</b>	<b>-4.7</b>

Table 11: IVA, by Fresh Produce Industry, nominal, \$ million

	FY08	FY09	FY10	FY11	FY12	FY13	FY14	FY15	FY16	FY17	FY17 Change
	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	%
Under Cover Vegetable Growing in Australia	181	136	154	164	169	179	182	211	228	240	5.1
Outdoor Vegetable Growing in Australia	907	1,004	1,059	1,125	1,112	1,242	1,159	1,171	1,387	1,786	28.7
Apple, Pear and Stone Fruit Growing in Australia	314	238	172	234	219	175	196	193	199	242	21.8
Grape Growing in Australia	693	583	546	466	431	503	427	456	504	480	-4.9
Citrus Fruit, Nut and Other Fruit Growing in Australia	563	449	617	455	560	709	594	683	821	764	-7.0
Egg Farming in Australia	100	91	101	116	115	125	130	139	151	150	-0.8
<b>Total</b>	<b>2,758</b>	<b>2,501</b>	<b>2,649</b>	<b>2,560</b>	<b>2,606</b>	<b>2,933</b>	<b>2,688</b>	<b>2,853</b>	<b>3,290</b>	<b>3,662</b>	<b>11.3</b>

Table 12: IVA, by Fresh Produce Industry, real (2016-17), \$ million

	FY08	FY09	FY10	FY11	FY12	FY13	FY14	FY15	FY16	FY17	FY17 Change
	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	%
Under Cover Vegetable Growing in Australia	213	153	170	175	179	188	189	214	232	240	3.5
Outdoor Vegetable Growing in Australia	1,068	1,126	1,168	1,200	1,178	1,307	1,205	1,192	1,410	1,786	26.7
Apple, Pear and Stone Fruit Growing in Australia	370	267	189	249	232	184	204	197	202	242	19.9
Grape Growing in Australia	816	654	602	497	456	530	444	464	513	480	-6.4
Citrus Fruit, Nut and Other Fruit Growing in Australia	663	504	681	486	593	747	617	696	834	764	-8.4
Egg Farming in Australia	118	102	112	123	121	132	135	142	153	150	-2.4
<b>Total</b>	<b>3,248</b>	<b>2,806</b>	<b>2,922</b>	<b>2,730</b>	<b>2,759</b>	<b>3,088</b>	<b>2,794</b>	<b>2,905</b>	<b>3,344</b>	<b>3,662</b>	<b>9.5</b>

Table 13: Businesses, by Food and Beverage Manufacturing Industry, number

	FY08	FY09	FY10	FY11	FY12	FY13	FY14	FY15	FY16	FY17
	#	#	#	#	#	#	#	#	#	#
Meat and meat product manufacturing	1,067	1,088	1,144	1,148	1,096	1,029	1,203	1,234	1,188	1,110
Dairy product manufacturing	354	387	385	388	399	440	474	519	563	573
Fruit and vegetable processing	498	489	548	539	521	519	524	557	575	578
Oil and fat manufacturing	252	225	222	219	218	199	194	184	187	176
Bakery product manufacturing	5,473	5,750	5,779	5,947	6,011	5,897	5,928	5,853	5,852	5,828
Grain mill and cereal product manufacturing	309	300	313	321	313	315	328	332	353	340
Sugar and confectionery manufacturing	360	387	371	379	380	378	356	371	371	387
Seafood processing	306	327	269	250	252	236	233	215	203	212
Other food product manufacturing	1,206	1,246	1,251	1,286	1,277	1,343	1,380	1,437	1,530	1,598
Beverage Manufacturing	2,447	2,344	2,447	2,514	2,525	2,512	2,567	2,621	2,719	2,832
<b>Total</b>	<b>12,272</b>	<b>12,543</b>	<b>12,729</b>	<b>12,991</b>	<b>12,992</b>	<b>12,868</b>	<b>13,187</b>	<b>13,323</b>	<b>13,541</b>	<b>13,634</b>

Table 14: Grocery Businesses, number

	FY08	FY09	FY10	FY11	FY12	FY13	FY14	FY15	FY16	FY17
	#	#	#	#	#	#	#	#	#	#
Total Grocery Businesses	1,611	1,551	1,573	1,578	1,570	1,550	1,516	1,584	1,621	1,694

Table 15: Fresh Produce Businesses, number

	FY08	FY09	FY10	FY11	FY12	FY13	FY14	FY15	FY16	FY17
	#	#	#	#	#	#	#	#	#	#
Total Fresh Produce Businesses	28,046	27,250	27,334	26,059	24,942	23,696	22,799	21,925	21,204	20,758

Table 16: Productivity, by Food and Beverage Manufacturing Industry, nominal, \$IVA/Person

	FY08	FY09	FY10	FY11	FY12	FY13	FY14	FY15	FY16	FY17	FY17 Change
	\$	\$	\$	\$	\$	\$	\$	\$	\$	\$	%
Meat and meat product manufacturing	69,397	71,979	71,757	77,547	73,357	78,552	92,230	102,212	93,699	86,204	-8.0
Dairy product manufacturing	118,854	96,003	116,284	125,547	126,443	139,481	130,282	124,714	139,116	139,205	0.1
Fruit and vegetable processing	99,660	103,690	98,584	115,427	100,404	106,622	92,918	103,802	97,037	98,425	1.4
Oil and fat manufacturing	135,496	187,817	107,077	125,000	168,451	165,746	140,559	154,564	139,435	124,687	-10.6
Bakery product manufacturing	50,023	54,368	53,807	46,164	52,676	51,899	48,500	44,263	44,400	46,900	5.6
Grain mill and cereal product manufacturing	113,816	105,043	121,812	138,984	141,635	142,857	145,413	144,844	144,188	153,084	6.2
Sugar and confectionery manufacturing	106,649	109,824	101,161	143,238	133,214	126,252	143,100	132,834	144,554	153,960	6.5
Seafood processing	47,171	65,601	91,345	82,527	63,389	64,516	62,585	69,385	79,434	65,416	-17.6
Other food product manufacturing	80,403	76,382	93,571	114,766	115,787	113,830	117,742	124,313	140,326	123,360	-12.1
Soft drink, cordial and syrup manufacturing	179,865	207,148	224,972	192,509	235,055	234,098	220,013	233,048	280,840	263,495	-6.2
Beer manufacturing	339,991	456,059	440,145	407,682	483,181	464,923	499,254	497,120	413,385	327,393	-20.8
Wine and other alcoholic beverage manufacturing	81,626	73,295	83,498	77,175	103,448	104,655	99,277	102,693	99,789	84,332	-15.5
<b>Total (weighted average)</b>	<b>89,080</b>	<b>92,492</b>	<b>97,396</b>	<b>102,385</b>	<b>104,780</b>	<b>106,996</b>	<b>111,807</b>	<b>108,995</b>	<b>105,213</b>	<b>102,218</b>	<b>-2.8</b>

**Table 17: Productivity, by Food and Beverage Manufacturing Industry, real (2016-17), \$IVA/Person**

	FY08	FY09	FY10	FY11	FY12	FY13	FY14	FY15	FY16	FY17	FY17 Change
	\$	\$	\$	\$	\$	\$	\$	\$	\$	\$	%
Meat and meat product manufacturing	81,727	80,725	79,148	82,728	77,668	82,711	95,869	104,077	95,209	86,204	-9.5
Dairy product manufacturing	139,969	107,667	128,260	133,935	133,874	146,866	135,423	126,989	141,358	139,205	-1.5
Fruit and vegetable processing	117,365	116,288	108,737	123,139	106,304	112,267	96,584	105,696	98,600	98,425	-0.2
Oil and fat manufacturing	159,569	210,636	118,105	133,352	178,350	174,522	146,106	157,384	141,681	124,687	-12.0
Bakery product manufacturing	58,911	60,974	59,349	49,248	55,771	54,647	50,414	45,071	45,115	46,900	4.0
Grain mill and cereal product manufacturing	134,037	117,805	134,357	148,270	149,959	150,421	151,150	147,487	146,511	153,084	4.5
Sugar and confectionery manufacturing	125,597	123,168	111,580	152,808	141,042	132,937	148,746	135,258	146,884	153,960	4.8
Seafood processing	55,551	73,572	100,752	88,041	67,114	67,932	65,055	70,651	80,714	65,416	-19.0
Other food product manufacturing	94,688	85,662	103,207	122,434	122,591	119,857	122,388	126,582	142,587	123,360	-13.5
Soft drink, cordial and syrup manufacturing	211,821	232,316	248,142	205,372	248,868	246,494	228,695	237,300	285,365	263,495	-7.7
Beer manufacturing	400,394	511,468	485,476	434,921	511,576	489,541	518,954	506,190	420,045	327,393	-22.1
Wine and other alcoholic beverage manufacturing	96,128	82,200	92,098	82,331	109,528	110,196	103,194	104,567	101,397	84,332	-16.8
<b>Total (weighted average)</b>	<b>104,906</b>	<b>103,730</b>	<b>107,427</b>	<b>109,226</b>	<b>110,937</b>	<b>112,661</b>	<b>116,219</b>	<b>110,984</b>	<b>106,908</b>	<b>102,218</b>	<b>-4.4</b>

**Table 18: Productivity, by Grocery Industry, nominal, \$IVA/Person**

	FY08	FY09	FY10	FY11	FY12	FY13	FY14	FY15	FY16	FY17	FY17 Change
	\$	\$	\$	\$	\$	\$	\$	\$	\$	\$	%
Sanitary paper product manufacturing	196,490	227,776	219,585	210,969	182,736	217,498	267,679	251,597	254,036	206,284	-18.8
Human pharmaceutical and medicinal product manufacturing	137,547	169,919	191,171	159,845	180,779	155,911	167,890	176,748	160,274	175,976	9.8
Cleaning compound manufacturing	140,804	163,166	209,727	197,692	137,710	124,604	132,890	142,826	160,614	179,369	11.7
Cosmetic and toiletry preparation manufacturing	78,843	76,206	106,686	95,627	87,115	79,686	92,317	96,571	92,154	82,666	-10.3
Polymer film and sheet packaging material manufacturing	126,836	126,176	121,118	125,156	137,194	129,300	132,855	128,065	138,293	159,939	15.7
<b>Total (weighted average)</b>	<b>135,113</b>	<b>156,662</b>	<b>174,738</b>	<b>159,127</b>	<b>158,510</b>	<b>145,199</b>	<b>156,788</b>	<b>158,611</b>	<b>153,253</b>	<b>162,434</b>	<b>6.0</b>

Table 19: Productivity, by Grocery Industry, real (2016-17), \$IVA/Person

	FY08	FY09	FY10	FY11	FY12	FY13	FY14	FY15	FY16	FY17	FY17 Change
	\$	\$	\$	\$	\$	\$	\$	\$	\$	\$	%
Sanitary paper product manufacturing	231,399	255,450	242,201	225,065	193,475	229,015	278,241	256,188	258,129	206,284	-20.1
Human pharmaceutical and medicinal product manufacturing	161,983	190,563	210,860	170,525	191,402	164,167	174,514	179,973	162,857	175,976	8.1
Cleaning compound manufacturing	165,820	182,990	231,327	210,900	145,803	131,202	138,133	145,432	163,202	179,369	9.9
Cosmetic and toiletry preparation manufacturing	92,851	85,465	117,674	102,016	92,234	83,906	95,960	98,333	93,638	82,666	-11.7
Polymer film and sheet packaging material manufacturing	149,370	141,506	133,592	133,518	145,256	136,146	138,097	130,401	140,522	159,939	13.8
<b>Total (weighted average)</b>	<b>159,117</b>	<b>175,696</b>	<b>192,735</b>	<b>169,759</b>	<b>167,826</b>	<b>152,887</b>	<b>162,974</b>	<b>161,505</b>	<b>155,723</b>	<b>162,434</b>	<b>4.3</b>

Table 20: Productivity, by Fresh Produce Industry, nominal, \$IVA/Person

	FY08	FY09	FY10	FY11	FY12	FY13	FY14	FY15	FY16	FY17	FY17 Change
	\$	\$	\$	\$	\$	\$	\$	\$	\$	\$	%
Under Cover Vegetable Growing in Australia	74,917	63,068	66,408	73,739	78,832	88,603	88,435	94,908	101,107	102,477	1.4
Outdoor Vegetable Growing in Australia	65,521	77,209	78,566	85,522	82,357	89,163	85,547	87,392	99,491	119,862	20.5
Apple, Pear and Stone Fruit Growing in Australia	18,866	25,354	17,661	25,151	23,662	19,523	22,642	23,128	25,277	29,846	18.1
Grape Growing in Australia	51,341	46,379	45,500	41,854	38,018	40,776	38,174	42,183	48,162	48,124	-0.1
Citrus Fruit, Nut and Other Fruit Growing in Australia	45,419	41,648	44,558	40,967	45,882	53,875	50,597	56,004	61,975	58,887	-5.0
Egg Farming in Australia	39,207	33,272	41,704	44,313	43,874	48,925	47,225	45,777	44,308	41,797	-5.7
<b>Total (weighted average)</b>	<b>44,950</b>	<b>49,398</b>	<b>49,239</b>	<b>51,681</b>	<b>51,029</b>	<b>55,388</b>	<b>53,813</b>	<b>57,031</b>	<b>64,279</b>	<b>70,573</b>	<b>9.8</b>

Table 21: Productivity, by Fresh Produce Industry, real (2016-17), \$IVA/Person

	FY08	FY09	FY10	FY11	FY12	FY13	FY14	FY15	FY16	FY17	FY17 Change
	\$	\$	\$	\$	\$	\$	\$	\$	\$	\$	%
Under Cover Vegetable Growing in Australia	88,227	70,730	73,247	78,666	83,464	93,294	91,925	96,639	102,736	102,477	-0.3
Outdoor Vegetable Growing in Australia	77,161	86,590	86,658	91,236	87,197	93,885	88,922	88,986	101,094	119,862	18.6
Apple, Pear and Stone Fruit Growing in Australia	22,217	28,435	19,480	26,831	25,053	20,557	23,536	23,550	25,684	29,846	16.2
Grape Growing in Australia	60,462	52,014	50,186	44,651	40,253	42,935	39,680	42,953	48,938	48,124	-1.7
Citrus Fruit, Nut and Other Fruit Growing in Australia	53,488	46,708	49,148	43,704	48,578	56,727	52,593	57,025	62,974	58,887	-6.5
Egg Farming in Australia	46,173	37,315	46,000	47,273	46,453	51,515	49,089	46,612	45,021	41,797	-7.2
<b>Total (weighted average)</b>	<b>52,936</b>	<b>55,400</b>	<b>54,311</b>	<b>55,134</b>	<b>54,028</b>	<b>58,321</b>	<b>55,936</b>	<b>58,071</b>	<b>65,315</b>	<b>70,573</b>	<b>8.1</b>

Table 22: Net Capital Expenditure, Food and Beverage Product Manufacturing, nominal, \$ million

	FY08	FY09	FY10	FY11	FY12	FY13	FY14	FY15	FY16	FY17	FY17 Change
	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	%
Food product manufacturing	2,559	1,959	2,181	2,387	2,925	3,029	2,827	2,298	2,605	2,362	-9.3
Beverage and tobacco product manufacturing	814	2,908	2,724	604	845	730	839	521	585	544	-7.0
<b>Total</b>	<b>3,373</b>	<b>4,867</b>	<b>4,905</b>	<b>2,991</b>	<b>3,770</b>	<b>3,759</b>	<b>3,666</b>	<b>2,819</b>	<b>3,190</b>	<b>2,906</b>	<b>-8.9</b>

Table 23: Net Capital Expenditure, Food and Beverage Product Manufacturing, real (2016-17), \$ million

	FY08	FY09	FY10	FY11	FY12	FY13	FY14	FY15	FY16	FY17	FY17 Change
	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	%
Food product manufacturing	3,014	2,197	2,406	2,546	3,097	3,189	2,939	2,340	2,647	2,362	-10.8
Beverage and tobacco product manufacturing	959	3,261	3,005	644	895	769	872	531	594	544	-8.35
<b>Total</b>	<b>3,973</b>	<b>5,458</b>	<b>5,411</b>	<b>3,190</b>	<b>3,992</b>	<b>3,958</b>	<b>3,811</b>	<b>2,871</b>	<b>3,241</b>	<b>2,906</b>	<b>-10.3</b>

Table 24: Net Capital Expenditure, Manufacturing, nominal, \$ million

	FY08	FY09	FY10	FY11	FY12	FY13	FY14	FY15	FY16	FY17	FY17 Change
	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	%
<b>Total Manufacturing</b>	<b>15,452</b>	<b>18,890</b>	<b>15,276</b>	<b>13,438</b>	<b>14,976</b>	<b>13,594</b>	<b>11,448</b>	<b>9,502</b>	<b>9,855</b>	<b>9,599</b>	<b>-2.6</b>



Table 25: Net Capital Expenditure, Manufacturing, real (2016-17), \$ million

	FY08	FY09	FY10	FY11	FY12	FY13	FY14	FY15	FY16	FY17	FY17 Change
	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	%
Total Manufacturing	18,197	21,185	16,849	14,336	15,856	14,314	11,900	9,675	10,014	18,197	-2.6

Table 26: Net Capital Expenditure, Private Sector, nominal, \$ million

	FY08	FY09	FY10	FY11	FY12	FY13	FY14	FY15	FY16	FY17	FY17 Change
	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	%
Total Selected Industries	184,422	197,220	200,165	184,161	228,952	224,765	234,882	225,090	211,812	186,099	-12.1

Table 27: Net Capital Expenditure, Private Sector, real (2016-17), \$ million

	FY08	FY09	FY10	FY11	FY12	FY13	FY14	FY15	FY16	FY17	FY17 Change
	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	%
Total Selected Industries	217,187	221,182	220,780	196,466	242,407	236,666	244,150	229,197	215,225	186,099	-13.5

Table 28: Gross Capital Expenditure, Food and Beverage Product Manufacturing, nominal, \$ million

	FY08	FY09	FY10	FY11	FY12	FY13	FY14	FY15	FY16	FY17	FY17 Change
	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	%
Food product manufacturing	3,020	2,403	2,860	3,056	3,184	3,342	3,128	2,686	2,963	2,672	-9.8
Beverage and tobacco product manufacturing	927	2,968	2,807	770	969	853	1,033	736	935	788	-15.7
Total	3,947	5,371	5,667	3,826	4,153	4,195	4,161	3,422	3,898	3,460	-11.2

Table 29: Gross Capital Expenditure, Food and Beverage Product Manufacturing, real (2016-17), \$ million

	FY08	FY09	FY10	FY11	FY12	FY13	FY14	FY15	FY16	FY17	FY17 Change
	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	%
Food product manufacturing	3,557	2,695	3,155	3,260	3,371	3,519	3,251	2,735	3,011	2,672	-11.3
Beverage and tobacco product manufacturing	1,092	3,329	3,096	821	1,026	898	1,074	749	950	788	-17.1
Total	4,649	6,024	6,251	4,082	4,397	4,417	4,325	3,484	3,961	3,460	-12.6

Table 30: Gross Capital Expenditure, Manufacturing, nominal, \$ million

	FY08	FY09	FY10	FY11	FY12	FY13	FY14	FY15	FY16	FY17	FY17 Change
	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	%
Total Manufacturing	17,695	20,862	17,590	15,251	16,572	15,650	13,625	12,435	12,813	12,083	-5.7

Table 31: Gross Capital Expenditure, Manufacturing, real (2016-17), \$ million

	FY08	FY09	FY10	FY11	FY12	FY13	FY14	FY15	FY16	FY17	FY17 Change
	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	%
Total Manufacturing	20,839	23,397	19,402	16,270	17,546	16,479	14,163	12,662	13,019	12,083	-7.2

Table 32: Gross Capital Expenditure, Private Sector, nominal, \$ million

	FY08	FY09	FY10	FY11	FY12	FY13	FY14	FY15	FY16	FY17	FY17 Change
	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	%
Total Selected Industries	216,308	237,948	233,176	227,307	260,765	268,649	285,728	276,655	263,141	243,057	-7.6

Table 33: Gross Capital Expenditure, Private Sector, real (2016-17), \$ million

	FY08	FY09	FY10	FY11	FY12	FY13	FY14	FY15	FY16	FY17	FY17 Change
	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	%
Total Selected Industries	254,738	266,858	257,191	242,494	276,089	282,874	297,002	281,703	267,381	243,057	-9.1

Table 34: Capital Investment, Food and Beverage Product Manufacturing, nominal, \$ million

	FY08	FY09	FY10	FY11	FY12	FY13	FY14	FY15	FY16	FY17	FY17 Change
	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	%
Food product manufacturing	2,177	1,770	1,734	1,972	2,465	2,525	2,215	2,167	2,417	2,284	-5.5
Beverage and tobacco product manufacturing	724	862	830	544	584	726	819	540	409	603	47.4
Total	2,901	2,632	2,564	2,516	3,049	3,251	3,034	2,707	2,826	2,887	2.2

Table 35: Capital Investment, Food and Beverage Product Manufacturing, real (2016-17), \$ million

	FY08	FY09	FY10	FY11	FY12	FY13	FY14	FY15	FY16	FY17	FY17 Change
	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	%
Food product manufacturing	2,564	1,985	1,913	2,104	2,610	2,659	2,302	2,207	2,456	2,284	-7.0
Beverage and tobacco product manufacturing	853	967	915	580	618	764	851	550	416	603	45.1
Total	3,417	2,952	2,828	2,684	3,228	3,423	3,153	2,757	2,872	2,887	0.5

Table 36: Capital Investment, Manufacturing, nominal, \$ million

	FY08	FY09	FY10	FY11	FY12	FY13	FY14	FY15	FY16	FY17	FY17 Change
	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	%
Total Manufacturing	14,149	15,303	11,612	12,420	13,488	12,558	10,746	9,072	9,498	9,015	-5.1

Table 37: Capital Investment, Manufacturing, real (2016-17), \$ million

	FY08	FY09	FY10	FY11	FY12	FY13	FY14	FY15	FY16	FY17	FY17 Change
	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	%
<b>Total Manufacturing</b>	<b>16,663</b>	<b>17,162</b>	<b>12,808</b>	<b>13,250</b>	<b>14,281</b>	<b>13,223</b>	<b>11,170</b>	<b>9,238</b>	<b>9,651</b>	<b>9,015</b>	<b>-6.6</b>

Table 38: Capital Investment, Private Sector, nominal, \$ million

	FY08	FY09	FY10	FY11	FY12	FY13	FY14	FY15	FY16	FY17	FY17 Change
	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	%
<b>Total Selected Industries</b>	<b>153,945</b>	<b>172,572</b>	<b>169,353</b>	<b>171,799</b>	<b>206,010</b>	<b>212,745</b>	<b>213,726</b>	<b>201,017</b>	<b>183,251</b>	<b>168,696</b>	<b>-7.9</b>

Table 39: Capital Investment, Private Sector, real (2016-17), \$ million

	FY08	FY09	FY10	FY11	FY12	FY13	FY14	FY15	FY16	FY17	FY17 Change
	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	%
<b>Total Selected Industries</b>	<b>181,295</b>	<b>193,539</b>	<b>186,795</b>	<b>183,278</b>	<b>218,116</b>	<b>224,010</b>	<b>222,159</b>	<b>204,685</b>	<b>186,204</b>	<b>168,696</b>	<b>-9.4</b>

Table 40: Turnover Growth, by Food and Beverage Product Manufacturing Industry, nominal, percent

	FY08	FY09	FY10	FY11	FY12	FY13	FY14	FY15	FY16	FY17
	%	%	%	%	%	%	%	%	%	%
Meat and meat product manufacturing	0.0 %	8.3 %	(0.9 %)	3.9 %	10.7 %	(0.3 %)	11.8 %	14.8 %	1.0 %	(5.6 %)
Dairy product manufacturing	0.0 %	(7.7 %)	3.9 %	2.5 %	(8.6 %)	7.8 %	3.4 %	0.9 %	0.4 %	2.0 %
Fruit and vegetable processing	0.0 %	6.2 %	6.1 %	2.3 %	(3.6 %)	3.5 %	(0.5 %)	(3.7 %)	(2.8 %)	3.2 %
Oil and fat manufacturing	0.0 %	58.5 %	(18.0 %)	(1.1 %)	(50.4 %)	22.6 %	(0.5 %)	8.5 %	6.5 %	15.9 %
Bakery product manufacturing	0.0 %	6.3 %	5.8 %	(3.2 %)	7.4 %	(5.2 %)	7.4 %	(5.3 %)	(1.0 %)	(0.9 %)
Grain mill and cereal product manufacturing	0.0 %	8.1 %	21.7 %	(19.1 %)	4.7 %	1.6 %	2.1 %	6.9 %	(3.3 %)	7.5 %
Sugar and confectionery manufacturing	0.0 %	3.3 %	3.7 %	6.7 %	4.8 %	(0.8 %)	8.2 %	2.4 %	(0.1 %)	4.8 %
Seafood processing	0.0 %	14.4 %	1.5 %	(22.3 %)	4.0 %	(3.3 %)	11.0 %	(25.0 %)	5.2 %	(3.9 %)
Other food product manufacturing	0.0 %	13.8 %	1.1 %	(1.3 %)	11.8 %	(0.3 %)	2.1 %	4.4 %	6.9 %	0.2 %
Soft drink, cordial and syrup manufacturing	0.0 %	1.3 %	12.3 %	(4.1 %)	4.5 %	14.8 %	0.0 %	0.7 %	4.6 %	(6.1 %)
Beer manufacturing	0.0 %	8.5 %	5.3 %	(0.7 %)	(2.7 %)	6.5 %	3.8 %	3.9 %	(6.0 %)	(5.9 %)
Wine and other alcoholic beverage manufacturing	0.0 %	9.7 %	0.9 %	(10.6 %)	5.3 %	(3.0 %)	(3.1 %)	4.5 %	12.5 %	(3.7 %)

**Table 41: Turnover Growth, by Food and Beverage Product Manufacturing Industry, real (2016-17), percent**

	FY08	FY09	FY10	FY11	FY12	FY13	FY14	FY15	FY16	FY17
	%	%	%	%	%	%	%	%	%	%
Meat and meat product manufacturing	0.0 %	3.1 %	(2.6 %)	0.5 %	9.8 %	(0.8 %)	10.4 %	12.5 %	0.8 %	(7.1 %)
Dairy product manufacturing	0.0 %	(12.1 %)	2.2 %	(0.9 %)	(9.3 %)	7.2 %	2.0 %	(1.2 %)	0.2 %	0.4 %
Fruit and vegetable processing	0.0 %	1.1 %	4.4 %	(1.1 %)	(4.3 %)	3.0 %	(1.7 %)	(5.6 %)	(3.0 %)	1.6 %
Oil and fat manufacturing	0.0 %	50.9 %	(19.4 %)	(4.3 %)	(50.8 %)	21.9 %	(1.8 %)	6.3 %	6.3 %	14.1 %
Bakery product manufacturing	0.0 %	1.2 %	4.0 %	(6.4 %)	6.6 %	(5.7 %)	6.1 %	(7.3 %)	(1.2 %)	(2.5 %)
Grain mill and cereal product manufacturing	0.0 %	2.9 %	19.7 %	(21.8 %)	3.9 %	1.0 %	0.7 %	4.7 %	(3.5 %)	5.8 %
Sugar and confectionery manufacturing	0.0 %	(1.6 %)	2.0 %	3.2 %	4.0 %	(1.3 %)	6.8 %	0.3 %	(0.3 %)	3.1 %
Seafood processing	0.0 %	8.9 %	(0.2 %)	(24.9 %)	3.2 %	(3.8 %)	9.6 %	(26.5 %)	5.0 %	(5.5 %)
Other food product manufacturing	0.0 %	8.4 %	(0.6 %)	(4.6 %)	10.9 %	(0.9 %)	0.8 %	2.3 %	6.7 %	(1.4 %)
Soft drink, cordial and syrup manufacturing	0.0 %	(3.5 %)	10.4 %	(7.3 %)	3.7 %	14.2 %	(1.2 %)	(1.4 %)	4.4 %	(7.6 %)
Beer manufacturing	0.0 %	3.3 %	3.6 %	(4.0 %)	(3.5 %)	6.0 %	2.4 %	1.8 %	(6.2 %)	(7.3 %)
Wine and other alcoholic beverage manufacturing	0.0 %	4.5 %	(0.7 %)	(13.5 %)	4.5 %	(3.6 %)	(4.3 %)	2.3 %	12.3 %	(5.3 %)

**Table 42: IVA Growth, by Food and Beverage Product Manufacturing Industry, nominal, percent**

	FY08	FY09	FY10	FY11	FY12	FY13	FY14	FY15	FY16	FY17
	%	%	%	%	%	%	%	%	%	%
Meat and meat product manufacturing	0.0 %	5.2 %	(2.7 %)	7.0 %	(2.4 %)	7.3 %	17.3 %	14.7 %	(9.0 %)	(10.3 %)
Dairy product manufacturing	0.0 %	(13.9 %)	14.2 %	(5.0 %)	(0.9 %)	11.8 %	(3.2 %)	(5.8 %)	21.1 %	1.9 %
Fruit and vegetable processing	0.0 %	(2.6 %)	(4.8 %)	9.1 %	(9.9 %)	11.6 %	(14.0 %)	20.3 %	0.1 %	(6.8 %)
Oil and fat manufacturing	0.0 %	31.1 %	(47.7 %)	26.4 %	7.3 %	1.7 %	(16.3 %)	15.4 %	(2.2 %)	(10.7 %)
Bakery product manufacturing	0.0 %	5.8 %	(0.1 %)	(6.1 %)	16.9 %	(3.5 %)	(9.6 %)	(6.0 %)	4.6 %	2.8 %
Grain mill and cereal product manufacturing	0.0 %	0.5 %	22.6 %	10.9 %	2.2 %	(0.7 %)	(4.3 %)	5.8 %	(2.5 %)	4.6 %
Sugar and confectionery manufacturing	0.0 %	13.8 %	(16.3 %)	34.9 %	(8.7 %)	(7.7 %)	10.8 %	(9.8 %)	9.7 %	11.3 %
Seafood processing	0.0 %	51.0 %	30.3 %	(16.1 %)	(16.4 %)	0.0 %	(14.5 %)	(3.3 %)	14.1 %	(17.3 %)
Other food product manufacturing	0.0 %	0.6 %	23.4 %	2.6 %	12.1 %	2.0 %	(3.7 %)	1.8 %	21.4 %	(6.3 %)
Soft drink, cordial and syrup manufacturing	0.0 %	6.1 %	10.8 %	(13.9 %)	23.7 %	7.5 %	(3.4 %)	(2.3 %)	8.5 %	(15.2 %)
Beer manufacturing	0.0 %	29.7 %	(14.9 %)	2.6 %	23.5 %	(10.1 %)	7.2 %	1.0 %	4.3 %	(13.5 %)
Wine and other alcoholic beverage manufacturing	0.0 %	(15.7 %)	22.8 %	(10.3 %)	30.5 %	2.6 %	(2.5 %)	1.3 %	2.9 %	(17.0 %)

**Table 43: IVA Growth, by Food and Beverage Product Manufacturing Industry, real (2016-17), percent**

	FY08	FY09	FY10	FY11	FY12	FY13	FY14	FY15	FY16	FY17
	%	%	%	%	%	%	%	%	%	%
Meat and meat product manufacturing	0.0 %	0.2 %	(4.3 %)	3.4 %	(3.1 %)	6.8 %	15.8 %	12.4 %	(9.2 %)	(11.8 %)
Dairy product manufacturing	0.0 %	(18.0 %)	12.3 %	(8.1 %)	(1.7 %)	11.2 %	(4.4 %)	(7.7 %)	20.8 %	0.3 %
Fruit and vegetable processing	0.0 %	(7.3 %)	(6.3 %)	5.5 %	(10.6 %)	11.0 %	(15.1 %)	17.8 %	(0.1 %)	(8.3 %)
Oil and fat manufacturing	0.0 %	24.8 %	(48.6 %)	22.3 %	6.5 %	1.1 %	(17.3 %)	13.1 %	(2.4 %)	(12.1 %)
Bakery product manufacturing	0.0 %	0.8 %	(1.8 %)	(9.2 %)	16.0 %	(4.0 %)	(10.7 %)	(7.9 %)	4.3 %	1.2 %
Grain mill and cereal product manufacturing	0.0 %	(4.3 %)	20.6 %	7.2 %	1.4 %	(1.2 %)	(5.5 %)	3.6 %	(2.7 %)	3.0 %
Sugar and confectionery manufacturing	0.0 %	8.4 %	(17.7 %)	30.5 %	(9.4 %)	(8.2 %)	9.4 %	(11.6 %)	9.4 %	9.6 %
Seafood processing	0.0 %	43.8 %	28.2 %	(18.8 %)	(17.0 %)	(0.5 %)	(15.6 %)	(5.3 %)	13.9 %	(18.6 %)
Other food product manufacturing	0.0 %	(4.2 %)	21.4 %	(0.8 %)	11.3 %	1.5 %	(4.9 %)	(0.3 %)	21.1 %	(7.8 %)
Soft drink, cordial and syrup manufacturing	0.0 %	1.0 %	8.9 %	(16.7 %)	22.7 %	6.9 %	(4.6 %)	(4.3 %)	8.2 %	(16.5 %)
Beer manufacturing	0.0 %	23.5 %	(16.3 %)	(0.7 %)	22.6 %	(10.6 %)	5.8 %	(1.0 %)	4.0 %	(14.9 %)
Wine and other alcoholic beverage manufacturing	0.0 %	(19.7 %)	20.8 %	(13.3 %)	29.5 %	2.1 %	(3.8 %)	(0.7 %)	2.7 %	(18.3 %)

**Table 44: Productivity Growth, by Food and Beverage Product Manufacturing Industry, nominal, percent**

	FY08	FY09	FY10	FY11	FY12	FY13	FY14	FY15	FY16	FY17
	%	%	%	%	%	%	%	%	%	%
Meat and meat product manufacturing	0.0 %	3.7 %	(0.3 %)	8.1 %	(5.4 %)	7.1 %	17.4 %	10.8 %	(8.3 %)	(8.0 %)
Dairy product manufacturing	0.0 %	(19.2 %)	21.1 %	8.0 %	0.7 %	10.3 %	(6.6 %)	(4.3 %)	11.5 %	0.1 %
Fruit and vegetable processing	0.0 %	4.0 %	(4.9 %)	17.1 %	(13.0 %)	6.2 %	(12.9 %)	11.7 %	(6.5 %)	1.4 %
Oil and fat manufacturing	0.0 %	38.6 %	(43.0 %)	16.7 %	34.8 %	(1.6 %)	(15.2 %)	10.0 %	(9.8 %)	(10.6 %)
Bakery product manufacturing	0.0 %	8.7 %	(1.0 %)	(14.2 %)	14.1 %	(1.5 %)	(6.5 %)	(8.7 %)	0.3 %	5.6 %
Grain mill and cereal product manufacturing	0.0 %	(7.7 %)	16.0 %	14.1 %	1.9 %	0.9 %	1.8 %	(0.4 %)	(0.5 %)	6.2 %
Sugar and confectionery manufacturing	0.0 %	3.0 %	(7.9 %)	41.6 %	(7.0 %)	(5.2 %)	13.3 %	(7.2 %)	8.8 %	6.5 %
Seafood processing	0.0 %	39.1 %	39.2 %	(9.7 %)	(23.2 %)	1.8 %	(3.0 %)	10.9 %	14.5 %	(17.6 %)
Other food product manufacturing	0.0 %	(5.0 %)	22.5 %	22.7 %	0.9 %	(1.7 %)	3.4 %	5.6 %	12.9 %	(12.1 %)
Soft drink, cordial and syrup manufacturing	0.0 %	15.2 %	8.6 %	(14.4 %)	22.1 %	(0.4 %)	(6.0 %)	5.9 %	20.5 %	(6.2 %)
Beer manufacturing	0.0 %	34.1 %	(3.5 %)	(7.4 %)	18.5 %	(3.8 %)	7.4 %	(0.4 %)	(16.8 %)	(20.8 %)
Wine and other alcoholic beverage manufacturing	0.0 %	(10.2 %)	13.9 %	(7.6 %)	34.0 %	1.2 %	(5.1 %)	3.4 %	(2.8 %)	(15.5 %)

**Table 45: Productivity Growth, by Food and Beverage Product Manufacturing Industry, real (2016-17), percent**

	FY08	FY09	FY10	FY11	FY12	FY13	FY14	FY15	FY16	FY17
	%	%	%	%	%	%	%	%	%	%
Meat and meat product manufacturing	0.0 %	(1.2 %)	(2.0 %)	4.5 %	(6.1 %)	6.5 %	15.9 %	8.6 %	(8.5 %)	(9.5 %)
Dairy product manufacturing	0.0 %	(23.1 %)	19.1 %	4.4 %	(0.0 %)	9.7 %	(7.8 %)	(6.2 %)	11.3 %	(1.5 %)
Fruit and vegetable processing	0.0 %	(0.9 %)	(6.5 %)	13.2 %	(13.7 %)	5.6 %	(14.0 %)	9.4 %	(6.7 %)	(0.2 %)
Oil and fat manufacturing	0.0 %	32.0 %	(43.9 %)	12.9 %	33.7 %	(2.1 %)	(16.3 %)	7.7 %	(10.0 %)	(12.0 %)
Bakery product manufacturing	0.0 %	3.5 %	(2.7 %)	(17.0 %)	13.2 %	(2.0 %)	(7.7 %)	(10.6 %)	0.1 %	4.0 %
Grain mill and cereal product manufacturing	0.0 %	(12.1 %)	14.1 %	10.4 %	1.1 %	0.3 %	0.5 %	(2.4 %)	(0.7 %)	4.5 %
Sugar and confectionery manufacturing	0.0 %	(1.9 %)	(9.4 %)	36.9 %	(7.7 %)	(5.7 %)	11.9 %	(9.1 %)	8.6 %	4.8 %
Seafood processing	0.0 %	32.4 %	36.9 %	(12.6 %)	(23.8 %)	1.2 %	(4.2 %)	8.6 %	14.2 %	(19.0 %)
Other food product manufacturing	0.0 %	(9.5 %)	20.5 %	18.6 %	0.1 %	(2.2 %)	2.1 %	3.4 %	12.6 %	(13.5 %)
Soft drink, cordial and syrup manufacturing	0.0 %	9.7 %	6.8 %	(17.2 %)	21.2 %	(1.0 %)	(7.2 %)	3.8 %	20.3 %	(7.7 %)
Beer manufacturing	0.0 %	27.7 %	(5.1 %)	(10.4 %)	17.6 %	(4.3 %)	6.0 %	(2.5 %)	(17.0 %)	(22.1 %)
Wine and other alcoholic beverage manufacturing	0.0 %	(14.5 %)	12.0 %	(10.6 %)	33.0 %	0.6 %	(6.4 %)	1.3 %	(3.0 %)	(16.8 %)

**Table 46: Number of Businesses Growth, by AFG Sub-sector, percent**

	FY08	FY09	FY10	FY11	FY12	FY13	FY14	FY15	FY16	FY17
	%	%	%	%	%	%	%	%	%	%
Food and Beverage Manufacturing	0.0 %	2.2 %	1.5 %	2.1 %	0.0 %	(1.0 %)	2.5 %	1.0 %	1.6 %	0.7 %
Grocery	0.0 %	(3.7 %)	1.4 %	0.3 %	(0.5 %)	(1.3 %)	(2.2 %)	4.5 %	2.3 %	4.5 %
Fresh Produce	0.0 %	(2.8 %)	0.3 %	(4.7 %)	(4.3 %)	(5.0 %)	(3.8 %)	(3.8 %)	(3.3 %)	(2.1 %)
<b>Total AFG Businesses</b>	<b>0.0 %</b>	<b>(1.4 %)</b>	<b>0.7 %</b>	<b>(2.4 %)</b>	<b>(2.8 %)</b>	<b>(3.5 %)</b>	<b>(1.6 %)</b>	<b>(1.8 %)</b>	<b>(1.3 %)</b>	<b>(0.8 %)</b>

**Table 47: Food Product Manufacturing Industry Employment, by State, number**

	FY11	FY12	FY13	FY14	FY15	FY16	FY17
	#	#	#	#	#	#	#
Australian Capital Territory	1,145	1,112	1,186	1,186	1,160	1,100	1,208
New South Wales	58,777	64,021	61,094	59,006	59,508	61,576	60,677
Northern Territory	575	700	681	578	629	708	650
Queensland	47,429	46,820	46,722	45,859	47,668	47,816	47,707
South Australia	16,678	17,301	17,590	16,637	16,397	17,104	16,481
Tasmania	6,998	7,182	6,930	6,500	6,822	7,486	7,799
Victoria	60,047	59,935	62,944	61,873	63,073	65,920	64,893
Western Australia	15,009	15,046	14,775	15,615	15,761	15,807	15,894
<b>Total</b>	<b>206,658</b>	<b>212,117</b>	<b>211,922</b>	<b>207,254</b>	<b>211,018</b>	<b>217,517</b>	<b>215,309</b>

**Table 48: Beverage and Tobacco Product Manufacturing Employment, by State, number**

	FY11	FY12	FY13	FY14	FY15	FY16	FY17
	#	#	#	#	#	#	#
Australian Capital Territory	-	99	132	126	107	116	99
New South Wales	9,286	8,149	7,425	7,570	8,982	7,537	7,683
Northern Territory	-	-	30	31	29	29	29
Queensland	3,024	3,049	3,980	4,143	3,149	2,974	2,944
South Australia	7,259	7,169	7,342	7,273	7,117	7,293	7,088
Tasmania	-	483	550	621	1,065	1,130	792
Victoria	6,726	6,929	7,753	7,798	7,248	7,170	7,261
Western Australia	3,890	3,720	3,689	4,113	3,707	4,048	3,782
<b>Total</b>	<b>30,185</b>	<b>29,598</b>	<b>30,901</b>	<b>31,675</b>	<b>31,404</b>	<b>30,297</b>	<b>29,678</b>

**Table 49: Food Product Manufacturing Turnover, by State, nominal, \$ million**

	FY11	FY12	FY13	FY14	FY15	FY16	FY17
	\$m	\$m	\$m	\$m	\$m	\$m	\$m
Australian Capital Territory	194	157	211	194	157	79	157
New South Wales	21,065	21,359	21,890	22,516	23,928	24,170	24,867
Northern Territory	170	174	168	148	164	83	510
Queensland	15,643	16,847	17,009	18,553	20,002	20,976	20,549
South Australia	5,105	5,837	5,180	5,015	5,128	4,133	4,221
Tasmania	1,713	2,166	2,208	2,245	2,402	2,950	2,497
Victoria	25,453	24,436	25,255	27,269	28,609	29,331	28,957
Western Australia	4,538	4,771	4,720	5,533	5,240	4,284	4,590
<b>Total</b>	<b>73,881</b>	<b>75,747</b>	<b>76,641</b>	<b>81,473</b>	<b>85,630</b>	<b>86,006</b>	<b>86,348</b>

**Table 50: Food Product Manufacturing Turnover, by State, real (2016-17), \$ million**

	FY11	FY12	FY13	FY14	FY15	FY16	FY17
	\$m	\$m	\$m	\$m	\$m	\$m	\$m
Australian Capital Territory	207	166	222	202	160	79	157
New South Wales	22,472	22,614	23,049	23,404	24,365	24,559	24,867
Northern Territory	181	184	177	154	167	83	510
Queensland	16,688	17,837	17,910	19,285	20,367	21,314	20,549
South Australia	5,446	6,180	5,454	5,213	5,222	4,200	4,221
Tasmania	1,827	2,293	2,325	2,334	2,446	2,998	2,497
Victoria	27,154	25,872	26,592	28,345	29,131	29,804	28,957
Western Australia	4,841	5,051	4,970	5,751	5,336	4,353	4,590
<b>Total</b>	<b>78,817</b>	<b>80,198</b>	<b>80,699</b>	<b>84,688</b>	<b>87,192</b>	<b>87,389</b>	<b>86,348</b>

**Table 51: Beverage and Tobacco Product Manufacturing Turnover, by State, nominal, \$ million**

	FY11	FY12	FY13	FY14	FY15	FY16	FY17
	\$m	\$m	\$m	\$m	\$m	\$m	\$m
Australian Capital Territory	-	25	45	27	164	169	21
New South Wales	6,673	5,326	5,251	5,431	6,137	5,441	5,265
Northern Territory	-	-	30	41	165	166	46
Queensland	2,695	11,799	4,490	4,450	3,060	3,037	2,805
South Australia	2,256	2,393	2,660	2,656	2,654	2,783	2,607
Tasmania	333	276	293	274	338	330	292
Victoria	3,978	4,087	4,084	4,096	4,304	3,948	4,115
Western Australia	1,366	1,435	1,520	1,528	1,629	1,658	1,371
<b>Total</b>	<b>17,301</b>	<b>25,341</b>	<b>18,373</b>	<b>18,503</b>	<b>18,451</b>	<b>17,532</b>	<b>16,522</b>



**Table 52: Beverage and Tobacco Product Manufacturing Turnover, by State, real (2016-17), \$ million**

	FY11	FY12	FY13	FY14	FY15	FY16	FY17
	\$m	\$m	\$m	\$m	\$m	\$m	\$m
Australian Capital Territory	-	26	47	28	164	169	21
New South Wales	7,119	5,639	5,529	5,645	6,249	5,529	5,265
Northern Territory	-	-	32	43	165	166	46
Queensland	2,875	11,799	4,728	4,626	3,116	3,086	2,805
South Australia	2,407	2,534	2,801	2,761	2,702	2,828	2,607
Tasmania	355	292	309	285	344	335	292
Victoria	4,244	4,327	4,300	4,258	4,383	4,012	4,115
Western Australia	1,457	1,519	1,600	1,588	1,659	1,685	1,371
<b>Total</b>	<b>18,457</b>	<b>26,137</b>	<b>19,346</b>	<b>19,233</b>	<b>18,782</b>	<b>17,809</b>	<b>16,522</b>

**Table 53: Total Manufacturing Turnover, by State, nominal, \$ million**

	FY11	FY12	FY13	FY14	FY15	FY16	FY17
	\$m	\$m	\$m	\$m	\$m	\$m	\$m
Australian Capital Territory	1,189	1,309	1,404	1,180	1,196	1,220	1,271
New South Wales	114,887	116,447	113,018	109,711	104,960	107,554	109,225
Northern Territory	4,296	4,652	4,913	4,999	4,401	4,073	3,159
Queensland	72,128	79,881	78,653	77,384	72,733	73,659	66,460
South Australia	26,828	26,497	24,022	24,316	23,269	22,531	21,695
Tasmania	6,846	7,735	6,475	6,521	6,550	6,807	6,494
Victoria	104,147	102,507	98,965	103,331	104,039	103,424	102,063
Western Australia	58,346	60,204	60,087	58,227	56,877	53,413	53,601
<b>Total</b>	<b>388,667</b>	<b>399,232</b>	<b>387,537</b>	<b>385,669</b>	<b>374,025</b>	<b>372,681</b>	<b>363,968</b>

**Table 54: Total Manufacturing Turnover, by State, real (2016-17), \$ million**

	FY11	FY12	FY13	FY14	FY15	FY16	FY17
	\$m	\$m	\$m	\$m	\$m	\$m	\$m
Australian Capital Territory	1,268	1,386	1,478	1,227	1,218	1,240	1,271
New South Wales	122,563	123,290	119,002	114,040	106,875	109,287	109,225
Northern Territory	4,583	4,925	5,173	5,196	4,481	4,139	3,159
Queensland	76,947	84,575	82,818	80,437	74,060	74,846	66,460
South Australia	28,620	28,054	25,294	25,275	23,694	22,894	21,695
Tasmania	7,303	8,190	6,818	6,778	6,670	6,917	6,494
Victoria	111,105	108,531	104,205	107,408	105,937	105,090	102,063
Western Australia	62,244	63,742	63,269	60,525	57,915	54,274	53,601
<b>Total</b>	<b>414,635</b>	<b>422,693</b>	<b>408,057</b>	<b>400,887</b>	<b>380,849</b>	<b>378,686</b>	<b>363,968</b>

**Table 55: Food, Beverage and Tobacco Product Manufacturing Imports, by State, nominal, \$ million**

	FY08	FY09	FY10	FY11	FY12	FY13	FY14	FY15	FY16	FY17
	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m
Australian Capital Territory	0	0	0	0	-	0	0	-	-	0
New South Wales	3,668	4,223	4,183	4,203	4,590	4,924	5,587	6,178	6,960	6,689
Northern Territory	11	13	5	3	4	3	3	4	4	3
Queensland	1,027	1,240	1,263	1,305	1,386	1,462	1,711	1,816	1,985	1,983
South Australia	445	430	395	372	451	483	549	639	654	563
Tasmania	126	162	123	115	51	52	52	54	69	135
Victoria	3,595	4,137	3,788	4,090	4,277	4,290	5,246	5,563	6,099	6,460
Western Australia	452	528	497	517	580	638	705	772	822	791
<b>Total</b>	<b>9,3234</b>	<b>10,733</b>	<b>10,254</b>	<b>10,605</b>	<b>11,339</b>	<b>11,852</b>	<b>13,853</b>	<b>15,026</b>	<b>16,593</b>	<b>16,624</b>

**Table 56: Food, Beverage and Tobacco Product Manufacturing Imports, by State, real (2016-17), \$ million**

	FY08	FY09	FY10	FY11	FY12	FY13	FY14	FY15	FY16	FY17
	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m
Australian Capital Territory	0	0	0	0	-	0	0	-	-	0
New South Wales	4,319	4,736	4,614	4,484	4,860	5,184	5,808	6,291	7,072	6,689
Northern Territory	13	15	5	4	4	3	3	4	4	3
Queensland	1,209	1,391	1,393	1,393	1,468	1,540	1,779	1,849	2,017	1,983
South Australia	525	482	435	397	478	509	570	651	665	563
Tasmania	148	181	136	123	54	54	54	55	70	135
Victoria	4,234	4,639	4,178	4,363	4,528	4,518	5,453	5,665	6,198	6,460
Western Australia	532	592	548	552	614	672	733	786	836	791
<b>Total</b>	<b>10,980</b>	<b>12,036</b>	<b>11,309</b>	<b>11,316</b>	<b>12,006</b>	<b>12,480</b>	<b>14,400</b>	<b>15,301</b>	<b>16,862</b>	<b>16,624</b>

**Table 57: Food, Beverage and Tobacco Product Manufacturing Exports, by State, nominal, \$ million**

	FY08	FY09	FY10	FY11	FY12	FY13	FY14	FY15	FY16	FY17
	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m
Australian Capital Territory	-	-	-	-	-	-	-	-	-	-
New South Wales	2,932	3,477	3,100	3,030	3,468	3,499	3,814	4,758	5,289	5,536
Northern Territory	2	4	8	6	7	9	10	25	82	76
Queensland	4,222	4,943	3,954	4,504	4,807	5,167	5,597	7,030	7,311	7,374
South Australia	2,769	2,629	2,393	2,453	2,541	2,512	2,880	3,389	3,504	3,816
Tasmania	314	333	311	356	390	411	473	471	508	480
Victoria	5,093	5,520	4,817	5,239	5,394	5,629	6,985	7,505	7,361	7,308
Western Australia	1,045	1,196	995	934	958	1,157	1,446	1,641	1,742	1,808
<b>Total</b>	<b>16,377</b>	<b>18,101</b>	<b>15,578</b>	<b>16,523</b>	<b>17,566</b>	<b>18,383</b>	<b>21,205</b>	<b>24,818</b>	<b>25,798</b>	<b>26,398</b>

**Table 58: Food, Beverage and Tobacco Product Manufacturing Exports, by State, real (2016-17), \$ million**

	FY08	FY09	FY10	FY11	FY12	FY13	FY14	FY15	FY16	FY17
	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m
Australian Capital Territory	-	-	-	-	-	-	-	-	-	-
New South Wales	3,453	3,899	3,419	3,233	3,672	3,684	3,965	4,845	5,374	5,536
Northern Territory	2	4	9	7	7	9	11	25	84	76
Queensland	4,972	5,544	4,361	4,805	5,090	5,441	5,818	7,158	7,429	7,374
South Australia	3,261	2,949	2,639	2,617	2,691	2,645	2,994	3,450	3,561	3,816
Tasmania	370	373	343	380	413	432	491	480	516	480
Victoria	5,998	6,190	5,313	5,589	5,711	5,927	7,261	7,642	7,480	7,308
Western Australia	1,230	1,341	1,098	997	1,014	1,218	1,503	1,671	1,770	1,808
<b>Total</b>	<b>19,286</b>	<b>20,300</b>	<b>17,182</b>	<b>17,628</b>	<b>18,598</b>	<b>19,356</b>	<b>22,043</b>	<b>25,271</b>	<b>26,213</b>	<b>26,398</b>

**Table 59: Grocery Imports, by State, nominal, \$ million**

	FY08	FY09	FY10	FY11	FY12	FY13	FY14	FY15	FY16	FY17
	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m
Australian Capital Territory	0	0	0	0	-	0	0	0	0	0
New South Wales	8,047	9,319	9,555	10,310	10,724	10,919	11,005	10,867	12,383	12,567
Northern Territory	1	1	1	1	2	3	2	5	5	3
Queensland	469	532	517	553	534	548	609	666	853	831
South Australia	106	122	117	121	113	113	141	153	193	180
Tasmania	7	9	10	8	10	9	9	14	12	14
Victoria	2,807	2,866	2,743	3,012	3,093	2,982	3,116	3,393	3,599	3,480
Western Australia	222	293	234	248	253	272	283	311	321	315
<b>Total</b>	<b>11,659</b>	<b>13,142</b>	<b>13,177</b>	<b>14,253</b>	<b>14,729</b>	<b>14,846</b>	<b>15,165</b>	<b>15,409</b>	<b>17,366</b>	<b>17,390</b>

Table 60: Grocery Imports, by State, real (2016-17), \$ million

	FY08	FY09	FY10	FY11	FY12	FY13	FY14	FY15	FY16	FY17
	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m
Australian Capital Territory	0	0	0	0	-	0	0	0	0	0
New South Wales	9,476	10,451	10,539	10,999	11,354	11,497	11,439	11,065	12,582	12,567
Northern Territory	1	1	1	1	2	3	3	5	5	3
Queensland	552	597	571	590	565	577	633	678	866	831
South Australia	125	137	129	129	120	119	146	155	196	180
Tasmania	8	11	11	9	10	9	10	14	12	14
Victoria	3,306	3,215	3,026	3,213	3,274	3,139	3,238	3,455	3,657	3,480
Western Australia	262	328	258	264	268	286	294	317	326	315
<b>Total</b>	<b>13,730</b>	<b>14,740</b>	<b>14,535</b>	<b>15,205</b>	<b>15,593</b>	<b>15,630</b>	<b>15,763</b>	<b>15,689</b>	<b>17,644</b>	<b>17,390</b>

Table 61: Grocery Exports, by State, nominal, \$ million

	FY08	FY09	FY10	FY11	FY12	FY13	FY14	FY15	FY16	FY17
	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m
Australian Capital Territory	-	-	-	0	-	-	-	-	-	-
New South Wales	2,170	1,773	1,700	1,734	1,750	1,426	901	904	1,511	1,862
Northern Territory	1	1	1	0	1	0	0	0	1	1
Queensland	158	157	144	146	164	182	183	197	181	195
South Australia	115	130	126	128	114	97	140	105	170	149
Tasmania	5	3	4	3	3	3	6	11	7	7
Victoria	1,083	1,413	1,477	774	794	887	960	943	1,321	1,785
Western Australia	52	63	55	63	72	72	58	57	77	118
<b>Total</b>	<b>3,584</b>	<b>3,540</b>	<b>3,507</b>	<b>2,848</b>	<b>2,898</b>	<b>2,667</b>	<b>2,248</b>	<b>2,217</b>	<b>3,268</b>	<b>4,117</b>

Table 62: Grocery Exports, by State, real (2016-17), \$ million

	FY08	FY09	FY10	FY11	FY12	FY13	FY14	FY15	FY16	FY17
	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m
Australian Capital Territory	-	-	-	0	-	-	-	-	-	-
New South Wales	2,556	1,988	1,875	1,850	1,852	1,501	936	920	1,536	1,862
Northern Territory	1	1	1	0	1	0	0	0	1	1
Queensland	187	176	159	155	173	192	190	201	184	195
South Australia	136	145	139	137	121	102	145	107	173	149
Tasmania	6	3	5	3	4	3	6	11	7	7
Victoria	1,275	1,585	1,629	826	841	934	998	961	1,343	1,785
Western Australia	61	71	61	67	76	76	60	58	78	118
<b>Total</b>	<b>4,222</b>	<b>3,969</b>	<b>3,869</b>	<b>3,038</b>	<b>3,068</b>	<b>2,808</b>	<b>2,335</b>	<b>2,258</b>	<b>3,322</b>	<b>4,117</b>

Table 63: Fresh Produce Imports, by State, nominal, \$ million

	FY08	FY09	FY10	FY11	FY12	FY13	FY14	FY15	FY16	FY17
	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m
Australian Capital Territory	-	-	-	-	-	0	-	-	-	-
New South Wales	170	183	211	207	238	232	263	294	307	336
Northern Territory	0	0	0	0	0	0	0	0	0	0
Queensland	50	47	45	54	60	56	99	107	115	131
South Australia	19	22	12	14	17	6	9	7	11	8
Tasmania	1	2	2	2	1	1	2	2	2	3
Victoria	149	164	187	181	185	192	234	261	263	299
Western Australia	25	25	22	29	38	40	53	55	58	58
<b>Total</b>	<b>414</b>	<b>443</b>	<b>479</b>	<b>487</b>	<b>539</b>	<b>527</b>	<b>660</b>	<b>726</b>	<b>756</b>	<b>835</b>

Table 64: Fresh Produce Imports, by State, real (2016-17), \$ million

	FY08	FY09	FY10	FY11	FY12	FY13	FY14	FY15	FY16	FY17
	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m
Australian Capital Territory	-	-	-	-	-	0	-	-	-	-
New South Wales	200	205	232	220	252	245	274	300	312	336
Northern Territory	0	0	0	0	0	0	0	0	0	0
Queensland	59	53	49	57	63	59	103	109	117	131
South Australia	22	24	13	14	18	6	9	7	12	8
Tasmania	2	3	2	2	1	1	2	2	2	3
Victoria	176	184	206	193	196	202	243	266	267	299
Western Australia	30	28	25	31	41	42	55	56	59	58
<b>Total</b>	<b>489</b>	<b>497</b>	<b>527</b>	<b>517</b>	<b>571</b>	<b>555</b>	<b>686</b>	<b>740</b>	<b>769</b>	<b>835</b>

Table 65: Fresh Produce Exports, by State, nominal, \$ million

	FY08	FY09	FY10	FY11	FY12	FY13	FY14	FY15	FY16	FY17
	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m
Australian Capital Territory	0	-	-	-	-	-	-	-	-	-
New South Wales	80	88	90	72	73	96	101	103	118	189
Northern Territory	1	2	2	2	3	3	1	3	4	8
Queensland	83	81	94	78	88	96	103	114	157	279
South Australia	82	81	77	62	65	76	91	101	138	131
Tasmania	41	46	47	51	47	50	52	62	91	51
Victoria	251	379	269	229	294	390	532	574	740	764
Western Australia	50	63	66	67	62	63	65	73	93	105
<b>Total</b>	<b>588</b>	<b>740</b>	<b>645</b>	<b>561</b>	<b>632</b>	<b>774</b>	<b>945</b>	<b>1030</b>	<b>1341</b>	<b>1527</b>

Table 66: Fresh Produce Exports, by State, real (2016-17), \$ million

	FY08	FY09	FY10	FY11	FY12	FY13	FY14	FY15	FY16	FY17
	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m
Australian Capital Territory	0	-	-	-	-	-	-	-	-	-
New South Wales	94	98	99	77	77	101	105	105	120	189
Northern Territory	2	2	2	2	3	3	1	4	4	8
Queensland	98	91	103	84	93	101	107	116	160	279
South Australia	96	91	85	67	69	80	94	103	140	131
Tasmania	48	52	51	55	50	53	54	63	92	51
Victoria	296	426	297	244	311	411	553	584	752	764
Western Australia	58	70	72	71	66	67	67	75	95	105
<b>Total</b>	<b>692</b>	<b>830</b>	<b>709</b>	<b>600</b>	<b>669</b>	<b>816</b>	<b>981</b>	<b>1,050</b>	<b>1,363</b>	<b>1,527</b>

Table 67: Food and Beverage Product Manufacturing Imports, by Industry, nominal, \$ million

	FY08	FY09	FY10	FY11	FY12	FY13	FY14	FY15	FY16	FY17
	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m
Beer Manufacturing	185	261	232	219	245	302	391	418	469	459
Biscuit Manufacturing (Factory based)	169	186	185	199	214	237	285	281	316	285
Bread Manufacturing (Factory based)	24	28	32	38	41	41	44	46	53	49
Cake and Pastry Manufacturing (Factory based)	196	218	208	243	264	305	373	401	459	480
Cereal, Pasta and Baking Mix Manufacturing	200	255	230	221	236	268	338	375	435	424
Cheese and Other Dairy Product Manufacturing	614	584	572	642	706	644	847	890	984	1,185
Confectionery Manufacturing	647	782	784	831	817	807	1,005	1,126	1,293	1,204
Cured Meat and Smallgoods Manufacturing	24	25	20	29	38	43	49	58	67	73
Fruit and Vegetable Processing	1,658	1,823	1,607	1,745	1,981	1,904	2,218	2,473	2,719	2,717
Grain Mill Product Manufacturing	414	491	484	418	382	397	509	616	792	771
Ice Cream Manufacturing	41	44	44	49	49	49	73	63	77	79
Meat Processing	434	599	566	545	565	610	627	772	757	770
Milk and Cream Processing	27	33	26	32	33	29	42	42	43	44
Oil and Fat Manufacturing	876	1,016	880	875	873	963	1,024	1,128	1,200	1,212
Other Food Product Manufacturing n.e.c.	843	1,003	992	1,044	1,170	1,317	1,461	1,619	2,014	1,803
Poultry Processing	6	13	35	34	44	54	66	65	74	64
Prepared Animal and Bird Feed Manufacturing	307	365	381	367	343	374	440	492	555	607
Seafood Processing	1,081	1,232	1,189	1,213	1,314	1,358	1,702	1,693	1,717	1,825
Soft Drink, Cordial and Syrup Manufacturing	721	816	821	853	977	1,007	1,045	1,145	1,148	1,075
Spirit Manufacturing	507	537	559	558	575	587	625	653	728	722
Sugar Manufacturing	39	58	66	117	86	67	110	128	99	122
Wine and Other Alcoholic Beverage Manufacturing	484	540	525	548	641	688	780	771	838	818
<b>Total</b>	<b>9,497</b>	<b>10,909</b>	<b>10,438</b>	<b>10,820</b>	<b>11,594</b>	<b>12,051</b>	<b>14,054</b>	<b>15,257</b>	<b>16,837</b>	<b>16,790</b>

**Table 68: Food and Beverage Product Manufacturing Imports, by Industry, real (2016-17), \$ million**

	FY08	FY09	FY10	FY11	FY12	FY13	FY14	FY15	FY16	FY17
	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m
Beer Manufacturing	218	293	256	234	259	318	406	426	476	459
Biscuit Manufacturing (Factory based)	199	209	204	212	226	250	296	286	322	285
Bread Manufacturing (Factory based)	28	31	35	40	43	43	46	47	54	49
Cake and Pastry Manufacturing (Factory based)	230	244	229	259	279	321	387	409	466	480
Cereal, Pasta and Baking Mix Manufacturing	235	286	253	236	250	282	351	382	442	424
Cheese and Other Dairy Product Manufacturing	723	655	631	685	748	678	881	907	1,000	1,185
Confectionery Manufacturing	762	877	864	886	865	850	1,045	1,147	1,314	1,204
Cured Meat and Smallgoods Manufacturing	28	28	22	31	40	46	51	59	68	73
Fruit and Vegetable Processing	1,953	2,044	1,772	1,862	2,097	2,005	2,306	2,518	2,763	2,717
Grain Mill Product Manufacturing	488	551	534	446	405	418	530	627	804	771
Ice Cream Manufacturing	48	49	48	53	52	52	76	64	78	79
Meat Processing	511	671	624	581	598	642	651	786	770	770
Milk and Cream Processing	31	37	29	34	35	30	43	43	44	44
Oil and Fat Manufacturing	1,032	1,140	971	933	924	1,014	1,065	1,149	1,220	1,212
Other Food Product Manufacturing n.e.c.	993	1,125	1,094	1,114	1,239	1,387	1,519	1,649	2,047	1,803
Poultry Processing	7	14	39	36	47	57	69	67	75	64
Prepared Animal and Bird Feed Manufacturing	362	409	420	392	363	394	458	501	564	607
Seafood Processing	1,273	1,382	1,311	1,295	1,392	1,429	1,769	1,724	1,745	1,825
Soft Drink, Cordial and Syrup Manufacturing	849	915	905	910	1,035	1,060	1,086	1,165	1,166	1,075
Spirit Manufacturing	598	602	616	596	609	618	649	665	739	722
Sugar Manufacturing	46	65	73	125	91	70	115	131	101	122
Wine and Other Alcoholic Beverage Manufacturing	570	605	579	585	678	725	811	785	851	818
<b>Total</b>	<b>11,184</b>	<b>12,232</b>	<b>11,509</b>	<b>11,545</b>	<b>12,275</b>	<b>12,689</b>	<b>14,610</b>	<b>15,537</b>	<b>17,109</b>	<b>16,790</b>

Table 69: Food and Beverage Product Manufacturing Exports, by Industry, nominal, \$ million

	FY08	FY09	FY10	FY11	FY12	FY13	FY14	FY15	FY16	FY17
	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m
Beer Manufacturing	18	19	19	22	22	21	23	24	31	37
Biscuit Manufacturing (Factory based)	77	88	95	94	86	79	83	86	87	106
Bread Manufacturing (Factory based)	97	90	93	90	91	84	93	94	95	99
Cake and Pastry Manufacturing (Factory based)	15	15	14	14	15	18	20	19	19	22
Cereal, Pasta and Baking Mix Manufacturing	132	148	147	132	113	120	125	142	160	171
Cheese and Other Dairy Product Manufacturing	2,576	2,511	1,924	2,183	2,116	2,061	2,519	2,209	1,994	1,899
Confectionery Manufacturing	267	290	286	280	266	233	283	285	311	310
Cured Meat and Smallgoods Manufacturing	25	21	18	20	25	27	30	31	29	33
Fruit and Vegetable Processing	809	1,011	1,016	1,030	1,342	1,508	1,577	1,790	2,595	3,790
Grain Mill Product Manufacturing	764	1,069	1,029	1,098	1,412	1,534	1,593	1,527	1,720	1,648
Ice Cream Manufacturing	33	32	28	29	30	27	22	24	25	29
Meat Processing	6,996	7,918	6,769	7,387	7,599	8,219	10,496	13,681	12,939	11,723
Milk and Cream Processing	165	148	143	137	157	161	200	259	329	328
Oil and Fat Manufacturing	238	295	290	304	317	343	377	370	396	415
Other Food Product Manufacturing n.e.c.	425	457	471	514	512	513	593	894	1,541	1,863
Poultry Processing	45	68	65	93	103	91	108	129	114	118
Prepared Animal and Bird Feed Manufacturing	658	1,156	826	848	947	993	810	820	915	948
Seafood Processing	419	395	334	320	514	683	862	966	1,012	969
Soft Drink, Cordial and Syrup Manufacturing	34	40	50	56	58	56	51	59	75	83
Spirit Manufacturing	109	122	126	134	139	157	191	223	214	248
Sugar Manufacturing	35	47	48	59	51	43	59	64	87	125
Wine and Other Alcoholic Beverage Manufacturing	2,702	2,495	2,190	2,011	1,913	1,868	1,853	1,991	2,194	2,378
<b>Total</b>	<b>16,639</b>	<b>18,435</b>	<b>15,981</b>	<b>16,855</b>	<b>17,828</b>	<b>18,839</b>	<b>21,967</b>	<b>25,685</b>	<b>26,881</b>	<b>27,341</b>



**Table 70: Food and Beverage Product Manufacturing Exports, by Industry, real (2016-17), \$ million**

	FY08	FY09	FY10	FY11	FY12	FY13	FY14	FY15	FY16	FY17
	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m
Beer Manufacturing	21	22	21	24	23	23	24	24	31	37
Biscuit Manufacturing (Factory based)	91	99	105	100	91	83	86	87	88	106
Bread Manufacturing (Factory based)	114	101	103	96	96	89	97	95	97	99
Cake and Pastry Manufacturing (Factory based)	18	17	16	15	15	19	21	19	20	22
Cereal, Pasta and Baking Mix Manufacturing	156	166	163	141	119	127	130	145	163	171
Cheese and Other Dairy Product Manufacturing	3,034	2,816	2,122	2,329	2,240	2,170	2,619	2,249	2,026	1,899
Confectionery Manufacturing	314	325	316	299	282	245	294	290	316	310
Cured Meat and Smallgoods Manufacturing	29	24	20	22	26	28	31	31	30	33
Fruit and Vegetable Processing	953	1,134	1,121	1,099	1,421	1,588	1,639	1,823	2,637	3,790
Grain Mill Product Manufacturing	900	1,199	1,135	1,171	1,495	1,615	1,656	1,555	1,747	1,648
Ice Cream Manufacturing	38	36	31	31	32	28	23	24	25	29
Meat Processing	8,239	8,880	7,466	7,880	8,045	8,654	10,910	13,931	13,148	11,723
Milk and Cream Processing	194	166	158	146	166	170	207	264	334	328
Oil and Fat Manufacturing	280	331	320	325	336	361	392	377	403	415
Other Food Product Manufacturing n.e.c.	501	513	519	549	542	540	616	911	1,566	1,863
Poultry Processing	53	76	71	100	109	95	112	131	115	118
Prepared Animal and Bird Feed Manufacturing	775	1,296	911	904	1,003	1,046	842	835	929	948
Seafood Processing	493	443	369	341	545	719	896	984	1,028	969
Soft Drink, Cordial and Syrup Manufacturing	40	45	55	59	62	59	53	61	76	83
Spirit Manufacturing	128	137	139	143	147	166	199	227	218	248
Sugar Manufacturing	41	53	53	63	54	45	61	65	89	125
Wine and Other Alcoholic Beverage Manufacturing	3,181	2,798	2,416	2,146	2,025	1,967	1,926	2,027	2,229	2,378
<b>Total</b>	<b>19,593</b>	<b>20,677</b>	<b>17,630</b>	<b>17,983</b>	<b>18,874</b>	<b>19,837</b>	<b>22,834</b>	<b>26,155</b>	<b>27,314</b>	<b>27,341</b>

Table 71: Grocery Imports, by Industry, nominal, \$ million

	FY08	FY09	FY10	FY11	FY12	FY13	FY14	FY15	FY16	FY17
	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m
Human Pharmaceutical and Medicinal Product Manufacturing	8,348	9,512	9,610	10,528	11,092	10,958	10,672	10,486	11,800	11,987
Cosmetic and Toiletry Preparation Manufacturing	1,151	1,236	1,242	1,263	1,223	1,292	1,528	1,621	1,943	1,883
Cleaning Compound Manufacturing	547	648	617	678	701	800	936	1,023	1,098	1,108
Polymer Film and Sheet Packaging Material Manufacturing	1,293	1,364	1,328	1,398	1,414	1,414	1,644	1,823	2,034	1,982
Sanitary Paper Product Manufacturing	443	517	506	518	479	550	549	622	706	684
<b>Total</b>	<b>11,782</b>	<b>13,277</b>	<b>13,303</b>	<b>14,385</b>	<b>14,909</b>	<b>15,014</b>	<b>15,330</b>	<b>15,575</b>	<b>17,582</b>	<b>17,644</b>

Table 72: Grocery Imports, by Industry, real (2016-17), \$ million

	FY08	FY09	FY10	FY11	FY12	FY13	FY14	FY15	FY16	FY17
	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m
Human Pharmaceutical and Medicinal Product Manufacturing	9,832	10,667	10,600	11,231	11,744	11,538	11,093	10,677	11,990	11,987
Cosmetic and Toiletry Preparation Manufacturing	1,356	1,386	1,369	1,348	1,295	1,361	1,589	1,650	1,974	1,883
Cleaning Compound Manufacturing	644	727	680	723	742	842	973	1,042	1,116	1,108
Polymer Film and Sheet Packaging Material Manufacturing	1,523	1,529	1,464	1,491	1,497	1,489	1,709	1,856	2,067	1,982
Sanitary Paper Product Manufacturing	522	579	558	552	507	579	571	633	718	684
<b>Total</b>	<b>13,877</b>	<b>14,888</b>	<b>14,671</b>	<b>15,345</b>	<b>15,785</b>	<b>15,809</b>	<b>15,935</b>	<b>15,858</b>	<b>17,865</b>	<b>17,644</b>

Table 73: Grocery Exports, by Industry, nominal, \$ million

	FY08	FY09	FY10	FY11	FY12	FY13	FY14	FY15	FY16	FY17
	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m
Human Pharmaceutical and Medicinal Product Manufacturing	3,972	4,045	4,134	3,827	4,082	3,910	3,370	2,503	3,014	3,522
Cosmetic and Toiletry Preparation Manufacturing	334	344	367	371	387	408	471	468	557	683
Cleaning Compound Manufacturing	173	203	191	178	147	150	139	165	233	238
Polymer Film and Sheet Packaging Material Manufacturing	94	112	90	90	90	90	90	105	118	121
Sanitary Paper Product Manufacturing	110	114	100	98	86	76	76	80	70	69
<b>Total</b>	<b>4,683</b>	<b>4,818</b>	<b>4,882</b>	<b>4,564</b>	<b>4,792</b>	<b>4,634</b>	<b>4,146</b>	<b>3,322</b>	<b>3,992</b>	<b>4,633</b>

Table 74: Grocery Exports, by Industry, real (2016-17), \$ million

	FY08	FY09	FY10	FY11	FY12	FY13	FY14	FY15	FY16	FY17
	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m
Human Pharmaceutical and Medicinal Product Manufacturing	4,678	4,536	4,560	4,083	4,321	4,117	3,503	2,549	3,062	3,522
Cosmetic and Toiletry Preparation Manufacturing	393	386	405	396	410	429	490	477	566	683
Cleaning Compound Manufacturing	204	228	210	190	155	158	145	168	236	238
Polymer Film and Sheet Packaging Material Manufacturing	111	126	100	96	95	94	93	107	120	121
Sanitary Paper Product Manufacturing	130	128	111	105	91	80	79	82	72	69
<b>Total</b>	<b>5,516</b>	<b>5,404</b>	<b>5,386</b>	<b>4,870</b>	<b>5,072</b>	<b>4,878</b>	<b>4,310</b>	<b>3,383</b>	<b>4,056</b>	<b>4,633</b>

Table 75: Fresh Produce Imports, by Industry, nominal, \$ million

	FY08	FY09	FY10	FY11	FY12	FY13	FY14	FY15	FY16	FY17
	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m
Apple and Pear Growing	4	3	4	6	4	3	3	6	4	6
Berry Fruit Growing	7	6	6	7	13	19	21	21	33	30
Citrus Fruit Growing	39	39	42	55	38	49	61	69	63	79
Grape Growing	95	128	114	83	124	117	133	134	130	122
Kiwifruit Growing	39	39	41	44	47	48	45	55	56	55
Mushroom Growing	11	15	10	8	10	14	18	21	27	28
Other Fruit and Tree Nut Growing	84	75	106	99	129	93	177	194	184	233
Poultry Farming (Eggs)	1	2	3	2	2	1	2	1	4	4
Stone Fruit Growing	21	21	30	29	41	43	62	57	60	54
Vegetable Growing (Outdoors)	124	124	138	167	146	153	158	182	196	223
Vegetable Growing (Under Cover)	0	1	1	1	1	-	-	-	-	-
<b>Total</b>	<b>425</b>	<b>453</b>	<b>495</b>	<b>501</b>	<b>555</b>	<b>540</b>	<b>681</b>	<b>740</b>	<b>757</b>	<b>834</b>

Table 76: Fresh Produce Imports, by Industry, real (2016-17), \$ million

	FY08	FY09	FY10	FY11	FY12	FY13	FY14	FY15	FY16	FY17
	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m
Apple and Pear Growing	5	4	4	6	4	3	4	6	5	6
Berry Fruit Growing	9	7	6	7	13	20	22	21	33	30
Citrus Fruit Growing	45	44	46	59	40	52	63	70	64	79
Grape Growing	112	143	126	88	132	123	138	136	132	122
Kiwifruit Growing	46	44	45	47	50	51	47	56	57	55
Mushroom Growing	13	17	11	9	10	15	19	21	27	28
Other Fruit and Tree Nut Growing	99	85	117	106	136	98	184	198	187	233
Poultry Farming (Eggs)	1	2	3	3	2	2	2	2	4	4
Stone Fruit Growing	25	23	33	31	43	46	65	58	61	54
Vegetable Growing (Outdoors)	146	139	152	178	155	162	164	185	199	223
Vegetable Growing (Under Cover)	0	1	1	2	1	-	-	-	-	-
<b>Total</b>	<b>501</b>	<b>509</b>	<b>544</b>	<b>536</b>	<b>586</b>	<b>572</b>	<b>708</b>	<b>753</b>	<b>769</b>	<b>834</b>

Table 77: Fresh Produce Exports, by Industry, nominal, \$ million

	FY08	FY09	FY10	FY11	FY12	FY13	FY14	FY15	FY16	FY17
	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m
Apple and Pear Growing	14	19	17	13	15	18	15	18	34	25
Berry Fruit Growing	7	5	7	4	3	1	3	2	5	9
Citrus Fruit Growing	172	160	193	136	160	188	201	208	298	336
Grape Growing	113	204	98	85	104	185	237	251	387	392
Kiwifruit Growing	3	2	1	1	3	1	2	3	4	3
Mushroom Growing	5	4	4	3	3	5	7	7	9	10
Other Fruit and Tree Nut Growing	75	107	94	77	107	163	219	293	346	379
Poultry Farming (Eggs)	1	2	1	1	2	5	2	3	3	6
Stone Fruit Growing	40	53	50	36	42	64	79	87	124	95
Vegetable Growing (Outdoors)	180	204	202	217	195	195	206	227	288	302
Vegetable Growing (Under Cover)	-	-	-	-	-	-	-	-	-	-
<b>Total</b>	<b>610</b>	<b>760</b>	<b>667</b>	<b>573</b>	<b>634</b>	<b>825</b>	<b>970</b>	<b>1,099</b>	<b>1,499</b>	<b>1,555</b>

Table 78: Fresh Produce Exports, by Industry, real (2016-17), \$ million

	FY08	FY09	FY10	FY11	FY12	FY13	FY14	FY15	FY16	FY17
	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m
Apple and Pear Growing	16	21	19	14	16	18	16	19	35	25
Berry Fruit Growing	8	6	7	4	3	1	3	2	5	9
Citrus Fruit Growing	202	180	213	145	169	197	209	212	303	336
Grape Growing	133	229	108	91	110	195	246	255	393	392
Kiwifruit Growing	4	2	1	1	4	1	2	3	4	3
Mushroom Growing	6	4	4	4	3	5	7	7	9	10
Other Fruit and Tree Nut Growing	88	120	103	82	113	172	228	298	352	379
Poultry Farming (Eggs)	1	2	1	1	3	5	2	3	3	6
Stone Fruit Growing	47	59	55	39	44	68	82	88	126	95
Vegetable Growing (Outdoors)	212	229	223	231	206	205	214	232	293	302
Vegetable Growing (Under Cover)	-	-	-	-	-	-	-	-	-	-
<b>Total</b>	<b>717</b>	<b>852</b>	<b>734</b>	<b>612</b>	<b>671</b>	<b>867</b>	<b>1,009</b>	<b>1,119</b>	<b>1,523</b>	<b>1,555</b>

Table 79: AFG Imports, Top 10 Countries of Origin, \$ million

Top 10 Import Origins	FY17
	\$m
United States of America	4,812
New Zealand	3,411
China (excluding SARs and Taiwan)	2,642
Germany	2,373
Thailand	1,670
France	1,650
United Kingdom	1,597
Ireland	1,543
Italy	1,473
Switzerland	1,309

Table 80: AFG Exports, Top 10 Countries of Destination, \$ million

Top 10 Export Destinations	FY17
	\$m
China (excluding SARs and Taiwan)	5,142
United States of America	4,387
Japan	3,684
Korea, Republic of	2,131
New Zealand	2,076
Hong Kong (SAR of China)	1,658
India	1,634
Singapore	1,272
Vietnam	1,079
Indonesia	864

Table 81: AFG Trade Relationships, Top 10 Countries by Total Trade Relationship, \$ million

Top 10 Trade Relationships	FY17
	\$m
United States of America	9,199
China (excluding SARs and Taiwan)	7,784
New Zealand	5,487
Japan	3,992
Germany	2,613
Korea, Republic of	2,432
United Kingdom	2,341
India	2,315
Singapore	2,196
Thailand	2,181

Table 82: AFG Imports, Top 10 Import Industries, \$ million

Top Import Industries	FY17
	\$m
Human Pharmaceutical and Medicinal Product Manufacturing	11,987
Fruit and Vegetable Processing	2,717
Polymer Film and Sheet Packaging Material Manufacturing	1,982
Cosmetic and Toiletry Preparation Manufacturing	1,883
Seafood Processing	1,825
Other Food Product Manufacturing n.e.c.	1,803
Oil and Fat Manufacturing	1,212
Confectionery Manufacturing	1,204
Cheese and Other Dairy Product Manufacturing	1,185
Cleaning Compound Manufacturing	1,108

Table 83: AFG Exports, Top 10 Export Industries, \$ million

Top Export Industries	FY17
	\$m
Meat Processing	11,723
Fruit and Vegetable Processing	3,790
Human Pharmaceutical and Medicinal Product Manufacturing	3,522
Wine and Other Alcoholic Beverage Manufacturing	2,378
Cheese and Other Dairy Product Manufacturing	1,899
Other Food Product Manufacturing n.e.c.	1,863
Grain Mill Product Manufacturing	1,648
Seafood Processing	969
Prepared Animal and Bird Feed Manufacturing	948
Cosmetic and Toiletry Preparation Manufacturing	683

## B Methodology

Since the release of the State of the Industry 2009 publication, the Australian Bureau of Statistics (ABS), which is the primary source for the data used in this Report, has discontinued some aspects of its statistical reporting. Where this is the case, previous years' Reports have provided an explanation through use of a footnote. This Report only notes differences of source data or methodology where it has differed from the 2017 State of the Industry Report.

In compiling this Report, a new approach has been used whereby only data for 2016-17 has been used. This differs from prior years where the most recent data available was used. The change has been made to ensure a consistent view across variables and to mitigate against confusing the most recent variable movements.

### B.1 Updating data in the charts and tables

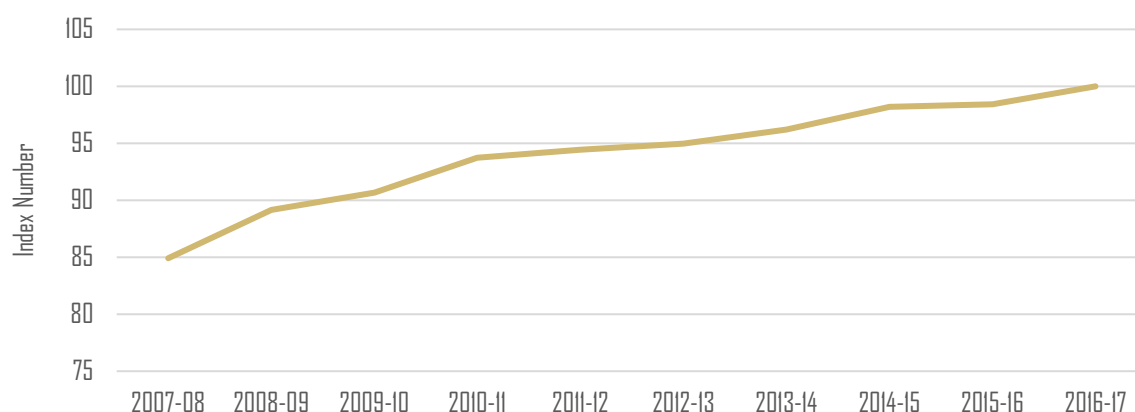
In order to facilitate consistency with the State of the Industry publications for prior years, when compiling the charts and tables for this report re-estimates of the data have not been sought. However, it is important to note that the ABS and IBISWorld have made, in some cases, updates to historical numbers. In such cases, this report is based on the most recent estimates available. For more detail regarding these revised estimates please refer to the appropriate IBISWorld industry report or the ABS catalogue. Consult the explanatory notes within these source documents for a more detailed explanation of the methodology used in re-forecasting data.

To ensure comparability of data in the figures and tables within this report, historical data has been adjusted for inflation until the most recent year for which data is presented. The inflation-adjusted figures are referred to as real values and are used in comparisons and growth calculations. To calculate the appropriate inflation adjustment we have utilised ABS catalogue 6401 "Consumer Price Index" weighting relative index numbers (based on contribution to CPI) to form an AFG specific deflator, specially we have utilised :

1. Index Numbers: Food and Non-Alcoholic Beverages
2. Index Numbers: Fruit and Vegetables

Prior iterations of this report have reported values in real terms where nominal values for industry value add ("IVA"), turnover, productivity and trade had been deflated into real 2013-14 dollars. Subsequent to the release of the last report the Australian Bureau of Statistics has rebased some of its national accounts to be based on 2015-16 dollars.

This report deviates from past reports in additionally applying this deflator to trade based values. This change in trade deflators has been based on the impact that the price of non-food and beverage commodities has on the relevant indices and results in a deviation from the trade values reported in prior reports. The deflator used is shown in Figure 37 below.

**Figure B.1: Food and Grocery deflator, index numbers**

## B.2 Estimating suppressed ABS data

Where an industry becomes small enough that publishing information could allow for possibility to identify individual company performance, among other reasons, the ABS may suppress the data for that industry, noting that it will be included in sub totals where relevant. Where this has occurred in industry data used in this report, the missing data points have been estimated using by calculating the average contribution, to the relevant industry statistic, made by the missing industry based off known data points, and applying this average to relevant total or subtotal to estimate the missing data point.

Based on the suppression of data, some totals (and subtotals) within ABS datasets do not reconcile to the sum of the components of the dataset. No attempt has been made to scale, or in any other way manipulate, known data points to match the industry total or subtotal.

## B.3 Metro and Regional Employment

Data relating to Metro and Non-metro employment numbers at the 3&4 Digit ANZSIC Industry level is not widely available. Prior reports have based the metro and non-metro split of employment on the national split within the whole of the Manufacturing sector, applying the relevant metro/non-metro split to estimate AFG metro and non-metro employment.

This report utilises the 2011 and 2016 census data to obtain the metro/regional split, by state, for Food and Beverage Manufacturing. It then applies a CAGR growth rate for the years in between census dates to estimate the metro/regional employment ratio (and utilises the aforementioned CAGR growth to estimate the split in 2016-17). This estimated split is then applied to known industry employment levels as found in ABS catalogue 8155, to approximate the metro/regional employment figure for the Food Product and Beverage and Tobacco Product manufacturing sectors.

The number of Grocery and Fresh Produce employees working in metro and regional areas was determined by calculating the total manufacturing metro/regional employment split, and applying this ratio to each sub-sector's respective employment. These employment estimates are then added to the estimates for Food and Beverage metro and regional employment to derive AFG wide regional and metro employment.

## B.4 Comparison of data and analysis to prior years

Readers are advised to exercise caution when comparing data in this 2018 Report to that published in previous reports. This is due to the following reasons:

1. For some variables, data has been taken from an alternative source when compared to prior year's reports. Where this has been done, it has been noted.
2. In some instances, IBISWorld reports did not align with the ANZSIC 2006 codes chosen for the figures and tables in this Report. In such cases, the IBISWorld data was allocated to the category of 'best fit'. This means that in some cases, the data reported for a particular category or sector by ABS did not match exactly with the corresponding data reported by IBISWorld.



3. The data for prior years has been adjusted for inflation each year the Report is published. Therefore, the use of real data (inflation adjusted) in the Report limits direct comparability with prior years' reports. For example, in this 2018 Report, figures quoted are in real terms and have been adjusted to the value for the most recent year for which data is available meaning all dollars reported are in 2016-17 dollar terms. As discussed above, a new deflator comprised of relevant CPI measurements has been used in this Report that differs from last year's report.
4. Some methodologies have been updated to provide a more accurate estimate of figures (for example, metro verse regional employment split). Where this has been done, it has been noted.
5. Some previously reported data points have been updated. Specifically, the ABS has revised some estimates and figures within catalogue 8155 for 2014-15 and 2015-16. An example of this is where Gross Capital Expenditure for 2015-16 was recorded at \$3.96 billion in the 2015-16 release, but revised downward to \$3.89 billion in the 2016-17 release.
6. This report details the results of changes to Net Capital Expenditure which is equal to Gross Capital Expenditure minus any proceeds from the disposal of assets. This differs from past reports which discussed and analysed Gross Capital Expenditure.

## B.5 Change in Employment data source

Prior iterations of reports have utilised ABS catalogue 6291 *'Labour Force, Australia, Detailed, Quarterly'* to establish employment numbers within the Food & Beverage Product manufacturing industry, in addition to the Grocery Industry.

After much analysis, this report has changed source from ABS Cat 6291 to 8155 *'Australian Industry'* for several important reasons being:

1. ABS 8155 provides employment at the 4 Digit ANZSIC '06 level, providing for more detailed analysis within the Food and Beverage and Grocery Sector
2. ABS 8155 is utilised for turnover, IVA, CAPEX and Capital Investment data, and thus utilising it for employment data results in a single source of data for the vast majority of industry analysis
3. ABS 8155 is derived from Economic Activity Surveys ("EAS") and Business Account Statements ("BAS"), whereas the Labour Force catalogue (6291) is derived from household surveys, given all other data is derived from EAS & BAS information, 8155 represents a more consistent source of information
  - a. ABS 8155 is derived from Economic Activity Surveys ("EAS") and Business Account Statements ("BAS"), whereas the Labour Force catalogue (6291) is derived from household surveys, given all other data is derived from EAS & BAS information, 8155 represents a more consistent source of information
4. ABS 8155 requires no manipulation to obtain relevant numbers, figures from ABS 6291 were an average of quarterly data, where the reported quarters were not financial quarters, leading to a timing discrepancy between employment analysis and all analysis performed utilising ABS 8155

## B.6 Retrospective updates to IBISWorld & ABS Data

Since the publication of the prior report, IBISWorld have updated several reports related to the calculation of Fresh Produce data, leading to discrepancies within reported past data, specifically:

1. Report A0122 – Undercover Vegetable Growing in Australia
  - a. An isolated IT issue has resulted in adjustments to IVA calculations
2. A0172 – Egg Farming in Australia
  - a. The availability of new data resulted in significant changes to employment numbers in addition to the number of businesses operating in the industry.
3. A0130 – Apple, Pear and Stone Fruit Growing in Australia
  - a. A0130 Apple, Pear and Stone Fruit Growing is based off inconsistent data from the ABS (7503.0). Data on apple, pear and stone fruit growing statistics is patchy, with data often not

available or accurate in some years. As a result, industry revenue and statistics can often jump from year-to-year, but are based on the most up to date data available at the time of publication

In addition, the availability of new information received by the ABS from businesses resulted in the estimates for 2014-15 and 2015-16 of this series being revised in ABS catalogue 8155.

# C Detailed sector definition

Appropriately defining the scope of the industry for the State of the Industry report series is critical in securing its value. Therefore, for prior year's reports, thorough research of relevant sources was conducted to obtain the different perspectives on which industries should be included in the definition.

## C.1 Defining the sector to be covered by the Report

Prior to commencement of this publication series, the industry sectors covered by the Report had not previously been described collectively by industry or government agencies. Those selected for inclusion in the Report share a number of common features at product and/or operational levels and consequently also in the business challenges they face. The definition used to determine whether industry sectors should be included was:

*Those industries that provide value-add to agriculture, food and other products for the purpose of producing everyday fresh and processed food, beverages and grocery products consumed and used by Australians.*

Products encompassed include packaged, shelf-stable food from all categories, fresh foods such as fruit and vegetables and non-food grocery products used by consumers for personal, home and pet care. These products share a number of distinguishing characteristics that enable them to be sensibly aggregated:

- they are all (generally) presented to consumers meeting strict product specifications;
- their integrity is assured through the use of sophisticated quality systems;
- they share the same supply chains; and
- they are purchased and used daily by consumers.

Commodities (e.g. grains, live animals, etc.) not purchased by consumers directly were excluded from the Report.

Three broad groupings were identified consistent with this definition:

- food and beverage manufacturing;
- grocery manufacturing; and
- fresh produce production.

Food and beverage manufacturing includes processed, packaged, shelf-ready food and beverages commonly found in supermarkets and other retail outlets, and the ingredients which go into their manufacture. It includes dairy, cereal and baked products, meat and fish products, and processed fruits and vegetables. It excludes, to the extent that ABS data does not include, products produced onsite in supermarkets such as onsite baking.

Grocery manufacturing refers to non-food grocery manufacturing and it includes personal care, home care and pet care products. These products have been included because they share a common supply chain with food and beverage products and they face many of the same challenges such as high input costs.

Fresh food production includes fresh produce such as fruit, vegetables, nuts and eggs. This category was included because the delineation between processed foods is becoming blurred (e.g. many 'fresh' products are now presented to the consumer processed in some way, such as fresh-cut salads), and also because many farm - fresh products are consumed directly without the need for additional processing (e.g. milling, refining, slaughtering, etc.). Indeed, the majority of these products are available year round and supplied to retailers subject to tight product specifications with their integrity assured by advanced quality assurance systems, much in the same way that processed food is handled.

Unprocessed food and fibre commodities (e.g. wheat, coarse grains, live animals, etc.) were excluded from the definition, as was the value of the restaurant and catering sector. Where possible, tobacco products were also excluded from the definition.

The ANZSIC codes were used to help define the industry as it was recognised that much of the data to be collected would be aggregated under these codes. Following a review of 62 industry sub-sectors defined in the ANZSIC codes, it was concluded that the industry is best-defined using 41 sub-sector codes. A full list of those sub-sectors considered in developing the final industry definition can be found in the tables below.

## C.2 The sector definition

For the State of the Industry 2018 report, the primary objective was to ensure comparability between years and therefore the retention of the final industry definition as used in prior year's reports. However, to ensure it remained relevant and accurate, desktop research was conducted to ensure that ABS had not significantly changed its definitions of industries nor any significant amendments made to the sources of information. It was found that no major amendments had been made over the 2016-17 year (though some minor amendments made to data points compared to prior years).

All industries included for this 2018 Report when constructing the sector definition are shown in the tables below.

**Table C.1: Fresh produce sub-sector (industries included)**

ANZSIC Code	Description
0121	Mushroom growing
0122	Vegetable growing (under covers)
0123	Vegetable growing (outdoors)
0131	Grape growing
0132	Kiwifruit growing
0133	Berry fruit growing
0134	Apple and pear growing
0135	Stone fruit growing
0136	Citrus fruit growing
0139	Other fruit and nut growing
0172	Poultry farming (eggs)

Table C.2: Food and beverage sub-sector (industries included)

ANZSIC Code	Description
1111	Meat processing
1112	Poultry processing
1113	Cured meat and smallgoods manufacturing
1120	Seafood processing
1131	Milk and cream processing
1132	Ice cream manufacturing
1133	Cheese and other dairy product manufacturing
1140	Fruit and vegetable processing
1150	Oil and fat manufacturing
1161	Grain mill product manufacturing
1162	Cereal, pasta and baking mix manufacturing
1171	Bread manufacturing (factory based)
1172	Cake and pastry manufacturing (factory based)
1173	Biscuit manufacturing (factory based)
1174	Bakery product manufacturing (non-factory based)
1181	Sugar manufacturing
1182	Confectionery manufacturing
1191	Potato, corn and other crisp manufacturing
1192	Prepared animal and bird feed manufacturing
1199	Other food product manufacturing n.e.c.
1211	Soft drink, cordial and syrup manufacturing
1212	Beer manufacturing
1213	Spirit manufacturing
1214	Wine and other alcoholic beverage manufacturing

Table C.3: Grocery sector (industries included)

ANSIC Code	Description
1524	Sanitary paper product manufacturing
1841	Human pharmaceutical and medicinal product manufacturing
1851	Cleaning compound manufacturing
1852	Cosmetic and toiletry preparation manufacturing
1911	Polymer film and sheet packaging material manufacturing
<b>Industries considered but excluded</b>	
1340	Knitted product manufacturing
1351	Clothing manufacturing
1352	Footwear manufacturing
1510	Pulp, paper and paperboard manufacturing
1522	Paper bag manufacturing
1523	Paper stationery manufacturing
1709	Other petroleum and coal product manufacturing
1831	Fertiliser manufacturing
1891	Photographic chemical product manufacturing
1912	Rigid and semi-rigid polymer product manufacturing
1920	Natural rubber product manufacturing
2010	Glass and glass container manufacturing
2029	Other ceramic product manufacturing
2132	Aluminium smelting
2299	Other fabricated metal product manufacturing n.e.c.
2439	Other electrical equipment manufacturing
2449	Other domestic appliance manufacturing
2592	Toy, sporting and recreational product manufacturing
5411	Newspaper publishing
5412	Magazine and other periodical publishing
1832	Pesticide manufacturing

## D Full list of products

Table D.1 below outlines the primary data sources used for this Report. The following table (Table D.2) outlines the primary activities included within each ANZSIC class that has been included within the definition of the sector in this Report. Further information regarding the ANZSIC classification and inclusions/exclusions can be found within the ABS report “Australian and New Zealand Standard Industrial Classification 2006”.

**Table D.1: Sources of Information**

Data Source	Information:
<b>Custom Trade Data Set</b>	Trade Data for Selected 4 Digit ANZSIC06 Codes, Obtained from the Australian Bureau of Statistics
<b>ABS 8165</b>	Counts of Australian Businesses, including Entries and Exits, Obtained from the Australian Bureau of Statistics
<b>ABS 8155 Table 1</b>	Australian Industry 2016-17, Manufacturing Industry by ANZSIC Class, Obtained from the Australian Bureau of Statistics
<b>ABS 8155 Table 2</b>	Australian Industry 2016-17, Manufacturing Industry by States and Territories by ANZSIC Subdivision, Obtained from the Australian Bureau of Statistics
<b>ABS 8155 Table 4</b>	Australian Industry 2016-17, Industry Performance by Industry Subdivision, Obtained from the Australian Bureau of Statistics
<b>ABS 5204</b>	Australian System of National Accounts, Obtained from the Australian Bureau of Statistics
<b>ABS 5206</b>	Australian National Accounts: National Income, Expenditure and Product, obtained from the Australian Bureau of Statistics
<b>Census Data</b>	Select Employment Data for Food and Beverage Manufacturing, 2011 & 2016 Census', Obtained from the ABS
<b>A0122</b>	Undercover Vegetable Growing in Australia, obtained from IBISWorld
<b>A0123</b>	Outdoor Vegetable Growing in Australia, obtained from IBISWorld
<b>A0130</b>	Apple, Pear and Stone Fruit Growing in Australia, obtained from IBISWorld
<b>A0131</b>	Grape Growing in Australia, obtained from IBISWorld
<b>A0139</b>	Citrus Fruit, Nut and Other Fruit Growing in Australia, obtained from IBISWorld
<b>A0172</b>	Egg Farming in Australia, obtained from IBISWorld
<b>C1214</b>	Wine Production in Australia, obtained from IBISWorld
<b>C1212</b>	Beer Manufacturing in Australia, obtained from IBISWorld

Table D.2: Primary Activities by ANZSIC Code

ANZSIC	Description	Primary activities include:
0121	Mushroom Growing	<ul style="list-style-type: none"> <li>• Cultivated mushroom growing</li> <li>• Mushroom spawn growing</li> </ul>
0122	Vegetable Growing (Under Covers)	<ul style="list-style-type: none"> <li>• Capsicum growing (under cover)</li> <li>• Cucumber growing (under cover)</li> <li>• Herb growing (under cover)</li> <li>• Lettuce growing (under cover)</li> <li>• Sprout growing (under cover)</li> <li>• Tomato growing (under cover)</li> <li>• Vegetable growing n.e.c. (under cover)</li> </ul>
0123	Vegetable Growing (Outdoors)	<ul style="list-style-type: none"> <li>• Asparagus growing (outdoors)</li> <li>• Bean growing (outdoors)</li> <li>• Carrot growing (outdoors)</li> <li>• Garlic growing (outdoors)</li> <li>• Herb growing (outdoors)</li> <li>• Kumara growing (outdoors)</li> <li>• Melon growing (outdoors)</li> <li>• Onion growing (outdoors)</li> <li>• Pea growing (outdoors)</li> <li>• Potato growing (outdoors)</li> <li>• Sugar beet growing (outdoors)</li> <li>• Sweetcorn growing (outdoors)</li> <li>• Tomato growing (outdoors)</li> <li>• Truffle growing (outdoors)</li> <li>• Vegetable growing n.e.c. (outdoors)</li> <li>• Vegetable seed growing (outdoors)</li> </ul>
0131	Grape Growing	<ul style="list-style-type: none"> <li>• Grape growing</li> <li>• Grape sundrying</li> <li>• Table grape growing</li> <li>• Vineyard operation</li> <li>• Wine grape growing</li> </ul>
0132	Kiwifruit Growing	<ul style="list-style-type: none"> <li>• Kiwifruit growing</li> </ul>
0133	Berry Fruit Growing	<ul style="list-style-type: none"> <li>• Berry fruit growing</li> <li>• Blackberry growing</li> <li>• Blackcurrant growing</li> <li>• Blueberry growing</li> <li>• Boysenberry growing</li> <li>• Cranberry growing</li> <li>• Gooseberry growing</li> <li>• Loganberry growing</li> <li>• Raspberry growing</li> <li>• Redcurrant growing</li> <li>• Strawberry growing</li> </ul>
0134	Apple and Pear Growing	<ul style="list-style-type: none"> <li>• Apple growing</li> <li>• Nashi pear growing</li> <li>• Pear growing</li> <li>• Quince growing</li> </ul>
0135	Stone Fruit Growing	<ul style="list-style-type: none"> <li>• Apricot growing</li> <li>• Cherry growing</li> <li>• Nectarine growing</li> <li>• Peach growing</li> <li>• Plum or prune growing</li> </ul>
0136	Citrus Fruit Growing	<ul style="list-style-type: none"> <li>• Citrus fruit growing</li> <li>• Citrus orchard operation</li> <li>• Grapefruit growing</li> <li>• Lemon growing</li> <li>• Mandarin growing</li> <li>• Orange growing</li> </ul>



		<ul style="list-style-type: none"> <li>• Tangelo growing</li> </ul>
0137	Olive Growing	<ul style="list-style-type: none"> <li>• Olive growing</li> </ul>
0139	Other Fruit and Nut Growing	<ul style="list-style-type: none"> <li>• Almond growing</li> <li>• Brazil nut growing</li> <li>• Cashew nut growing</li> <li>• Chestnut growing</li> <li>• Coconut growing</li> <li>• Macadamia nut growing</li> <li>• Pecan nut growing</li> <li>• Walnut growing</li> <li>• Avocado growing</li> <li>• Banana growing</li> <li>• Coconut growing</li> <li>• Custard apple growing</li> <li>• Feijoa growing</li> <li>• Fig growing</li> <li>• Loquat growing</li> <li>• Mango growing</li> <li>• Passionfruit growing</li> <li>• Pawpaw growing</li> <li>• Persimmon growing</li> <li>• Pineapple growing</li> <li>• Tamarillo growing</li> </ul>
0172	Poultry Farming (Eggs)	<ul style="list-style-type: none"> <li>• Egg farm operations</li> <li>• Poultry farming (for eggs)</li> <li>• Poultry hatching operation (egg breeds)</li> </ul>
1111	Meat Processing	<ul style="list-style-type: none"> <li>• Abattoir operation (except poultry)</li> <li>• Animal meat packing and freezing</li> <li>• Animal oil or fat, unrefined, manufacturing</li> <li>• Lard or tallow rendering</li> <li>• Meat extract or essence manufacturing</li> <li>• Meat manufacturing (except bacon, ham and poultry)</li> <li>• Meat or bone meal manufacturing (except fish or poultry meal)</li> <li>• Meat packing (except poultry)</li> <li>• Meat, canned, manufacturing (except poultry, bacon, ham and corned meat)</li> <li>• Meat, dehydrated, manufacturing (except poultry)</li> <li>• Meat, frozen, manufacturing (except poultry)</li> </ul>
1112	Poultry Processing	<ul style="list-style-type: none"> <li>• Frozen poultry manufacturing</li> <li>• Game bird slaughtering</li> <li>• Poultry abattoir operation</li> <li>• Poultry croquette manufacturing</li> <li>• Poultry meat or bone meal manufacturing</li> <li>• Poultry meat packing</li> <li>• Poultry meat processing (including canning)</li> </ul>
1113	Cured Meat and Smallgoods Manufacturing	<ul style="list-style-type: none"> <li>• Bacon manufacturing</li> <li>• Corned meat manufacturing (including canned)</li> <li>• Croquette manufacturing n.e.c.</li> <li>• Ham, canned, manufacturing</li> <li>• Meat speciality manufacturing</li> <li>• Pate manufacturing</li> <li>• Poultry smallgoods manufacturing</li> <li>• Smallgoods manufacturing</li> </ul>

1120	Seafood Processing	<ul style="list-style-type: none"> <li>• Crustacean, processed, manufacturing (including cooked and/or frozen) n.e.c.</li> <li>• Fish cleaning or filleting</li> <li>• Fish fillet manufacturing</li> <li>• Fish loaf or cake manufacturing</li> <li>• Fish paste manufacturing</li> <li>• Fish pate manufacturing</li> <li>• Fish, canned, manufacturing</li> <li>• Fish, dried or smoked, manufacturing</li> <li>• Mollusc, processed, manufacturing (including shelled)</li> <li>• Oyster, shelling, freezing or bottling in brine</li> <li>• Scallop, preserved, manufacturing</li> <li>• Seafood, canned, manufacturing</li> <li>• Seafood, preserved, manufacturing</li> <li>• Whole fin fish freezing</li> </ul>
1131	Milk and Cream Processing	<ul style="list-style-type: none"> <li>• Cream, pasteurised, manufacturing (except canned)</li> <li>• Milk, low fat, manufacturing</li> <li>• Milk, pasteurised, manufacturing</li> <li>• Skim milk manufacturing</li> <li>• Standard milk manufacturing</li> <li>• Ultra heat treatment milk manufacturing</li> </ul>
1132	Ice Cream Manufacturing	<ul style="list-style-type: none"> <li>• Confections, frozen manufacturing</li> <li>• Fruit ice, frozen, manufacturing</li> <li>• Gelato manufacturing</li> <li>• Ice cream manufacturing</li> <li>• Sorbet manufacturing</li> </ul>
1133	Cheese and Other Dairy Product Manufacturing	<ul style="list-style-type: none"> <li>• Anhydrous milk fat (butter oil) manufacturing</li> <li>• Butter manufacturing</li> <li>• Buttermilk manufacturing</li> <li>• Casein manufacturing</li> <li>• Cheese manufacturing</li> <li>• Condensed milk manufacturing</li> <li>• Cream, canned, manufacturing</li> <li>• Dairy product manufacturing n.e.c.</li> <li>• Dried ice cream, soft serve or milk shake mix manufacturing</li> <li>• Evaporated milk manufacturing</li> <li>• Flavoured milk manufacturing</li> <li>• Infants' milk-based formula and food manufacturing</li> <li>• Lactose manufacturing</li> <li>• Liquid ice cream, soft serve or milk shake mix manufacturing</li> <li>• Malted milk powder manufacturing</li> <li>• Milk and coffee mixtures, condensed or concentrated, manufacturing</li> <li>• Milk powder manufacturing</li> <li>• Sour cream manufacturing</li> <li>• Whey or whey powder manufacturing</li> <li>• Yoghurt manufacturing</li> </ul>

1140	Fruit and Vegetable Processing	<ul style="list-style-type: none"> <li>• Baby food, canned or bottled, manufacturing (except milk based)</li> <li>• Baked bean manufacturing</li> <li>• Bean/legume, dried or canned, manufacturing</li> <li>• Chutney or relish manufacturing</li> <li>• Coconut, desiccated, manufacturing</li> <li>• Fruit dehydrating or drying (except sun drying) manufacturing</li> <li>• Fruit juice, 100 per cent pure or concentrated, manufacturing</li> <li>• Fruit pulp, puree or spread manufacturing</li> <li>• Fruit salad manufacturing</li> <li>• Fruit, frozen, manufacturing</li> <li>• Fruit, preserved, manufacturing (including canned or bottled)</li> <li>• Grape crushing</li> <li>• Jam manufacturing (including preserves, jellies or fruit spreads)</li> <li>• Mixed meat and vegetable manufacturing</li> <li>• Rice preparation, canned, manufacturing</li> <li>• Sauce manufacturing (except Worcestershire sauce)</li> <li>• Spaghetti, canned, manufacturing</li> <li>• Vegetable juice or soup manufacturing</li> <li>• Vegetable salad manufacturing</li> <li>• Vegetable soup manufacturing</li> <li>• Vegetable, frozen, manufacturing</li> <li>• Vegetable, preserved, manufacturing (including canned, dehydrated, dried or quick frozen)</li> <li>• Vinegar manufacturing (except wine vinegar)</li> </ul>
1150	Oil and Fat Manufacturing	<ul style="list-style-type: none"> <li>• Animal oil, refined, manufacturing</li> <li>• Cotton seed oil manufacturing</li> <li>• Deodorised vegetable oil manufacturing</li> <li>• Edible oil or fat, blended, manufacturing</li> <li>• Fish or other marine animal oil or meal manufacturing</li> <li>• Lard, refined, manufacturing</li> <li>• Margarine manufacturing</li> <li>• Olive oil manufacturing</li> <li>• Tallow, refined, manufacturing</li> <li>• Vegetable oil, meal or cake manufacturing</li> </ul>
1161	Grain Mill Product Manufacturing	<ul style="list-style-type: none"> <li>• Arrowroot manufacturing</li> <li>• Baking powder manufacturing</li> <li>• Barley malt manufacturing</li> <li>• Barley meal or flour manufacturing</li> <li>• Cornflour manufacturing</li> <li>• Cornmeal manufacturing</li> <li>• Dextrin manufacturing</li> <li>• Dextrose manufacturing (except prepared)</li> <li>• Glucose manufacturing</li> <li>• Gluten manufacturing</li> <li>• Malt extract manufacturing</li> <li>• Malt manufacturing</li> <li>• Pollard manufacturing (from wheat, barley or rye)</li> <li>• Rice flour, meal or offal manufacturing</li> <li>• Rice manufacturing (including parboiled)</li> <li>• Rice starch manufacturing</li> <li>• Rye flour, meal or offal manufacturing</li> <li>• Sago manufacturing</li> <li>• Self-raising flour manufacturing</li> <li>• Semolina manufacturing</li> <li>• Starch manufacturing</li> <li>• Tapioca manufacturing</li> <li>• Unpopped corn manufacturing (for popcorn)</li> <li>• Wheat germ manufacturing</li> <li>• Wheaten bran manufacturing</li> <li>• Wheaten flour manufacturing</li> <li>• Wheaten malt manufacturing</li> </ul>

		<ul style="list-style-type: none"> <li>• Wheatmeal manufacturing</li> </ul>
1162	Cereal, Pasta and Baking Mix Manufacturing	<ul style="list-style-type: none"> <li>• Baking mix (prepared) manufacturing</li> <li>• Bread mix (dry) manufacturing</li> <li>• Cake mix manufacturing</li> <li>• Cereal food manufacturing n.e.c.</li> <li>• Coatings made from cereal food (except biscuit or breadcrumb) manufacturing</li> <li>• Custard powder manufacturing</li> <li>• Dessert, dried prepared, manufacturing</li> <li>• Noodle manufacturing</li> <li>• Oatmeal manufacturing</li> <li>• Oats, hulled or shelled, manufacturing</li> <li>• Oats, kilned or unkilned manufacturing</li> <li>• Pasta, fresh or dried, manufacturing</li> <li>• Pastry mix manufacturing</li> <li>• Prepared breakfast cereal manufacturing</li> </ul>
1171	Bread Manufacturing (Factory Based)	<ul style="list-style-type: none"> <li>• Bagel manufacturing (factory based)</li> <li>• Bread bakery operation (factory based)</li> <li>• Bread dough, frozen, manufacturing (factory based)</li> <li>• Bread roll manufacturing (factory based)</li> <li>• Bread, leavened or unleavened, manufacturing (factory based)</li> <li>• Breadcrumb manufacturing (factory based)</li> <li>• English muffin manufacturing (factory based)</li> <li>• Fruit loaf manufacturing (factory based)</li> <li>• Panini manufacturing (factory based)</li> <li>• Pita bread manufacturing (factory based)</li> </ul>
1172	Cake and Pastry Manufacturing	<ul style="list-style-type: none"> <li>• Cake icing or decorating (factory based)</li> <li>• Cake or pastry-based pudding and dessert manufacturing (factory based)</li> <li>• Cake or pastry-based slice manufacturing (factory based)</li> <li>• Cake or pastry manufacturing (factory based)</li> <li>• Cake or pastry, frozen, manufacturing (factory based)</li> <li>• Crumpet manufacturing (factory based)</li> <li>• Doughnut manufacturing (factory based)</li> <li>• Pastry manufacturing (includes frozen dough; factory based)</li> <li>• Pie manufacturing (including meat, fruit or vegetable pies; factory based)</li> </ul>
1173	Biscuit Manufacturing (Factory Based)	<ul style="list-style-type: none"> <li>• Biscuit dough manufacturing (factory based)</li> <li>• Biscuit manufacturing (except pet food biscuits; factory based)</li> <li>• Ice cream cone or wafer manufacturing (factory based)</li> </ul>
1174	Bakery Product Manufacturing (Non-Factory Based)	<ul style="list-style-type: none"> <li>• Manufacturing and selling bread from the same premises (non-factory based)</li> <li>• Manufacturing and selling other bakery products from the same premises (non-factory based)</li> </ul>
1181	Sugar Manufacturing	<ul style="list-style-type: none"> <li>• Brown sugar manufacturing</li> <li>• Cane syrup manufacturing</li> <li>• Caster sugar manufacturing</li> <li>• Icing sugar manufacturing</li> <li>• Molasses manufacturing</li> <li>• Sugar manufacturing</li> <li>• Treacle manufacturing</li> </ul>
1182	Confectionery Manufacturing	<ul style="list-style-type: none"> <li>• Chewing gum manufacturing</li> <li>• Chocolate manufacturing</li> <li>• Cocoa product manufacturing</li> <li>• Confectionery manufacturing</li> <li>• Crystallised or glace fruit manufacturing</li> <li>• Drinking chocolate manufacturing</li> <li>• Licorice manufacturing</li> <li>• Marshmallow manufacturing</li> <li>• Marzipan manufacturing</li> <li>• Nut, candied, manufacturing</li> </ul>

1191	Potato, Corn and Other Crisp Manufacturing	<ul style="list-style-type: none"> <li>• Popcorn, candied, manufacturing</li> </ul>
		<ul style="list-style-type: none"> <li>• Corn chip manufacturing</li> <li>• Crisp manufacturing</li> <li>• Potato crisp manufacturing</li> <li>• Taco, tortilla or tostada shell manufacturing</li> </ul>
1192	Prepared Animal and Bird Feed Manufacturing	<ul style="list-style-type: none"> <li>• Animal feed, prepared, manufacturing (except uncanned meat or bone meal or protein-enriched skim milk powder)</li> <li>• Animal food, canned, manufacturing</li> <li>• Bird feed manufacturing</li> <li>• Cattle lick manufacturing</li> <li>• Cereal meal manufacturing (for fodder, except from rice or rye)</li> <li>• Chaff manufacturing</li> <li>• Crushed grain manufacturing (including mixed; for fodder)</li> <li>• Dehydrated lucerne manufacturing</li> <li>• Dog and cat biscuit manufacturing</li> <li>• Fodder, prepared, manufacturing</li> <li>• Grain offal manufacturing (for fodder; except from rice or rye)</li> <li>• Lucerne cube, manufacturing</li> <li>• Lucerne meal, manufacturing</li> <li>• Pet food, canned, manufacturing</li> <li>• Poultry feed, prepared, manufacturing</li> <li>• Sheep lick manufacturing</li> </ul>
1199	Other Food Product Manufacturing N.e.c	<ul style="list-style-type: none"> <li>• Coffee manufacturing</li> <li>• Colouring, food, manufacturing</li> <li>• Dessert mix, liquid, manufacturing</li> <li>• Egg pulping or drying</li> <li>• Flavoured water pack manufacturing (for freezing into flavoured ice)</li> <li>• Food dressing manufacturing</li> <li>• Food flavouring manufacturing</li> <li>• Food manufacturing n.e.c.</li> <li>• Gelatine manufacturing</li> <li>• Ginger product manufacturing (except confectionery)</li> <li>• Health supplement manufacturing</li> <li>• Herb, processed, manufacturing</li> <li>• Honey, blended, manufacturing</li> <li>• Hop extract, concentrated, manufacturing</li> <li>• Jelly crystal manufacturing</li> <li>• Pre-prepared meal, frozen, manufacturing</li> <li>• Rice preparation manufacturing n.e.c.</li> <li>• Salt, cooking or table, manufacturing</li> <li>• Savoury speciality manufacturing</li> <li>• Seasoning, food, manufacturing</li> <li>• Soya bean concentrate, isolate or textured protein manufacturing</li> <li>• Spice manufacturing</li> <li>• Tea blending manufacturing</li> <li>• Tea manufacturing</li> <li>• Worcestershire sauce manufacturing</li> <li>• Yeast or yeast extract manufacturing</li> </ul>
1211	Soft Drink, Cordial and Syrup Manufacturing	<ul style="list-style-type: none"> <li>• <b>Carbonated water or cordial manufacturing</b></li> <li>• <b>Cider, non-alcoholic, manufacturing</b></li> <li>• <b>Cordial manufacturing</b></li> <li>• <b>Energy drink manufacturing</b></li> <li>• <b>Fruit drink, less than 100 per cent pure juice, manufacturing</b></li> <li>• <b>Ginger beer, non-alcoholic, manufacturing</b></li> <li>• <b>Ice manufacturing (except dry ice)</b></li> <li>• <b>Mineral water manufacturing</b></li> <li>• <b>Powder flavour manufacturing (for soft drinks)</b></li> <li>• <b>Purified water manufacturing</b></li> <li>• <b>Soda water manufacturing</b></li> <li>• <b>Soft drink manufacturing</b></li> </ul>

		<ul style="list-style-type: none"> <li>• Syrup, chocolate, caramel or vanilla, manufacturing</li> <li>• Syrup, fruit, manufacturing</li> <li>• Tonic water manufacturing</li> </ul>
1212	Beer Manufacturing	• Beer manufacturing (except non-alcoholic beer)
1213	Spirit Manufacturing	<ul style="list-style-type: none"> <li>• Brandy manufacturing</li> <li>• Fortified spirit manufacturing</li> <li>• Liqueur manufacturing</li> <li>• Spirit-based mixed drink manufacturing</li> <li>• Potable spirit manufacturing</li> </ul>
1214	Wine and Other Alcoholic Beverage Manufacturing	<ul style="list-style-type: none"> <li>• Beverage n.e.c., alcoholic, manufacturing</li> <li>• Carbonated wine manufacturing</li> <li>• Cider, alcoholic, manufacturing</li> <li>• Fortified wine manufacturing</li> <li>• Mead manufacturing</li> <li>• Perry, alcoholic, manufacturing</li> <li>• Sherry manufacturing</li> <li>• Sparkling wine manufacturing</li> <li>• Wine-based fruit drink 'cooler' manufacturing</li> <li>• Wine manufacturing</li> <li>• Wine vinegar manufacturing</li> <li>• Unfortified wine manufacturing</li> </ul>
1524	Sanitary Paper Product Manufacturing	<ul style="list-style-type: none"> <li>• Disposable paper nappy (cellulose-based) manufacturing</li> <li>• Facial tissue manufacturing</li> <li>• Paper napkin manufacturing</li> <li>• Paper towel manufacturing</li> <li>• Sanitary napkin (cellulose-based) manufacturing</li> <li>• Sanitary paper product manufacturing n.e.c.</li> <li>• Tampon (cellulose-based) manufacturing</li> <li>• Toilet tissue manufacturing</li> </ul>
1841	Human Pharmaceutical Manufacturing	<ul style="list-style-type: none"> <li>• Ampoule manufacturing</li> <li>• Analgesic manufacturing</li> <li>• Anthelmintic manufacturing</li> <li>• Antibacterial manufacturing</li> <li>• Antibiotic manufacturing</li> <li>• Antibody manufacturing</li> <li>• Antigen manufacturing</li> <li>• Antitoxin manufacturing</li> <li>• Biotechnological manufacture of pharmaceutical and medicinal products</li> <li>• Blood serum manufacturing</li> <li>• Contraceptive, medicinal, manufacturing (except rubber contraceptives)</li> <li>• Diagnostic substance manufacturing</li> <li>• Drug manufacturing (except veterinary)</li> <li>• Herbal drug manufacturing</li> <li>• Hormone manufacturing (except veterinary)</li> <li>• Medicinal capsule manufacturing</li> <li>• Medicinal chemical manufacturing</li> <li>• Medicinal ointment manufacturing</li> <li>• Medicine manufacturing (except veterinary)</li> <li>• Morphine manufacturing</li> <li>• Saccharin manufacturing</li> <li>• Serum manufacturing</li> <li>• Vaccine manufacturing (except veterinary)</li> <li>• Vial manufacturing</li> <li>• Vitamin product manufacturing</li> </ul>
1851	Cleaning Compound Manufacturing	<ul style="list-style-type: none"> <li>• Candle manufacturing</li> <li>• Denture cleaner manufacturing</li> <li>• Detergent manufacturing</li> <li>• Dishwashing detergent manufacturing</li> <li>• Disinfectant manufacturing</li> <li>• Emulsifier manufacturing</li> <li>• Glycerine manufacturing</li> </ul>

		<ul style="list-style-type: none"> <li>• Hypochlorite-based bleach manufacturing</li> <li>• Laundry detergent manufacturing</li> <li>• Penetrant manufacturing</li> <li>• Peroxide preparation manufacturing</li> <li>• Polish manufacturing</li> <li>• Scouring compound manufacturing</li> <li>• Soap manufacturing</li> <li>• Toothpaste manufacturing</li> </ul>
1852	Cosmetic and Toiletry Preparation Manufacturing	<ul style="list-style-type: none"> <li>• After-shave lotion manufacturing</li> <li>• Barrier cream manufacturing</li> <li>• Cosmetic deodorant manufacturing</li> <li>• Depilatory manufacturing</li> <li>• Eye shadow manufacturing</li> <li>• Face cream and lotion manufacturing</li> <li>• Hair preparation manufacturing</li> <li>• Lip balm manufacturing</li> <li>• Lipstick manufacturing</li> <li>• Mascara manufacturing</li> <li>• Nail polish preparation manufacturing</li> <li>• Perfume manufacturing</li> <li>• Shaving preparation manufacturing</li> <li>• Sunscreen preparation manufacturing</li> <li>• Talcum powder manufacturing</li> <li>• Toilet lanolin manufacturing</li> </ul>
1524	Sanitary Paper Product Manufacturing	<ul style="list-style-type: none"> <li>• Disposable paper nappy (cellulose-based) manufacturing</li> <li>• Facial tissue manufacturing</li> <li>• Paper napkin manufacturing</li> <li>• Paper towel manufacturing</li> <li>• Sanitary napkin (cellulose-based) manufacturing</li> <li>• Sanitary paper product manufacturing n.e.c.</li> <li>• Tampon (cellulose-based) manufacturing</li> <li>• Toilet tissue manufacturing</li> </ul>
1841	Human Pharmaceutical Manufacturing	<ul style="list-style-type: none"> <li>• Ampoule manufacturing</li> <li>• Analgesic manufacturing</li> <li>• Anthelmintic manufacturing</li> <li>• Antibacterial manufacturing</li> <li>• Antibiotic manufacturing</li> <li>• Antibody manufacturing</li> <li>• Antigen manufacturing</li> <li>• Antitoxin manufacturing</li> <li>• Biotechnological manufacture of pharmaceutical and medicinal products</li> <li>• Blood serum manufacturing</li> <li>• Contraceptive, medicinal, manufacturing (except rubber contraceptives)</li> <li>• Diagnostic substance manufacturing</li> <li>• Drug manufacturing (except veterinary)</li> <li>• Herbal drug manufacturing</li> <li>• Hormone manufacturing (except veterinary)</li> <li>• Medicinal capsule manufacturing</li> <li>• Medicinal chemical manufacturing</li> <li>• Medicinal ointment manufacturing</li> <li>• Medicine manufacturing (except veterinary)</li> <li>• Morphine manufacturing</li> <li>• Saccharin manufacturing</li> <li>• Serum manufacturing</li> <li>• Vaccine manufacturing (except veterinary)</li> <li>• Vial manufacturing</li> <li>• Vitamin product manufacturing</li> </ul>

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# E Glossary

Abbreviation	Description
ABS	Australian Bureau of Statistics
AFGC	Australian Food and Grocery Council
ANZSIC	Australian and New Zealand Standard Industrial Classification
Appreciation	An increase in the value of the Australian dollar in comparison to foreign currency
CAGR	Compound Annual Growth Rate
Capital Investment (Gross Fixed Capital Formation)	Gross fixed capital formation is measured by the total value of a producer's acquisitions, less disposals, of fixed assets during the reference period, plus certain additions to the value of non-produced assets realised by the productive activity of businesses. Fixed assets are tangible or intangible assets produced as outputs from processes of production that are themselves used repeatedly or continuously in other processes of production for more than one year.
CPI	Consumer Price Index
Depreciation	A decrease in the value of the Australian dollar in comparison to foreign currency
Disposal of assets	Proceeds from the sale of tangible assets (plant, machinery, equipment, land, dwellings, other buildings and structures), and intangible assets (such as patents, licences and goodwill)
Employment	The number of workers employed in the industry or sector at the end of June for the current year, excluding working proprietors
EY	Ernst & Young
FTA	Free Trade Agreement
GDP	Gross Domestic Product
Gross Capital Expenditure	Gross expenditure on acquiring fixed tangible and intangible assets, before deduction of trade-in allowances, and including expenses (except capitalised interest) incurred during the year in acquiring such assets. Fixed tangible assets include land, dwellings, other buildings and structures, plant, machinery and equipment (including motor vehicles). Intangible assets include capitalised exploration expenditure, patents, licences and goodwill.
Industry turnover	Income generated by businesses within the industry from the sales of goods and services. Industry turnover includes the income generated from rent, leasing and hiring income
IVA	Industry value-add. IVA represents the value-added by an industry to the intermediate inputs used by the industry. IVA is the measure of the contribution by manufacturing businesses to gross domestic product. IVA is the total value of goods and services produced by an industry, after deducting the cost of goods and services used in the process of production.
Mfg	Manufacturing
n.e.c.	Not elsewhere classified
Net Capital Expenditure	The value of total capital expenditure less proceeds received from the disposal of assets.
n.f.d.	No further details
Real growth	The growth rate of the variable when the effect of inflation (increase in prices) has been removed
Re-exports	Goods which are imported into Australia and then exported with no additional value-added
Sales of goods and services	Income generated by businesses within the industry or sector from the sales of goods and services
Trade surplus	A positive balance of trade (i.e. the value of exports exceeds the value of imports)

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Trade deficit	A negative balance of trade (i.e. the value of imports exceeds the value of exports)
Upstream industry	An industry that is part of or pertaining to the early stages in the production of a product. The food and grocery industry utilizes the output from an upstream industry as an input. An example of the upstream industry for the milk and cream processing industry is the dairy cattle farming industry
USA	United States of America

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