



South Australian Primary Industries Scorecard

2024-25



Government of South Australia
Department of Primary Industries
and Regions

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Acknowledgment of Country

The Department of Primary Industries and Regions cares for the Country and communities of South Australia.

We ensure the land, sea, water and sky are healthy for future generations and strive to better understand their spiritual and cultural significance for Aboriginal people across the state.

In the spirit of reconciliation, our commitment is to build progressive and trusting relationships to share knowledge and learn from each other.

We recognise and own a difficult past, and together we will walk forward.

We acknowledge the many Aboriginal people of this Country as the oldest continuous living culture in the world.

South Australian Primary Industries Scorecard 2024-25
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All enquiries

GPO Box 1671, Adelaide SA 5001
E pirsa.communications@sa.gov.au

Executive Summary

In 2024-25, primary industries and agribusiness revenue decreased by 6% to \$16.3 billion, while production value decreased by 7% to \$8.4 billion. Overseas exports of agriculture, food, wine and forestry products decreased by 11% to \$7.7 billion. Its share of total SA exports also decreased from 49% to 46%. The result follows a prolonged period of warm and dry conditions that had developed in early 2023 and resulted in the lowest grain harvests in decades.

China remained as the top export destination for South Australia's food, wine and agribusiness commodities despite an 18% decrease in exports value. Exports value to most key markets decreased with the exception of the United States, which increased by 47% mainly driven by beef exports.

Contribution to Gross State Product (GSP), in terms of Industry Gross Value Added, from primary production activity (agriculture, forestry and fishing) was \$5.1 billion, down by 14% compared with 2023-24. The primary industries sector along with its associated processing sectors also supported 68,000 FTE jobs in 2024-25.

Overall, results for the full food and wine industry supply chain were slightly down. Combined gross food and wine revenue decreased by just over 1% to reach \$26.2 billion, with decreases in food commodity exports the main driver.

As at 2024-25 there are a total of 257 Australian Carbon Credit Units (ACCU) scheme projects registered in South Australia including 237 agriculture and vegetation projects. In 2024-25, 50 new projects were registered in South Australia including 49 agriculture and vegetation projects.

Introduction





In order to track the performance of the primary industries in the state, the Department of Primary Industries and Regions (PIRSA) has created a set of industry scorecards. These scorecards offer comprehensive value chain metrics to assess annual performance.

The 2024-25 scorecard includes primary industries sectors and associated processing such as field crops, livestock, horticulture, wine, seafood, dairy, forestry, wool, skins, seeds and animal feed. Headline indicators to help describe the economic contribution and performance of the industry in South Australia are also included in the report.

The first of these is primary industries and agribusiness revenue which measures the revenue of primary production and associated processing. This includes the final sales of primary industries products (largely international and interstate exports of unprocessed grains and live animals) plus the value of locally processed products (such as fresh and processed food, wine and wood products at wholesale value).

The value of these industries to the state is reflected in the included measures of employment and contribution to Gross State Product (GSP).

For continuity with previous scorecard reports (the SA Food and Wine Scorecard that was published until 2016-17), the full food and wine supply chain measures are included in the food and wine supply chain section of this report. The food and wine scorecards expand beyond primary production and processing to include the value of final local retail and food service sales.

While retail and food service sales are included in this section of the food and wine scorecards, for the purpose of measuring the employment and economic impact of the primary industries and agribusiness sectors, retail and food service contributions are not included.

An addition to the scorecard made in 2023-24 was the inclusion of carbon farming activities across the state. The scorecard now tracks the number of Australian Carbon Credit Unit (ACCU) Scheme projects—covering agriculture and vegetation—registered in South Australia, along with the number of ACCUs issued, abatement commitments, and contracts. The long-term objective is to measure and monitor carbon abatement registered under the ACCU Scheme, and the associated revenue generated through agriculture-related activities across the state.

Overview



Economic Overview

The global economy demonstrated resilience in 2024-25 amid persistent uncertainties, with Gross Domestic Product (GDP) growth projected at 3.3% for 2024 before easing slightly to 3.2% in 2025 (IMF, 2025). The modest slowdown reflects trade policy frictions, including potential tariff hikes and geopolitical tensions, which could disrupt supply chains and elevate commodity prices. Global inflation continued to moderate, though it remained above targets in major economies like the United States, driven by lingering supply-side pressures. Geopolitical risks -including ongoing conflicts and policy volatility- posed downside risks to growth, particularly through impacts on energy and fertiliser costs that affect agricultural export competitiveness.

Australia's economy grew modestly in the 2024-25 financial year, with GDP expanding by 1.4%, the weakest annual growth since the early 1990s, excluding COVID-impacted 2019-20 year (ABS, 2025). Growth was supported by resilient household consumption and public sector demand, offset by weaker productivity and external headwinds. Inflation moderated, with the trimmed mean rate at 2.7% (year-ended June 2025), close to the Reserve Bank of Australia's (RBA) 2 to 3% target midpoint. Australian labour market remained robust despite subdued GDP growth, with strong participation and employment to population ratios. Australia's unemployment rate stood at 4.2% in June 2025 (South Australian Centre for Economic Studies, 2025).

South Australia's Gross State Product (GSP) increased by 1.0% in 2024-25. Aggregate spending strengthened, led by sharp increases in public sector investment, and dwelling investment. Public sector consumption spending also grew solidly throughout the year, while household consumption growth resumed following period of prolonged weakness supported by easing inflationary pressures (South Australian Centre for Economic Studies, 2025).

South Australia's international trade has weakened through 2024-25, largely reflecting the impact of a poor grain harvest. Labour market conditions in South Australia have rebounded strongly through 2024-25 following a period of softness in the first half of 2024, with total employment rising by 3.7% in the year to June 2025 (South Australian Centre for Economic Studies, 2025).

Australia's seasonal conditions in 2024-25 were characterised by warmer-than-average temperatures and variable rainfall, with some regions experiencing significant rainfall and others facing dry conditions. For much of 2024 and until June 2025, slow-moving high-pressure systems dominated southern Australia's weather patterns, contributing to persistent warm and dry conditions. Since early 2023, rainfall deficiencies (rainfall totals in the lowest 5% since 1900) have developed in Western Australia, South Australia, Victoria and Tasmania (Bureau of Meteorology, 2025).

Rainfall deficiencies resulted in below-average winter crop production in South Australia and Victoria. However, favourable seasonal conditions in New South Wales and Queensland at the time of planting supported increased planting areas and above-average yields, driving strong national winter crop production (ABARES, 2024). In addition to the smaller harvest, prolonged dry conditions in South Australia strained pasture establishment, leading to fodder shortages, high prices, widespread destocking and animal welfare concerns.

South Australian primary industries faced several other challenges in the 2024-25 financial year. The detection of tomato brown rugose fruit virus (ToBRFV) affected market access, with some domestic jurisdiction and exports destinations such as New Zealand placing restrictions on South Australian tomatoes. The algal bloom which is harmful to fish and some marine animals continued to affect the seafood and tourism industries, while biosecurity risks such as varroa mite and giant pine scale remained potential threats to the apiary and forestry industries.

Despite these challenges, 2024-25 brought positive developments for the agriculture, fisheries and forestry industry. The full resumption of Australian live rock lobster and red meat exports to China marked a significant milestone, effectively ending all trade restrictions imposed since 2020.

Primary Industries and Agribusiness Revenue

Primary industries and agribusiness revenue (referred to as revenue hereafter) is a headline measure in the scorecard. It includes the final sales of primary industries products (largely unprocessed grains and live animals) and the value of locally processed products (mostly food, beverages and wine).

In 2024–25, South Australia’s primary industries and agribusiness collectively generated \$16.3 billion (Figure 1). Field crops was the largest contributor, accounting for \$4.25 billion or 26% of the total. Livestock (excluding dairy and wool) followed closely with \$4.13 billion. Horticulture, wine, and forestry contributed \$2.26 billion, \$2.24 billion, and \$1.60 billion, respectively. Dairy, seafood, and wool were comparatively smaller contributors, generating \$757 million, \$490 million, and \$374 million, respectively, in 2024–25.

Figure 2 outlines the revenue trend over the past five years. In 2024-25, the total revenue was down by about 6% to \$16.3 billion. This trend was primarily due to the decline in field crop sector revenue, which dropped by 32% from \$6.27 billion to \$4.25 billion. This decrease was driven by a smaller crop harvest following prolonged dry conditions across most cropping areas in the state. Alongside field crops, wool and dairy were the only other sectors to record a decline in revenue. Wool industry revenue decreased by 23% to \$374 million driven by the persistent dry conditions. Dairy industry revenue decrease (down by 1%) was driven by 13% loss in cheese manufacturing value, much of which was offset by gain in milk-powder processing value.

Livestock (excluding dairy and wool), horticulture, and wine recorded significant revenue gains in 2024–25, offsetting much of the overall decline in total primary industries and agribusiness revenue. Livestock industry revenue rose by

19% to reach \$4.13 billion, driven primarily by higher meat processing values resulting from a combination of increased prices and greater processing volumes. Beef sector growth was underpinned by a 21% rise in average prices and a 26% increase in the number of cattle processed. Growth in sheep meat and pig meat sectors was mainly due to higher prices, while the chicken meat sector benefited from increased processing volumes.

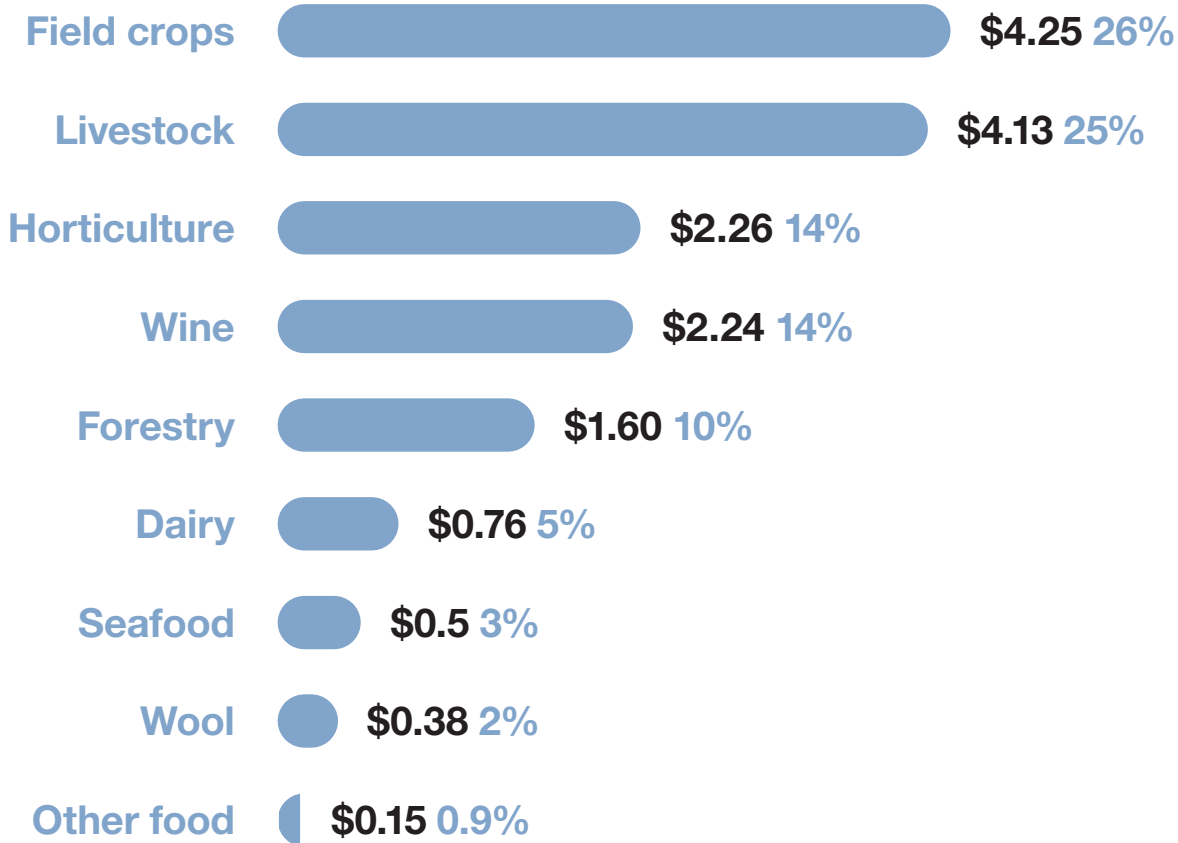
Horticulture industry revenue recorded a 9% increase to reach \$2.26 billion. Almond sector, which saw a 78% increase in value, was the main driver of this growth. Key sectors like potato (down 2%), citrus (down 3%) recorded marginal decreases in revenue whereas, tomato sector revenue was significantly down by 24%.

The wine industry revenue, measured in the scorecard by the wholesale value of produced wine inclusive of sales and changes in inventory, increased by 12% in 2024-25, reflecting approximately 8% increase in crush size and 5% increase in the overall average crush purchase value.

Forestry industry revenue rose marginally by 2% to reach \$1.60 billion. Seafood industry revenue increased by 7% to reach \$490 million, mainly driven by increase in the value of rock lobsters (up 18% to \$126 million) and southern bluefin tuna (up 4% to \$80 million).

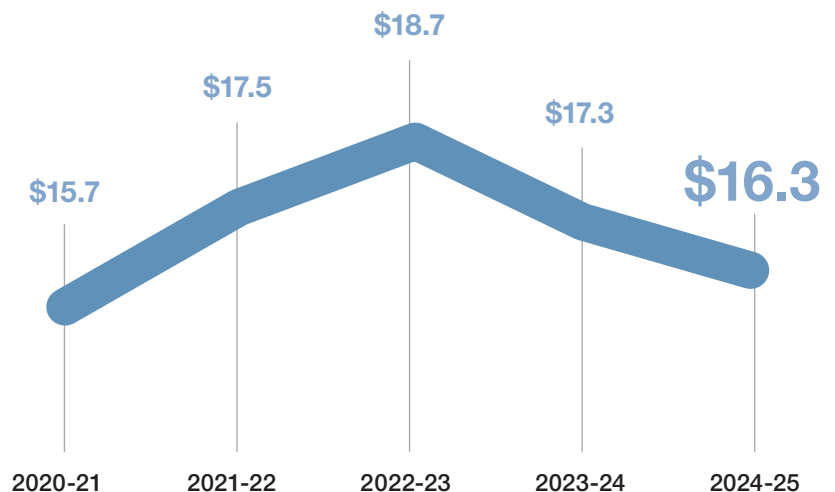
\$16.3 billion

Figure 1. Primary industries and agribusiness revenue (\$ billion) and share of the total revenue by industry 2024-25



Revenue \$ billion

Figure 2. 5-year trend of Primary industries and agribusiness revenue (\$ billion)



Primary production value refers to the value of a commodity at the local level of production, also known as the farm gate value. This represents the value of production to the primary producer.

Production Value

\$ billion

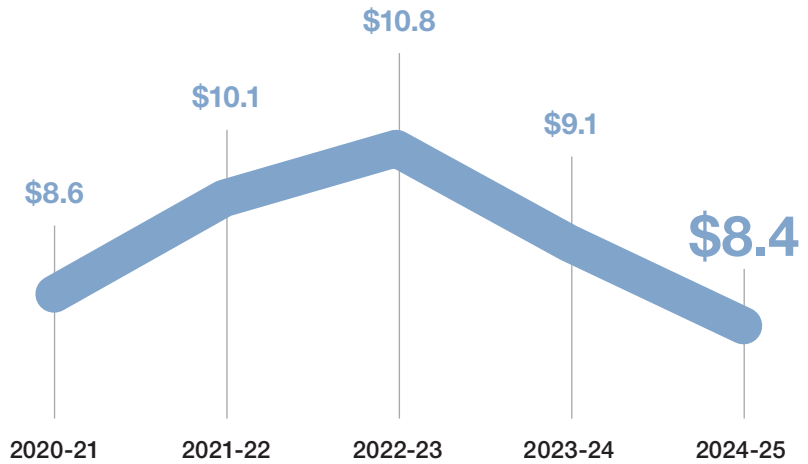


Figure 3. Primary production value (\$ billion) decreased by 7% in 2024-25

Table 1 summarises production values and changes compared with 2023–24 and five-year averages, highlighting trends over the past five years. In 2024–25, total primary production value decreased by around 7% to \$8.4 billion, primarily due to a decline in field crop production value, which fell by 35% to \$2.39 billion. Prolonged dry conditions across most cropping regions in the state resulted in a well below-average grain harvest of 5.2 million tonnes, leading to the lower production value.

In contrast, the production value of the livestock industry increased by 23% to \$2.44 billion, driven primarily by strong growth in the beef and sheep meat sectors. Beef production value rose by 30% to \$946 million, while sheep meat surged by 35% to \$650 million, largely due to higher cattle and lamb prices, which increased by an average of 29% and 48% respectively compared with the previous year. The egg industry, although relatively small, recorded a 34% increase in production value, rising from \$50 million to \$67 million, as egg prices climbed significantly.

Horticulture production increased by 13% to \$1.58 billion, with much of the growth driven by a 78% rise in the value of almond production to \$401 million. Key sectors such as citrus and potatoes recorded lower production values compared with 2023–24, decreasing by 3% and 2% respectively. Tomato production value fell sharply by 23% to \$108 million, while

combined cucumber and capsicum production values rose by 4% to \$151 million, reflecting an anticipated industry shift from tomatoes to cucumbers and capsicums following the impact of ToBRFV on tomato crops.

Winegrape production value reached \$577 million, up 13% from the previous year, reflecting approximately 8% increase in the winegrape crush and 5% rise in the overall average purchase price, though this remains well below the 5-year average. Seafood production value, comprising aquaculture and wild-catch fisheries, grew by 7% to \$443 million. This increase was largely driven by a 13% rise in wild-catch fisheries value to \$232 million, underpinned by strong growth in rock lobster and prawn sectors, which recorded increases of 18% (to \$120 million) and 29% (to \$34 million) respectively.

Other industries that recorded a decline in production value, apart from field crops, included dairy, wool, and forestry. Similar to field crops, the dairy and wool sectors were affected by the prolonged dry conditions across the state. Dairy production value fell by 3% compared with the previous year, driven by a 1.6% reduction in milk production volume and a 1.1% decrease in the farmgate milk price. Wool production value declined by 14% to \$375 million, largely due to an 18% drop in the volume of wool produced. Forestry production value decreased by 19%, reflecting reductions in both log volumes and average prices, particularly for hardwood logs.

Table 1. Primary production value (farmgate value) by sector

	2024-25 (value in \$ million)	Change from 2023-24	Change from previous 5 year average	5-year trend
Field crops	2,391	-35%	-33%	
Wheat	919	-47%	-46%	
Barley	352	-48%	-45%	
Other	1,120	-8%	-7%	
Livestock	2,436	23%	5%	
Sheep	650	35%	-5%	
Beef	946	30%	5%	
Chicken	411	9%	18%	
Pig	290	7%	11%	
Other	138	10%	15%	
Horticulture	1,581	13%	22%	
Potatoes	346	-2%	35%	
Citrus	125	-3%	1%	
Almonds	401	78%	117%	
Other	709	3%	-3%	
Wool	375	-14%	-13%	
Winegrapes	577	13%	-13%	
Seafood	443	7%	3%	
Aquaculture*	211	1%	-8%	
Wild Catch Fisheries	232	13%	16%	
Forestry**	280	-19%	-10%	
Dairy	336	-3%	14%	
Total	8,419	-7%	-9%	

*All data (excluding Southern bluefin tuna based on industry projections and not actual data

**Most recent data available for forestry production is the 2023-24 data from ABARES

Overseas Exports

Total overseas merchandise exports from South Australia in 2024-25 decreased by about 5% to reach \$16.6 billion.

The value of overseas exports of primary industries and associated processing (or food and agribusiness industries) totalled \$7.7 billion, a decrease by about 11% from the previous financial year. Increases in value of wine, beef, sheep meat, almond and lobster exports were not enough to offset the loss in value of grain exports (down by 42% to \$2.6 billion), thereby bringing down the total food and agribusiness exports value in 2024-25. Its share of total merchandise exports also decreased from 49% to 46% (Figure 4).

Table 2 includes values of top ten food and agricultural products exported from South Australia in 2024-25, along with change from the previous year in terms of percentage as well as absolute value.

The largest exports were wine (\$1.77 billion), wheat (\$1.18 billion), beef (\$804 million), sheep meats (\$722 million) and lentils (\$646 million). Among key exports, top performers were lobsters (up by 131% or \$53 million to reach \$93 million), beef (up by 123% or \$443 million to reach \$804 million), almonds (up by 64% or \$183 million to reach \$466 million), sheep meats (up by 25% or \$144 million to reach \$722 million) and wine (up by 14% or \$215 million to reach \$1.77 billion).

South Australia's top ten export markets for food and agribusiness in 2024-25 are shown in figure 5, with recent trend in growth for these markets shown in figure 6.

China was by far the largest destination importing \$1.5 billion worth of goods with wine (\$735 million), almonds (\$275 million) and barley (\$211 million) making up more than 80%. After rebounding in 2023-24 following removal of most trade restrictions, exports to China have slowed down in 2024-25 mostly driven by the drop in grain exports reflecting the low production season. On the contrary, exports of wine (up by 114% or \$391 million), almonds (up by 130% or \$156 million) and lobsters (up from \$170,000 to \$63 million) to China increased substantially.

The United States was the second largest export destination and exports increased sharply to reach \$1 billion. This upswing was mostly driven by substantial increase in beef exports which made up almost half of the total. The United States was followed by India, Indonesia and Japan exports to which decreased in 2024-25 mainly because of decrease in grain exports. India, Bangladesh and Indonesia were the three largest importers of grains followed by China and South Africa. United States, South Korea, China and Japan were the largest importers of livestock products mainly beef and sheep meats.

Figure 4. Primary industries overseas export in comparison with the total export value (\$ billion)

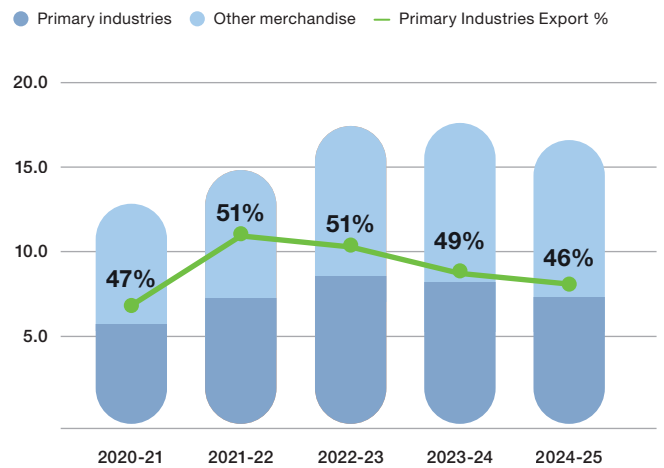


Table 2: Top ten exported products and change from previous financial year

Product	Exports Value (\$ million)		Change from previous year	
	2024-25	%	%	Absolute value (\$ million)
Wine	1,768	14%		\$215
Wheat	1,181	-42%		-\$869
Beef	804	123%		\$443
Sheepmeats	722	25%		\$144
Lentils	646	-27%		-\$234
Almonds	466	65%		\$183
Canola	355	-29%		-\$148
Barley	336	-58%		-\$464
Citrus fruits	132	5%		\$6
Hay	106	-12%		-\$14

Top 10 export markets

\$ million

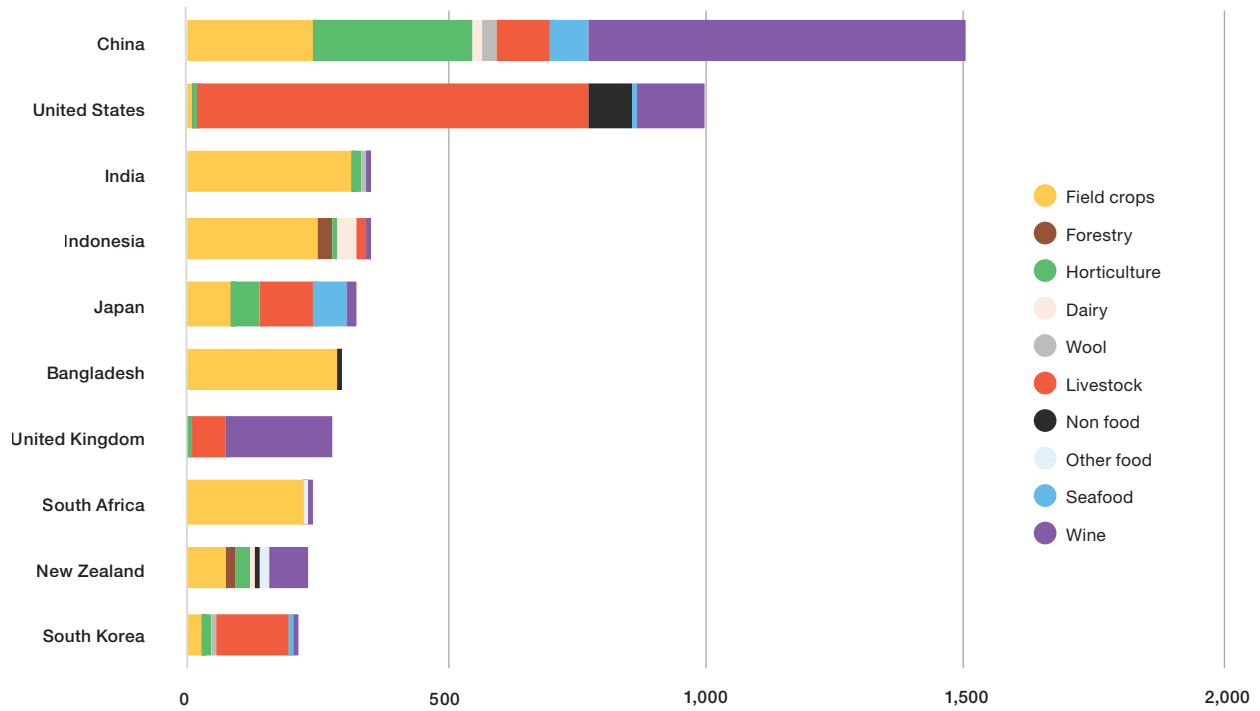


Figure 5. Top 10 export markets for SA's Primary industries and agribusiness

Export markets

\$ million

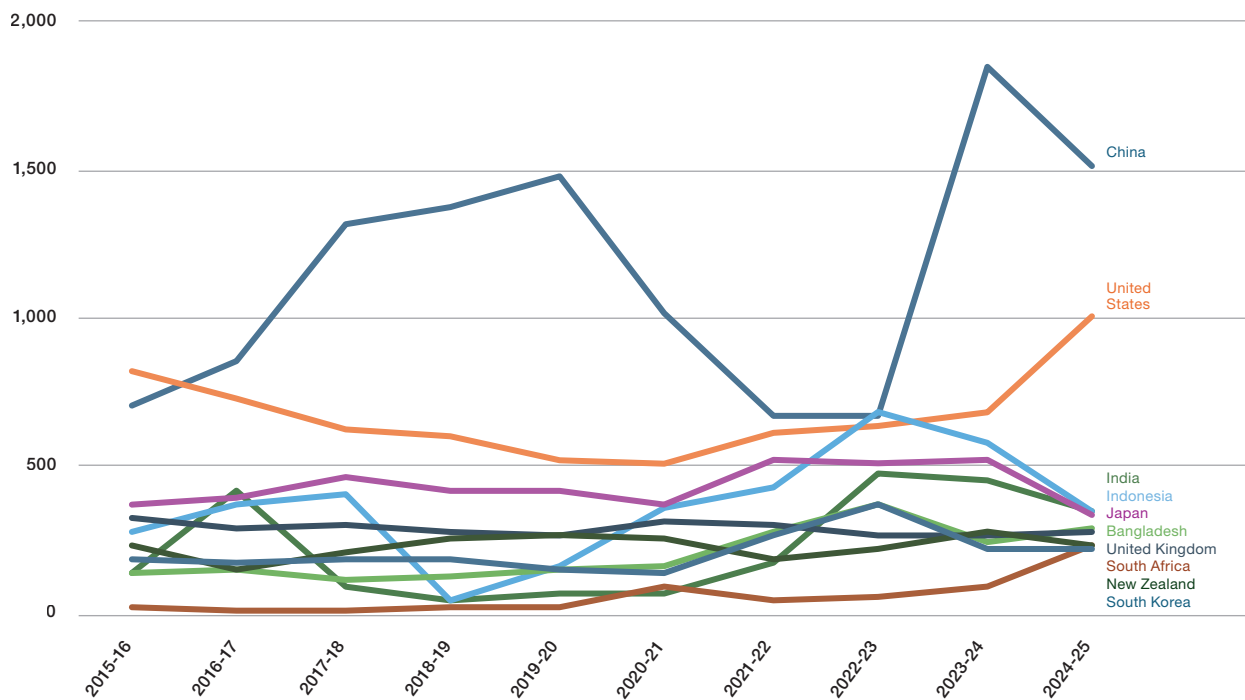


Figure 6. Top 10 export markets and their growth trend in past ten years

Total overseas exports, interstate trade and change in stocks

South Australia’s total value of overseas exports, net interstate trade and change in stocks decreased by about 12% to reach \$11 billion, mainly because of the smaller grain crop harvest and subsequent decrease in grain exports, with some of the losses being offset by increase in livestock, horticulture and wine exports.

The net interstate trade measure reflects the value of goods crossing the state’s borders, with a positive value indicating net interstate exports and a negative value indicating net imports from other states. This is an important metric as it captures some of South Australia’s exports that are not recorded in ABS statistics as originating from the state. For example, much of South Australia’s wool is exported via Melbourne and therefore reported as Victorian exports. Using this measure, PIRSA estimates that interstate exports of

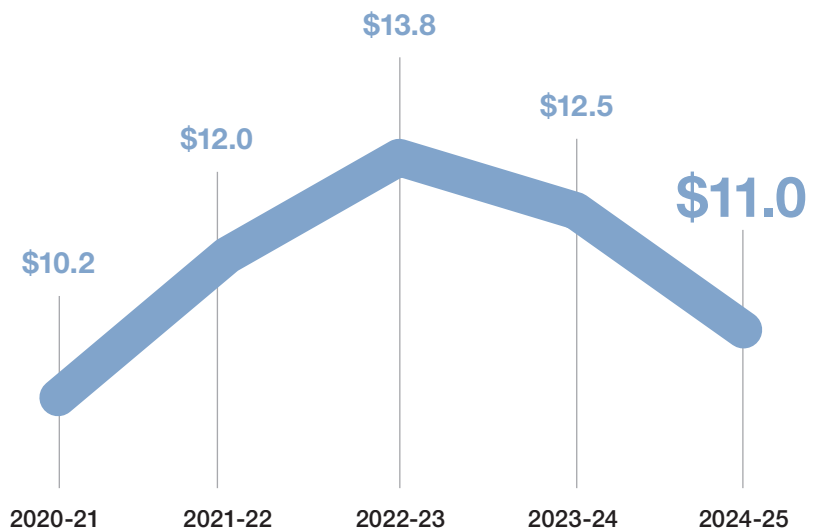
wool from South Australia were valued at \$291 million, which would ultimately be exported overseas. This puts the total value of wool exports from the state at around \$369 million. Similarly, value of timber logs exported from the South East region of the state via Portland, Victoria was also estimated to be around \$19 million putting the total estimated value of timber log exports from the state at \$22 million.

\$11 billion

Overseas and Net Interstate Trade

\$ billion

Figure 7. 5-year trend of primary industries total overseas and interstate exports (\$ billion)



Economic Contribution and Employment

To enable consistent measurement of economic contribution (contribution to Gross State Product or GSP) and employment (Full Time Equivalents or FTE) these measures were aligned with estimates which are based on the Australian Bureau of Statistics' Australian National Accounts and Labour Force survey data. For contribution to GSP, industries included in the estimates are Agriculture, Forestry and Fishing only as ABS data do not breakdown manufacturing.

Employment FTEs

In 2024-25, total employment in primary industries and associated processing was estimated to be around 68,000 FTEs (Figure 8). This was a decrease of around 11% from the previous financial year.

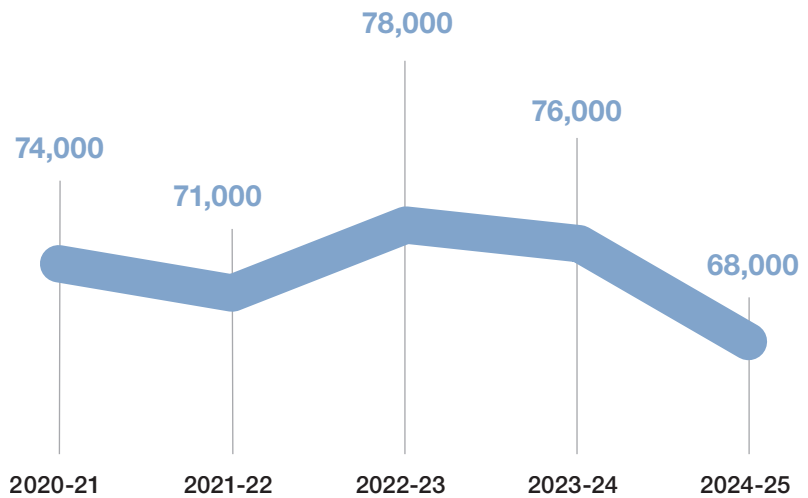


Figure 8. Primary industries and agribusiness employment (FTEs)

GSP \$ billion

Contribution to GSP (Figure 9) in terms of real industry value added, from just primary production activity alone (agriculture, forestry and fishing) in 2024-25 was \$5.05 billion, a decrease by almost 14% from the previous financial year resulting in its share of GSP decreasing by 0.6 points to 3.3% (ABS, 2025).

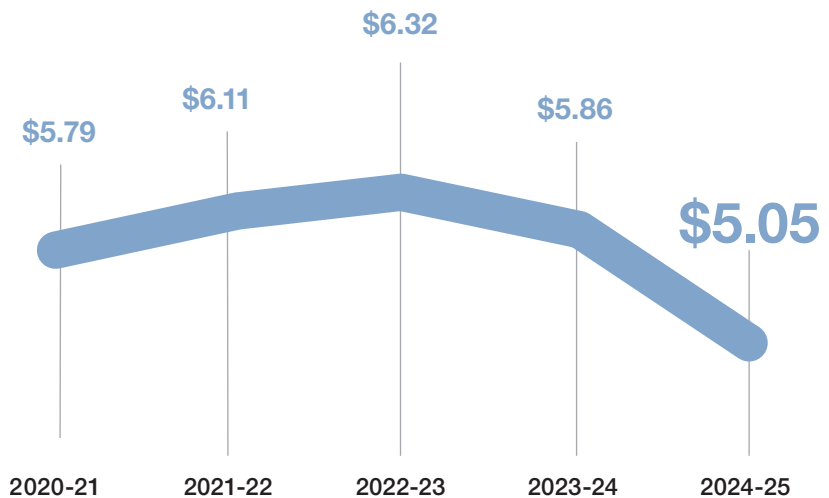


Figure 9. Contribution to GSP (\$ billion) from primary production activity





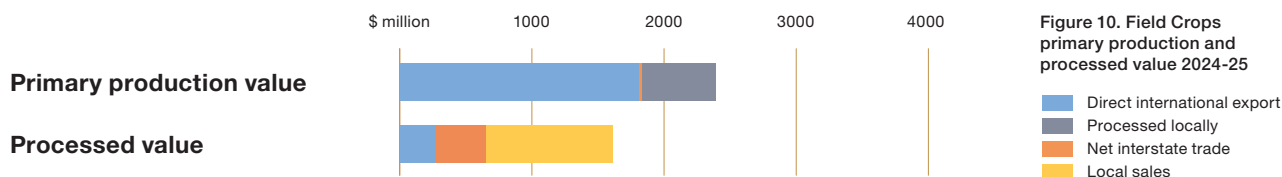
Sector summaries



The sector performance summaries include the 2024-25 value of the major industries at the primary production and processing level. Comparisons with the previous year and over the past five years are also provided. Primary production value is shaded to indicate how much of local production is processed in the state, exported interstate or sent unprocessed overseas. The processed value indicates the wholesale value of processed products. The totals are shaded to reflect the proportion that is exported internationally, interstate or sold in the South Australian market.

Field Crops

	Total (\$ million)	Change from 2023-24	Change from previous 5-year average	5-year trend
Primary production value	2,391	▼ 35%	▼ 33%	
Processed value	1,616	▲ 0.5%	▼ 2.7%	



Field crops in South Australia include grains—mainly wheat, barley, oilseeds and pulses—as well as hay and seeds. Grain production in the 2024–25 season totalled 5.2 million tonnes, which is 43% below the five-year average and the lowest volume since 2008–09. This marks the second consecutive season of decline following the record harvest in 2022–23. The significant rainfall deficit experienced across the state over the 18 months to February 2025 was the main driver of the reduced output. Frost also contributed to lower production, with damaged crops cut for hay in areas where biomass allowed.

The total value of field crop production was \$2.39 billion, a 35% decline from the previous season, driven largely by a 41% drop in grain output. Lentils was the only grain crop to record growth, with production value rising 20% to \$383 million, primarily due to significant expansion in planted area—particularly on the Eyre Peninsula. Wheat production value fell to \$919 million (down 47%), barley to \$352 million (down 48%), and canola to \$251 million (down 17%). Hay production value increased by 17% driven by increase in price despite a smaller production.

Figure 10 shows that vast majority of grains produced are exported as grain commodities and relatively smaller quantities are sent interstate or processed in the state. Wheat, barley, lentils and canola are the largest exports.

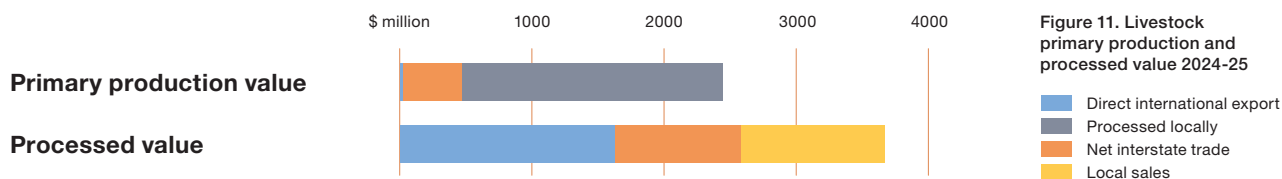
Overseas exports of grain commodities fell by 42% to \$2.63 billion. Wheat exports were valued at \$1.18 billion (down 42%), with the largest markets being Indonesia (\$250 million) and South Africa (\$215 million). Barley exports (both feed and malting) declined by 58% to \$336 million, with key destinations including China (\$211 million), Saudi Arabia (\$49 million) and Iran (\$26 million).

Lentil exports decreased by around 27% to \$646 million, most of which went to India (\$278 million) and Bangladesh (\$257 million). Canola oilseed exports followed a similar pattern, falling 30% to \$355 million, with Pakistan (\$102 million), Belgium (\$90 million) and Germany (\$58 million) making up the principal export destinations. In 2024-25, there were no recorded exports of lucerne seeds to Saudi Arabia as it marks the first full season since the import closure.

Processing value of field crops industry increased marginally (up by 0.5%) as a result of increase in the value of hay that eventuated from increased price reflecting the shortage. Compared with the previous 5-year average, processing value was down by around 3%, mainly resulting from a decline in the wholesale value of barley (beer) processing with the closing of a major beer manufacturing facility in the state in June 2021. The reduced beer manufacturing capacity has been partially offset by the continued increase in scale of the craft brewing sector.

Livestock

	Total (\$ million)	Change from 2023-24	Change from previous 5-year average	5-year trend
Primary production value	2,436	^ 23%	^ 5%	
Processed value	3,675	^ 24%	^ 37%	



The livestock industry includes beef, sheep, pig meats and chicken meat, along with smaller sectors such as eggs, kangaroo and goats. Although livestock sector recorded growth in overall value during 2024-25, this was in the face of challenging seasonal conditions. Prolonged dry weather across South Australia led to severe fodder shortages, forcing producers to increase livestock turn-off rates to manage feed constraints. These conditions not only influenced herd management decisions but also placed pressure on input cost and long-term herd building strategies, highlighting significant impact of climate variability on the sector's performance.

In 2024-25, the total value of livestock production (excluding wool and dairy) reached \$2.44 billion—an increase of about 23% on the previous year. All major livestock categories recorded production value growth, including beef (up 30%), sheep meat (up 35%), chicken (up 9%) and pork (up 7%). The beef and sheep sectors were the main drivers of this increase, largely due to higher cattle and lamb prices, which rose by an average of 29% and 48% respectively compared with the previous year.

Livestock processing value increased by around 24% to \$3.67 billion, with beef, chicken, sheep and pigmeats accounting for roughly 95% of the total. All major livestock sectors recorded growth in processing value in 2024-25 compared with the previous year. The beef sector was the strongest contributor, with processing value rising 58% to just over \$1 billion. This substantial increase was driven by a 21% rise in average beef prices and a 26% increase in the number of cattle slaughtered.

Growth in the sheep meat sector was supported by a 21% increase in the average lamb price. Chicken meat processing value rose by 9% to \$940 million, largely due to a 13% increase in processing volume. Similarly, pig meats processing value increased by nearly 15% to \$625 million, underpinned by a 3% rise in output and an 11% increase in average price.



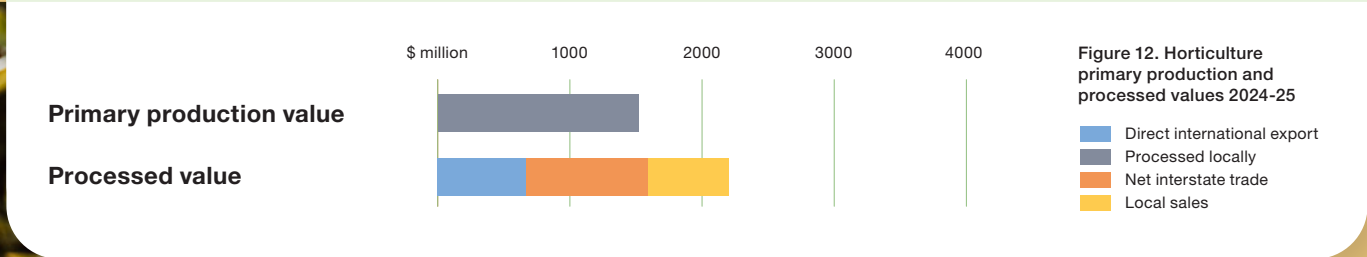
Total livestock export value, excluding dairy and wool, rose by about 55% to \$1.64 billion, with beef and sheep meat accounting for over 93% of this total, or \$1.53 billion. Beef sector exports increased by 123% to \$805 million, almost all of which was meat. This surge was driven by strong overseas demand, with all of the top ten beef export markets recording increases in value during 2024-25. The United States remained the state's most valuable beef market, with both export volume and value rising sharply from 2023-24. Exports to the U.S. reached \$432 million—an increase of 161%—and represented more than half of total beef export value. South Korea and Japan remained the second and third largest markets respectively.

Sheep sector export value reached \$723 million in 2024-25, an increase of 25%, with meat accounting for almost the entire total; live sheep exports contributed only about \$1.3 million. The rise in export value was driven by higher prices (up 17%) and increased export volumes (up 7%). All major markets recorded growth, with the United States remaining the most valuable destination at \$315 million (44% of total exports). Malaysia (\$70 million) and China (\$59 million) were also among the top three markets.

Pig meat (\$16 million) and chicken meat exports (\$32 million), while small relative to production, increased by 7% and 8% respectively in 2024-25.

Horticulture

	Total (\$ million)	Change from 2023-24	Change from previous 5-year average	5-year trend
Primary production value	1,581	^ 13%	^ 22%	
Processed value	2,260	^ 9%	^ 17%	



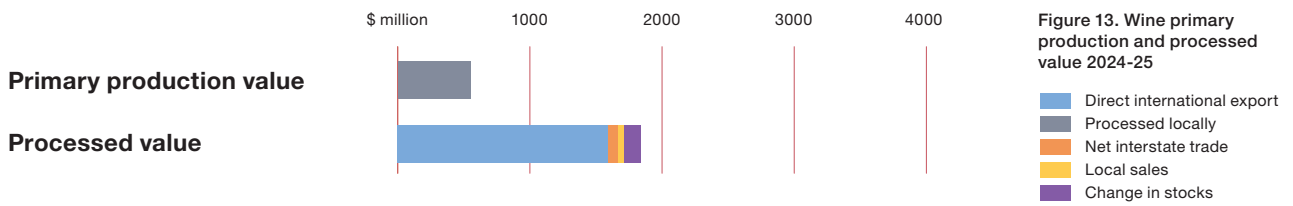
More than 40 horticultural products are measured in the scorecard, with potatoes, almonds, citrus and tomatoes being the largest contributors. In 2024–25, the value of primary horticultural production reached \$1.58 billion, representing a 13% increase on the previous year. This growth was driven largely by a substantial rise in almond production value, which increased by around 78% to \$401 million.

Figure 12 shows that all horticultural produce is processed within the state, with the scorecard defining processing to include even basic activities such as washing and packing. In 2024–25, the horticulture processing value was \$2.26 billion, an increase of around 9% on the previous year. This growth was driven primarily by a 78% rise in the value of almonds, which more than offset declines in citrus (down 3%), potatoes (down 2%) and tomatoes (down 24%).

Total overseas horticultural exports reached \$683 million in 2024–25, an increase of around 39% from 2023–24. Almond exports, which rose by 65% to \$466 million, was the sole driver of this growth. Citrus fruit exports increased by 5%, supported by a 3% rise in the average price and a 2% rise in the volume of citrus fruit exports. Although relatively small compared with other major horticultural sectors, potato exports value recorded strong growth, increasing by 31% to \$28 million.

Wine

	Total (\$ million)	Change from 2023-24	Change from previous 5-year average	5-year trend
Primary production value	577	▲ 13%	▼ 13%	
Processed value	2,245	▲ 12%	▼ 7%	



The wine sector recorded increases in value across both primary production (winegrape growing) and processing (wine production). In 2025, the crush of South Australian winegrapes was estimated to be 747,688 tonnes, representing an 8% increase on the 2024 crush, although remaining 10% below the 10-year average (Wine Australia, 2025). The total estimated value of the crush was \$577 million, up 13%, reflecting the larger crush volume combined with increase in the average purchase price, which rose from \$675 per tonne in 2024 to \$700 per tonne (Wine Australia, 2025). However, production value remains well below the 5-year average. Wine processing value was estimated at \$2.24 billion, an increase of 12%, largely driven by higher wine production volumes following the increase in the total reported winegrape crush.

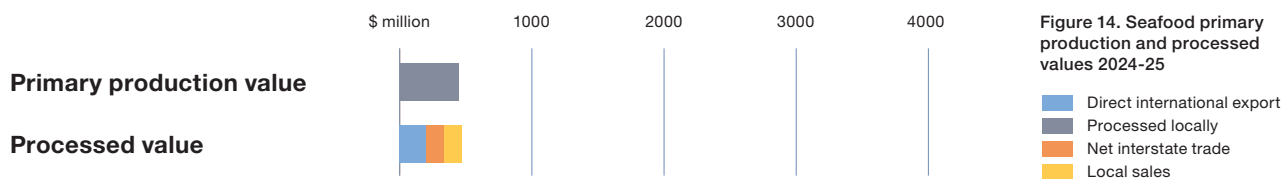
The total value of wine exports increased by 14% to \$1.77 billion in 2024–25. Exports to China surged by 114%, reaching \$735 million. In contrast, exports to most other major markets declined over the same period, reflecting softer global demand. Key markets experiencing decreases included the United Kingdom (down 8% to \$212 million), the United States (down 4% to \$132 million), Hong Kong (down 54% to \$116 million) and Canada (down 3% to \$101 million), with Singapore (up 35% to \$96 million) being the only major market aside from China to avoid a decline.

The outlook for the Australian wine sector has worsened over the past year, with global consumption continuing to fall and annual global consumption remaining below annual production despite some countries reducing vineyard areas. Many winegrape growers have opted for short-term cost-saving measures rather than removing vines, but without substantial reductions in vineyard area, grape prices are unlikely to improve. Similarly, wine prices are expected to remain under pressure while both Australia and global markets face significant oversupply compared with demand (Wine Australia, 2025).



Seafood

	Total (\$ million)	Change from 2023-24	Change from previous 5-year average	5-year trend
Primary production value	443	↑ 7%	↑ 3%	
Processed value	490	↑ 7%	↑ 3%	



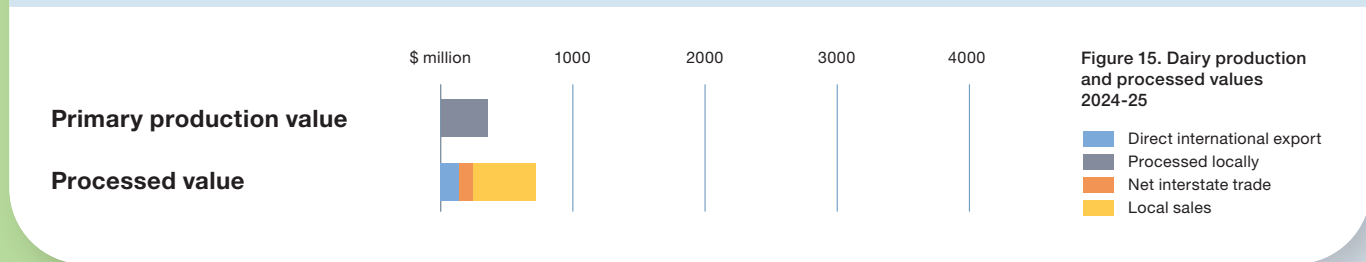
The seafood sector includes fisheries and aquaculture production such as Southern Rock Lobster, Southern Bluefin tuna, oysters, prawns and abalone. The sector had, in the recent past been, negatively impacted by the COVID-19 pandemic and bans, such as the ban on rock lobster, imposed by China.

Estimated seafood production value increased by 7% to \$443 million. This growth was driven primarily by higher values for rock lobster, and prawns. The increase in rock lobster value reflected a 17% rise in prices, supported by stronger demand from China following the removal of trade restrictions. In contrast, the growth in prawn value was largely due to a significant increase in catch volumes, which rose by 35%.

Seafood export values declined by 12%, driven primarily by a 48% fall in southern bluefin tuna exports. Production of southern bluefin tuna in both 2023–24 and 2024–25 remained broadly consistent with the previous three years. However, a substantial portion of the 2023 harvest was exported in July and August 2023 and therefore recorded in 2023–24 export data. This timing effect also reflects the emerging practice of retaining fish in farms for longer periods and harvesting on a more continuous basis. In contrast, rock lobster exports increased sharply, rising by 131% to \$93 million. Nearly 68% of this value, or \$63 million, was exported to China following the removal of trade restrictions.

Dairy

	Total (\$ million)	Change from 2023-24	Change from previous 5-year average	5-year trend
Primary production value	336	▼ 3%	▲ 14%	
Processed value	754	▲ 3%	▲ 17%	



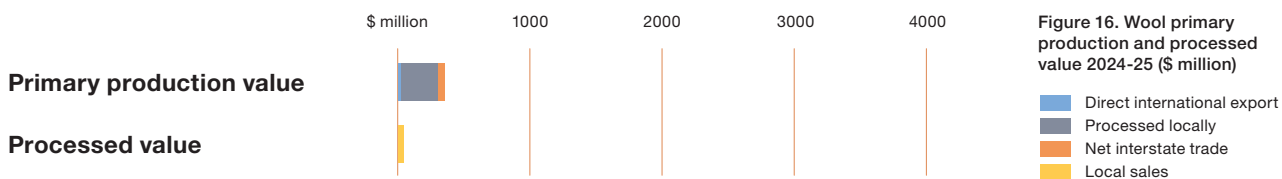
A marginal decrease in the farmgate milk price (down 1.1%) and milk production (down 1.6%) in 2024–25 compared with the previous year resulted in a nearly 3% decline in production value to \$336 million. While this decrease appears marginal, seasonal conditions, rising input costs, and difficulties in sourcing high-quality fodder placed considerable pressure on business operations throughout 2024-25. However, production value remains 14% above the previous five-year average, as farmgate prices continue to be significantly higher than historical levels.

Processing value increased by 3% to \$754 million, driven by a 3% rise in the value of drinking milk and an 11% increase in milk powder value. In contrast, the value of cheese processed in South Australia declined by 13%.

Dairy exports rose by 3% to \$156 million, largely driven by a 29% increase in the value of milk powder exports, which reached \$84 million. In volume terms, milk powder exports grew by 24% to nearly 18,000 tonnes. Conversely, cheese exports declined by 22% in value to \$54 million, accompanied by a 21% drop in volume.

Wool

	Total (\$ million)	Change from 2023-24	Change from previous 5-year average	5-year trend
Primary production value	375	▼ 14%	▼ 13%	
Processed value	54	▼ 18%	▼ 33%	



Dry conditions persisted across most of South Australia through to the end of June 2025, making the 2024–25 season one of the most challenging on record for sheep production in the state. Sheep numbers declined as elevated mutton prices encouraged continued turn-off, while historically low average cut per head contributed to an 18% fall in wool production, which dropped to 47.3 million kilograms greasy (AWI, 2025). Despite prices improving, this significant reduction in volume meant wool production value in 2024-25 declined by 14% to \$375 million. Wool processing (carbonised and scoured wool) value also decreased by 18% to \$54 million.

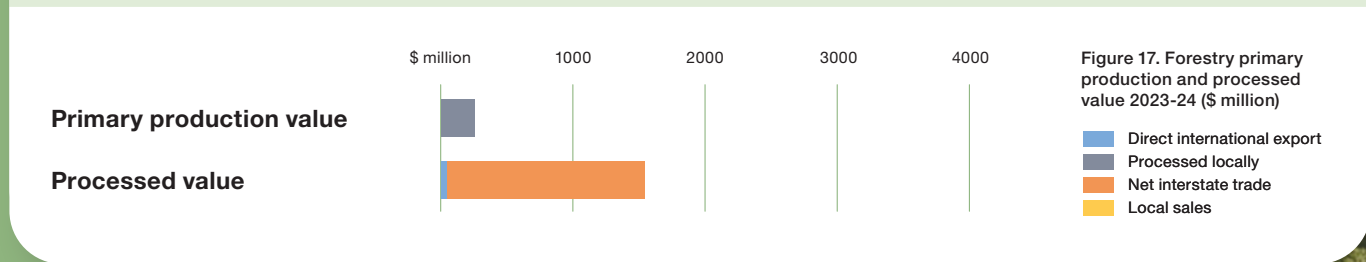
Australian wool exports continued to face challenges in 2024–25. Despite generally improving prices over the year, subdued

demand and lower production resulted in export values declining for the third consecutive year (Bendigo Bank, 2025). It is important to note that the majority of South Australian greasy wool is exported via Melbourne and is therefore not captured in ABS statistics as a South Australian export; only a smaller proportion is shipped directly from the state.

Direct exports of South Australian wool—including carbonised and scoured wool—was valued at \$78 million, a decline of 37% from the previous year. However, assuming no wool is retained domestically, total wool exports originating from South Australia are estimated at around \$369 million, with approximately \$291 million exported via Melbourne.

Forestry

	Total (\$ million)	Change from 2022-23	Change from previous 5-year average	5-year trend
Primary production value	280	▼ 19%	▼ 10%	
Processed value	1,602	▲ 2%	▲ 9%	



Forestry production includes softwood and hardwood logs, with forestry processing including wood and paper products. Forestry production and processing data reported here is from 2023-24, which is the latest data available from the Australian Bureau of Agricultural and Resources Economics and Sciences (ABARES). However, forestry export data reported is from the 2024-25 financial year and sourced from the Australian Bureau of Statistics (ABS).

Forestry primary production value (\$280 million) in 2023-24 was 19% lower than the previous year mainly because of 11% decrease in the volume of log harvested and 9% decrease in average price. Processed value was marginally higher (2%) compared with the previous year, indicating increase in sales of forestry products like wood and paper.

Forestry exports comprise a wide range of products, including timber logs and wood chips. In 2024-25, direct forestry exports increased by 5% to \$63 million, with timber logs accounting for nearly \$3 million of this total. However, these figures do not capture a significant proportion of the state's timber log exports from the South East region, as these are shipped via Portland (Victoria) and therefore not recorded in ABS statistics as South Australian exports. According to PIRSA estimates, the timber log exports from the South East region totalled approximately \$19 million in 2024-25, the majority of which were destined for India. This puts the state's timber log exports value at around \$22 million. Although the export of timber logs has improved since the removal of restrictions, it is still significantly below the 2016-17 to 2019-20 levels.





Carbon Farming

Carbon farming and the broader carbon market present exciting and critically important steps in our efforts to adapt to a changing climate and transition to an economy that is climate smart and resilient.

Greater adoption of carbon farming will help our primary industries and other sectors to reduce their emissions through the generation and purchase of high-quality carbon offsets. Carbon farming can contribute to emissions reduction through practices that increase the amount of carbon stored in soil and vegetation (sequestration) or avoid or reduce greenhouse gas emissions. Carbon farming practices can restore landscapes, improve agricultural productivity, generate new sources of income, and deliver a range of social and economic benefits for regional communities (Government of South Australia, 2022).

To track carbon farming activities in the primary industries sector in the State the Primary Industries Scorecard strives to track the following measures:

- a. Australian Carbon Credit Unit (ACCU) Scheme projects registered
- b. ACCUs issued
- c. Agriculture and Vegetation projects under abatement contracts and abatement commitments

Number of ACCU scheme projects registered

The ACCU scheme encourages people and businesses to run projects that reduce emissions or store carbon, for example by using new technology, upgrading equipment, changing business practices to improve productivity or energy use, and changing the way vegetation is managed. ACCU methods cover projects across:

- a. Agriculture
- b. Energy Efficiency
- c. Landfill and waste
- d. Mining, oil and gas
- e. Vegetation

Agriculture type methods for carbon abatement include practices that enhance soil organic carbon sequestration and animal effluent management. Project activities for these methods include recycling and reusing animal waste, storing soil carbon, and switching farm animal diets and fertilisers (CER, 2025).

Vegetation method projects remove carbon dioxide from the atmosphere and store it as carbon in plants. Project activities include reforestation, revegetation, managing safe fire burning practices and protecting native forest or vegetation at imminent risk of clearing (CER, 2025).

While the vegetation type methods are not exclusive to primary production, there is considerable overlap between land zoned for primary production and the implementation of vegetation type projects.

In Australia, as of 28 September 2025, a total of around 2,450 projects are registered under the ACCU scheme with a vast majority, around 2,040, being agriculture and vegetation projects. A total of 257 projects are registered in South Australia¹, of which 237 are agriculture and vegetation projects,

accounting for almost 12% of national total of agriculture and vegetation projects (CER, 2025).

In 2024-25, around 459 new projects were registered nationally of which around 405 were agriculture and vegetation method type projects. In South Australia, 50 new projects were registered with 49 of them being agriculture and vegetation method type projects (CER, 2025).

Number of ACCUs Issued

Since establishment, almost 174 million ACCUs have been issued with over 3 million issued to projects registered in South Australia. In 2024-25, around 21 million ACCUs were issued to projects all over Australia with around 12 million issued to agriculture and vegetation type projects. In the same period, around 530,000 ACCUs were issued to SA with around 114,000 issued to agriculture and vegetation projects (CER, 2025).

Agriculture and Vegetation projects under abatement contracts

The Clean Energy Regulator (CER) no longer holds ACCU Scheme auctions and the Department of Climate Change, Energy, the Environment and Water is considering how ACCU Scheme purchasing processes will be conducted in the future (CER, 2024). Therefore, CER's Carbon Abatement Contract Register includes information on auctions from April 2015 to March 2023 only. During this period, around 443 projects were contracted across Australia including 20 in SA. In SA 16 out of 20 projects were agriculture and vegetation projects under which a total abatement of 16 million tonnes CO₂e were committed, to be delivered from seven to 13 years from auction date, translating to a total expected carbon revenue of \$278 million which is determined by multiplying total contracted abatement by the \$17.35 which is the average weighted auction price after Auction 15 held in March 2023 (CER, 2023).

Figure 18. No. of ACCU scheme projects in SA

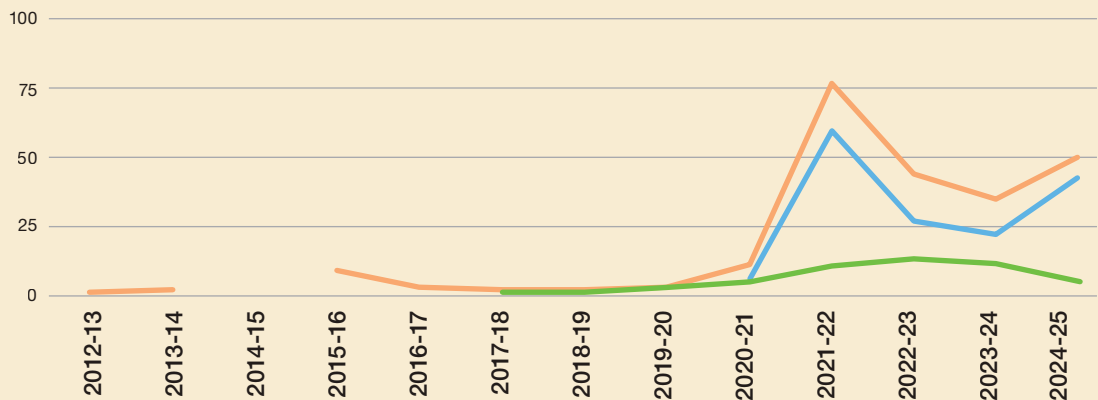
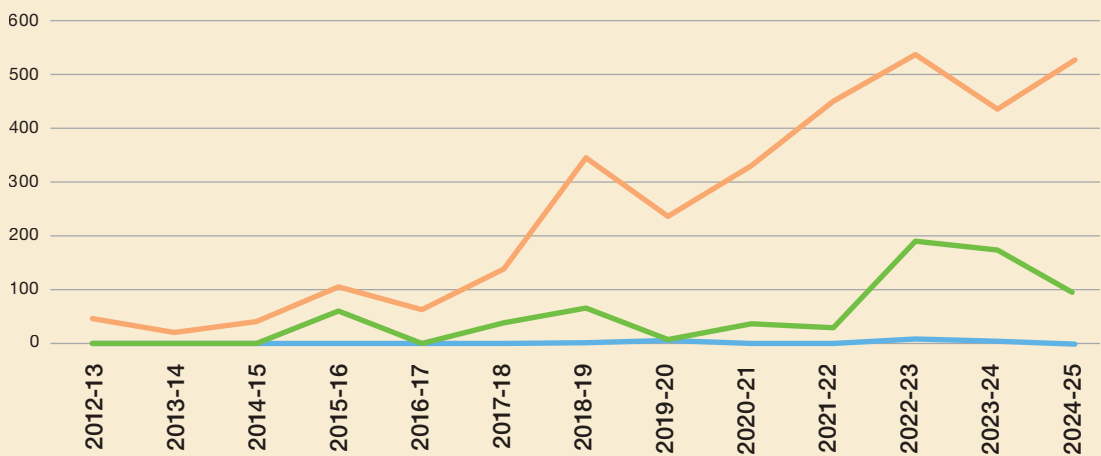


Figure 19. No. of ACCUs ('000) issued to projects in SA



● Total ● Agriculture ● Vegetation

1. Total does not include projects based in multiple states

Food and Wine supply chain

Key highlight for 2024-25 include:

\$26.2 billion

Gross food and wine revenue

Decreased by slightly more than 1% (down by \$342 million) to reach \$26.2 billion (table 3). This decrease was mainly due to the decrease in food commodity exports.

\$23.8 billion

Gross food revenue

(excludes wine) decreased by around 2% (down by \$518 million) to reach \$23.8 billion (Table 4).

\$2.4 billion

Gross wine revenue

Increased by around 8% (up \$176 million) to reach \$2.4 billion driven mainly by overseas exports that totalled \$1.77 billion (Table 5)

\$6.9 billion

Value of overseas food and wine exports

Decreased by almost 10% to reach \$6.9 billion (Table 3)

Food and wine revenue

Table 3. South Australia's gross food and wine revenue 2024-25

	2024-25 (\$ million)	Change from 2023-24 (\$ million)	5-year trend
Gross food and wine revenue	26,213	- 342	
Finished food and wine exports	4,604	949	
Food commodity exports	2,333	-1,707	
Net Interstate processed food & wine sales	2,696	-169	
Net Interstate food commodity sales	411	-102	
Retail trade sales	11,646	355	
Food service sales	4,523	331	

Food revenue

Table 4. South Australia's gross food revenue 2024-25

	2024-25 (\$ million)	Change from 2023-24 (\$ million)	5-year trend
Gross food revenue	23,832	- 518	
Finished food exports	2,836	734	
Food commodity exports	2,333	-1,707	
Net Interstate processed food sales	2,606	-112	
Net Interstate food commodity sales	411	-102	
Retail trade sales	11,357	346	
Food service sales	4,288	323	

Wine revenue

Table 5. South Australia's gross wine revenue 2024-25

	2024-25 (\$ million)	Change from 2023-24 (\$ million)	5-year trend
Gross wine revenue	2,381	+ 176	
International exports	1,768	215	
Net Interstate Trade	90	-56	
Retail trade sales	289	10	
Food service sales	235	8	

Glossary of terms

Primary production value

This measures the value of a commodity at the local level of production (alternatively known as farm gate value). This represents the value of production to the primary producer.

Processed

Products that have been minimally or highly processed. The value is represented by the product's wholesale price into the local or export market (alternatively known as "finished" for food and wine products). It also includes unprocessed food products that are ready to eat, such as fruit or seafood.

Commodity exports

Commodity exports are products that have a minimal change from their natural form and require further processing before consumption – for example bulk grain, unprocessed wool or live animals.

International exports

The value of international exports of products reported by the Australian Bureau of Statistics (ABS) as being of South Australian origin, noting some South Australian products including forestry, wool and Rock Lobsters are often consolidated for international export through interstate ports and are not reported as being of South Australian origin. In these instances, these products are included in the scorecard's interstate trade totals.

Local Sales

A measure of sales at wholesale value within the State. It includes the wholesale value of processed products minus the values of international exports and net interstate trade.

Net interstate trade and change in stocks

This represents the difference in the value of goods exported interstate from those that are imported from interstate, and any change in stocks. This includes products that are consolidated interstate for international export but not reported in ABS Statistics as South Australian international exports. For products that can be stored across years (mostly grain and wine), it also includes any change in stocks.

Primary industries and agribusiness revenue

This measures the revenue of primary production and associated processing. This includes the final sales of commodity primary industry products (mostly international and interstate exports of unprocessed grain, wool and live animals) plus the value of locally processed products (such as fresh and processed food, wine and wood products) at wholesale value.

Food retail sales

The value of food sales made through all retail stores including supermarkets and grocery stores, takeaway food, meat, fish, poultry, fruit and vegetable retailing, liquor retailing, bread and cake, and specialist food retailing.

Food service sales

The value of sales of food and beverages through restaurants, hotels, and tourism operations within South Australia. The calculation estimates the percentage of total sales that occur through these outlets. Prices used in this calculation are usually higher than those used at the retail level.

Food and wine gross revenue

An aggregate measure of revenue that includes international and interstate food and beverage exports and the value of food and beverage retail and service sales.

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