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Committee Secretary  
House of Representatives Standing Committee on Agriculture  
PO Box 6021  
Parliament House  
Canberra ACT 2600  
Submitted via email: [Agriculture.reps@aph.gov.au](mailto:Agriculture.reps@aph.gov.au)

Dear Committee Secretary,

Australian Pork Limited welcomes the opportunity to be able to provide a submission into the Standing Committee on Agriculture inquiry into the role of Australian agriculture in Southeast Asian Markets.

### **Australian Pork Limited and the Australian pork industry**

Australian Pork Ltd (APL) is the peak national representative body for Australian pork producers. It is a producer-owned company combining marketing, export development, research and innovation and strategic policy development to assist in securing a profitable and sustainable future for the Australian pork industry.

The domestic pork industry is a vital part of Australia's food supply chain, with pork the second most consumed meat in Australia and all fresh pork consumed in Australia domestically sourced. In 2022/23, the Australian pork industry produced 453,426 metric tonnes of pork. The largest volume of production is sourced from Queensland, Victoria, New South Wales, and South Australia from an Australian domestic commercial sow herd, as at 1 July 2023, of 285,538 sows.

The Australian pork industry contributes around \$6 billion in gross domestic product to the economy and supports a diverse range of careers across the food supply chain. The industry is domestically focused with around 90% of our production supporting food security for Australians. The value of the 10% exported in 2022/23 was around \$182 million.

Approximately 34,600 jobs are supported by the industry nationally, predominantly in regional Australia, supporting the economic and social prosperity of communities and the wellbeing of individuals. The Australian pork industry's workforce is skilled, specialised and generally engaged on a permanent basis.

Like many rural industries, the pork industry is currently being impacted by staff shortages with the industry willing and able to support more than 36,000 jobs nationwide and opportunity for growth up to 38,000 as Australian pork replaces imported pork in the domestic production of smallgoods.

APL holds a number of roles on behalf of the Australian pork industry. APL is:

- The pork Research, Development and Extension organisation leading research and extension in partnership with the Australian government and the research community
- The marketing arm of the Australian pork industry managing national campaigns such as “Get some pork on your fork” and the Valuable Provenance campaign raising awareness of how to support the growth of high-quality smallgoods made from Australian pork,
- The peak body for the Australian pork industry, representing pork within the National Farmers’ Federation and other representative frameworks,
- Leading the pork industry’s Sustainability Framework implementation,
- Part of the sector-wide collaborative effort to develop an Australian Agricultural Sustainability Framework, coordinated by the National Farmers’ Federation on behalf of the Federal Department of Agriculture, and
- The industry signatory to the Emergency Animal Disease Response Agreement (EADRA).

## Responses to the Terms of Reference

### Opportunities for Australian Agriculture in Southeast Asia

**a. How the Australian Government can support agriculture and food industries in leveraging partnership opportunities within the region. This includes new and improved market access, streamlining trade systems, and supporting industry to identify and build market opportunities in the region.**

#### Australia’s trade and market access

Australian agricultural industries have earned a global reputation for providing high-quality, safe, and sustainable food. With rigorous biosecurity and food safety standards, and commitment to sustainable, productive, and cutting-edge farming practices, Australia is a trusted supplier of agricultural goods to nations around the world. Whilst much of production goes into domestic food supply, export markets are important to the continuity and profitability of the Australian pork industry.

Differentiating and increasing purchasing of Australian pork and growing international demand for Australian pork are key focus areas for APL. Development of markets and production innovation are crucial to extending Australian pork’s reach internationally, with significant potential commercial value. APL’s 2020-25 strategic plan aims to generate 5+ new markets including via international expansion.

The pork industry’s international strategy development has focused predominantly on Singapore, Philippines, Japan, and Vietnam, and APL will continue to support industry in their approach to new or expanded market opportunities.

Australia’s Free Trade Agreements (FTAs) have the ability to assist the pork industry’s export competitiveness in key markets. We value the ongoing work of the Australian Government,

supporting industries by continuing an ambitious agenda of trade agreement negotiations to secure new, commercially meaningful export market access and improve export market access.

APL supports the continued review of FTAs to improve existing arrangements where opportunities exist. It is important that the approach taken includes appropriate consultation and steps are taken to ensure transparency and confidence.

#### Agriculture Counsellor Network

APL is supportive of the role played by agriculture counsellors in these markets. The Department of Agriculture, Fisheries and Forestry's (DAFF) Agriculture Counsellor network provide a critical role in facilitating Australian agriculture exports. We would strongly encourage the continued resourcing of this program as it is a valuable asset in market, assisting to resolve issues and market brand Australia.

### **Building the Southeast Asia's agricultural capability**

- b. Opportunities to build and strengthen partnerships in Southeast Asia to build capability in the region, including in the area of animal and plant biosecurity, adapting to a changing climate, improving agriculture sustainability and agriculture technology and innovation.**

#### Labour mobility

Australia is a relatively small pork producing nation on the world stage plus we have long been challenged by insufficient supply of specialist skills and labour domestically. If we look at supply versus demand for agricultural university graduates in Australia versus the job demand, there is shortfall. Currently is estimated there are around 1,000 graduates for an estimated 3000 jobs per year. This is an estimated shortfall of over 2000 per year<sup>1</sup>.

Access to skilled migration has been and continues to be very important to the Australian pork industry. Data from the 2021 ABS Census shows, that 36% of employees in the Australian pig farming workforce were born overseas, the majority (22%) of which are from the Philippines, with the remaining 14% including workers from other Southeast Asian countries. The industry has a higher reliance for skilled migrant workers when compared to the rest of agriculture whose workforce comprises 20% from skilled migration.

Southeast Asia has a strong focus on agricultural, up to university level training. Due to the local industry where pork is culturally significant workers from these countries have the skills and capability that can (and does) supplement the worker shortfalls in Australia. This has many benefits including skills transfer, team stability and overall business sustainability. We see this mainly in animal husbandry, where a certain level of skills and knowledge is required

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<sup>1</sup> Prately 2022, <https://www.agribusiness.asn.au/documents/item/710>

to meet our high animal welfare standards, but also in supporting technician roles that undertake maintenance including of low emissions technology such as biogas systems.

Labour mobility programs within the Southeast Asian region provides an opportunity for knowledge sharing and to enhance cultural ties. There is significant capacity building and knowledge exchange that occurs (and will continue to be important) between Australia and Southeast Asia, regarding agricultural research and practices. It is imperative that government support mechanisms that allow for immigration of agricultural skilled workers into Australia and that those involved in the application process are well resourced to assess visa applications quickly and efficiently.

### Capability building

Biosecurity is a priority for the pork industry due to the range of diseases which pigs are susceptible to and the close proximity of several high impact emergency animal diseases in countries neighbouring Australia.

Following the lessons learned during the pork industries preparation for the African swine fever (ASF) threat and our experience in responding to the Japanese encephalitis virus (JEV) in 2022, additional on-farm and across supply chain biosecurity activities have been undertaken by APL and implemented by the industry.

Unlike some countries within Southeast Asia, Australia has been fortunate to remain free of ASF. The pork industry in the Philippines is both important culturally and for food security. The country endured a devastating blow in 2019 with an outbreak of ASF, followed by the COVID-19 pandemic. The outbreak of ASF was responsible for massive losses in pig populations and drastic economic consequences. The impacts of which are still being felt.

Where Australia already plays a vital role in the capability building of agriculture within Southeast Asia is through the work of the Australian Centre for International Agricultural Research (ACIAR). ACIAR research has been incredibly successful in the region and as highlighted in the Moore Report, "ACIAR-supported research helped deliver A\$14.7 billion of additional value realised in Indonesia, A\$11.5 billion in Vietnam, A\$4.8 billion in the Philippines and A\$1.7 billion in Thailand."<sup>2</sup>

More specifically for the pork industry, work undertaken by the ACIAR enabled Australia, the Philippines and Timor-Leste to develop a Regional African Swine Fever Socioeconomic and Livelihood Impact Assessment Framework, to consider the impacts of the ASF outbreak<sup>3</sup>. The development of this Framework enabled collaboration between the countries involved on the impacts of ASF in the region.

Employment in Australia's pork industry is vital not only to our business' sustainability but there is an opportunity for skilled Filipino piggery workers to provide Australia with valuable

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<sup>2</sup> <https://www.dfat.gov.au/sites/default/files/invested-southeast-asia-economic-strategy-2040.pdf>

<sup>3</sup> <https://www.aciar.gov.au/sites/default/files/2021-06/final-report-LS-2019-187.pdf>

insights into responding to an ASF outbreak, and for Filipino applicants to support COVID and ASF recovery back at home via remittances.

Department of Agriculture, Fisheries and Forestry (DAFF) also play a pivotal role in the capability building. For example, by bolstering the biosecurity capability and capacity during Indonesia's foot and mouth disease outbreak in 2022 and supporting the Timor-Leste government in their biosecurity preparedness initiatives. Opportunities for government-to-government cooperation and information sharing should continue to be investigated.

### Identifying new and emerging opportunities

#### **c. Identifying new and emerging opportunities and challenges in the region for the Australian agriculture industry, including enhanced market intelligence for exporters to support them to navigate markets and realise opportunities.**

Southeast Asia represents a growing market for Australian agriculture both in terms of population growth and demographic shifts, as wages and subsequent disposable incomes rise, there will be greater consumption, not just in pork but by other commodities such as red meat, seafood, eggs, dairy products, and manufactured foods. There is also an expected change in consumer preferences, moving toward sustainably sourced produce which will drive demand for our products. This creates an opportunity for Australia to highlight its clean and green brand credentials.

### Leveraging identified opportunities

#### **d. Mechanisms for government and industry to leverage identified opportunities for Australian agriculture, and to address key priorities in the Southeast Asia region.**

As a leader in social licence, the pork industry is committed to supporting developments in sustainability that seek to demonstrate Australian agriculture's strong credentials. To support this, APL developed the Pork Sustainability Framework to allow Australian pork producers to demonstrate their commitments in the areas of People, Pigs, Planet and Prosperity.

APL supported and contributed to the development of the Australian Agriculture Sustainability Framework (AASF) to standardise sustainability measurement and to allow Australian agriculture to report into and compare against major international standards. The AASF is a joint initiative led by the National Farmers' Federation and supported by the Australian Government. Development commenced in 2020 and is ongoing, with Australian Farm Institute and CSIRO as primary delivery partners. It is aligned with global initiatives such as the United Nations Sustainable Development Goals.

The AASF provides international trading partners with confidence that Australia takes agricultural sustainability seriously and it provides clarity about how our agricultural production aligns with international climate and sustainability initiatives. This program should be leveraged to meet the emerging opportunity within Southeast Asia, promoting the credentials of Australian agriculture to markets across the region. There is an opportunity for government

to promote the AASF to highlight and substantiate Australian agricultures' clean and green image. As a largely domestic industry (90% of pork produced is consumed in Australia) APL also sees benefits in using the AASF to provide a stronger narrative to help Australians understand industry actions in the sustainability space.

## **Food security in Southeast Asia**

### **e. How Australian agriculture can support Southeast Asia's food security [towards 2040].**

Pork is important culturally and for food security in Southeast Asia and many of these countries are net food importing countries. Australia is well positioned to meet the growing demand for supplementary food requirements due to our geographic proximity and cultural ties, supported by robust free trade agreements.

The Australian pork industry exports 10% of our overall production to high value markets where it is worth around \$182 million per annum. Our export markets are an important component of the Australian pork industry. Export markets provide profitable diversification and product opportunities which in turn support management and stability of the domestic market.

During Covid-19, Australian pork was able to continue to fulfil its commitment to supplying high quality, safe, nutritious pork to the regions during this time due to our relationships with overseas trading partners. One of our key markets, is Singapore and during Covid the Singapore government provided support and ensured flights were made available to allow pork into the country. More recently, Singapore has faced a shortage of pork due to one of its larger importing countries being affected by an outbreak of ASF. During this time Australia has been able to fill this gap in the market.

Exporting to the Southeast Asian region goes beyond our exporting of food and there is an opportunity for the Department to provide support for biosecurity systems in other countries, that will greatly contribute to domestic food security outcomes with our Southeast Asian neighbours.

It is important that to maintain our ability to provide the Southeast Asia region with food security, the domestic policy settings support the production of pork within Australia. We implore the government to consider ensuring that domestic policy settings are being designed and implemented with the utmost consideration given the impact on agriculture's ability to produce food.

The scope of consideration needs to look broadly across policy in biosecurity, industrial relations, animal welfare and environment. Settings that negatively impact farmers ability to produce food, therefore reduce our ability to export to our neighbours in Southeast Asia.

By ensuring that the domestic policy settings are favourable to agriculture production, the government will in turn be supporting the food security of the region.

Thank you again for the opportunity to provide comment. Please do not hesitate to contact Tanya Pittard, General Manager of Policy, and Industry Relations via email at [tanya.pittard@dfat.gov.au](mailto:tanya.pittard@dfat.gov.au) if you would like to discuss the areas raised in this submission.

Yours sincerely

Ms Margo Andrae

Chief Executive Officer