

Pork Sustainability Framework 2023 Baseline Report

Australian Pork Limited



AUSTRALIAN
Pork[®]

About the baseline

This Report summarises the industry baseline figures, and highlights areas of progress achieved so far. It also outlines current and upcoming activity planned to ensure industry is on target to meet its sustainability goals.

The data sets for the Report are not from the same time period but where possible, metrics are reported up to June 2022. In a few cases, data has yet to be sourced which has been noted in the reporting.

For the first year of reporting we have drawn upon data from two key data sources. The first is Australian Pork Limited's (APL) survey of the Australian community which was undertaken in May 2021. This data was collected by a third party using a representative sample of over 2,000 Australians to understand their views of the industry.

The data was critical for the initial development of the Pork Sustainability Framework (the Framework) to both prioritise the areas of action that are important to Australians and, to provide baseline data for community understanding and perceptions of the Australian pork industry.

The second data source is APL's Quarterly Producer Survey. This survey seeks to understand the relative adoption of various practices by the industry and to identify emerging issues and where assistance may be required.

Due to the significant work in responding to the Japanese encephalitis virus (JEV) outbreak in the first half of 2022, the survey was put on hold. This has meant that not all data is available for reporting on all metrics in the Report.

74 producer members, representing 44% of Australian production, were surveyed. As part of the ongoing review process for the Framework, APL will continue to evaluate the reporting metrics to review where we can improve data quality into the future.

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Progress highlights

A revolutionary contributor to Australia's economy and those who work in the sector.



\$200 mil

Since the launch of the Framework, the industry has grown farm gate value by \$200 million keeping us on track to sustainably add \$1 billion to farm gate value by 2025.

A world leader in animal welfare and health.



\$23 mil

 invested in animal welfare research

Over the last 10 years, the Australian pork industry has invested over \$23 million into supporting pig health and welfare.

A world leader in environmental best practice.



73%

 reduction in emissions intensity since 1980

Building and maintaining advocacy for Australian pork, the product and the sector.



Launch

 of career portal

Houses an array of career profiles and job opportunities and will showcase examples of real people doing real jobs within the pork sector to sow the seed for future workforces.

A note from the CEO

Following the launch and initial implementation of the Australian Pork Limited Sustainability Framework in 2021, we've taken time to reflect on, and capture, our baseline activity. This ensures the progress we are driving sees impactful change in the areas of sustainable improvement.

Since the Framework's launch, the industry has faced many external pressures and challenges some of which, whilst not totally unexpected, were not necessarily foreseen. Parts of Australia have been devastated by floods, fires and heatwaves brought about by climate impacts, and alongside the rest of the world, we've seen supply chains disrupted by political issues – such as the war in Ukraine – and have faced continued labour shortages due to COVID-19 policies.

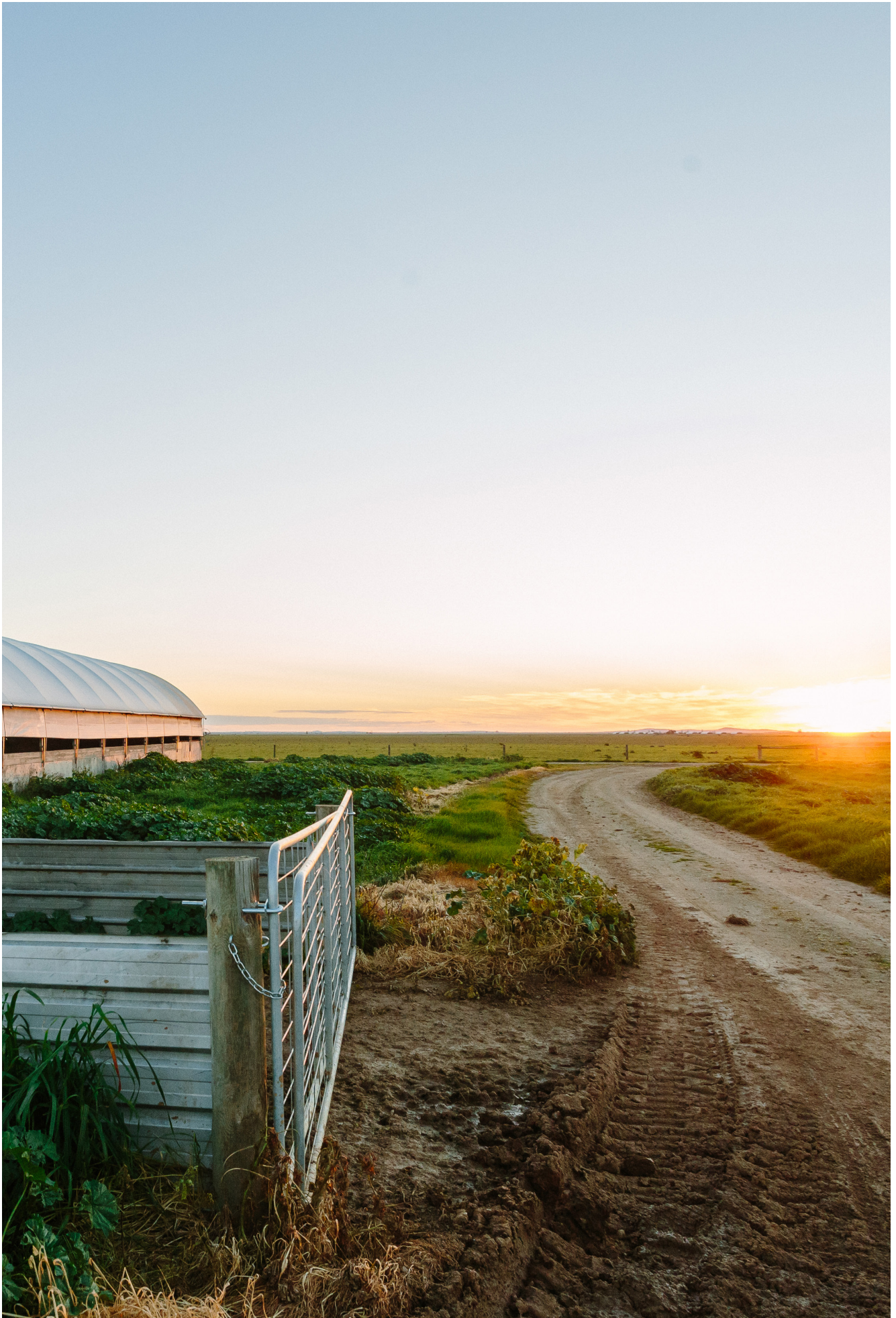
More specifically for the pork sector, 2022 delivered significant biosecurity and disease threats. At the beginning of the year, an outbreak of Japanese encephalitis virus (JEV) peaked at 79 infected premises across four states and unfortunately lead to 30 cases of human infection.

But amidst these crises, we also saw the Australian pork industry staying true to commitments and making strides in addressing our sustainability challenges.

While the Framework is the first of its kind for Australian Pork Limited (APL), the industry has acknowledged the importance of improved efforts in the area of sustainability for a long time, working behind-the-scenes on various initiatives for years. The Framework itself is a fluid, ever-evolving document and there will be changes as we learn about what works best, and as we find new goals to strive for. APL is dedicated to continuous work with our producers to ensure constant progress and improvement is made.

The sustainability of our pork industry matters to producers and to the Australian community alike. I am excited and determined for the future of this great industry and, I hope in reading this update you can find many opportunities to experience the same sentiment.

MARGO ANDRAE
CEO



Sustainability Framework

An overview

Aim

The vision of the Pork Sustainability Framework is to enable a thriving Australian pork industry, striving to sustainably produce the pork that people love. The Framework provides direction for the industry's activities through the setting of aspirations, and the measurement of progress. It takes a wide definition of sustainability incorporating social, environmental and economic factors that come together to provide a comprehensive understanding of the industry and its activities. The Framework reflects the collective position that industry is striving to obtain. It does not place onus on individuals to act, as every farm is different, and the feasibility of actions will vary. It encourages action that will aid change at the industry level.

Consultation

The Pork Sustainability Framework was developed through extensive consultation with the pork industry. Industry stakeholders from the APL Board to all producers in our network were consulted to ensure our goals were aspirational yet remained achievable. We undertook a specific research project to understand the views of the Australian community, working with focus groups in metropolitan and regional areas—as well as conducting a survey of over 2,000 Australians. The aim was to invite the community with us on our sustainability journey, ensuring we are meeting community expectations on sustainability.

As we navigate the next stages of implementation and further develop the goals set within the Framework, consultation with both pork producers and the broader Australian community remains a top priority for APL. This will ensure the Pork Sustainability Framework is meeting the needs of those who are at the coalface of, and those who seek to understand more about this industry.

Reporting scope

Whilst the scope of the Pork Sustainability Framework covers the entire Australian pork supply chain, the Framework is largely focused on driving improvement at the farm level.

Unlike other industries, the Australian pork industry caters predominantly to the domestic market with only around 10% of pork produced exported to our neighbours in South East Asia. Whilst pork products are imported into Australia, most notably ham and bacon, these products are not included within the Framework or reporting.

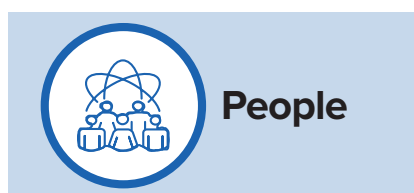
Significant focus has been given to farm level initiatives, as this is where we can have the greatest impact. The Framework focuses on areas such as breeding, raising and management of pigs in Australia and it also extends to considerations around the transport and slaughter of pigs. The Framework touches on the uses of pork as a product but this is not its primary focus.

The Framework does not:

- Mandate or accredit individual farm activities
- Apply to imported pork products
- Cover feed production (covered by other frameworks such as Behind Australian Grain)
- Endorse prescriptive management practices
- Support the comparison of other Australian protein products to gain a competitive edge

The Pork Sustainability Framework is centred around the four key pillars of our industry. Without one of these pillars existing and working in harmony with the others, the industry wouldn't exist.

This means that there is no one pillar more integral to the framework than the others, all have equal weighting when considering the sustainability of the industry. The four pillars have been central to the industry for many years with the framework using them to bring to life the vision of the industry to be proactive leaders in the food industry of the future.



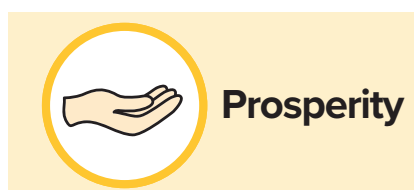
Building and maintaining advocacy for Australian pork; the product and the sector.



A world leader in animal welfare and health.



A world leader in environmental best practice.



A revolutionary contributor to Australia's economy and those who work within the sector.



Labour

Like other agricultural sectors across the globe, the pork industry faced major labour shortages throughout 2022 which continued into 2023. Labour shortages are being felt right across the supply chain and have been an ongoing struggle since the start of the COVID-19 pandemic, with Australia's international and domestic border closures impacting workforce accessibility. In Australia, pork producers and processors continue to report substantial staff shortages of at least 10-20%.

Disease

The largest impact on the Australian pork industry in 2022 was the spread of Japanese encephalitis virus (JEV) in Australia. Mindful of foot-and-mouth disease (FMD) and African swine fever (ASF) being reported in neighbouring countries, our industry continues to stay vigilant, and remain leaders in on-farm biosecurity measures. It remains to be seen if JEV will continue to have lasting impacts on pork production.

Global supply chain disruption

Global events continue to impact on the pork industry and its supply chain, including the continued difficulties in sourcing labour, and rising geopolitical tensions, such as the war in Ukraine, that continue to put pressure on agricultural supply chains. With increased commodity prices, such as feed-grain, fertiliser and fuel prices, the cost of pork production continues to rise.

Climate change

Severe weather events, influenced largely by El Nina, continue to put pressure on pork producers. From the heat waves and fires seen across Australia in early 2022, to the repeated flooding events on the East coast, there has been a notable rise in occurrence of extreme weather events. These weather events are already affecting production, with feed availability and ambient temperature large concerns for producers. Climate change is already affecting our industry and we know, will apply a constant pressure moving forward.

Animal welfare

While concerns from the general public may have moved to environmental issues, animal welfare is never far from people's minds, and continues to be a high priority for the pork industry. With the formation of the Labor Government, came the establishment of a dedicated Office of the Inspector General of Animal Welfare with an initial focus on animal export. Ensuring high quality science is used to inform the development of any new Standards and Guidelines is critical for the pork industry. We acknowledge that the wellbeing of pigs is vital for the sustainability of the pork industry.

Greenhouse gas emissions

Part of the challenge of reporting on environmental sustainability is in raising awareness that it can't be tied to one specific measure and requires a more holistic methodology. Notwithstanding, there is a current focus and concern on greenhouse gas emissions and targets by the general public.

Challenges within the operating environment





Activity report

Whilst various focus areas within the Pork Sustainability Framework have been and will be prioritised in the short term, activity continues across all the Focus Areas under the four Framework pillars:

- People
- Pigs
- Planet
- Prosperity

Across the following pages, a summary of some of the great wins, insights and challenges the industry has faced across the year and some of the activity APL has undertaken to help achieve the goals of being a progressive, innovative and forward-thinking industry.



People

Rural communities

2022 marked the fifth year of the FightMND campaign which sees Australian pork producers and Coles coming together to support those living with Motor Neurone Disease (MND) and raise money to contribute to finding a cure. 10c was donated from each cut of Australian pork sold through Coles in May and June 2022, doubling to 20c on free-range products. This totalled a record-breaking \$8.6 million this year. Since the campaign's inception, together, Australian pork producers and Coles have raised over \$20 million dollars to fund research and ultimately find a cure for the incredibly cruel disease.

There is no truly effective treatment or cure, which is why FightMND was created. The pork industry is proud to work to support Australians living with MND across our communities.

Telling our story

The APL Communications Team have developed a new suite of resources to better tell the story of pork production in Australia. This activity was a result of research which showed the average Australian knows little about our industry. By sharing the stories of our producers, through new video content and an increased visibility on social media, we hope to further raise the profile of the great work Australian pig farmers do to produce quality food.

Human nutrition and cooking with pork

APL supports everyday Australians with recipe inspiration and cooking tips to cement the place of highly nutritious pork on plates.

On the other end of the culinary spectrum, PorkStar continues to reach new heights. PorkStar is a unique influencer brand aimed at getting Australian pork on the menus of top restaurants and top of mind amongst foodies, influencer chefs, food media and other food professionals including farmers and butchers.

The program develops more than just product inspiration, it also celebrates the provenance of the products, mentors emerging talent and applauds talented professionals and their stories. PorkStar is well recognised as an aspirational brand that connects, supports, develop and encourages food professionals to spotlight pork within conversation and experiences. Through working with and supporting these influencers to learn about the pork industry and the stories behind the product, it helps to spread APL's key messages to a wider audience and celebrate the love of all things pork.

Food safety and quality

Maintaining and improving food safety standards and pork quality is an important undertaking for producers. In 2022, several pork quality projects concluded, including an exploration of the export potential to Japan, one of the most discerning and pork loving markets. While ultimately, the trial showed Australian pork differs from Japanese preferences, it was a great opportunity to understand different cultural requirements in relation to product and in forging future connections.

Locally, APL continued to refine initiatives focused on traceability. A specific example of this is the bacon and ham traceback project currently underway with Oritain, an industry leader utilising forensic science and data to truly verify origin. In 2021-22, a review of the existing PhysiTrace program was completed by Oritain. This review indicated that Oritain's traceability program could be more cost effective for the Australian pork industry. This is critical, as a large percentage of ham and bacon is not made with Australian pork.

By supporting and verifying products on their origins, APL is contributing to maintaining trust in Australian produced products. As an example, 16 samples of ham or bacon, which were listed as containing a minimum of 95% Australian ingredients, were collected from supermarket retailers in major Australian cities. The traceback results from Oritain indicated the samples were consistent with the known chemical fingerprint for Australian ham and bacon and have accurate country of origin claim.

Employment and work health & safety

Undoubtedly one of the biggest stressors on the pork industry continues to be the ongoing lack of access to labour, exacerbated by the impacts of the COVID-19 pandemic. APL addresses industry workforce priorities through both our producer relations and capability programs as well as our strategic policy work.

A sustainable and capable workforce as part of a prosperous and resilient community takes time and investment to build. The number of graduate programs and skill development opportunities in the pork industry are increasing, along with annual mentoring and leadership programs led by or supported by industry.

APL is a long-standing member of the Primary Industries Education Foundation Australia (PIEFA) which provides national leadership and coordination of initiatives to encourage primary industries education in schools through a partnership between industry, government and educators. APL continues to leverage PIEFA's extensive expertise and reach to better promote our

industry to students and teachers, such as collaborating to update pork industry teaching resources. This will support schools in utilising APL's virtual tour of the pork supply chain so students can understand the various career options available to them in the future.

Also delivered in 2022, was the Career Portal function on the APL website, which houses an array of career profiles and job opportunities within the pork industry, summarising required experience, skills and possible career pathways. Moving forward, it will showcase examples of real people doing real jobs within the pork sector to sow the seed for future workforces. Building a sustainable workforce will remain a key priority moving forward.

At a national policy level, the change in Federal government saw the Coalition's AgVisa scheme off-the-table and a refocus on upskilling, attracting and protecting workers. This has meant changes to industrial relations legislation for businesses, as government acts on commitments to improve job security and wages.



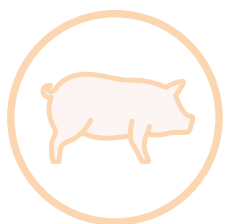
APL has been working hard to advocate for access to labour through representation at national workforce policy forums such as the Jobs and Skills Summit (September 2022) which was the initial step in a 12-month process to tackle workforce challenges more broadly. In the lead up, industry and regional Ministerial meetings aimed to canvass issues and identify common ground. APL CEO, Margo Andrae represented the industry at a meeting with Agriculture Minister, Murray Watt, and APL worked with the National Farmers Federation (NFF) and Australian Meat Industry Council (AMIC) to ensure pork industry issues were understood and included.

The APL policy team continues to advocate for better responses, including fit-for-purpose visa solutions and faster visa-processing for the industry given the importance of overseas skills and labour to supplement the current Australian capacity. This includes supporting businesses using skilled migration via initiatives such as the Pork Industry Labour Agreement. The APL team has provided policy submissions to various processes, including:

- The federal treasury's development of an Employment White Paper
- The Federal government's review of Australia's Migration System
- Input to the federal government's development of skills priority list which determines occupations that are in shortage. This list underpins employment, training subsidies and migration policies.

APL also contributes to the Rural Safety Health Alliance which has delivered research and analysis on key risks and hazards for pig farming. In addition, through the NFF, is also supporting the work of Farmsafe across the nation to enhance farm safety practices.





Pigs

Pig health and biosecurity

As the Australian pork industry has spent the past few years preparing for ASF, during the 2022 JEV outbreak and the foundations laid down during this time, such as the relationships built between Chief Veterinary Officers and industry, allowed us to adequately respond to JEV.

However, there were still weak points in the biosecurity system that needed further development including:

- National consistency across the JEV response, including interpretation of key documents and application of permitting.
- Consistency of response staffing, including sufficient Liaison Livestock Industry (LLI) representation.

These gaps have been addressed by APL, and continue to be so, such as through development of a JEV vaccine for pigs and a diagnostic test kit. APL worked with state bodies to roll-out disease information and mosquito management resources. The APIQ quality assurance program was also updated to incorporate standards for mosquito management, and the APL communications team worked at a national level to ensure everyone received the same messages. This was mirrored by APL's policy team who ran a workshop to bring industry and government together to agree on actions going forward.

As we have seen with human diseases like COVID-19, responses require a strong and coordinated approach and APL is committed to continue to develop relationships between industry, government and research so we can be better prepared for the future.

Pig welfare and husbandry

APL supports several projects, in collaboration with our sister organisation – APRIL (Australasian Pork Research Institute Ltd) that are seeking further improvement on welfare outcomes for both sows and their progeny. In recent times, much of this work has focused on seasonal infertility and heat stress in sows.

Perhaps the most exciting development in the last 18 months, was a \$2.89million grant awarded for a three-year collaborative project, led by SunPork, to help improve animal welfare across the whole industry.

The project aim is to understand the behavioural issue of tail biting, ultimately resulting in options to prevent its occurrence and remove the need to dock pigs' tails. Traditionally, part of the pig's tail is docked soon after birth to prevent tail biting later in life.

Data will be collected from commercial farms to help researchers understand behaviour patterns and risk factors associated with tail biting. From there, they will investigate options for new dietary and management strategies, as well as training and support for farmers to make objective decisions with confidence as to whether they can raise pigs with intact tails.

Pig nutrition

Nutrition is core to pig businesses, and we are constantly looking for ways to improve and optimise feed intakes. Both APL and APRIL have strong research programs that target improved nutrition and reduced costs for producers.

APRIL continue to develop the AusScan technology to understand the potential impacts of downgraded wheat from the 2021/22 season. The wheat was downgraded to feed wheat due to early germination caused by an unusually wet summer. The original AusScan data did not include sprouted grains so APRIL conducted a study to analyse sprouted grain for a number of criteria including digestible energy. The work showed acceptable energy values for pigs (and poultry), proving that the sprouted wheat had an equivalent nutritional value to normal wheat and could be used as a feed ingredient.

On the APL front, new research explored the use of dietary additives to improve feed efficiency and carcass composition of growing pigs. Previous work has shown that some substances can improve gains, but results have been variable. The work showed that supplementing dietary micro chromium picolinate improved the feed conversion ratio and reduced P2 backfat, both of which are key production and quality indicators. The study also provided insight into the regulatory difficulties in testing new compounds, with other proposed compounds unable to be tested due to regulatory difficulties. This has highlighted a key role for bodies like APL to fund pre-approval phases for new supplements that otherwise might not be able to be accessed to test their efficiency.

Making the most of Australian genetics

Breeding is key for Australian pork production, particularly as Australia does not import genetics, so any gains must be made with what we have. Trying to improve genetically linked traits such as greater litter size can have unintended consequences when other linked traits like birth weight are often overlooked, which has been seen overseas. An APL supported PhD student has been exploring how these traits interact and is further investigating whether boar performance is linked to progeny success.

The project has continued to investigate boar mortality breeding values as a predictor of progeny survival and has evaluated the immune responsiveness for improved progeny survival based on boars. This improved knowledge will help breeding companies to better target their programs and see increased progeny performance in Australian herds.





Planet

Carbon cycling and nutrient accounting

Individual pork producers are making changes on farm to improve their carbon emissions as well as better manage other nutrients such as nitrogen and phosphorus. APL is supporting producers through this transition via both an environmentally focused research program and a dedicated extension resource (see Innovative Farming below).

The first step for producers is to understand their baseline figures on various environmental factors like greenhouse gas emissions, water and energy use. APL is currently undertaking a lifecycle assessment (LCA) project, that covers over 40% of production, to better understand these data sets. Some of the results so far are used to report against goals in this Framework Annual Report. This is the first full LCA project since 2010, and for the first time it includes developing a method to measure the sector's nutrient impacts from nitrogen and phosphorus on waterways. This is important as a more holistic approach is needed beyond just carbon emissions. By starting to understand how other nutrients move in a pork system, we can better plan and develop options to improve their recapture and use in a circular economy.

In terms of greenhouse gas emissions, we know that an uncovered anaerobic lagoon, which is used to manage effluent in a conventional system can account for over 50% of on farm emissions. However we can cover the pond and capture these emissions and turn them into renewable power through biogas technology. This technology is currently used by 29% of the commercial sow herd and APL is actively supporting 11 producers with feasibility assessments to drive further uptake.

Farm biodiversity and natural resource stewardship

While APL is not currently active in this area, that doesn't mean the industry isn't already working in the space. Individual producers are building on biodiversity on-farm while other industry bodies, such as APRIL, are investing in innovations around measurement of water quality.

Many smaller producers are seeking to build on

opportunities in the biodiversity space. This includes exploring regenerative practices, planting native species to improve soil health and seeking local indigenous knowledge leaders to better understand what species the land used to support.

Planting natives around vulnerable areas like creeks and escarpments has a double benefit of stabilising the soil and attracting native wildlife back into the area through providing habitat.

Closing the loop to reduce waste

Reducing waste and moving towards a circular economy is critical for Australian agriculture. Pork is already contributing to this shift, with producers utilising pig waste for energy and fertiliser, and taking in food waste from other industries as feed and recycling water throughout the farm.

In 2021, APL published the Closing the Loop on Waste roadmap, providing industry with further information and opportunities to reduce waste.

Following on from this, new activities are being developed by APL. In Business Innovation, APL is exploring opportunities to develop food and manufacturing waste into feed products in collaboration with new companies that are bringing solutions to market in working with pork businesses.





Prosperity

Reduced cost of production and profitability through chain

With the rising costs of inputs, it is more important than ever that APL works together to assist producers to optimise their production and reduce costs. One of APL's biggest portfolios of work is focused on reducing cost of production through improving health, reducing feed costs and improving productivity.

In May 2022, an evaluation of 16 research projects that have been completed in the cost of production portfolio was undertaken. Examples of outputs from the projects included: new and improved feed supplementation strategies; improved understanding of the effects and best management of heat stress; and new insights in the causes and potential management of seasonal infertility.

The projects have been well received by pork industry stakeholders with many producers already beginning to adopt new on farm management practices. There has been particular interest in optimised feed and supplementation strategies to improve production outcomes. The report noted key impacts from these projects included increased productivity and profitability of the industry, increased efficiency of resource allocation for future RD&E, increased scientific knowledge and research capacity and increased regional community wellbeing through spill over benefits of a more productive pork industry.

Total funding across the 16 projects analysed was \$10.4 million with the investment estimate to have produced a net benefit of \$61.4 million, giving a present value of the investments at \$47.08 million. This gives a cost benefit ratio of 4.3 to 1. This positive result shows that the reduced cost of production program has and will continue to benefit to the Australian pork industry.

Value for money

APL's Foodservice program is all about encouraging venues to include more Australian pork on their menu. With a firm focus on menu penetration, the program's communication has focused on value as a key message.

Pork was supported in-market by the APL seasonal campaigns delivered through foodservice trade media celebrating the value pork delivers to chefs and their bottom line. These campaigns included a set of cost effective on-trend recipes that APL determined from data insights and the cost per plate for each meal. The recipes are developed from data research APL commissions to ensure that we are focused on pork's most popular meals on menu. With stir-fry rating as the number one pork meal ordered out-of-home and, that grilled and roasted meat remain amongst the top five pork meals, APL has included modern ways for chefs to incorporate these meals into their menu utilising seasonal produce.

Earlier this year, we saw out-of-home consumption of pork reach a new high, with the proportion of those who ate pork out-of-home lifted to its highest point in the last two years. This has resulted in the conversion of pork being on the menu and having more consumers eating pork. This strengthened in July to sit at 20%. What this demonstrates is that when pork is on menu, as it is in two out of three cases in out-of-home venues, the consumer increasingly chooses it.

Diversified markets

While diversified markets is not currently a strong focus for the APL team, the marketing team has still integrated this ideal through investigating and promoting pork through multiple avenues.

The Category Retail Marketing team at APL is the hub for market research, data sourcing, pork retailer relationship management and conducting supporting campaign marketing activations throughout retailers. These retailers include Woolworths, Coles, Aldi, Costco, Metcash, independents and butchers. Cross category partnerships have been a large focus to build customer confidence in pork with everyday brands and pantry items to highlight how simply pork can be incorporated into everyday meals. These partnerships also build instore presence and our ability to engage in larger retailer campaigns. Relationships have been formed and campaigns executed with well-known trusted brands such as Gravox and Masterfoods to build customer confidence in pork and instore presence.

APL have also launched free pork butchers point-of-sale marketing kits to support the pulled pork campaign and the summer/Christmas campaign to get more pork on BBQs. This kit includes store marketing presence and recipe cards to demonstrate how easily pulled pork can be made and served in different ways to drive the 'nextovers' concept of making one batch of pulled pork into several meals over the week, showcasing value and convenience. Summer recipes were also developed and highlight the versatility of pork through providing a list of alternative cuts which can be used.

By targeting different points-of-sale, across different times throughout the year using various cuts of pork, APL's Marketing team is helping to secure a wide market for Australian pork producers.

Innovative farming

The APL Extension program continues to grow and develop, having had a strong focus on sustainability over the last year. APL's Extension team is critical to ensuring that pork producers remain innovative, being the vehicle through which research and technical information is shared through to producers.

The team has been developing a segmentation system for producers to understand which producers are interested in particular topics to ensure that the most relevant information to their interests is shared

with them. This approach will help to drive greater adoption by providing relevant information and regular engagement on topics individuals care most about.

The team was expanded in 2022 through the appointment of a Sustainability Project Officer. This is in recognition of the continuing importance of making improvements on farm to meet sustainability goals, particularly in the environmental space. In the first year, the role has been focused on increasing the uptake of biogas by the industry, which not only reduces methane emissions from ponds but also greatly reduces the energy costs on farm. An additional 50 farms have been identified where the technology could be viable and the Officer is working to conduct site visits, feasibility studies and testing to help producers determine if it is the right step for them. As a result of this work, several producers are already considering installing a system, which is an exciting achievement. As the role develops other sustainability initiatives will be developed and rolled out.





Emerging issues

As we develop next actions to drive sustainability forward, we acknowledge there are still changes happening in the wider Australian and global context that will impact upon our success. Issues that need to be considered and reflected in our work going forward include:

- Competing priorities – e.g. disease outbreaks
- External pressures on parts of the Framework – e.g. the narrow focus on greenhouse gas emissions at the expense of other important areas of work
- Data quality and integrity
- Alignment with other standards – e.g. the Australian Agricultural Sustainability Framework
- Governance of the Pork Sustainability Framework
- Changing frameworks for reporting and measurement
- Changing community needs and expectations
- Consideration of reflecting the whole farm story, not just commodity focused reporting
- Financing sustainability activities
- Working with supply chains through changing supply statuses

Framework going forward / Continuous improvement

Following the development of this report, the Pork Sustainability Framework will be reviewed by APL to make improvements based on our learnings. This will include a revision of some of the metrics to improve focus and ensure they are framed correctly. Some metrics may be significantly changed or removed if no suitable data source is available. It is expected that these changes will be reported in the next Annual Framework Report.

We are always open to constructive feedback to ensure we are delivering to expectations. If there are things you think we should be including or changing, please let us know by emailing sustainability@australianpork.com.au



Baseline data report

In order to report on progress over time, after the launch of the Sustainability Framework, APL needed to establish baseline data sets.

Over the following pages, we have reported all baseline figures for each of the Framework targets.

Pillar goals

	Goal	Progress	Data Source
People			
Community Goal	Increased awareness of the positive impact of the pork industry on communities	39% believe industry gives back to regional and rural communities 71% agree that they are more likely to support industries supporting local communities	Pollinate Pork Sustainability Survey 2021
Producer Goal	Pork production career is attractive	No data collected on people’s perceptions of careers in pork 9 APL supported higher degree by research (HDR) students 2 APRIL supported HDR students in 2022	APL Data
Pigs			
Community Goal	Increased community belief in good animal welfare across the Australian pork industry	70% trust the pork industry 14% have only heard positive things about the animal welfare in the pork industry (50% have heard something positive, including a bit of both, 48% negative) 35% believe pork farmers treat their pigs well and are raised in humane ways	Pollinate Pork Sustainability Survey 2021
Producer Goal	A leading industry implementing world’s best practices in animal care	No data, adoption survey scheduled	
Planet			
Community Goal	Industry as a livestock leader with low GHG emissions and adopter of closed loop systems for carbon and water	2020 baseline emissions 3.3kgCO2/kg LW produced, from LCA of 44% of production¹ 44% of producers surveyed recycle water on farm (producer survey- respondents claimed) 78% reuse effluent on crops 58% compost spent bedding/manure	2020 Life Cycle Assessment of Australian Pork 2022 APL Producer Survey
Producer Goal	Adoption of innovations and technology to further reduce GHG and use community waste streams	15% of producers surveyed used food waste 27% utilise agricultural waste 49% utilise solar power 9% utilise biogas	2022 APL Producer Survey
Prosperity			
Community Goal	Australian pork industry is an active and sustainable contributor to the Australian economy	\$5.3 billion contributed to GDP (2018) 36,000 people employed in the industry	APL Data

¹ Includes Scope 1, 2, and 3 (upstream) emissions as well as Land Use and direct Land Use Change.

Short term targets

Producer Goal	Reduce economic volatility for pork producers	Baconer (60.1-75kg) price 349c / kg at farm gate in June 2021	ABARES Commodity Price Update
	Goal	Progress	Data Source
Employment	Increased visibility and positive perception of the Australian pork sector as a career choice	<i>No data</i>	
Pig health and biosecurity	Increase piglet survivability to over 85% pre-weaning	87.4% Farrowing House Survivability	APL National Pig Industry Benchmarking
Pig welfare and husbandry	100% of pig producers aware of and implementing welfare standards and guidelines	<i>No data, standards and guidelines not developed yet</i>	
Carbon cycling and nutrient accounting	Pork is a low emissions protein	2020 baseline emissions 3.3kgCO ₂ /kg LW produced, from LCA of 44% of production 22% of the Australian community believe pork farmers are reducing their carbon footprint	2020 Life Cycle Assessment of Australian Pork Pollinate Pork Sustainability Survey 2021
Closing the loop to reduce waste	60% of production using waste recycling and renewable energy technology	49% producers surveyed using solar 9% producers using biogas 78% reusing effluent on crops 49% composting mortalities	2022 APL Producer Survey

Ongoing targets

	Goal	Progress	Data Source
People			
Rural communities	Support local communities through initiatives such as charity events	39% of the Australian community surveyed industry gives back to regional and rural communities 71% agree that they are more likely to support industries supporting local communities	Pollinate Pork Sustainability Survey 2021
	Promote stories of pork industry working with communities	2,155 mentions of positive or neutral content (including Christmas coverage) with a potential reach of 16.72M	APL Media Monitoring Report
	Improved community knowledge of pig industry	21% of Australians agree that they have a good or better knowledge of the Australian pork industry	Pollinate Pork Sustainability Survey 2021
	Number of visits to the APL website	51,199 total users of the APL website in 2021/22	Google Analytics

	Goal	Progress	Data Source
People			
Rural communities	Improved community belief in farmed pig welfare/maintained trust in pig farmers	21% of the community surveyed have a good understanding of Australian pork production processes 18% have a very good knowledge and understanding of the Australian pork industry	Pollinate Pork Sustainability Survey 2021
Telling our story	20,000 visits to APL website per month	4,266 users per month on the APL website in 2021/22	Google Analytics
Human nutrition and cooking with pork	Increase in people agreeing pork is seen as part of a healthy diet	46% of people surveyed agreed that pork is healthy and good for you	Advertising and campaign marketing tracking Wave 73 Report 2022
	Enjoyment of pork meals, increase in memorable meals, reduction in fail rates, family/kid-friendly recipes	No data	
Food safety and quality	At least 75% of community believes pork produces safe food	44% of people surveyed in the advertising and campaign marketing tracking 2022 agreed that Australia sets higher safety standards than other countries for pork	Advertising and campaign marketing tracking Wave 73 Report 2022
	At least 90% of pork produced under industry quality system	89% of commercial sows covered under APIQ	APIQ Data
	% compliance with chemical residues	99.24% compliance reported by National Residue Testing (2020/2021 FY)	National Residue Survey 2020/21 report
Employment and work health & safety	Increased perception of pork as a good career choice – diversity and wellbeing	The census showed the pig farming industry workforce to be made up of: 29% female 36% born overseas 2% of people who identified as requiring assistance with core activities 2% Aboriginal and Torres Strait islander No data was collected on mental health and wellbeing	ABS Australian Census 2021
	Number of people completing training programs e.g. ProHand, ASF training and % of pork workers with relevant university degrees	58% of producers surveyed had piggery-based staff with a Certificate III 31% of producers have staff with a Bachelor's Degree 9% of producers have staff with postgraduate training eg Masters or PhD	2022 APL Producer Survey

	Goal	Progress	Data Source
Employment and work health & safety	Decrease serious injury rates on pork farms and processes	No data on injuries 0 fatalities in last 5 years (2015-2020)	WorkSafe Reports
Pigs			
Pig health and biosecurity	100% of pigs transported safely	No data	
	90% of producers have in place a biosecurity plan	89% of production covered by APIQ which requires biosecurity plan	APIQ Data
	Zero emergency disease outbreaks	1 – Japanese Encephalitis Virus	APL Data
	Number of biosecurity preparedness exercises	1 series – Razorback exercises for ASF	APL Data
Pig health and husbandry	All pig veterinarians aware of and using AMS guidance when prescribing treatments	17.3% of producers have an AMS plan documented No veterinary survey scheduled	2022 APL Producer Survey
	% of producers aware of humane killing requirements in standards and guidelines	No data – survey planned	
	Adoption of effective enrichments for pigs	No data – survey planned	
Pig nutrition	Improve herd feed efficiency	No data	
	Alternative feed ingredients used in pig rations	No data	
Making the most of Australian genetics	Adoption of new genetic technologies to hasten gains including solutions to improve welfare, health, production and reproductive wastage	No data	
Planet			
Carbon cycling and nutrient accounting	Reduction in the amount of phosphorus, potassium and nitrogen leached per kilo of pork	No data available	Under development through Life Cycle Assesment (LCA)
	Strategic development of export markets to limit amount of miles	Investigating Japan and focused on South East Asia due to geographic proximity	APL Data
	Carbon cycling explored for the pork industry (e.g. vegetation, soil, microflora)	1 new research project investigating effluent and soil health	APL Data

	Goal	Progress	Data Source
Planet			
Farm biodiversity and natural resource stewardship	100% of farms with nutrient management plans in place	53% of producers surveyed have nutrient management plans	2022 APL Producer Survey
	Number of farms involved in biodiversity activities (landcare, vegetation protection)	51% of producers surveyed managed weeds and pests 24% utilise vegetative buffer strips 17% manage native vegetation 10% are involved in conservation programs	2022 APL Producer Survey
	Reduced reliance on town and river water and increased use of recycled water	94L of water used per kg of liveweight produced (LCA results) 44% of producers surveyed recycle water on farm 17% of producers surveyed recycle over 50% of their water use	2020 Life Cycle Assessment of Australian Pork
	Increased acceptance of pork as a sustainable industry	13% of community surveyed felt that pork was a sustainable meat when asked to choose their main reason for eating pork	Pollinate Pork Sustainability Survey 2021
Closing the loop to reduce waste	30% of pork production undertaken using food waste, by-products, insects or other sustainable feed sources	15% of producers surveyed utilised manufacturing food waste 27% of producers surveyed utilised agricultural waste	2022 APL Producer Survey
	75% of piggeries composting mortalities and spent bedding	58% of producers surveyed compost spent bedding and manure 49% of producers surveyed composted mortalities	2022 APL Producer Survey
	Further development of products to allow use of all parts of the pig and recycle by-products from processing	No data	
Prosperity			
Value for money	Pork seen as good value for money protein	29% of people agree that pork is good value for money, second only to chicken	Advertising and campaign marketing tracking Wave 73 Report 2022
Diversified markets	Pork producers able to access diverse income streams to improve resilience	No data	
Innovative Farming	Pork producers are seen as progressive/ innovative adopters	32% of the community think the Australian pork industry is innovative/progressive	Pollinate Pork Sustainability Survey 2021



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