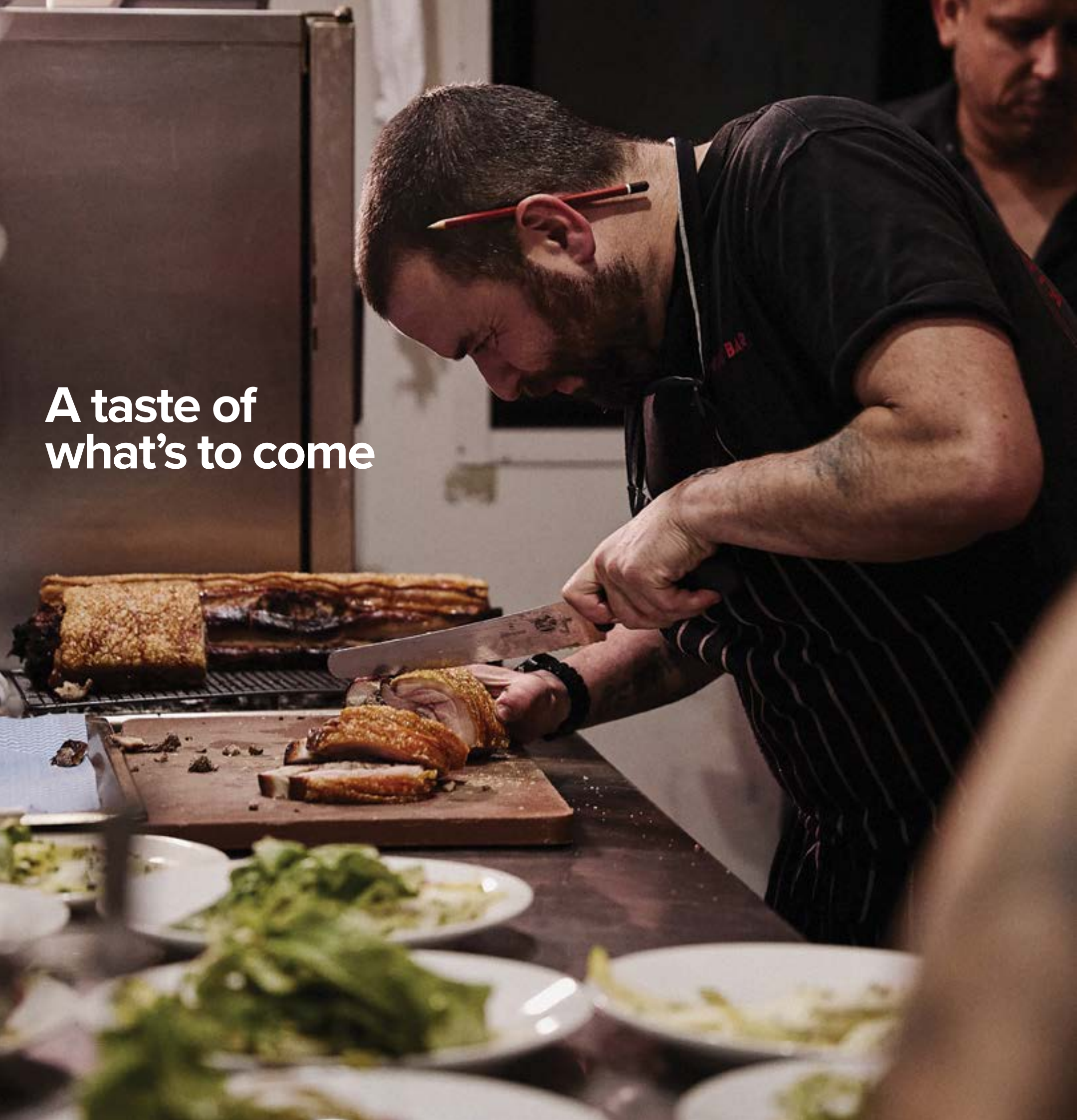


A woman with dark hair, smiling, is wearing blue denim overalls and holding a small, spotted piglet. She is standing in a farm environment with metal cages visible in the background.

Shaping the future of Australian Pork

2025 – 2030
STRATEGIC PLAN



A taste of what's to come

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Economic contribution	\$6.9_B	289,000	National sow herd size
Domestic market value	\$1.7_B	12.2%	Market share of fresh meats
Export market value	\$256_M	25.5%	Australian share of smallgoods
Value of farmgate production	\$1.9_B	10.45_{kg}	Per capita consumption of fresh pork
Workforce (EFT)	36,071	#2	Second-most consumed meat in Australia
Australian pork produced per year (tonnes)	450,569	73%	Reduction in emissions intensity since 1980

Well positioned to build on our strengths

The Australian pork industry continues to demonstrate resilience and progress in a dynamic political and regulatory landscape. While we face ongoing challenges—including biosecurity risks, shifting consumer expectations, rising production costs, global trade pressures, and the impacts of climate change—our industry remains committed to innovation, sustainability and building a strong social licence to operate.

Despite the challenges of our operating environment, pork plays a vital role in Australia’s broader agricultural sector and economy, supporting employment in many regional and rural communities across the country, with an estimated 36,071 people employed across the pork supply chain.

In the five years since the launch of our previous Strategic Plan, we have grown from a \$5.3 billion to a \$6.9 billion industry, and remain the second-most consumed meat after chicken in Australia, with 77 per cent of Australians now eating pork at least once per year.

International demand for Australian pork has also strengthened, with a successful period of sustained growth in the Singapore market. Our international reputation as producers of safe, disease-free and high-quality Australian-grown fresh pork remains a key selling point as we continue to expand our overseas markets.

Meanwhile, domestic consumer demand will continue to be driven by consumer trust and social licence to operate. Animal care remains a top priority for our industry as we prepare to lead the development of Australia’s first national, industry-led Standards and Guidelines for Pig Welfare.

To capitalise on growing consumer demand, and remain competitive against other meat, we must strengthen awareness of pork’s strong nutritional credentials as a high-quality, nutritious, affordable meat.

Considering our operating environment, the Australian pork industry is well-positioned to build on our strengths through our work in policy, research and innovation and sharing the Story of Pork with all Australians.

Growing consumer demand	Opportunity	As Australia’s second-most consumed meat, there is still room for Australian pork to grow to meet further demand. Domestic consumer demand continues for fresh pork. The plant-based food industry has seen a decline in retail sales, while meat consumption has remained at record levels.
Technology & innovation	Opportunity	Advances in technology are set to transform the way the industry works, from research, production, processing through to how we market products in Australia and in export markets.
Government RD&E co-investment	Opportunity	The Statutory Funding Agreement between industry and the Commonwealth demonstrates confidence in the industry’s RD&E future.
Larger farms & abattoirs	Opportunity & threat	While bringing greater efficiency and lower costs, some farms may find it more difficult to remain competitive in this evolving environment.
Animal health & wellbeing	Opportunity & threat	Australia needs a nationally consistent approach to pig welfare that reflects modern farming standards and provides all state governments with clear, science-based standards that are practical, measurable and consistently reflected in legislation across all jurisdictions. Development of the industry-led National Standards and Guidelines for Pig Welfare is an opportunity for the Australian pork industry to further strengthen its position as a leader in animal care. At the same time, many producers continue to experience effects of illegal activity at the hands of animal activists, who continue to endanger the health status of our farms, the health and wellbeing of our pigs and cause ongoing trauma for our farmers.
Import competition	Threat	While Australian pork is the second-most consumed meat, approximately 74.5 per cent of smallgoods produced in Australia use imported pork.
Biosecurity	Threat	Australia remains one of just a few countries in the world that enjoys a high disease-free status for our pig herds. However ongoing vigilance and continual improvement of our national and on-farm biosecurity systems is our industry’s and Australia’s best line of defence against African swine fever (ASF), porcine reproductive and respiratory syndrome (PRRS), foot-and-mouth disease and porcine epidemic diarrhoea (PED) and the many other diseases active in pig herds across the world.
Rising input costs	Threat	Rising input costs will remain a concern for producers looking to maintain competitiveness and grow profitability in both local and international markets.
Workforce challenges	Threat	Attracting and retaining talent remains a priority for the pork industry. Labour force instability has become common for all agricultural industries, with skilled workers increasingly difficult to source and retain, particularly in regional areas. The pork industry relies on access to the highly skilled international workforce to fill critical gaps. These critical workers make a substantive contribution to the pork industry and the communities they are part of. Succession planning on farms is a key area of work, looking at ways to support young people to enter the industry. While pork specific agricultural courses continue to decline, access to high quality training, with the all-important practical components is key to helping young people understand opportunities within the pork industry.

Who we are

Our purpose
To enable a thriving pork industry.

Our headline
We are the progressive pork organisation.

- What we do
- **Effective Marketing**
 - **Proactive Policy**
 - **Impactful Research.**

Vision & goal
Australia’s most versatile protein from farm to fork, sustainably adding \$1 billion to farmgate value by 2030.

- Culture
- We lead with curiosity
 - We deliver with purpose
 - We foster connection and a sense of community.

- Values
- **Driving results**
Say what we’ll do, do what we say, be accountable
 - **Curious**
Think wide, listen well, deliver right
 - **One APL Team**
Belong, support, thrive
 - **Future focused**
Shaping tomorrow, starting today.

Key industry achievements over the last five years

Industry value grown
\$5.3b to \$6.9b

People employed across the industry
36,071

- Consultation**
- 11 stakeholder engagement workshops
 - APL staff engagement workshops
 - APL Board engagement workshops
 - 85% of production industry consulted
 - Industry-wide Green Paper consultation process.

Strategic themes

- 1 Growing fresh pork demand**
- Increasing share of fresh meat
 - Developing added-value new product development opportunities
 - Increasing pork on foodservice menus.

- 2 Diversifying markets and revenue**
- Increasing demand for Australian smallgoods
 - Increasing export market value
 - Increasing pork in quick service restaurants (QSR)
 - Developing alternative revenue streams.

- 3 Driving sustainable productivity**
- Reducing cost of production in farms and processing
 - Meaningful research, innovation and extension
 - Developing viable environmental solutions
 - Accelerating Australian genetic improvement
 - Attracting, retaining and building talent.

- 4 Advancing industry integrity**
- Stewarding quality assurance and industry compliance
 - Animal health and welfare first
 - Leading biosecurity
 - Deepening member and industry engagement
 - Lifting community trust.

Results driven, future focussed



It is a pleasure to present Australian Pork Limited's (APL) 2025-2030 Strategic Plan on behalf of the APL Board and team, and to share with our stakeholders the future direction for the Australian pork industry to guide APL as an organisation.

This plan is an evolution, not a revolution. Five years ago our purpose was to become Australia's progressive pork company, delivering a thriving industry for pig producers and other key stakeholders across the supply chain. This continues to be our purpose and has shaped the development of this strategy to guide our industry to 2030.

Over the past five years we have made significant strides as an industry. Some of the biggest achievements have been:

- Achieving a marketing ROI of 13x
- Achieving a research ROI of 4-7x
- Demonstrating the integrity of our industry through our response to the Victorian Parliamentary Inquiry into Pig Welfare
- Extension of timeframe of Australian Carbon Credit Units from 7 to 15 years
- Partnering effectively with government to extend trade and market access into Asia
- Consistently building capability and capacity across the industry.

Now, as we look toward new opportunities for the next five years, this plan will see us further establish pork as Australia's most versatile protein from farm to fork, sustainably adding \$1 billion to farmgate value by 2030.

Looking ahead, our operating environment will grow more complex. Our biosecurity will remain at risk, geopolitical issues will likely continue to intensify, and animal welfare and sustainability will be key drivers for the industry.

During our consultations with industry, we heard across the country that the next five years will also bring opportunities to improve our productivity and profitability across the supply chain.

APL will continue striving to increase demand and sustainable progress for Australian pork and we believe this plan will drive our industry forward over the next five years towards future success.

We would like to thank producers, processors, retailers, APL staff, government and other key stakeholders – for their active participation in the consultation process and for their ongoing support.

On behalf of the APL Board,

Andrew Baxter
Chair

Consistently building capability and capacity across the industry

More than a plan, a path forward

Australian Pork Limited (APL) is the industry body for Australian pig producers, performing marketing activities to improve the demand for Australian pork, research, innovation and extension to make the industry more competitive, and representing industry to ensure that government and regulators have all the necessary information for successful policy outcomes readily available.

APL's 2025-2030 Strategic Plan guides our investments and outlines the priorities and outcomes we will deliver for our levy payers over the next five years. This will ensure Australian pork remains competitive, sustainable and responsive to industry and consumer needs.

This plan specifically targets growing consumer demand and profitability, driving productivity, diversifying markets and revenue and strengthening the integrity of the Australian pork industry.

Over the past eight months, APL has engaged in extensive consultation with our levy payers and other key stakeholders across the Australian pork industry, as well as state and federal government, to understand how their needs and priorities have changed over the past five years. We have sought feedback on the strengths, weaknesses, opportunities, threats and long-term trends impacting the industry. This uncovered a new vision for APL – to become Australia's most versatile protein, farm to fork – and helped shape our four new strategic themes.

- Growing fresh pork demand
- Diversifying markets and revenue
- Driving sustainable productivity
- Advancing industry integrity.

This Strategic Plan outlines each theme's supporting programs, key result areas and the enablers required to deliver the strategy. Delivery of this plan will be enabled through an increased focus on cost of production, processing, use of technology, improved communications and knowledge transfer initiatives.

The strategy will be executed through our Annual Operating Plans (AOP) which will outline the annual levels of investment in projects and allow us to define our priority areas for each financial year. Annual reports will measure our performance in key focus areas and delivery of our revised purpose to be Australia's most versatile protein, farm to fork.



The progressive pork organisation

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.

As a company, APL exists to fulfil obligations under the *Pig Industry Act 2001*, which is to deliver marketing, promotion, strategic policy development and research and development outcomes for the benefit of the Australian pig industry.



WHAT WE DO

Effective marketing

Measured consumer insight, creativity and collaboration which results in sales growth over time.

Proactive policy

Shaping an environment that stays ahead of community expectations whilst remaining safe and practical for producers.

Impactful research

Making a difference to all Australian pork producers through learning and sharing new ways to build revenue and reduce costs and risks.

We partner with farmers to enable a thriving pork industry.

To be Australia's most versatile protein, from farm to fork, sustainably adding \$1 billion to farm gate value by 2030.

OUR PURPOSE

OUR VISION AND GOAL

OUR CULTURE

OUR VALUES

- We lead with **curiosity**
- We deliver with **purpose**
- We foster **connection** and a sense of **community**.
- **Driving results**
Say what we'll do, do what we say, be accountable
- **Curious**
Think wide, listen well, deliver right
- **One APL Team**
Belong, support, thrive
- **Future focused**
Shaping tomorrow, starting today.

The right information at the right time enables strong decision making

The development of this strategic plan involved an extensive consultation process with stakeholders from the entire supply chain, as well as state, territory and federal government and industry representative bodies.

As levy payers, Australian pork producers are APL's primary stakeholders. As the industry grows and evolves over time, so do the needs of these stakeholders.

In addition to pork producers, the consultation process also included the Commonwealth, the supply chain, industry representative bodies and other key stakeholders.

APL conducted 11 formal open-invitation producer meetings across Australia. This Strategic Plan was also presented at APL's Delegates Forums for feedback and input from producer-elected industry representatives, and additional consultation with government and the RSPCA.

The Australian pork industry also identified research and development priorities through the industry-informed Pork Industry Insight Panel and Green Paper process.

The key priorities from stakeholders that directly contributed to the development of this Strategic Plan were:

- Delivery of industry-led Standards and Guidelines for Pig Welfare
- Maintaining strong biosecurity
- Reducing cost of production on-farm and in processing while identifying new revenue streams
- Increasing market share, particularly for Australian smallgoods
- Greater communication between APL and industry.

The outcomes of this consultation process have cemented the market context APL and the broader industry operates in and identified significant opportunities for growth over the next five years, including more than 70 potential initiatives for consideration.

Extensive consultation with stakeholders



Four strategic themes



Industry consultation resulted in four strategic themes that will govern our priority areas over the next five years. We have identified key programs to be delivered under each strategic theme for APL and the wider pork industry in order to deliver against the targeted outcome statements. These are outlined below and will be supplemented with an AOP and reported against in Annual Reports each year.

AOPs will be implemented through a multidisciplinary, cross-divisional approach designed to maximise internal and external collaboration.

1 Growing fresh pork demand

Increasing demand for fresh pork by making it a front of mind option for everyday Australians, from midweek dinners to dining out.

- Increasing share of fresh meat
- Developing added value new product development opportunities
- Increasing pork on menu (foodservice).

2 Diversifying markets and revenue

Continuing to support export markets while identifying new domestic revenue and market opportunities.

- Increasing demand of Australian smallgoods
- Increasing export market revenue
- Increasing pork in QSR
- Developing alternative revenue streams.

3 Driving sustainable productivity

Identifying new ways to increase the profitability of pork through research, innovation and extension.

- Reducing cost of production for farms and processing
- Delivering meaningful research, innovation and extension
- Developing viable environmental solutions
- Accelerating Australian genetic improvement
- Attracting, retaining and building talent.

4 Advancing industry integrity

Demonstrating the high standards of the Australian pork industry to maintain confidence in the systems that underpin industry integrity.

- Stewarding quality assurance and industry compliance
- Animal health and welfare first
- Leading biosecurity
- Deepening member and industry engagement
- Lifting community trust.

Strengthening pork's position in the Australian market

The Australian pork industry is domestically focused, with around 85 per cent of production supporting food security for Australians and 15 per cent of product exported. As the population and demand for meat increases, we have a clear incentive to keep increasing pork's share of fresh meat that is consumed within Australia.

As our population continues to grow, it brings with it increased opportunity to capture the imagination of everyday consumers and inspire them to include more pork as part of their repertoires.

Driving sustained growth relies not only on a high-quality product, but will also depend on establishing pork as the logical first choice in both at home and foodservice environments. Driving this demand for fresh pork will continue to be a key focus for APL and will build on the approach of our work over the last five years through the Get Some Pork on Your Fork campaign, to continue showcasing the versatility, health credentials and appeal of Australian pork.

Increasing share of fresh meat

Australian family households are by far the biggest consumers of meat, accounting for half of all fresh meat consumed.

While demand for pork has increased, it remains underutilised in meals that dominate consumers' midweek repertoires – stir-fries, roasts and grilled meals.

To keep driving sustained growth in domestic consumption, we must become an everyday essential, front of mind for consumers.

By evolving the successful Get Some Pork on Your Fork campaign into a more targeted approach in advertising, we will work to increase consideration of pork as the perfect hero ingredient for family household meals.

This program will also see APL conduct research and innovation projects targeted at improving product quality.

Developing added value new product development opportunities

The innovation that underpins pork products has strong potential to extend to new product development.

This research and innovation will engage retailers, producers and processors to uncover new opportunities, including for whole of carcass utilisation and exploration of new markets.

Increasing pork on menu (foodservice)

Over the last three years, we have seen an increase in pork on menu. Australians are becoming more confident in choosing pork in out of home food settings.

This program will focus on ensuring that pork on menu continues to grow across not only restaurants, but foodservice and fast-food environments.

This program will also seek to rally the industry to address supply and demand blockers and increase opportunities in QSR settings.



Diversifying markets and revenue to reduce reliance on any single customer, product, or channel

Resilience comes from diversity of markets, products and revenue. This theme is about expanding where and how value is created, so Australian pork is better positioned for growth.

Consultation with industry has identified an appetite to further explore new markets, opportunities for product diversification and revenue streams.

Domestically, Australian pork is available across a range of products that meet the needs of consumers at home. To ensure we continue to grow, we need to explore new ways for consumers to enjoy pork products – whether by collaborating with our PorkStar and foodservice chefs or working with producers and others along the supply chain to identify new opportunities to get more pork on to menus.

By broadening our market base and revenue streams, we're building a more stable and sustainable future for the pork industry.



Increasing demand for Australian smallgoods

We know consumers want to support Australian-grown products, but the majority of pork for ham and bacon products are imported.

While the cost of producing smallgoods from Australian pork is comparable to that of imported pork, there remains a heavy reliance on imported product due to supply availability.

This project will seek new opportunities to grow Australian supply to increase our market share of smallgoods.

Due to reliability and profitability, this is not a tap that can be turned on overnight, reducing our cost of production will be essential, but the industry welcomes the opportunity to become the preferred smallgoods supplier.

Increasing export market value

While Australian pork production is domestically focused, we have seen growth in the export demand for Australian-grown, quality pork.

The opportunities in our exports markets over the last five years have delivered great success in Singapore.

Over the next five years, we will continue focusing on our Singapore market, while exploring exciting new opportunities, both in our existing southeast Asian markets and by delving into new markets which could include untapped parts of Asia.

Increasing pork in QSR

While Australia doesn't currently have a strong presence in QSR (or fast-food retailers), we have seen increased value from promotional opportunities.

This project will allow us to move from promotional offerings to establishing a more permanent position on QSR menus for pork.

Through brand development, awareness and extension into QSR markets, we will work to give retailers the confidence to feature pork onto their menus.

Developing alternative revenue streams

The industry continues to move towards sustainability, with farms increasingly using infrastructure that supports alternative revenue streams, such as extension to batteries, composting, natural fertilisers and renewable energy.

Through this program, APL will identify new opportunities for producers to develop revenue streams, beyond pork sales.

Over the next five years APL will identify new projects through research and market opportunities to connect producers with new and innovative revenue streams.

From a policy perspective, APL will also advocate for national consistency and regulations to support investment in alternative revenue streams.



Having a positive impact across the pork production system



In agriculture, the word ‘sustainable’ often carries two meanings—both equally important to our industry.

The Australian pork industry always strives to be progressive and achieve long-term growth by implementing practices and products that not only secure the longevity of our industry, but demonstrate our strong sustainability credentials. APL is the custodian of the Australian Pork

Industry Sustainability Framework, which recognises the necessary balance across the four pillars, People, Pigs, Planet and Prosperity. As an industry, we are committed to having a positive impact across the entire pig production system.

Supporting sustainable productivity through a focus on reducing the cost of production on-farm and during processing is an ongoing priority for the industry. Investment and implementation of research requires strong leadership and a workforce

supported to continue building on our great history of environmental improvement, animal care and innovation.

The projects under this theme will enable our producers to increase productivity and profitability while ensuring Australian pork remains affordable, responsible to the planet and our animals, nutritious for consumers and profitable for our farmers.

Reducing cost of production for farms and processing	Delivering meaningful research, innovation and extension	Developing viable environmental solutions	Accelerating Australian genetic improvement	Attracting, retaining and building talent
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Addressing cost of production will always be a major objective for producers. Australia continues to have a higher cost of production than the rest of the world. We must address this to ensure we remain competitive. Through this program, APL will work to address the main contributors to cost of production, including by reducing feed costs, improving animal health, improving herd performance and increasing processing throughput.	It is impossible for APL to achieve our purpose to enable a thriving pork industry without innovation. This program will enable APL and the broader industry to create efficient practices while furthering our ability to capture new and innovative opportunities by developing new technology to drive profitability. This will include artificial intelligence and other technology to encourage more efficient and profitable pig management. By focusing on a more effective approach to extension, APL will also provide better opportunities for producers to access research, and information from APL projects and consider how to adopt innovation on-farm to support more efficient and profitable production and processing.	Sustainability is about giving back more than we take. This program aims to identify and implement practical, cost-effective solutions that support producers in reducing emissions, while contributing to a more sustainable future for both the planet and our industry. By exploring innovative approaches to environmental stewardship, this program will make it easier for producers to meet emissions reduction requirements without compromising their long-term viability. From a policy perspective, this program will help the pork industry demonstrate our commitment to managing and mitigating environmental and public health impacts.	The Australian pork industry has the opportunity to investigate the acceleration of Australian genetics with the aim of improving productivity in our herds. This program will explore ways to better understand and exploit Australian genetics to better understand how to responsibly improve what we already have.	Workforce shortages and retention remain a challenge for our industry. We must focus on developing and nurturing the talent we have, while finding our future industry leaders. Through this program, APL will continue working with education providers and industry partners to raise awareness among students and potential employees of opportunities in the industry. We will continue delivering our leadership and capability programs, while working with other leadership programs to strengthen the capability of the industry and nurture our future leaders, advocates and spokespeople to ensure a sustainable industry.
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Demonstrating leadership, responsibility and transparency in everything we do

Trust is never earned by doing the minimum. To secure the longevity of the Australian pork industry, we need to demonstrate how we have raised the bar across all our practices, to continue building trust and confidence with government and the broader community.

As consumer expectations around animal welfare continue to rise, the Australian pork industry intends to lead, not follow. This theme is not just about meeting requirements; it's about setting new standards that the industry can take pride in, and the broader community can trust.

Demonstrating integrity means taking responsibility across the board, for how we treat our animals, care for the environment, support our people, and show up in the public eye. It means aiming for outcomes that are not only accepted, but respected.

This is something our industry has always done well. Our science-backed APIQ® system covers 90 per cent of production and demonstrates a commitment to maintaining compliance with expected standards. We have world-class biosecurity standards that ensure the health of our animals and our consumers. We produce high-quality, affordable and nutritious protein, effectively tracked from paddock to plate. All of this must be celebrated.

Over the next five years we will continue to invest in the systems, relationships and evidence that will allow us to lead with confidence, maintain our social licence, and build a lasting future for Australian pork.

Stewarding quality assurance and industry compliance

Our industry is always moving forward and ensuring we have science-backed, best-practice management in place.

Over the next five years, APL will continue to ensure APIQ® remains up to date and fit for purpose.

This Strategic Plan will also see APL support the industry with transitioning to real-time tracking of pigs, through the implementation and adoption of the PigPass 2.0 app.



Animal health and welfare first

The Australian pork industry is a leader in animal welfare. There is an opportunity for a more consistent approach to pig welfare that reflects modern farming standards that are clear, evidence-based, practical, measurable, independent and consistently reflected in legislation across all jurisdictions.

This program will see the delivery of national Standards and Guidelines for Pigs, sponsored by APL and led by the whole industry, while furthering the reputation of the industry as a leader in animal care.

Beyond this, the program will also drive the development of new innovations to further protect and enhance the health and wellbeing of Australian pigs.

Leading biosecurity

As we move into the next five years, biosecurity will continue to be a key concern, and the greatest threat to our industry.

Through this program, APL will strengthen the industry's disease preparedness capability beyond ASF by working closely with industry and government, investing in knowledge gaps and developing new technologies that assist in prediction and supply chain management in the event of an emergency animal disease response.

Deepening member and industry engagement

As the industry-owned research and development corporation (RDC) for the Australian pork industry, APL has a responsibility to represent all producer levy payers, recognise and consult with APL Members and Delegates on key policy priorities, and work with State Pork Organisations.

This program aims to strengthen industry confidence by actively demonstrating accountable, and transparent representation of levy-paying producers through meaningful engagement and collaboration.

Lifting community trust

This program will ensure we continue to build community confidence and trust by further bringing the story of Australian pork to life.

Through this project, APL will strengthen the reputation of the pork industry by engaging with stakeholders including retailers, policymakers, media, educators and members of the foodservice industry to keep lifting trustworthiness within the community.

We will celebrate pork's strong nutrition credentials, the environmental management of the industry and our commitment to always improving animal care.

Bringing the Australian pork story to life



Growing demand, delivering results

Any strategy seeks to move a competitive position from the current one to a new, more attractive one. The measures and targets outlined below are aspirations APL has for each Strategic Theme.

Each measure has a formalised methodology of reporting to ensure it is measured in a consistent manner with a defined regularity.

Delivery of the strategic objectives is supported by AOPs. The AOPs are annual investment plans that describe the projects to be funded to achieve the agreed five-year strategic outcomes. KPIs will be included in each AOP to provide additional detail for each Key Result Area (KRA).

TABLE 1. AUSTRALIAN PORK INDUSTRY KRA

STRATEGIC THEME	INDUSTRY OUTCOME	MEASURE	TARGET 2025	OBJECTIVE 2030
Growing fresh pork demand	Increasing share of fresh meat	% share of fresh meat	12.2%	12.8%
Diversifying markets and revenue	Increasing export market value	Australian pork international sales (A\$m)	\$254m	\$275.6m
	Increasing demand for Australian-made smallgoods	Australian smallgoods by volume (T)	111,624	129,303
Driving sustainable productivity	Meaningful research, innovation and extension	% of research and innovation projects aligned with industry and Green Paper issues and industry priorities	80%	100%
		% of research and innovation extension commenced within 30 days of project completion	80%	90%
Advancing industry integrity	Demonstrating leadership in animal welfare	Standards and Guidelines (S&G) process completed	Commence S&G process	New S&G implemented by industry
	Implementing real-time tracking of commercial pig movements	% of production using eNDV (PigPass 2.0)	15%	100%
	Enhanced on-farm biosecurity protection	% of production accredited to voluntary enhanced biosecurity standards (VEBS)	7%	50%

Rigour
in everything
we do

Building resilience, driving progress

An impactful RI&E portfolio

APL invests in new, developing and established industry opportunities. These investments may complement relevant national and cross-sectoral initiatives.

Investment is allocated to achieve balanced, financially responsible investment outcomes from both industry and Commonwealth matching funds.

Our investments integrate the triple bottom line objectives of economic, environmental and social responsibility. APL conducts an annual research and innovation cycle process, which considers the role and input by the pork industry Chief Scientist, the annual pork industry Green Paper, the APL Strategic Plan and industry research priorities.

Throughout this cycle, APL calls for Expressions of Interest (EOI) for research and innovation projects that address key research areas. To ensure APL remains agile and responsive to industry needs, further to the EOI process, APL may call for or commission high priority research projects as the need arises.

APL's systems ensure the portfolio of investments are prioritised according to Government and pork industry research priorities, strategic themes and objectives, levels of risk, return and opportunity for leverage.

The Board has established the Investment Committee to assist in prioritising and recommending specific investments to the Board for funding. Producer-elected Delegates representing Australian pork producers communicate the contemporary views of the Australian pork production industry to APL at least twice per annum.

APL management and committees – which include the industry Chief Scientist, the Australasian Pork Research Institute, industry experts and subject matter experts – consider the views of industry when identifying and evaluating projects. If proposed projects are supported by the relevant committee, they are recommended to the Board for endorsement and funding.

Investing for fiscally responsible outcomes



Industry assumptions for the next five years

Table 2 outlines the assumptions around the key industry parameters over the term of this Strategic Plan.

The industry outcomes targeted in this Strategic Plan incorporate relatively modest volume of production growth assumptions and relatively aggressive industry value assumptions: aiming to maintain the gross value of on-farm

production in the industry at its highest level ever (\$1.94 billion). Achieving this goal will add \$1 billion to the Australian pig industry over five-year period of the Strategic Plan.

TABLE 2. PROJECTIONS FOR INDUSTRY DEVELOPMENT TO 2030

YEAR ENDING JUNE 30		2020	2025	2030	2025 vs 2020 (%)	2030 vs 2025 (%)
Number of sows		275,507	286,884	290,000	4.1%	1.1%
Pigs weaned per year		18.9	19.6	20.5	4.1%	4.5%
Slaughter numbers	millions	5.20	5.64	5.96	8.4%	5.6%
Average weight	HSCW kg	77.2	80.3	83.4	4.0%	3.9%
Total domestic produced	HSCW tonnes 000's	401.9	453.1	497.2	12.7%	9.7%
Industry gross value of production	\$ millions	\$ 1,294	\$ 1,728	\$ 1,929	33.5%	11.6%
Total exports	SW tonnes 000's	38.5	48.4	59.7	25.7%	23.3%
Import volume HSCW	HSCW equiv tonnes 000's	312.8	303.2	301.8	-3.0%	-0.5%
Total available domestic	HSCW tonnes 000's	666.5	685.8	724.4	4.4%	4.1%
Australian population	millions	25.1	26.7	29.0	6.4%	8.9%

The projections presented in this table are based on assumptions drawn from currently available data. While every effort has been made to ensure accuracy, they are subject to change due to unforeseen economic or market developments.



Financial performance 2025-2030

The industry assumptions in the previous section have been used to forecast the financial performance of APL for the period of the 2025 - 2030 Strategic Plan, including the resources required to deliver on the strategic themes.

As a principle, the Board has decided to introduce a degree of flexibility into forward budgets.

In previous strategic plans, the five-year budget included predetermined allocations between each strategic objective. These apportionments were reviewed by the Board annually. Occasionally, these reviews led to the reallocation of funds between strategic objectives.

As the Australian pork industry has become more dynamic, APL has identified a need to be more resilient to the changing environment. APL will address this need by improving the agility of its processes and planning.

This Strategic Plan is therefore more dynamic than previous plans, as the Board has established a new RI&E priority-setting process. The Green Paper process is an overview of the state of the entire value chain of the Australian pork industry at a point in time. An important outcome stemming from the Green Paper is the development of several RI&E

priorities that align with the issues identified by the Australian pork industry.

The key assumptions used to ascertain the forecast financial performance are:

- The Pig Slaughter Levy remains unchanged at \$3.25 per slaughter, as received by APL
- The continuation of the R&D matching system in its current form and at its current levels
- Other revenue streams which include external grants, interest income and reimbursement for services provided to other industry organisations are consistent with current expectations.

Given the ambitious goals of this Strategic Plan, additional resourcing may be required to ensure effective delivery. As an industry we may need to consider changing the levy amount in order to facilitate improved RI&E and market outcomes.



Improving the agility of processes & planning



During APL's 2020-2025 Strategic Plan, the unprecedented COVID-19 pandemic impacted our ability to expend all our funds in some areas, leading to a surplus. These surplus funds will now be utilised over the next five years across marketing, research, innovation, extension and policy.

TABLE 3. FORECAST APL FINANCIAL INCOME AND EXPENDITURE
PLANNING THROUGH TO 2030

YEAR ENDING 30 JUNE	2026		2027		2028		2029		2030	
	R&D (\$'000)	Marketing	R&D (\$'000)	Marketing	R&D (\$'000)	Marketing	R&D (\$'000)	Marketing	R&D (\$'000)	Marketing
Levy	5,750	12,938	5,800	13,050	5,850	13,163	5,900	13,275	5,950	13,388
Government R&D Matching Contributions	5,750		5,800		5,850		5,900		5,950	
Other Revenue		514		426		426		426		426
Total Income	11,500	13,451	11,600	13,476	11,700	13,589	11,800	13,701	11,900	13,814
STRATEGIC THEME 1 Growing fresh pork demand	1,689	6,533	1,713	6,625	1,737	6,719	1,761	6,814	1,786	6,910
STRATEGIC THEME 2 Diversifying markets and revenue	20	510	20	517	21	525	21	532	21	539
STRATEGIC THEME 3 Driving sustainable productivity	3,606	576	3,657	584	3,708	592	3,761	600	3,814	609
STRATEGIC THEME 4 Advancing industry integrity	2,081	964	2,111	978	2,141	992	2,171	1,006	2,201	1,020
Other Expenditure	4,104	5,434	4,100	5,164	4,094	5,156	4,086	5,147	4,077	5,136
Total Expenditure by Category	11,500	14,017	11,600	13,710	11,700	13,822	11,800	13,935	11,900	14,047
Total Expenditure	25,517		25,310		25,522		25,735		25,947	
Surplus/Deficit	(566)		(234)		(234)		(234)		(234)	

Measurement and evaluation

Strategies, objectives, and KPIs are set out in APL's Strategic Plan and the AOP which outline projects by program.

Assessment of potential project investments

The decision to invest in a project is made following evaluation of the:

- Alignment of the project with the Strategic and AOP. The Strategic Plan is reviewed annually
- Alignment with APL's Governance Framework and Corporate Social Responsibility policies
- Likely economic, societal and environmental impacts with particular consideration given to the national rural R&D priorities and providing outcomes for Australian pork producers and the Australian pork supply chain as a whole
- Value for money and budget.

During the evaluation stage the expected benefits to Australian pork producers are estimated. The potential and likely contribution of non-financial impacts are also considered in conjunction with APL's Strategic Plan.

- Pathway to adoption, uptake and commercialisation opportunities, where relevant
- Project risk assessment.

The R&D and non-R&D costs of each project being evaluated are reported separately and in aggregate.

On-going evaluation of project investments

The impact of the strategic themes on the industry as a whole are measured using KRAs. APL's performance in efficiently and effectively delivering projects to support those pillars are measured using organisation KPIs. APL's KRAs and KPIs are published in APL's AOP which are available on APL's website.

Projects are measured and evaluated through their life to determine whether further investment would add value to the Australian pork industry. The measured KRAs and KPIs for each program are reported to the APL Board regularly. The measured outcomes are reported in APL's Annual Report which is available on APL's website. The Annual Report describes, inter alia, how the projects advance the objective outcomes of the AOP and the Strategic Plan.



Evaluation of projects at the end of their life

Selected programs incorporate a budget for ex-post evaluation of projects to be performed by external independent consultants.

These post-project evaluations apply the evaluation guidelines for the assessment of performance impacts developed by the Council of Rural Research and Development Corporations. APL also participates in the Council's process for aggregation of performance impact evaluations undertaken across the RDCs.

Typical ex-post reports performed by external independent consultants include:

- Industry Economic Impact Reports (whole of industry)
- Ex-Post Economic Analysis (programs)
- Ex-Post Benefit Cost Analysis (programs).

Research and development findings are published and disseminated through APL's various communication channels unless there is a cogent reason why publication is not appropriate such as when APL is pursuing a commercialisation opportunity.

Program Framework

The Annual Report provides assessment of programs delivered under each AOP.

APL has an established structure which facilitates planning, guides investment selection, monitors performance and reports on progress/achievements resulting from the investment activities.

The Program Framework has the following elements:

- The Australian Pork Limited Strategic Plan 2025-2030 which describes the objectives, outcome statements and key performance indicators to direct investment of levy payer funds and Commonwealth Matching Payments
- Delivery of the strategic objectives are supported by AOPs.

The Annual Report brings together performance related information generated by the Program Framework and summarises the AOP outputs and impact of investments.

Alignment with government priorities

The Australian Government provides public investment in rural R&D because profitable, competitive and sustainable rural industries provide benefits for the whole Australian Commonwealth.

The Australian Government contributes to the Australian pork industry by providing matching contributions to APL for eligible R&D expenditure to a limit of the lesser of an annual cap of 0.5 per cent of the industry's gross value of production or the cumulative R&D levy collected by the government from industry. This substantial support from the Commonwealth enables APL to significantly leverage producer levies and their investment into its research, development and extension investments.

Matching contributions provided by the Australian Government may only be spent in accordance with the *Pig Industry Act 2001* and the funding agreement between the Commonwealth and APL.

The funding agreement prohibits expenditure on agri-political activities and payments to industry representative bodies.

APL's programs and plans must be consistent with the Australian Government's National Science Statement, National Agricultural Innovation Policy Statement, and other guidelines and priorities communicated by the Commonwealth and reflect the dynamic nature of the global market. As a rural RDC, APL has also developed and refined its R&D process to implement key investment evaluation and reporting frameworks to demonstrate its alignment with both industry productivity and government rural R&D priorities and provide robust and objective information on the overall economic, social (public good) and environmental returns produced by APL's R&D portfolio.

APL is committed to ensuring a sustainable and competitive Australian pork industry focused on:

- **The economical and environmentally sustainable implementation of new and advanced technologies and RD&E outcomes by producers and key industry stakeholders to enhance animal welfare, biosecurity, soil, water and natural resource management, traceability, product quality and safety, animal health, pig management practices;**
- **Protecting Australia's community, public health, primary industries and environment from biosecurity threats;**
- **Enhancing productivity**
- **Market insights.**

APL's Statutory Funding Agreement requires APL to show contributions to Australia's **National Science Statement**, the **National Agricultural Innovation Statement** and the **National Primary Industries RD&E Framework**. APL's alignment to these government priorities is summarised as follows:

National Agricultural Innovation Priorities:

Priority 1 Trusted exporter of premium food and agricultural products

Priority 2 Champion of climate resilience to increase the productivity, profitability and sustainability of the agricultural sector

Priority 3 World leader in preventing and rapidly responding to significant pests and diseases through future-proofing our biosecurity system

Priority 4 Mature adopter, developer and exporter of digital agriculture.

National Science and Research Priorities:

Priority 1 Transitioning to a net zero future

Priority 2 Supporting healthy and thriving communities

Priority 3 Elevating Aboriginal and Torres Strait Islander knowledge systems

Priority 4 Protecting and restoring Australia's environment

Priority 5 Building a secure and resilient nation.

A photograph of two pigs in a field. One pig is in the foreground, facing right, and the other is slightly behind it, also facing right. They are in a grassy field with a fence line in the background. The sky is clear and blue.

Working together towards a better future

TABLE 4. ALIGNMENT WITH GOVERNMENT PRIORITIES

APL STRATEGIC THEMES	APL PROGRAM AREAS	NATIONAL AGRICULTURAL INNOVATION PRIORITIES	SCIENCE AND RESEARCH PRIORITIES
Growing fresh pork demand	Increasing share of fresh meat	Priority 1	Priority 5
	Developing added value NPD opportunities	Priority 1 Priority 4	Priority 5
	Increasing pork on menu (foodservice)	Priority 4	Priority 5
Diversifying markets and revenue	Increasing share of Australian smallgoods	Priority 1 Priority 4	Priority 5
	Increasing export market value	Priority 1	Priority 5
	Increasing pork in QSR		Priority 5
	Developing alternative revenue streams	Priority 2 Priority 4	Priority 5
Driving sustainable productivity	Reducing cost of production for farms and processing	Priority 2 Priority 4	Priority 1 Priority 5
	Delivering meaningful research, innovation and extension	Priority 2 Priority 4	Priority 1 Priority 4 Priority 5
	Developing viable environmental solutions	Priority 2 Priority 4	Priority 1 Priority 4 Priority 5
	Accelerating Australian genetic improvement	Priority 3 Priority 4	Priority 5
	Attracting, retaining and building talent	Priority 4	Priority 5
Advancing industry integrity	Stewarding quality assurance and industry compliance	Priority 2 Priority 3 Priority 4	Priority 1 Priority 2 Priority 4 Priority 5
	Animal health and welfare first	Priority 3 Priority 4	
	Leading biosecurity	Priority 3 Priority 4	Priority 2 Priority 3
	Deepening member and industry engagement	Priority 4	Priority 2
	Lifting community trust	Priority 1 Priority 2 Priority 3 Priority 4	Priority 1 Priority 2 Priority 3 Priority 4 Priority 5



A shared vision for the future

APL actively collaborates within and across the agricultural RDC environment. APL is involved in a number of key, future-focused collaborative relationships and projects, as described in the following:

National Primary Industries Research Development and Extension Framework

The Australian, state and territory governments, Rural R&D Corporations, CSIRO, and universities jointly implemented the National Primary Industries Research, Development and Extension (RD&E) Framework to encourage greater collaboration and promote continuous improvement in the national investment of RD&E resources. Through this Framework, primary industries RD&E is now more collaborative and coordinated.

The Framework currently includes 14 sectoral strategies (including pork) and eight cross-sectoral strategies.

Specifically, the APL Strategic Plan aligns several programs to the pork sector and cross sectoral strategies under the National Primary Industries RD&E Framework.

National Pork RD&E Strategy

The National Pork RD&E Strategy for the Australian pork industry was designed and implemented in 2009 to optimise the execution and outcomes of future research and development (including the technology transfer of those R&D outcomes).

This strategy aimed to optimise the combined infrastructure and resources existing in Australia for pork RD&E, under the management of the various interested parties, for the purposes of carrying out research, development and extension for the Australian pork industry.

The objectives of this strategy continue to underpin how APL and APRIL work collaboratively and co-operatively together.

The cross-sectoral RD&E strategies have enabled APL and the pork industry to increase its collaboration and leverage of its RD&E funding in a number of areas.



Preparing for an emergency disease

African swine fever (ASF) preparedness has increased engagement and strengthened relationships between government and industry, particularly with the Chief Veterinary Officers.

APL has effectively established and continues to work collaboratively through Emergency Animal Disease (EAD) Technical Panel. This collaboration has achieved valuable ASF preparedness and response outcomes for the industry, significantly improving our ability to successfully respond to an ASF incursion. At the same time, APL continues to positively communicate with producers to drive awareness and address concerns around ASF.

Cross-sectoral RD&E strategies and projects

APL continues to be actively involved with the development and implementation of a number of other cross sectoral RD&E strategies, including the Animal Welfare RD&E Strategy (Steering committee member, and project management coordinator), the Animal Biosecurity RD&E strategy (Steering Committee member) and the Food and Nutrition RD&E Strategy. APL is currently leading three DAFF funded projects as part of the Rural Research and Development for Profit program and collaborating and investing in eight others.

Feed grain R&D partnership

APL is a key member of the cross-sectoral Feed Grain R&D Partnership which was established in 2007 to integrate and identify collaborative Research and Development (R&D) initiatives across participating R&D funding agencies involved with the feed grain and livestock supply chain. The members include: Australian Eggs, MLA, Australian Export Grains Innovation Centre, APRIL, AgriFutures Australia, Dairy Australia, and Stock Feed Manufacturers' Council of Australia.

The Feed Grain Partnership continues its role as a focal mechanism for the major organisations and companies in the feed grain industry, to provide whole of supply chain guidance to the different agencies.

In addition, APL is also involved in a number of collaborative RD&E projects with other RDCs.

Council of Rural Research and Development Corporations (CRRDC)

APL provides executive support services to the Council of Rural Research and Development Corporations (CRRDC). APL also actively participates in CRRDC cross-sectoral events to present outcomes from our investments to a cross-sectoral audience.

Emerging National Rural Issues program (coordinated by AgriFutures Australia)

The Emerging National Rural Issues program aims to directly address barriers to growth and assist government and industry to respond to opportunities. APL is investing in the collaborative National Education Food and Fibre Strategy and is involved in a number of other collaborative projects.

Australasian Pork Research Institute Limited (APRIL)

APL and the Australasian Pork Research Institute Limited (APRIL) work collaboratively to ensure that pork research, development and extension (RD&E) is focused, efficient and delivers outcomes in a timely manner to ensure that the Australian pork industry is competitive, productive and sustainable. This collaboration between APL and APRIL minimises the risk of duplication in RD&E programmes and activities.



TABLE 5. ALIGNMENT WITH NATIONAL PRIMARY INDUSTRIES RESEARCH DEVELOPMENT
AND EXTENSION FRAMEWORK

		PORK	ANIMAL BIOSECURITY	TRANSPORT	ANIMAL WELFARE	FOOD AND NUTRITION	BIOENERGY	SOILS	WATER USE IN AGRICULTURE	PLANT BIOSECURITY
Growing fresh pork demand	Increasing share of fresh meat	Yes				Yes				
	Developing added-value	Yes				Yes				
	New product development opportunities									
Diversifying markets and revenue	Increasing pork on menu (foodservice)	Yes				Yes				
	Increasing demand for Australian smallgoods	Yes				Yes				
	Increasing export market value	Yes				Yes				
Driving sustainable productivity	Increasing pork in QSR	Yes				Yes				
	Developing alternative revenue streams	Yes				Yes				
	Reducing cost of production for farms and processing	Yes							Yes	
	Delivering meaningful research, innovation and extension	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	
	Developing viable environmental solutions	Yes					Yes	Yes		
Advancing industry integrity	Accelerating Australian genetic improvement	Yes	Yes	Yes						
	Attracting, retaining and building talent	Yes								
	Stewarding quality assurance and industry compliance	Yes	Yes		Yes				Yes	
	Animal health and welfare first	Yes	Yes		Yes				Yes	
	Leading biosecurity	Yes	Yes		Yes				Yes	
	Deepening member and industry engagement	Yes			Yes					
	Lifting community trust	Yes								

Corporate governance and compliance statements

APL receives income through:

- Marketing and R&D Pig Slaughter Levy (via the Commonwealth)
- Commonwealth R&D Matching Contributions
- Grants
- Strategic Investments and other revenue.

As the declared Industry Services Body under the *Pig Industry Act 2001*, APL has mutual obligations as partner with the Commonwealth in delivering services to members and levy payers and responsibilities for the custody and investment of the funds. APL notes the Commonwealth's expectation that it implements good corporate governance practice in managing and investing the funds.

Accountability and reporting

Through its Board, APL is accountable to the Commonwealth through the Department of Agriculture, Fisheries and Forestry (the department) as well as to its levy paying members, and formally reports to each via Strategic Plans (such as this one), AOPs and Annual Reports.

APL also communicates with stakeholders through a range of channels, including:

- Regular meetings with and reports to the department
- Publications and online content
- Consultation with levied industries and R&D partners
- Social media, media, conferences, workshops, grower updates and similar activities.

Each year's AOP summarises the review of the strategic objectives, supporting themes, enablers and the planned financial resource allocations for the upcoming financial year. Each year's Annual Report includes a description of how strategic directions, policies and processes have been applied during the year.

Consultation with members and levy payers, government and industry stakeholders

APL regularly engages and consults with its key stakeholders about the operating environment, priorities and desired outcomes for the industry. The company's strategies are designed to actively support the needs and aspirations of both the industry and the Australian community.

Extension and adoption statement

APL conducts a number of extension and adoption activities, including face-to-face engagement, base funded RD&E facilities and the production and distribution of targeted publications and supporting resources. These activities are further supported by the evaluation of potential project investments, which includes ensuring the project's pathway to adoption, uptake and commercialisation opportunities is appropriate and likely to succeed (see Investment Evaluation Framework).

Business best practice

APL adopts best business practices, including adherence with relevant Australian Standards and leading organisational management models including:

- Measurement of organisational performance against specified outcomes and objectives
- Adoption of best practice in managing compliance with legislative and regulatory requirements
- Maintaining a suite of internal policies and procedures.

Role of the Board

The APL Board is composed of five elected directors and four specialist directors. The specialist directors are appointed by the Board to ensure a balance of skills and expertise which is in accordance with criteria set out in the company's constitution and the Funding Agreement with the Commonwealth.

The APL Board sets strategic direction within the requirements of the *Pig Industry Act 2001*, the *Corporations Act 2001*, the Funding Agreement with the Commonwealth and the APL constitution. When strategic direction is developed, stakeholder views are considered through consultation with members, government and the supply chain.

The Board delegates responsibility for management of the company and delivery of strategic outcomes to the Chief Executive Officer.

The Board is responsible for ensuring company funds are used to the best advantage of, and for the benefit of Australian levy-paying pork producers, the wider industry and the Australian community.

The Board strives to create member value by constructively engaging with management to ensure the appropriate development, execution and monitoring of the company's agreed strategic outcomes.



Creating value, growing demand

The Board’s functions include:

- Establishing company policies
- Appointment of the CEO and providing direction on the appointment, remuneration and evaluation of senior management
- Approving major strategies, plans and budgets
- Reviewing company performance
- Responding to management recommendations on major initiatives
- Approving significant capital expenditure
- Ensuring the company acts legally and responsibly on all matters and that the highest ethical standards are maintained.

The Board carries out its functions in line with the Australian Institute of Company Directors Code of Conduct.

The Board has established appropriate systems and controls to ensure that the company acts within the law at all times, avoids conflicts of interest and operates honestly and ethically in all business activities. APL has in place key corporate controls including risk management, fraud control, and intellectual property management.

The Board also has in place a process whereby the interests of all directors which could be a source of perceived or actual conflict are disclosed on appointment, reviewed on an annual basis and, where applicable, notified as and when they arise. The Board and individual directors, by request through the Chair, may obtain independent advice on matters of importance.

Alignment with Guidelines

The following compliance table provides the link between the requirements under the Funding Agreement and the disclosure of the requirements in this Strategic Plan.



TABLE 6. PERFORMANCE PRINCIPLES AND GUIDELINES

Principle	Page number
1 Stakeholder engagement – Engage stakeholders (including industry representative bodies) to identify research, development and extension priorities and activities that provide benefits to portfolio industries.	16
2 Research, development and extension activities – Priorities and activities are strategic, collaborative, and targeted to improve profitability, productivity, competitiveness, and preparedness for future opportunities/challenges through a balanced portfolio.	16 19 34 42-53
3 Collaboration – Strategic and sustained cross-industry and cross-sectoral collaboration that addresses shared challenges and draws on experience from other sectors.	48-50
4 Governance – Arrangements and practices fulfil legislative requirements and align with contemporary Australian best practice for open, transparent, and proper use and management of funds.	54-57
5 Monitoring and Evaluation – Demonstrate positive outcomes and delivery of research, development and extension (and marketing) benefits to levy payers and the Australian community in general, and continuous improvement in governance and administrative efficiency.	42-46

Shaping tomorrow, starting today

