

# Australian Pork Limited

Annual Operating Plan  
2025-2026

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# Raising the bar: A plan for progress

**2025-2026 is the first year of Australian Pork Limited's (APL) new five-year Strategic Plan, and our first step towards achieving our goal of becoming Australia's most versatile protein from farm to fork, sustainably adding \$1 billion to farm gate value by 2030.**

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

APL's 2025-30 Strategic Plan priorities will be delivered through four strategic themes: Growing fresh pork demand, Diversifying markets and revenue, Driving sustainable productivity and Advancing industry integrity. These themes were developed following extensive consultation with the Australian pork industry, government and other key stakeholders.

Our priorities for the 2025-26 AOP underpinning the 2025-30 Strategic Plan themes are:

1. Increasing share of fresh meat
2. Increasing export market value
3. Increasing pork in quick service restaurants (QSR)
4. Reducing cost of production for farms and processing
5. Animal health and welfare first

This AOP will see an evolution of our successful Get Some Pork on Your Fork marketing, as we continue to increase the consideration of pork in quick and easy everyday meals (such as stir-fry), ongoing trade and consumer support in fresh pork export markets, and marketing support in domestic foodservice (including the quick service restaurant sector).

From a research, innovation and extension perspective, we will continue to invest in innovative solutions to address the main contributors to cost of production and processing across the supply chain. Further to this, improving the health and wellbeing of our pigs through research and new technology around animal welfare and biosecurity will remain a key priority.

Animal welfare also continues to be a key driver from a policy perspective. APL, on behalf of the industry will courageously step up to lead the development of the national Standards and Guidelines for Pig Welfare that build on the science-backed, evidence-based best practices that ensure positive animal health and welfare outcomes.

This 2025-26 AOP has been based on extensive consultation with our industry and key stakeholders and will be delivered by our valued APL team in collaboration with the APL Board.



# Underlying assumptions

APL's 2025-26 AOP is based on the following assumptions.

## Assumption One – Grain prices will continue to remain high in 2025-2026

A primary driver of pork production's economic viability continues to be the cost of feed. Australian conditions for the year ahead are predicted to remain drier than average in a number of regions – particularly the southeast, with crop estimates slightly down, meaning a potential increase to feed grain costs. Advice from grain traders and market analysts suggest that grain prices will remain high for the season.

## Assumption Two – Domestic pork processing will remain relatively stable

Industry assumptions combined with Australian Bureau of Agricultural and Resource Economics and Sciences (ABARES) predictions indicate a relatively stable year ahead. Farm gate prices have remained stable since December 2024, and progeny processing saw a 1.8 per cent increase in 2024.



## Assumption Three – Meat consumption in Australia will remain stable

Chicken is projected to continue leading Australia's animal protein market share, with pork in second place, with total consumption at 26 kg per person per year, including both fresh and processed pork. However, demand for pork is forecast to increase due to its continuing affordability when compared with beef and lamb.

## Assumption Four – Geopolitical and trade tensions may present opportunities for Australia to explore new export markets

While the continuation of geopolitical and trade tensions may pose risks for Australian pork, they may also present strategic opportunities to expand our export portfolio in untapped parts of Asia. The Australian pork industry is well-positioned to explore and expand into new and emerging markets, capitalising on demand for our sustainably home-grown, high-quality, nutritious fresh pork.

## Assumption Five – Producers will face increased requirements regarding environmental sustainability

The regulatory environment the Australian pork industry operates in will continue to intensify. Australia will introduce mandatory climate-related reporting, including Scope 3 emissions for large retailers and pork companies worth more than **\$250 million**. This will increase the need for producers to engage in measurement and further reduction initiatives. Producers must have the right tools and technologies to meet these monitoring and reporting requirements.

# An overview of our four strategic themes



In the first year of our 2025-30 Strategic Plan, APL will continue to contribute to the delivery of a thriving pork industry by focusing on four strategic themes:

## Growing fresh pork demand

Increasing demand by making fresh pork more front-of-mind for popular everyday meals at home, such as stir-fry, and more present on menus across foodservice.

## Diversifying markets and revenue

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

## Driving sustainable productivity

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

## Advancing industry integrity

Furthering Australian pork's progress in demonstrating ongoing improvements that underpin the integrity of our industry.

As described in APL's 2025-30 Strategic Plan, these themes have been developed to ensure strategic alignment with government and industry research priorities and maximise collaboration with research and development corporations (RDCs) and the broader agriculture sector.

# 2025-2030 Strategic Plan

## program areas

### Growing fresh pork demand

#### Increasing share of fresh meat

Developing added  
value new product  
development  
opportunities

Increasing pork on  
menu

### Diversifying markets and revenue

Increasing share of  
Australian smallgoods

#### Increasing export market value

#### Increasing pork in quick service restaurants

Developing  
alternative revenue  
streams

### Driving sustainable productivity

#### 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

### Advancing industry integrity

Stewarding quality  
assurance and  
industry compliance

#### Animal health and welfare first

Leading biosecurity

Deepening member  
and industry  
engagement

Lifting community  
trust through  
social licence  
communications

The 2025-30 Strategic Plan includes four strategic themes and 17 key program areas that sit underneath each theme. Some of these programs underpin business as usual activity each year, while some are dependent on progress in other areas.

This AOP has been developed with the same ambition and progressive approach of APL's 2025-30 Strategic Plan. Continuing with our

agreed consultative development strategy, the entire APL team, Board, broader industry and key stakeholders had opportunity to provide input into this plan.

Five program priorities have been identified and agreed upon by the APL Board and executive leadership team for the 2025-26 financial year.

## STRATEGIC THEME ONE

# Growing fresh pork demand

### Increasing share of fresh meat

This program will use focused, memorable and branded storytelling to shift consumer perceptions and make pork more front-of-mind when it comes to everyday meals such as stir-fries, grilled or barbecued meat and roasts.

Through targeted “Get Some Pork On Your Fork” marketing activity and retail partnerships, we will position pork as an enticing twist on everyday meals, perfect for family mealtimes through the week.

This AOP will focus on increasing pork’s share of fresh meat, and strengthening first-to-mind status for the mid-week stir-fry occasion.

APL will also conduct research and innovation to further enhance product quality.

### Developing added value NPD opportunities

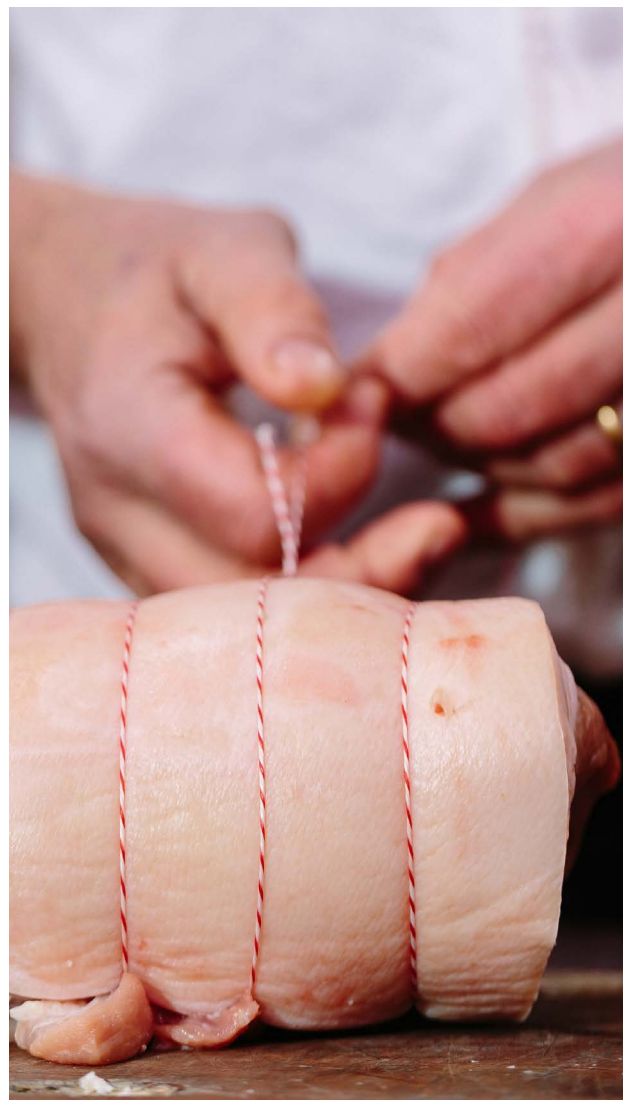
This marketing research and innovation program will engage retailers, processors and key supply chain partners to uncover new products that will further enhance pork’s front-of-mind position for everyday meals.

This will enable not only new cuts of meat to be brought to market, but also new models of delivery and new innovations in cooking across breakfast, lunch and dinner.

The Policy work within this portfolio priority is a continued focus on improving market access. As the peak industry body for the Australian pork industry, from paddock to plate, APL is working to build the case for increased access for Australian pork products.

### Increasing pork on menu (Foodservice)

This program will focus on ensuring that pork on menu continues to grow across the volume and high-end of foodservice.





# Diversifying markets and revenue

## Increasing export market value

While Australian pork production is domestically focused, we have seen growth in the export demand for Australian-grown, quality pork in recent years. However, we need to remain responsive to potential new and developing competing markets.

The Policy work within this program is a continued focus on improving market access. As the peak industry body for the Australian pork industry, from paddock to plate, APL is working to build the case for increased market access for Australian pork products.

This program will focus on maximising the visibility of Australian-grown pork among international retailers and consumers to increase awareness and preference as the easy first choice.

The focus for the 2025-26 AOP will be to maintain pork's strong export value at \$254 million. A global brand approach – already started with the launch of APL's new Singapore campaign ("Flown in fresh, full of flavour") and website – will ensure a consistent overseas campaign.

## Increasing demand for Australian smallgoods

The challenge remains that most consumers are not aware of the extent of imported meat in ham and bacon products in retail. Building on the momentum of the marketing activity in 2024-25,

APL will continue to focus on raising awareness among consumers of the use of imported meat, so they are better able to make informed choices.

## Developing alternative revenue streams

Through this program, APL will identify new opportunities for producers to develop revenue streams, beyond pork sales to generate sustainable demand. The scope of work within this program will also include policy work to advocate for national consistency and regulations to support investment in alternative revenue streams.

## Increasing pork in QSR

Cost of living pressures have sharpened consumers' and therefore restaurants' focus on affordable take-away food options, including in fast-food settings. This generally works to pork's disadvantage compared to chicken as an ingredient, however the Mexican QSR segment, currently going through a period of rapid growth, is an example of a growing opportunity for pork in QSR.

This program will address the decline of pork on QSR menu, working with supply chain stakeholders and QSR decision-makers to hold pork's position on menu steady in 2025-26.



STRATEGIC THEME  
THREE

# Driving sustainable productivity



## Reducing cost of production for farms and processing

Australian production costs on-farm, and during transport and processing are higher than in overseas markets. This impacts our ability to remain competitive with international markets, particularly when it comes to production of smallgoods. Reducing costs is best achieved through improving productivity and innovation.

This program will address the main contributors to the cost of production on-farm and in processing. Focus areas for this AOP will include reducing feed costs, improving animal health and welfare, improving herd performance and increasing processing efficiency.

## Delivering meaningful research, innovation and extension

The pace of change required by producers to maintain efficiency and profitability is increasing. The pork industry requires access to innovation and new ideas, particularly related to artificial intelligence (AI) and new technology, to capitalise on the potential value of existing or future datasets for more efficient and profitable pig management.

This program will focus on providing opportunities for producers to adopt new technology and efficient practices to drive greater profitability on-farm. By delivering effective extension, APL will provide a mechanism through which producers can access this research, innovation and information and consider adoption.

## STRATEGIC THEME THREE



# Driving sustainable productivity

### Developing viable environmental solutions

There is an increasing environmental regulatory focus on agriculture. Intensive agricultural sectors such as pork have the opportunity to clearly demonstrate how we manage and mitigate environmental and public health impacts. 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.

During this AOP, we will focus on ensuring farmers have access to practical and meaningful tools such as emissions calculators to support with additional Scope 3 reporting requirements. By exploring innovative approaches to environmental stewardship, the program will make it easier for producers to meet emissions reduction requirements without compromising their long-term viability.

### Accelerating Australian genetic improvement

Accelerating Australian genetic gains without compromising the health of our animals is a

priority for the industry. A focus for this AOP will be exploring ways to help facilitate short- and long-term solutions to accelerate improvement.

### Attracting, retaining and building talent

Workforce shortages and retention remain a challenge for the pork industry due to low awareness of career opportunities. APL will continue working with education providers and industry partners to raise awareness among students and potential employees of opportunities in the industry.

This will be complemented by the implementation of the APL and APRIL Education and Training Committee, responsible for coordinating and delivering tertiary education and training to stakeholders in the Australian pork industry, to assist in building greater research capacity for the industry.

APL's leadership and capability development programs remain a priority, with the Australian Pork Emerging Leaders and the Pork Leadership Course fostering the current and next generation of pork industry leaders.



# Advancing industry integrity

## **Animal health and welfare first**

The health and wellbeing of our animals is a leading priority for the pork industry, and we remain committed to demonstrating leadership in this space.

The key focus for this AOP will be to engage the pork supply chain and key stakeholders in the industry-led national Standards and Guidelines for Pigs, continuing research that demonstrates science-backed evidence-based best practices that ensure positive animal health and welfare outcomes.

With knowledge and technology advancements, we will also explore and extend science-based solutions to continuously improve our farming practices and enhance the welfare of our pigs and the farmers who care for them.

## **Stewarding quality assurance and industry compliance**

APL remains focused on ensuring the industry continues to raise the bar on quality and compliance while always acting with integrity and respect for our planet and our animals.

A focus for this program will be increasing real-time tracking of commercial pig movements, achieved through the release of the updated PigPass 2.0 app.

**APL remains focused on ensuring the industry continues to raise the bar on quality and compliance while always acting with integrity and respect for our planet and our animals.**



# Advancing industry integrity

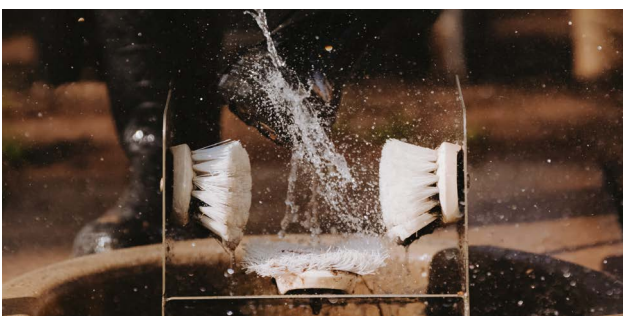


## Leading biosecurity

Biosecurity is always a key concern for our industry. Ensuring we have strong prevention and response protocols is our most vital defence.

Through this program, APL will strengthen the industry's disease preparedness capability beyond African swine fever 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 (EAD) response.

A focus for this AOP will be ensuring production continues to move towards accreditation against the voluntary enhanced biosecurity standards (VEBS) to further strengthen biosecurity on-farm.



## Deepening member and industry engagement

As the producer-owned peak representative body for the Australian pork industry, APL has a responsibility to represent the views, wishes and concerns of our industry. As ever, facilitating strong industry engagement and collaboration with industry remains a priority for the organisation. The 2025-26 AOP will provide opportunities to continue building existing relationships and creating meaningful industry engagement.

## Lifting community trust

Social licence storytelling will continue as an always-on communications initiative. For this AOP, the focus will be on sharing the strong nutrition credentials of fresh pork with Australian consumers, helping them recognise pork's place as part of a balanced family diet, and proactive storytelling to strengthen community perceptions of the industry's animal care.

# Targets and key performance indicators

APL is an outcomes-driven organisation. The targets and Key Performance Indicators (KPIs) we have are consistent with both the 2025-2030 Strategic Plan and the resource which we apply to each target.

Wherever possible, we select investments and activities that will offer improvements towards multiple targets as well as strategic Key Result Areas (KRAs).

To demonstrate alignment with strategy, the following pages contain a table incorporating the focused portfolio of Strategic KRAs and the additional Operating KPIs for this 2025-26 AOP.

**Our investments and activities aim to offer improvements to multiple targets.**



TABLE 1 – APL KPIs AND KRAs

Strategic theme	Strategic KRA	AOP KPI	Measure	FY 2025 estimate	FY 2026 target
GROWING FRESH PORK DEMAND	Increasing share of fresh meat	First to mind for stir-fry	% increase of first to mind occurrences	7%	9%
		Share of fresh meat (MAT)	% increase of fresh meat share	12.2%	12.3%
DIVERSIFYING MARKETS AND REVENUE	Increasing export market value	Maintain export market value	Total export value	\$254 million MAT	\$254 million MAT
		Arrest decline and hold stable	% of pork on QSR menu occasions	48%	48%
DRIVING SUSTAINABLE PRODUCTIVITY	Delivering meaningful research, innovation and extension	Research and innovation projects aligned with industry and Green Paper priorities	% of projects aligned with industry and Green Paper priorities	80%	85%
		Research and innovation extension commenced within 30 days of project completion	% of extension commenced within 30 days of project completion	80%	82%
		Demonstrating pathways for career progression	% of alumni and current APEL members attend inaugural National APEL forum	-	60%
ADVANCING INDUSTRY INTEGRITY	Demonstrating leadership in animal welfare	Commence Standards and Guidelines (S&G) review process	S&G review commenced and Stakeholder Advisory Group established	Not commenced	Under development
	Implementating real time tracking of commercial pig movements.	Commercial pig movements recorded using eNVD (PigPass 2.0 app)	% of commercial pig movements recorded using eNVD	15%	30%
	Enhancing on farm biosecurity protection	Commercial production accredited to VEBS	% of production accredited to VEBS	7%	20%



TABLE 2 – CONCISE BUDGET MODEL

Trading Income			
APL Income	R&D (\$'000)	Non-R&D (\$'000)	Total (\$'000)
Levy Income	5,750	12,938	18,688
Matching income	5,750	-	5,750
Other income	-	514	514
<b>Total Trading Income</b>	<b>11,500</b>	<b>13,451</b>	<b>24,951</b>

APL Project Costs			
Growing Fresh Pork Demand	R&D	Non-R&D	Total
Increasing share of fresh meat (GSPOYF)	1,055	6,180	7,235
Developing added value NPD opportunities	-	-	-
Increasing pork on menu (foodservice)	633	353	986
<b>Total Growing Fresh Pork Demand</b>	<b>1,687</b>	<b>6,533</b>	<b>8,220</b>
Diversifying Markets & Revenue	R&D	Non-R&D	Total
Increasing demand for Australian smallgoods	-	200	200
Increasing export market value	20	160	180
Increasing pork in QSR (hero product)	-	150	150
Developing alternative revenue streams	-	-	-
<b>Total Diversifying Markets and Revenue</b>	<b>20</b>	<b>510</b>	<b>530</b>
Driving Sustainable Productivity	R&D	Non-R&D	Total
Reducing COP for farms and processing	1,864	-	1,864
Driving new research, innovation and extension	773	436	1,208
Developing viable environmental solutions	269	-	269
Accelerating Australian genetic improvement	80	-	80
Attracting, retaining and building talent	620	140	760
<b>Total Driving Sustainable Productivity</b>	<b>3,606</b>	<b>576</b>	<b>4,181</b>
Advancing Industry Integrity	R&D	Non-R&D	Total
Stewarding quality assurance and industry compliance	2	234	236
Animal health and welfare first	1,159	10	1,169
Leading biosecurity	588	39	627
Deepening member and industry engagement	270	536	806
Lifting community trust	65	145	210
<b>Total Advancing Industry Integrity</b>	<b>2,083</b>	<b>964</b>	<b>3,047</b>
<b>Total Project Costs</b>	<b>7,396</b>	<b>8,583</b>	<b>15,978</b>

Operating Expenses	R&D	Non-R&D	Total
Operating Expenses	470	623	1,094
Employment Costs	3,333	4,412	7,745
Travel	301	399	700
<b>Total Operating Expenses</b>	<b>4,104</b>	<b>5,434</b>	<b>9,539</b>
<b>Net Surplus/(Deficit)</b>			<b>(566)</b>

