

Summary - 2025 Green Paper¹

The 2025 Green Paper continues the theme started in 2023 when the need was recognised by the APL and APRIL Boards for the Australian pork industry to improve and advance its overall research strategy and outcomes through an industry-informed, and more cohesive and coordinated, research and development (R&D) program. Through the Pork Industry Insight Panel (PIIP), workshops were held (face-to-face) in August 2023 and November 2024 resulting in the publication of the 2023 and 2024 Green Papers, respectively.

The PIIP met (in an online format) in September 2025 to conduct a 'lite touch' exercise in recognition that the R&D priorities identified from the 2024 Green Paper had just been announced in a joint call for Expressions of Interest between APL and APRIL. Over 95% of PIIP members at the 2024 Green Paper workshop attended the 2025 workshop.

The PIIP worked through a structured evaluation comprising an environmental scan of the industry, identification of the key deliverables industry is seeking from any investment in R&D, i.e., Growth, (being) Disease-Free, Progress Social Licence, Profitability and Sustainability. To ensure the PIIP conducted review of the entire pork value chain, seven segments (Genetics, Farms, Primary Processing, Secondary Processing, Tertiary Processing, Wholesale and Export, and Retail) were assessed in a matrix according to 19 disciplines (Health, Nutrition, Management, Housing, Biosecurity, Environment, Welfare, Transport and Freight, Quality, Food Safety, Yield, People, Market Access, Social Licence, Information and Insights, Communication, Technology and Marketing).

Most attention was focused on the Genetics and Farms segments, with the disciplines receiving most attention being Health, Nutrition, Management, Housing, Biosecurity, and Welfare, and those with the least attention being Utilities, Quality, Market Access, Social Licence, Information and Insights, Communication, Technology, Marketing. As with previous Green Papers, most attention was focused on pre-farm gate segments than post-farm gate segments.

The PIIP remarked that further industry consolidation commensurate with enhanced appetite for growth (expansion) had occurred in the 12 months since the PIIP last met as pig prices remained favourable. The sense of positivity about the current state of the Australian pork industry aired by the 2024 PIIP continued. Discussion and interactions amongst the PIIP this year were more subdued than in 2024, ostensibly because of the online format. Nevertheless, and contemplating the

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environmental scan of the industry, the 2025 PIIP considered the statements from the 2024 Green Paper regarding 'what the Australian pork industry is better at' and 'what it could do better' remained highly relevant. This was particularly so with progressing social licence, sustainability and being disease-free. It was also noted that the movement towards an industry-led Standards and Guidelines process has been an important step forward.

When considering what the PIIP thought could be achieved as a cohesive, strategic industry, there was agreement that the development of industry policies for the entire supply chain to ensure that products will be acceptable to the market was essential. Rules and regulations associated with pork products are important but there is no point ensuring everything pre-market is sound if there are issues post-farm. For example, research to understand baselines with establishing minimum residue levels (MRL) and recommendations of any withdrawal periods need to be disseminated to relevant sectors of the industry. Governments at all levels play different roles in deciding and implementing regulations and industry needs to find the best way to work with them to ensure that sense, connection and continuity are there for all in the supply chain.

The following points were noted associated with the *Genetics segment*:

- A better understanding of the implications of increased litter size across the entire value chain.
- Potential heterotic effects for relevant traits in Australia.

The following points were noted associated with the *Farms segment*:

- The need for an understanding of the prevalence of antimicrobial resistance (AMR) throughout the industry so that any necessary solutions can be sought.
- The (urgent) need for a Japanese Encephalitis (JE) virus vaccine.
- The industry strives to achieve gold standard welfare and programs e.g., APIQ, are held in high esteem by regulators who understand what the industry is trying to achieve with it. However, Corrective Action Requests (CARs) in APIQ continue to occur and industry must continue to work hard to achieve expected welfare outcomes.
- Concern that knowledge and understanding of animal and livestock production is decreasing, hence, some decision makers may be more susceptible to responding to subjective and biased information rather than objective information. However, and using biosecurity as an example, it was remarked that the Federal Government was aware of the Biosecurity Import Risk Analysis that was published to determine if Australia's appropriate level of protection (ALOP) was met by imported fresh pig semen (Richards *et al.*, 2025; *Aust. Vet. J.* 103(9): 603-613).
- Consideration for the industry to address the shortage of truck drivers and labour availability in general, hence, understanding any emerging and new technologies that address labour challenges is important including improving staff competency by continual staff training (should also increase retention and improve animal care). The issue of staff leaving after gaining permanent residency status was raised.
- It was mentioned that an APL Policy Research report on how to assist with attracting and retaining labour had been published. Future Green Papers will be useful to further explore

obtaining more data and information on where the actual labour needs are and how APL might assist in those labour needs areas.

- An acknowledgement of an increase in environmental regulations associated with outdoor pig farming (especially in Western Australia).
- Working collectively to show how piggery and (or) abattoir waste products can be effectively converted to viable products.
- The need for greater industry understanding on emission reduction opportunities and the subsequent impacts on the industry.
- Understanding of indirect threats and benefits to industry such as the domestic Sustainable Aviation fuel industry competing with the pig industry for tallow and vegetable oils (potential threat) but increasing supply of canola meal (potential benefit).

The following points were noted associated with the *Primary Processing segment*:

- Lean meat yield payment methods with the observation that Australia is one of the few countries that pay on P2, noting that technologies are available to predict yield of all cuts. However, it was observed that different retail suppliers have different cutting plans so it would be difficult to establish a price grid that fits all plans.
- Tattooing versus use of ear tags in NSW for pigs < 25 kg.

The following points were noted associated with the *Retail segment*:

- The significant rise in use of weight loss medications and likely impacts on meat (protein) demand and selections.
- A better understanding of the relationship between price and ever-changing determinants of demand.

While there was little discussion around “targets” for any of the segments, it was noted that several targets across the segments have been captured over the past year. It was suggested that this topic should be a focus for the PIIP in the 2026 Green Paper workshop.

Following a session of general discussion and feedback amongst the PIIP, other key points and outcomes from the 2025 Green Paper included:

- Announcement of the new APL Strategic Plan (2025-2030) and the research themes within it, addressed annually through the Annual Operating Plan.
- Continuation of the stock take of other R&D and tertiary education and training that occurs in the industry as per the 2024 Green Paper, that's not supported (or at least not directly) by APL and APRIL.
- Continuation of initiatives to promote interest in pigs for undergraduate students.
- The need for more expeditious translation of R&D outcomes to industry.
- Working through the 2024 Green Paper with the RSPCA provided the opportunity to explain the industry's R&D priorities.
- Reaffirmation of the need to promote further the nutritional value of pork and findings from eating quality research.

- As an exercise, the 2025 PIIP were invited to comment on commercialisation with the idea of conducting a 'Shark Tank' to enable organisations to pitch their wares to key industry figures and organisations, e.g., by inviting pitches from scientists or companies with technologies that are unknown in the context of the pork industry.
- The creation of a single (post-secondary) education and training committee (the Australian Pork Industry Education and Training Committee) serving the Australian pork industry was commended.
- It was noted that the Chief Scientist is working on a paper to record the changes that have occurred in pork infrastructure, R&D and personnel over the last ~ 50 years. It will be available in 2026.

Two comments were made by the PIIP regarding the activities of the Chief Scientist:

- "With regard to the Chief Scientist position, we have all subscribed to this position, it's well-integrated and there is a plan".
- "I like what I see with the development of the Green Paper process and the Chief Scientist position. I think it was a good move by the industry".

It was agreed the Chief Scientist continue to coordinate the structure of both the PIIP and workshop.

Finally, the 2025 PIIP determined that in 2026, the workshop should be a face-to-face meeting (with possible on-line connection) with membership restricted to a representative sample of those directly involved in the pork industry (pre- and post-farm gate) as well as some emerging leaders. State pork representatives were invited to join the 2025 PIIP, and this is recommended for the 2026 PIIP. Furthermore, Chairs of the APL reference groups will be invited to provide further industry background and context.

The 2025 Green Paper contains some key messages and outcomes that are not all related to R&D and education and training activities, e.g., with applications to extension and communication and adoption, policy and marketing. It is anticipated that the 2025 Green Paper can continue to inform and guide future APL and APRIL activities in such areas.

It is important to note that just prior to the 2025 Green Paper workshop, the joint call for Expressions of Interest in projects between APL and APRIL addressing the R&D priorities identified from the 2024 Green Paper occurred. The Australasian Pork Research Institute also issued a call in October 2025 for Transformation Projects directed at some of these priorities. With the passage of time, some of the challenges and opportunities carried forward into this 2025 Green Paper have been addressed in contracted projects through APL and APRIL, and (or) are currently in the process of being contracted. Furthermore, APRIL issued a call for Innovation Projects in March 2026, again targeting the 2024 Green Paper R&D priorities.

The 2025 Green Paper and this Summary have been prepared by the Chief Scientist for the Australian Pork Industry (a jointly funded role between APL and APRIL), Professor John Pluske, as an impartial, non-binding, priority-free overview of the state of the entire value chain of the Australian pork industry as of September 2025.

Research Priorities:

From the 2025 Green Paper, the following major research priorities have been identified:

1. Environment and Emissions:

- Delivering practical and meaningful outcomes that improve overall industry sustainability including emissions reduction and odour, and progressing nutrient and water management from effluent.
- Changing the paradigm in environmental/effluent research from a cost of production/compliance issue to an opportunity for industry growth and improved productivity.

2. Feeding and Nutrition: nutritional strategies and interventions that reduce herd feed conversion and contain feeds costs in the face of increasing competition for traditional raw materials.

3. Human Capacity and Society: building and retaining a resilient, diverse and skilled rural and regional workforce.

4. Data and Information: exploiting the benefits of artificial intelligence for more efficient and profitable pig production, processing, and data and information analyses.

5. Pig Genetics: enhancing the rate of genetic improvement in the Australian pork industry while maintaining current or better health status.

6. Pig Care and Wellbeing: providing novel tools or approaches to support continuous improvement and assessment of pig care and wellbeing and demonstrate the positive welfare credentials of Australian pork.

7. Pig Health and Antimicrobial Stewardship: delivering novel technologies and approaches to mitigate risks and production impacts of infectious diseases, enhance emergency animal disease preparedness, and further reduce antibiotic use.

8. Pig Processing and Meat Quality: ensuring a sustainable processing sector and increasing the share of domestic fresh meat consumption and export market value.

9. Retail: increasing share of meat consumption.