Australian Pork Limited

Annual Operating Plan 2026–2027

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EXECUTIVE
SUMMARY

Backing productivity and growth during uncertain times

This financial year will see Australian Pork Limited (APL) deliver the priorities and focus areas of the second year of our 2025–30 Strategic Plan, with the goal of becoming Australia's most versatile protein from farm to fork, sustainably adding $1 billion to farmgate value by 2030.

Australia's agricultural industry proved its strength and resilience during the 2025–26 financial year, reaching a record-breaking value of around $100 billion. Despite this, our operating environment is becoming increasingly volatile.

As APL delivers the Year Two Annual Operating Plan (AOP) within the five year Strategic Plan, our industry is competing with challenges driven by several external forces, including rising input costs due to climate factors and global conflict, as well as increasing regulatory pressures at both state and federal government levels.

This AOP has been developed with these considerations in mind, and informed by consultation with industry and key stakeholders.

APL's priorities for the 2026–27 AOP underpinning the 2025–30 Strategic Plan themes are:

1. Increasing share of fresh meat
2. Increasing pork on menu (foodservice)
3. Increasing export market value
4. Driving meaningful research, innovation and extension
5. Animal health and welfare first (S&Gs)
6. Deepening member and industry engagement

Some of these priorities build on the work already commenced during the previous financial year, while others will see APL deliver new projects aimed at enabling a thriving pork industry even during uncertain times.

APL will continue to invest in and evolve our Get Some Pork On Your Fork marketing campaign – increasing demand for fresh pork amongst domestic consumers, prioritising the midweek stir fry and Christmas roast occasions. APL will also further build on its relationships and integrated plans with retailers and butchers, and influential media, personalities and creators.

In addition to retail, domestic marketing efforts will be focused on maintaining pork's strong position on both high-end dining and casual foodservice menus. Abroad, activity will aim to support Australian pork's export value in Singapore and beyond, as competition increases.

From a research, innovation and extension perspective, we are heading into the new financial year in a stronger position than ever, with a committed pipeline of projects identified through the expressions of interest process. APL will call for Industry Priority Projects on 1 September 2026 and APRIL will call for Industry Priortiy Projects in February 2027. Projects will focus on reducing cost-of-production, strengthening animal health and care, developing viable environmental solutions, accelerating Australian genetic improvements and safeguarding our biosecurity.

This year, APL will also strengthen our extension delivery, with new initiatives to ensure research efforts translate into activities on-farm for more producers.

From a policy perspective, development of the industry-led National Standards and Guidelines for Pig Welfare continue to be the main priority for APL's policy team, with consultations continuing throughout the year.

Another priority – in an increasingly strong regulatory environment – is ensuring APL can continue to deliver strong, evidence-led, science-backed advocacy through robust industry data and consultation.

The objectives outlined in this AOP will be delivered by our valued APL team in collaboration with the APL Board. APL would like to thank all those who have been involved in developing the priorities for this AOP.

OPERATING
ENVIRONMENT

Underlying assumptions

APL's 2026–27 AOP is based on the following assumptions.

Domestic pork slaughters are forecast to remain stable

For the purposes of this AOP, the APL slaughter forecast is set at 5.75 million head. Forecasts indicate slaughter volumes will remain broadly consistent with 2025 levels. With changes to export markets impacting domestic supply, APL will continue to grow healthy domestic consumer demand year round.

Domestic consumer retail demand for Australian pork is anticipated to remain strong. This is driven by population growth, pork's relative price advantage compared with red meat, growing consideration of pork for everyday meals and ongoing household budget pressures.

Additionally, as cost of living pressures intensify, consumers are likely to reduce discretionary spending – including dining out – while shifting towards supermarket purchases of value-added products and essentials. In this context, pork's position as a well-priced, versatile protein reinforces the importance of maintaining strong collaboration with our retail partners.

Emergency animal disease and biosecuirty risks

Emergency animal disease (EAD) incursions are always a risk for the pork industry. The recent arrival of the H5N1 bird flu virus exposes the industry to a new level of risk.

While commercial herds currently remain free of the H5N1 virus, it is essential for producers to uphold strong biosecurity practices on-farm and remain vigilant to potential disease incursions.

More broadly, it is vital the industry continues to take all measures to protect our world-leading biosecurity status. Australia is one of the few pork-producing nations on earth free of the diseases reshaping overseas markets, including African swine fever, Seneca Valley virus disease, porcine reproductive and respiratory syndrome, swine influenza and foot-and-mouth disease. An incursion of any of these diseases would have a devastating impact on our industry and broader economy.

Australia must hold the line on fresh pork and pig genetic imports to prevent this from happening and adhere to our evidence-backed import risk assessment.

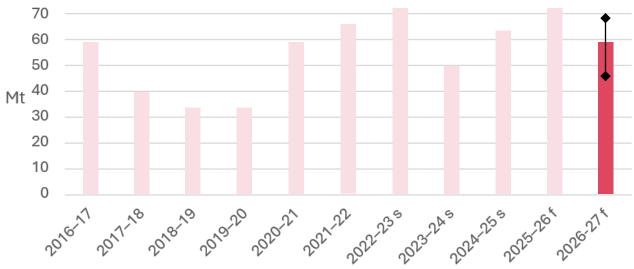
Grain prices and availability

The grain outlook indicates that Australia is entering the season with mixed conditions, with better soil moisture in the west and south but dryness in the north. There is also potential impact of an El Niño event, which is likely to reduce yields and planted area, shifting some production toward dual purpose crops rather than wheat. Overall production is still expected to be relatively strong at around 58 Mt, albeit below the five year average.

Rising oil and fertiliser prices driven by ongoing conflict in the Middle East are also likely to have a continued impact on the grains industry. Rising costs are prompting growers to cut nitrogen inputs or shift toward lower input enterprises, potentially reducing wheat and barley yields.

For the pork industry, this means that feed costs will likely remain elevated and volatile, with any improvement depending on seasonal conditions and global supply.

Domestic grain production forecast



Source: GRDC

Changing regulatory environment

The regulatory environment continues to create additional reporting requirements for the industry.

There continues to be a focus on climate reporting, environmental sustainability, biosecurity, animal welfare and traceability at all levels of government.

Mandatory climate related reporting is in effect for large producers, retailers and processors. There is also now a growing regulatory focus on how to measure industries', planned adaption to climate change through climate transition plans as well as general environmental obligations. The Australian pork industry contributes less than two per cent of agricultural emissions and has demonstrated a commitment to continue to invest in genuine emissions reductions.

APL continues to focus on providing data driven feedback to consultation opportunities. This ensures regulators are aware of and recognise the need for regulatory systems to differentiate between intensive agricultural productions systems and other regulated industries. Well-designed regulatory systems have the potential to support our industry to continue to innovate, invest and make a significant contribution to Australia's food security, workforce stability, natural environment and economy.

This AOP recognises the need to ensure APL is able to access reliable, up-to-date data to continue advocating for the industry across the broad range of policy portfolio areas: Animal Welfare, Biosecurity, Environment and Planning, Workforce (Education, Leadership, Training, Migration), Traceability and Integrity systems, and Trade and Market Access.

STRATEGIC THEMES

An overview of our four strategic themes

As we enter the second year of our 2025–30 Strategic Plan, APL will continue to deliver on our four strategic themes to enable a thriving pork industry:

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 foodservice menus.

Diversifying markets and revenue

Supporting export market value, and additional domestic smallgoods and fast-food restaurant growth opportunities.

Driving sustainable productivity

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

Advancing industry integrity

Demonstrating the industry's commitment to ongoing improvements that underpin our integrity and maintain confidence in our industry's ability to meet community expectations.

STRATEGIC THEMES

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 (foodservice)

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 these themes. 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.

Six program priorities have been identified and agreed upon by the APL Board and executive leadership team for the 2026–27 financial year. These priorities are highlighted above.

STRATEGIC THEME
ONE

Growing fresh pork demand

Increasing share of fresh meat

In domestic retail, fresh pork continues to benefit from its relative price advantage compared with other proteins. Considering tightening household budgets driven by various inflationary pressures, pork's price advantage over other proteins places it in a strong position to continue growing share of meat.

In 2026–27, this priority area will focus on strengthening consumer demand for fresh Australian pork through distinctive, branded storytelling, with the goal of growing pork's share of the fresh meat category from 12.48 per cent to 12.68 per cent.

This AOP will maintain the focus on stir-fry growth, drawing on the positive momentum from 2025–26 activity.

Tactics will focus on making pork "easy to mind" and "easy to buy", and will include exploring strategies to optimise performance for both human and AI-driven recipe discovery, ongoing collaboration with social creators, investment in retail partnerships and earned media storytelling, while also maintaining our successful Get Some Pork On Your Fork campaign.

APL will also deliver targeted research and innovation projects to improve eating quality in alignment with the industry's Green Paper priorities.

Research efforts will continue to strengthen the evidence base underpinning pork's nutritional benefits.

Developing added value new product development opportunities

APL will continue to work with retailers, processors and supply chain partners to uncover the product innovations that make Australian pork easier to choose and easier to cook.

Increasing pork on menu (foodservice)

This year will see the continuation of APL's 2025–26 program, with a focus on continued incremental growth of pork's record-high position on menu across high-end and casual dining.

While cost-of-living pressures and low levels of consumer confidence may impact dining out in the months ahead, pork's strong value and price advantage over other proteins means we are well positioned to hold our position on menu, with a goal of 1.0 per cent increase to bring the moving annual total (MAT) to 71.9 per cent.

The price and value advantage of Australian pork will be a consistent theme for the PorkStar program, with tactics rolling out across high-end and casual dining events alongside ongoing industry engagement.

STRATEGIC THEME
TWO

Diversifying markets and revenue

Increasing export market value

The South East Asian market's competitive landscape experienced a significant shift in 2026, with China's entry into the Singapore market. APL's dual priorities this year are to support expanding market access for fresh Australian pork, and to defend export value in Singapore and minimising the rate of decline by reinforcing our quality, safety and provenance credentials with trade and retail partners and consumers in the region.

Increasing demand for Australian smallgoods

While not a priority area under this AOP, increasing consumer awareness of imported pork products continues to be an important goal ("the fuller the bar, the more Aussie they are"). This year, our approach will shift from paid advertising to leveraging earned media channels.

Building on the success of APL's December 2025 earned media campaign which saw country of origin labelling front and centre in mainstream media, we will adopt a more consistent, year-round approach to increase awareness of imported smallgoods.

Wherever possible, activity will tap into the broader "team Australia" narrative, leveraging industry spokespeople and cultural moments around provenance, transparency and supporting Australian farmers.

Increasing pork in QSR

Pork's presence in quick service restaurants (fast food retailers or "QSR") has reached new heights, with rates of 55 per cent in April 2026.

While not a priority for this AOP, APL will continue to explore opportunities with supply chain stakeholders and QSR decision makers to help drive inclusion of Australian pork on menus. We will also work to improve provenance messaging wherever Australian pork is already used, with a focus on Mexican and pizza chains where clarity around provenance is often missing.

Developing alternative revenue streams

Australian pork producers are facing increasing stakeholder and market expectations regarding emissions reduction.

Appropriate regulatory settings will ensure the industry has an opportunity to convert capital investment in emissions abatement into additional on-farm income. Opportunities include sale of pasteurised soil conditioners, use of biogas digestor systems to divert local manufacturing food waste from landfill, the Australian Carbon Credit Unit (ACCU) scheme and other incentives.

In 2026–27, policy efforts will focus on ensuring all emissions reduction opportunities are accessible and available to more producers over a longer period, while also advocating for complementary financial mechanisms (including grants, trials and other government incentives) that support the industry's investment in improved environmental outcomes.

APL will continue to engage regulators to promote clear, practical frameworks that enable participation in emissions reduction projects, with a particular focus on ensuring producers are recognised for genuine emissions reductions.

STRATEGIC THEME
THREE

Driving sustainable productivity

Delivering meaningful research innovation and extension

Delivering effective innovation and extension to producers is an essential part of APL's role in ensuring they can manage operational challenges including increasing cost of production and tighter regulatory environments.

Under this priority program, APL will deliver research aligned with the industry's annual Green Paper priorities and continue to reshape extension so research outcomes reach producers as quickly as possible.

Over the past 12 months the APL team has consistently delivered extension to producers within 30 days of research reports being completed, however, producers need more accessible information. In 2026–27 our focus shifts to increasing the number of producers who access and adopt our research outcomes.

Other projects will include delivering issue-based workshops, expanding digital access to content, strengthening our extension network, and championing producer-led innovation. We will also work closely with Agriculture Innovation Australia (AIA), Cooperative Research Centres and other Research and Development Corporations to drive transformational research projects that address emerging industry challenges.

Reducing cost of production for farms and processing

The industry's ability to withstand unexpected shocks at both global and domestic levels – particularly for inputs within the supply chain – is critical to its ongoing success.

Production costs across Australian agriculture have remained high and will continue to be impacted by ongoing geopolitical pressure and trade disruption.

Projects delivered under this program area aim to address both factors.

APL's September 2026 Expressions of Interest call will commission new projects focussed on addressing the most significant cost drivers for farming and processing. This will build on a substantial portfolio of work already underway, including reducing feed costs and improving feed conversion, improving boar nutrition and semen quality and developing new technology to reduce cost of production in processing.

All commissioned projects will reflect priorities identified by industry through the Green Paper process.

Policy work in this area will include an industry-wide producer survey to inform updated ACIL Allen modelling assumptions. This data will underpin our economic analysis and industry contribution work, identifying where producers most need support and providing APL with a stronger evidence base for advocacy.

Developing viable environmental solutions

Regulation of environmental and public health have an increasing impact on pork farming systems. Regulation has continued to be amended, particularly around effluent and manure management. State-level requirements are tightening, mandatory climate reporting is now live across the supply chain, and banks and green finance providers are seeking producer data that is complex to gather.

Without practical tools to assess and demonstrate environmental impact, existing sites face a complex set of differing requirements across local, state/territory and federal levels, and the development of new sites face significant regulatory hurdles. APL's role is to support producers to meet these requirements with credible science, and to advocate for proportionate, evidence-based regulation to reduce the risk that regulation will be based on outdated assumptions or international regulations rather than Australian production systems.

Activities in this program area will support the industry with demonstrating that Australian pork is a low-emissions protein, and support farmers to deliver environmental efficiency from paddock to plate.

The 2026–27 research and innovation portfolio is focused on projects that will address:

- Updating the Biogas Code of Practice
- Emissions reduction through optimised manure management
- Reducing plastic waste arising from artificial insemination
- Reducing the environmental impact of deep-litter management
- Assessing opportunities for mobile struvite recovery.

Accelerating Australian genetic improvement

APL will continue working to understand both short and longer-term solutions to accelerate improvement of Australian genetics while maintaining or improving health status. This will involve gaining a better understanding of the genetic diversity of the current Australian commercial pig herd, genetic innovation for resistance to disease, technology adoption to improve reproductive output, and a clearer understanding of the cost benefit of increasing litter size.

Attracting, retaining and building talent

This program area builds on work commenced under the previous AOP.

Workforce shortages, staff retention and professional development continue to challenge the pork supply chain. Advocacy to ensure ongoing support for the Pork Industry Labour Agreement (PILA) is critical, as is the work done to demonstrate that the pork industry relies on highly skilled migrant labour.

As an industry, we must also develop the next generation of leaders, advocates and spokespeople to ensure long term capability and resilience.

APL will work with schools and universities to continue lifting visibility and uptake of pork industry careers. This will involve maintaining sponsorships of education and training initiatives and our ongoing collaboration with the Primary Industries Education Foundation Australia (PIEFA) to increase use of pork resources in schools.

The newly formed Australian Pork Industry Education and Training Committee (APIETC) developed by APL and APRIL will also provide leadership and coordination for higher education and post-graduate and training across the industry. APIETC will promote tertiary student engagement and ensure student projects and award proposals align with the industry's Green Paper priorities.

APL will also continue leading initiatives to develop the leadership and capability of the next generation of the pork industry, including continuing the Australian Pork Emerging Leaders (APEL) program and the Pork Leadership Course (PLC).

STRATEGIC THEME
FOUR

Advancing industry integrity

Animal health and welfare first

Demonstrating high standards of animal health and welfare is a critical factor impacting broader community and government confidence in the integrity of the Australian pork industry.

This year, APL will continue to lead the Australian Standards and Guidelines for Pig Welfare process on behalf of industry. This will include ongoing consultation with industry state/territory and federal government, key stakeholders and partners.

Research and innovation projects will largely be a continuation of projects commenced under the previous AOP, focusing on farrowing systems, pain relief for husbandry procedures, developing national guidance for humane sow and boar stunning, monitoring the effectiveness of CO_2 stunning, understanding farrowing systems and developing ProHand Transport for truck drivers.

The Health and Antimicrobial Stewardship research program will deliver novel technologies and approaches to mitigate risks and production impacts of infectious diseases, enhance emergency animal disease (EAD) preparedness, and further reduce antibiotic use. Research projects include developing pen-side diagnostic tools for producers, conducting national AMR surveillance and rollout of research and training and resources to support antimicrobial stewardship.

Stewarding quality assurance and industry compliance

APL is focused on ensuring the industry continues to demonstrate a high level of integrity through its compliance with quality assurance standards and traceability requirements on farm and throughout the supply chain. The implementation of the updated APIQ✓® Standards will be a focus of this program, to ensure pigs continue to be raised on farms meeting high standards for welfare, food safety, biosecurity, traceability, and environmental management. Another focus will be to increase the digital tracking of commercial pig movements, through the rollout of the updated PigPass 2.0 app.

Deepening member and industry engagement

As the industry-owned Research and Development Corporation for the Australian pork industry, we are committed to ensuring members have opportunities to engage with each other and APL.

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 (SPOs) in providing support on state and national issues being impacted by jurisdictional legislation.

We will continue to create opportunities for meaningful engagement across industry through quarterly member calls, ongoing collaboration with SPOs, bi-annual Delegates Forums and state-based Pork and Talk forums. APL will also demonstrate ongoing support for SPOs through joint engagement, submissions and government liaison where appropriate.

Leading biosecurity

Safeguarding the industry's biosecurity is one of APL's key responsibilities. As the pork industry signatory to the Emergency Animal Disease Response Agreement (EADRA), APL invests in industry preparedness activities and supports research and innovation vital to safeguarding the industry's biosecurity standards.

Research and innovation efforts under this program area will have a specific focus on addressing biosecurity gaps and supporting producer access to mitigation strategies and ensuring all producers have access to practical, evidence-based tools.

Projects will include continuing the Japanese Encephalitis (JE) and Influenza A surveillance program, development of JE vaccine toward full registration, the development of feral pig exposure and proximity alert tools, assessing decontamination chemicals on infrastructure, and disease surveillance in commercial herds.

Policy efforts will focus on strengthening jurisdictional confidence through engagement with government decision makers, and strengthening industry preparation and response readiness by building capability in Livestock-Liaison Industry and CCEAD roles through targeted engagement and training and participation in exercises and forums.

APL also demonstrates leadership within this space through our support of and engagement with other livestock sectors on issues of broader biosecurity importance.

Lifting community trust

The Australian Pork Sustainability Framework is a vehicle through which the pork industry can demonstrate a track record of compliance and achievement with regulatory requirements across its four pillars – Pigs, People, Planet and Prosperity.

Following the refresh of this vital tool, APL will use it as a platform to promote understanding of pork's sustainability credentials among industry and stakeholder groups.

Other policy activities will involve work with state and territory-based regulators to identify and progress opportunities to improve regulatory frameworks and guidance, including mortality composting.

From a marketing and communications perspective, APL will be maintaining its focus on lifting community perceptions of the industry's animal care, and of pork's nutritional benefits.

In 2025–26, APL's innovative social media campaign earned three million views within the first week, seeing creator and comedian Mitch Coombs doing work experience on the Blenkiron family farm in the Barossa Valley (#FarmLife). This AOP will see series two at another farm that demonstrates the care this industry takes of its animals.

INDUSTRY
OUTCOMES

Targets and key performance indicators

APL is an outcomes-driven organisation. Our targets and key performance indicators (KPIs) are consistent with both the 2025–30 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 our 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 2026–27 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 2026 estimate	FY 2027 target
GROWING FRESH PORK DEMAND	Increasing share of fresh meat	First to mind for stir-fry	% of first to mind occurrences	9.2%	11.2%
		Share of fresh meat (MAT)	% of fresh meat share	12.48%	12.68%
	Increasing pork on menu (foodservice)	Grow % of pork on menu (MAT)	% of pork on menu	70.9%	71.9%
DIVERSIFYING MARKETS AND REVENUE	Increasing export market value	Mitigate rate of value decline (MAT)	Total export value	$250.8m	$206m
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	85%	90%
		Research and innovation extension commenced within 30 days of project completion	% of extension commenced within 30 days of project completion	85%	90%
ADVANCING INDUSTRY INTEGRITY	Demonstrating leadership in animal welfare	Standards and Guidelines process continues	% of chapters updated and reviewed	12%	S&Gs 50% completed by end of FY
	Implementating real time tracking of commercial pig movements.	Commercial pig movements reported using an electronic NVD (eNVD)	% of commercial pig movements reported using eNVD	16%	40%
	Enhancing on-farm biosecurity protection	Commercial production accredited to higher biosecurity standards	% of production accredited to VEBS	14%	30%

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	6,655	-	6,665
Other income	-	330	330
Total Trading Income	**12,405**	**13,268**	**25,673**
APL Project Costs			
Growing Fresh Pork Demand	**R&D**	**Non-R&D**	**Total**
Increasing share of fresh meat (GSPOYF)	1,959	6,420	7,379
Developing added value NPD opportunities	-	-	-
Increasing pork on menu (foodservice)	88	520	608
Total Growing Fresh Pork Demand	**1,047**	**6,940**	**7,987**
Diversifying Markets & Revenue	**R&D**	**Non-R&D**	**Total**
Increasing demand for Australian smallgoods	-	-	-
Increasing export market value	96	450	546
Developing alternative revenue streams	-	-	-
Total Diversifying Markets and Revenue	**96**	**450**	**546**
Driving Sustainable Productivity	**R&D**	**Non-R&D**	**Total**
Reducing COP for farms and processing	1,960	10	1,970
Delivering meaningful research, innovation and extension	1,194	436	1,629
Developing viable environmental solutions	612	-	612
Accelerating Australian genetic improvement	164	-	164
Attracting, retaining and building talent	686	140	826
Total Driving Sustainable Productivity	**4,616**	**586**	**5,202**
Advancing Industry Integrity	**R&D**	**Non-R&D**	**Total**
Stewarding quality assurance and industry compliance	-	234	234
Animal health and welfare first	1,221	90	1,311
Leading biosecurity	636	79	715
Deepening member and industry engagement	270	526	796
Lifting community trust	37	145	182
Total Advancing Industry Integrity	**2,164**	**1,074**	**3,238**
Total Project Costs	**7,923**	**9,050**	**16,973**

Operating Expenses	R&D	Non-R&D	Total
Operating Expenses	505	670	1,176
Employment Costs	3,397	4,503	7,899
Travel	301	399	700
Total Operating Expenses	**4,203**	**5,572**	**9,775**
Net Surplus/(Deficit)			(1,075)

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