



Victorian
Farmers
Federation

Submission to the Inquiry into pig welfare in Victoria

Parliament of Victoria

Legislative Council Economy and Infrastructure Committee

12 January 2024

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Summary

The Victorian Farmers Federation (VFF) appreciates the opportunity to contribute to the Legislative Council Economy and Infrastructure Committee's Inquiry into pig welfare in Victoria. This subject is of paramount importance to pig farmers as they are firmly committed to providing the highest welfare standards to the pigs in their care.

Farmers care about our animals and we invest in resources every day to ensure the highest possible standards are adhered to. We strive to use the best farming practices that are based on robust science. Caring for our animals is at the centre of all decisions on farm and we work hard to demonstrate this to our community. Victorian pig farmers know that animal welfare matters to everyone and are pleased to explain how they care for their pigs.

The highly regulated system pig farmers operate under requires that high standards are maintained across farming systems, both indoor and outdoor. These systems are underpinned by the farmers' commitment to enhancing pig welfare and is further demonstrated by ongoing financial investment in the pig industry, where over the last decade, more than \$23 million has been allocated to animal welfare-related projects, supported by internationally respected welfare researchers, and providing outcomes that are the foundation of our farming practices, development, and training.

Victorian farmers work hard to comply with all regulations which have been established to maintain welfare outcomes in line with community and industry expectations. We are confident that existing regulations, including for the stunning of pigs using CO₂ gas, meet these expectations. It is important that these regulations are adhered to, and it is the expectation of farmers that all who are involved in the animal agriculture supply chain are compliant with these rules.

The VFF notes the circumstances which precipitated this Inquiry involving the illegal trespass of animal activists in Victorian abattoirs and the collection of footage as part of their ongoing ideologically driven campaign which has the ultimate objective of abolishing animal agriculture.

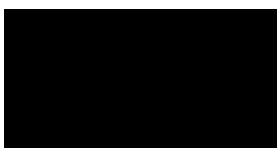
Disappointingly, the establishment of this Inquiry in the immediate aftermath of these events without allowing time for the regulator to properly investigate concerns, is characteristic of the political knee-jerk reactions which are becoming all too common in response to questions about animal welfare.

The VFF is concerned the establishment of this Inquiry under these circumstances only serves to embolden animal activists who engage in brazen and illegal behaviour. This is of particular concern to farmers as we are directly in the line of these activities which pose significant risks to the health and welfare of our animals, and the safety and wellbeing of our families and staff.

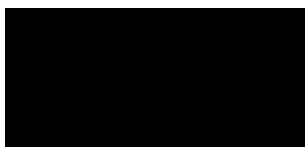
This Parliamentary Inquiry must be conducted fairly and must not preference the views of animal activists who seek to harass the community and undertake criminal behaviour. We hope the Parliament conducts a transparent and balanced Inquiry that meets the needs of all Victorians.

Fundamentally, Parliament has a duty to ensure the laws and regulations surrounding animal welfare are grounded in the best available science, as well as the knowledge and experience of people who work with animals every day. Victorian farmers are confident the existing world leading practices that we employ are supported by this evidence and we expect that the same standard is followed throughout the supply chain.

Failing to undertake this approach risks all manner of perverse outcomes, including the cessation of domestic industries and the consequent reliance on imported products which have not been produced according to the standards that the Australian community expects.



Emma Germano
President
Victorian Farmers Federation



David Wright
President
VFF Pig Group

Discussion

I. General Comments

Establishment of the inquiry

The VFF notes that this inquiry has originated out of circumstances in which animal activists trespassed in Victorian abattoirs and collected footage in their ongoing campaign against livestock farming.

Where there are breaches of animal welfare laws, it is entirely appropriate to use the existing regulatory frameworks to investigate and prosecute matters through agreed legal channels. The establishment of the Inquiry pre-dated any of the recent investigations and findings made by the regulator PrimeSafe Victoria into the abattoirs that were subject to the ABC 7:30 Report which aired in March 2023.

A Parliamentary Inquiry should be initiated and in response to concerns over systemic failings in a system or process. With regard to the regulation of pig farming and processing in Victoria, it cannot be said that there has been anything close to such a systemic failure. The threshold was simply not met.

The VFF is concerned that the Inquiry was established on the initiative of Ms Purcell, the only representative of the Animal Justice Party (AJP) in the Victorian Parliament, and as such has been done with the sole motivation of furthering the AJP's stated political objective to 'abolish all farming of animals' and to 'rapidly phase out and ban factory farming' as an 'interim measure until farming of animals ends'¹. These political objectives are completely out of step with the general community's values and ought not to be the impetus for establishing a parliamentary inquiry.

The government and the Parliament's concerns over animal activist behaviour have been well noted in recent years. Indeed, members of Parliament are on the record having spoken strongly in opposition to the activities of animal activists and acknowledged the impact on the wellbeing of farmers and indeed their animals:

'It is terrible when we have those incursions on farms. I know we had something happen a couple of weeks ago in this house, and all of our safety and security were brought into question by people coming into the house. In the same way, every farmer has the right to be safe in their workplace.'

Michaela Settle MP, 28 November 2023.

'The extreme actions of those people when they have invaded people's private homes and private properties cannot be condoned at all. It is really sad when people who are living and working and making a living and doing the right thing are then approached and attacked by extremists who have a single agenda, and that agenda really is not about protecting the animals or supporting the

¹ Animal Justice Party. Transforming Animal Agriculture: Our Vision for a Kinder Victoria. https://vic.animaljusticeparty.org/animal_agriculture

animals; it is actually about raising their own profile and why they are doing it. So they do not care about the families that they are invading or attacking, they just care about their own publicity. And I find that really sad.'

Maree Edwards MP, 8 February 2022.

'Farmers and agricultural businesses should be free to do their work without fear of being targeted by animal activists, who put hard working farming families, biosecurity, and the animals they purport to protect at risk. Biosecurity breaches caused by animal rights activists who trespass onto premises where livestock activities occur can affect human and animal health, and adversely impact market access.'

Jaclyn Symes MP, 10 February 2022.

Despite these strong statements, the VFF is disappointed that this inquiry (which only has served to embolden the unlawful activities of animal activists) has been supported by government members. The establishment of this inquiry sends a perverse signal to the community that people who conduct intimidatory, bullying and unlawful behaviour are able to advance their agendas through capturing the attention and support of Victoria's decision makers.

Unlawful animal activist activities show a complete lack of knowledge of animal farming practices, coupled with a total disregard for the biosecurity of farms. Their trespassing induces stress and fear in the animals, jeopardising their health and welfare. Such behaviour, with the successive trespassing of one farm after another, increases the risk of disease spread. Furthermore, animal activist trespassers pose high risks to the health, safety, and wellbeing of farmers, their families, and the workforce.

Their unsubstantiated narrative ignores or dismisses the stringent regulations and the significant efforts made by farmers to not only adhere to but often exceed animal welfare standards. This not only disparages the industry but also undermines the extensive body of work and commitment demonstrated by pig farmers in continuously improving animal welfare standards.

Importance of animal welfare to farmers

Farmers have a commercial imperative to maintain the best health and welfare outcomes for their animals. This is coupled with the farmers' genuine care for their animals.

Strong animal welfare standards have been linked to several positive outcomes, including improved animal health and reduced mortality rates. These improvements not only enhance the welfare of the pigs but also reduce the costs associated with veterinary care and disease management. Studies have demonstrated that well-cared-for animals are less susceptible to diseases and infections^{2,3}.

Furthermore, the quality of the end product is closely tied to the welfare standards maintained during the farming process. For example, stress reduction in pigs has been shown to improve pork quality, while poor welfare practices can negatively affect it². This aspect is particularly relevant in

² Fernandes, J.N; et al. Costs and Benefits of Improving Farm Animal Welfare, 2021. Agriculture 11, 104.

³ Dawkins, M.S. Animal welfare and efficient farming: is conflict inevitable? 2017. Animal Production Science, 57,201–208.

the context of market competition, where product quality can distinguish one supplier from another^{2,3}.

Pig farmers are at the vanguard of adopting high animal welfare standards. They recognise that the health and welfare of the animals under their care are essential components of a sustainable and farming system. As such, farmers are not just passive participants in this shift towards improved welfare practices; they are active, informed advocates and implementers of these standards.

Therefore, the VFF reiterates the importance of adopting validated welfare standards in animal production, anchored in evidence-based science. We advocate for a fair and balanced process in this inquiry that truly represents the interests of the animal production sector and safeguards the essential role of the farming community in the Victorian economy and the national food supply.

Additionally, the committee should concentrate on genuine industry challenges, steering clear of reinforcing any extreme agendas. It is imperative that the insights and contributions of those directly involved in pig farming are recognised and valued, ensuring that policy decisions accurately reflect and support the sector's needs.

II. Responses to the Terms of Reference

(1) the scope, application, compliance with and enforcement of relevant existing regulatory frameworks and their ability to promote pig welfare outcomes

All pig farming in Australia, particularly in Victoria, is highly regulated, with farmers adhering to stringent welfare requirements. The legislation in place is adequate and sufficient, ensuring that these high standards are consistently met.

All pigs fall under the Australian Model Code of Practice for the Welfare of Animals: Pigs (MCOP)⁴, approved in April 2007, which provides the foundation for the Victorian Standards and Guidelines for the Welfare of Pigs. This Code also underpins the Welfare Standards in the Australian Pork Industry Quality Assurance Program (APIQ)⁵, applicable to both indoor and outdoor systems.

While the Model Code outlines minimum welfare standards, APIQ standards exceed these, with 91% of commercial Australian pig farmers APIQ accredited. This accreditation requires independent annual audits by third party auditors, AUS-MEAT, and mandates six-monthly internal audits.

Regulation of pig farming

In terms of legislation, Victorian pig farmers are subject to an extensive and rigorous regulatory framework, underscoring the industry's commitment to maintaining high standards. These include:

- Prevention of Cruelty to Animals Act 1986
- Prevention of Cruelty to Animals Regulations 2019
- Victorian Standards and Guidelines for the Welfare of Pigs

⁴ CSIRO. Model Code of Practice for the Welfare of Animals: Pigs, 2008. <https://www.publish.csiro.au/book/5698/>

⁵ APL. What is APIQ? <https://www.australianpork.com.au/apiq/what-is-apiq>

- Code of Practice for the Welfare of Animals at Saleyards
- Livestock Management Act 2010
- Livestock Management Regulations 2021
- Livestock Disease Control Act 1994
- Livestock Disease Control Regulations 2017
- Impounding of Livestock Act 1994
- Impounding of Livestock Regulations 2018

Research and development

Over the past decade, the pig industry, particularly through Australian Pork Limited (APL), has demonstrated a strong commitment to animal welfare through significant financial investments. APL is an industry-owned research and development corporation co-funded by the Australian Government and farmers to improve the profitability, productivity, competitiveness and long-term sustainability of Australia's pig industry⁶.

Over \$23.6 million has been allocated directly by APL to animal welfare-related projects, with an additional \$3.75 million invested in biosecurity and emergency animal disease responsiveness. These funds support a range of projects, with 23% targeted specifically at animal welfare and the remainder incorporating welfare outcomes alongside broader objectives. These investments have been crucial for safeguarding the health and welfare of pigs, as well as of the broader livestock industry.

Additionally, the pig industry currently funds 19 welfare-related projects valued at \$5.71 million, focusing on areas such as stress reduction, health, handling, and pain management. This investment reflects the industry's proactive approach to improving welfare standards, continually evolving and adapting technologies where appropriate, while understanding and working to address community expectations. Ten of millions of dollars in research supporting animal welfare has also been funded by the Pork Cooperative Research Centre (CRC), which is currently transitioning to the Australasian Pork Research Institute Ltd (APRIL).

Community engagement and transparency

In response to the growing public interest in intensive pig production, Victorian pig farmers have continued their commitment to transparency. This proactive approach involves clearly communicating to the community the advanced levels of care and ethical practices in place, ensuring that pigs are able to express their innate behaviours under both indoor and outdoor farming systems.

This enhanced level of transparency is more than just a response to scrutiny; it represents a broader shift in the industry towards greater openness and community engagement. By doing so, pig farmers not only inform the public about the realities of pig farming but also helps to build trust and understanding about the rigorous welfare standards being upheld.

⁶ APL. Corporate documents. <https://www.australianpork.com.au/about-us/corporate-documents>

Skills and capability

The pig industry also places a high priority on human skills development. Comprehensive training programs are required and are a feature of staff development as the maintenance of staff competency is mandated under the Welfare Standards in APIQ. These programs ensure a culture of continuous improvement and ethical pig handling where pig welfare is highly valued.

Review of regulatory frameworks

The VFF strongly emphasises the necessity of basing pig welfare standards on validated outcomes. Prescriptive standards should be avoided within the regulatory frameworks or must be designed cautiously to avoid unintentional negative impacts on pig welfare or the imposition of unnecessary regulatory burdens on farmers.

To ensure the highest practices, proposed policy shifts should be supported by rigorous scientific evidence, developed in consultation with the industry and backed by fair and sound compliance and enforcement. Importantly, the personnel investigating compliance should be adequately resourced and possess the requisite skills and understanding of the complexities involved in pig farming.

The pig industry is a national industry and regulatory consistency across the states is extremely important. Ensuring national uniformity in welfare standards is critical and no changes should be made to the Victorian regulatory environment prior to completion of the planned review of the National Standards and Guidelines for the welfare of animals: Pigs. Victorian farmers are actively engaged in this national review process, demonstrating its strong commitment to contributing to the dialogue on pig welfare and maintaining high welfare standards across the state.

(2) the ability of the most common methods used to stun pigs before slaughter (including electrical stunning and exposure to high concentrations of carbon dioxide gas) in Victorian slaughterhouses to minimise pain, suffering and distress and prevent injury, and available alternatives

Victorian pig farmers care about their animals and want to ensure the welfare standards that are applied on farm, are similarly applied to the animals when they leave the farm for processing. Victorian pig farmers want to be assured that animals are processed according to world leading practices which are based on scientific evidence.

Stunning aims to intentionally cause unconsciousness and insensibility without pain and suffering. Animals must remain unconscious until death occurs through loss of blood, if not killed by the stunning method itself⁷. The impact of a stunning system should not be examined in isolation but include the differences of the components of the slaughter process that affect animal welfare.

In Australia, the *Model Code of Practice for the Welfare of Animals – Livestock at Slaughtering Establishments, 2002*, deems it acceptable for pigs to be stunned using controlled atmosphere carbon dioxide (CO₂), and two other physical methods, mechanical (e.g., captive bolt) and electrical.

⁷ EFSA AHAW Panel (EFSA Panel on Animal Health and Welfare), Nielsen S.S. et al. Scientific Opinion on the welfare of pigs at slaughter, 2020. EFSA Journal 18(6):6148, 113 pp. <https://doi.org/10.2903/j.efsa.2020.6148>

However, the most used stunning methods for pigs in commercial abattoirs in Australia are CO₂ and electrical stunning.

The use of CO₂ is considered a humane and acceptable stunning method for pigs in Australia⁸. Furthermore, CO₂ stunning for pigs is the most used stunning method across the European Union, United States, Asia, and Canada, with rigorous scientific research underpinning all methods used (United States⁹, the European Union¹⁰ and by the World Organisation for Animal Health¹¹).

Positive handling experience has also been found to provide benefits in terms of ease of handling and meat quality^{12,13}. Consequently, stock people behaviours impact both the immediate behaviour of the animal, as well as the subsequent behavioural responses of the animal to humans. Thus, understanding the animal's behavioural characteristics and sensory and cognitive capabilities is important for effective handling, as well as ensuring high animal welfare and productivity in all stages of livestock production. Optimisation of lairage and slaughter conditions (particularly facility layout, ambient control and handling) is important in order to allow pigs to recover from the stress of handling and transport and to ensure optimal and uniform carcass and meat quality¹⁴.

The Australian pork industry continues to invest in research and development to enhance the welfare and care of our pigs. This includes the design of modern infrastructures and low-stress animal handling systems. Our research has driven continuous improvement and significant investment across the industry, with 85% of Australia's commercial pig production being processed in export-certified abattoirs that have adopted world-leading infrastructures enhanced by the application of leading animal handling techniques and supervised by independently employed on-site veterinarians.

The industry will continue to use methods that are backed by peer-reviewed, Australian and global scientific research into animal welfare, ensuring the humane outcomes for our animals during processing.

Other gases have been investigated as an alternative to CO₂ for stunning pigs at slaughter. Over the past two decades, there have been numerous research projects conducted to find alternative gases to CO₂ stunning, but no alternative gases are yet available commercially that provides animal welfare benefits over CO₂. The issues reported with alternative gases and mixtures include longer stunning times, shorter stun-to-stick intervals, conflicting results regarding aversion signs, higher cost of gases, difficulty in handling lighter gases than air, and the negative impact on meat quality and the environment. As result, CO₂ stunning remains the only permitted gas stunning method worldwide, including in Australia.

In line with international best practices, the majority of pig-processing abattoirs in Australia have invested significantly in improving their infrastructure. The CO₂ stunning protocol used in many

⁸ CSIRO. Model Code of Practice for the Welfare of Animals: Livestock at Slaughtering Establishments, 2002.

<https://www.publish.csiro.au/ebook/download/pdf/2975>

⁹ NAMI. Recommended Animal Handling Guidelines and Audit Guide, 2021. <https://bit.ly/3HeVeJY>

¹⁰ Council Regulation (EC) No 1099/2009. <https://eur-lex.europa.eu/legal-content/EN/ALL/?uri=celex%3A32009R1099>

¹¹ OIE. Slaughter of animals for human consumption, 2005. Rev. sci. tech. Off. int. Epiz. 24: 693-710. <https://bit.ly/48OsV0G>

¹² Geverink, N. A et al. Effects of regular moving and handling on the behavioral and physiological responses of pigs to preslaughter treatment and consequences for subsequent meat quality, 1998. Journal of Animal Science, 76(8), 2080-2085.

¹³ Hambrecht, E. et al. Preslaughter handling effects on pork quality and glycolytic potential in two muscles differing in fiber type composition, 2005. Journal of Animal Science, 83(4), 900-907.

¹⁴ Faucitano, L., & Velarde, A. Optimising pig welfare during transport, lairage and slaughter, 2021. In Understanding the behaviour and improving the welfare of pigs (pp. 247-278). Burleigh Dodds Science Publishing.

abattoirs is a notable example of this, being not only the prevalent stunning method in Australian abattoirs but also widely recommended in Europe and other developed countries. This method allows for the group movement of pigs, thereby reducing pre-slaughter stress and closely aligning with the pig's natural behaviour.

The VFF endorses the CO₂ stunning method, as it aligns with the welfare guidelines of the World Organisation for Animal Health (WOAH), the global authority on this matter. According to WOAH guidelines, animals must be unconscious during the slaughtering process to minimise undue pain during bleeding, deeming CO₂ stunning a safe and welfare-effective protocol for pigs¹⁵.

However, other stunning methods must also continue to be allowed in Victoria as they also provide an appropriate pre-slaughter stunning option. Therefore, the VFF strongly advises against any modifications to existing regulations regarding permitted stunning procedures, as such untested modifications or restrictions could have detrimental effects on pig welfare.

(3) the outcomes of the 2017 industry-led phase out on the use of sow stalls

In 2010, the Australian pork industry made a commitment to voluntarily phase out of the use of gestation stalls from use for a maximum of six weeks to a maximum of five days from last mating by 2017. The outcome of this voluntary phase out was a move to housing sows in group or loose housing during the gestation period.

Under the current Model Code of Practice for the Welfare of Animals: Pigs (3rd Edition), the use of a stall during gestation is allowed. A sow must not be confined in a stall for more than six weeks of any gestation period. This is also the law in Victoria.

In response to the Australian Pork Industry's voluntary phase out, the Australian Pork Industry Quality Assurance Program (APIQ) developed and included an option (Option A) to verify that sows are kept in loose/group housing from at least five days after mating until one week before farrowing. Some members of industry have responded to additional customer and market specifications and have moved to using stalls for a maximum of 24 hours for mating only. APIQ offers verification for this practice under Option B.

- 91% of our industry is APIQ accredited.
- 88% of APIQ accredited farms are certified, through an annual independent audit, as complying with Option A.
- This equates to 80% of the Australian commercial sow herd being certified as complying with Option A under APIQ.

The remaining 20% of the industry are yet to be formally verified under APIQ Option A. While we do not have formal data on non-APIQ accredited farms, information collected through extension roadshows, producer phone calls and industry feedback indicate a range of reasons why they may not have sought formal accreditation for their status against the voluntary phase out. One being the small size of the farm and a decision not to invest in APIQ accreditation.

¹⁵ WOAH. Terrestrial Code Online Access, 2023. <https://www.woah.org/en/what-we-do/standards/codes-and-manuals/>

(4) current industry breeding and housing practices particularly the use of different forms of confinement

The outcomes of ongoing research and industry development are evident. There have been notable advancements in housing and production methods, as well as in management, health, and breeding practices. These advancements have been instrumental in reducing or eliminating several welfare problems, such as predation, thermal stress, certain infectious diseases, and nutritional stress¹⁶.

Therefore, it is crucial to recognise that the range of indoor and outdoor housing systems play a vital role in ensuring animal welfare. The effectiveness of these systems in promoting animal welfare outcomes largely depends on their design and management rather than the type of system itself¹⁶. In the Victorian pig farming community, a range of indoor and outdoor housing systems are effectively utilised, maintaining high design standards in both systems, ensuring they are tailored to meet the specific needs of the pigs within the locality and environment of the farm. The success of these systems in promoting animal welfare hinges on the skills, knowledge, and motivation of the stockpeople, who are well-trained to manage the nuances of pig care and work closely where required with experts such as veterinarians, nutritionists and environmental planning experts.

Through this holistic and science-driven approach, Victorian pig farmers not only meets but often exceeds the expectations for animal welfare, reflecting the deep commitment of Victorian farmers to the health and well-being of their animals.

Pig housing needs to be considered within the context of the regulatory frameworks that can influence the design and building of pig farms. Local and State Government planning laws cover all aspects of the planning requirements including the placement of sheds, management and access conditions. The planning process is rigorous, and it can take years and hundreds of thousands of dollars for pig farmers to successfully obtain development approval for new sheds or additional on-farm infrastructure.

Pig farmers choose to use a range of housing designs and practices based on regularly reviewed and updated science. Different forms of confinement are recognised by veterinarians and other animal welfare experts as being crucial options to support the health and wellbeing of both sows and piglets. Pig housing is designed to provide an environment where the pigs can feel safe, where protection from the elements can be provided, an appropriate environmental temperature can be maintained and pigs can have access to fresh food and water.

The VFF strongly advocates that any proposed changes or initiatives in breeding and housing practices should be underpinned by comprehensive, peer-reviewed scientific research. Moreover, these changes should be formulated in close consultation with the industry to guarantee that the outcomes are optimal for both pig welfare and the sustainability of the industry.

(5) international comparisons to determine industry adherence to best practice standards

The Australian pig industry is recognised as a global leader in pig welfare and whilst we are aware of the various nonregulated standards (recommendations for industries as they are not legislated)

¹⁶ Hemsworth, P.H. Key determinants of pig welfare: implications of animal management and housing design on livestock welfare, 2018. Animal Production Science, <https://www.publish.csiro.au/an/AN17897>

published by the multitude of various international pig industries, there is no one global 'best practice standard'. We must do our own due diligence and invest in Australian research to help ensure any recommendations for best practice in the Australian pig industry are backed by robust science and are fit for purpose in our unique operating environment.

The pig research community in Australia is recognised globally for its innovative approach to all aspects of pig production as well as the integrity of our research outcomes. We have some of the world's most celebrated and revered animal scientists undertaking globally relevant research for the Australian pig industry – and we are extremely proud of this fact.

The Australian pork industry considers 'Best Practice' to be outcome based rather than prescriptive. Australian pig farmers are innovative and at times must operate within small margins, so if a desirable outcome can be met even if the operating environment differs between different businesses this is seen as a positive thing for our pigs and our farmers.

Australia's standards lead the world, and VFF would be concerned if the inquiry led to any recommendations to unnecessarily regulate the industry. This would most likely reduce animal welfare standards. The potential impact of endangering the pig farming sector is the reduction of domestic pork and smallgoods supply, not a decrease in consumption. To meet consumer demand, this will likely result in increased imports of pork and smallgoods, from cheaper potentially lower welfare countries, negatively impacting Victoria's, and, consequently, Australia's GDP. The pork industry contributes substantially to the Australian economy, with an estimated \$6 billion value in 2022-23 and around 36,000 people employed across various sectors¹⁷.

This shift in pork origin, driven by ongoing consumer demand for pork, will likely result in increased imports, exposing consumers to products not adhering to the high standards maintained by Victorian farmers.

For example, Denmark, the major pork exporter to Australia, accounting for around 33% of imported pork has reported that nearly a third of its pig herds struggle to comply with pig welfare standards¹⁸. Thus, in Victoria, where strict regulations and high welfare standards are maintained and annually independently audited, relying more on imports could lead to the consumption of pork produced under less stringent welfare conditions.

This highlights the critical need to support a robust Victorian pork industry, ensuring that the high standards of animal welfare, currently applied by our pig farmers, are upheld in the products available to consumers.

¹⁷ APL. Industry facts, 2023. <https://bit.ly/3uN8aE3>

¹⁸ EuroMeat News. Denmark will tighten animal welfare control in the pig farms, 2023. <https://bit.ly/4a5kqQl>

Appendix

Pig Industry Statistics

According to Australian Pork Limited (AP), in 2022-23 the pork industry contributed around \$5.5 in gross product to the domestic economy¹⁹. In Victoria, this contribution was approximately \$1.38 billion to the state's economy²⁰. Victorian pig farming activities alone contributed \$527 million (value-added), supporting 3,000 full time direct jobs. These jobs generated \$255.2 million in household incomes for Victorian families.

The Department of Energy, Environment and Climate Action (DEECA)²¹ reported that in 2021-22, Victorian pig farm businesses constituted 24% of the 4,300 registered pig production sites across Australia. With 497,000 pigs they accounted for 19% of the national pig herd (which totals 2.6 million) and provided employment for around 36,000 people in various sectors including on-farm production, processing, and retail.

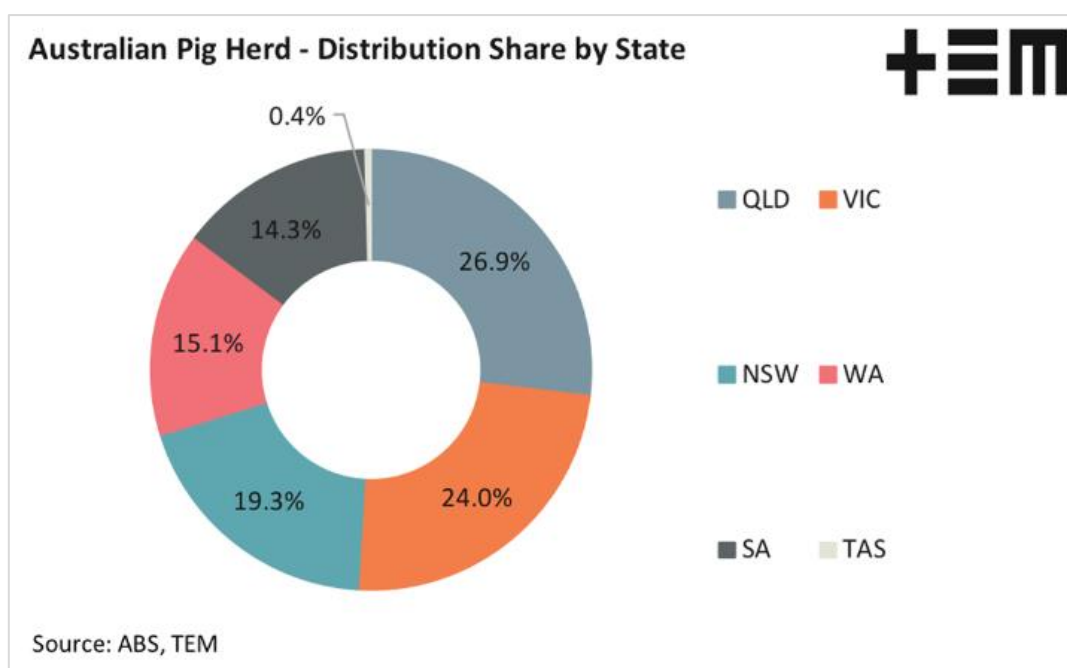


Figure 1. Australian pig herd distribution by state²².

¹⁹ APL. Annual Report 2022-23. <https://bit.ly/48qz03z>

²⁰ CIL Allen. 2022-23 Economic Contribution of the Australian Pork Industry, Prepared for APL, 2023.

²¹ DEECA. Victorian pig industry - Fast Facts January 2023.

https://agriculture.vic.gov.au/data/assets/pdf_file/0011/921179/Pig-industry-fast-facts-Jan-2023.pdf

²² APL. State of the Industry Report 2021. <https://australianpork.com.au/sites/default/files/2021-10/APLStateofIndustry-Report.pdf>

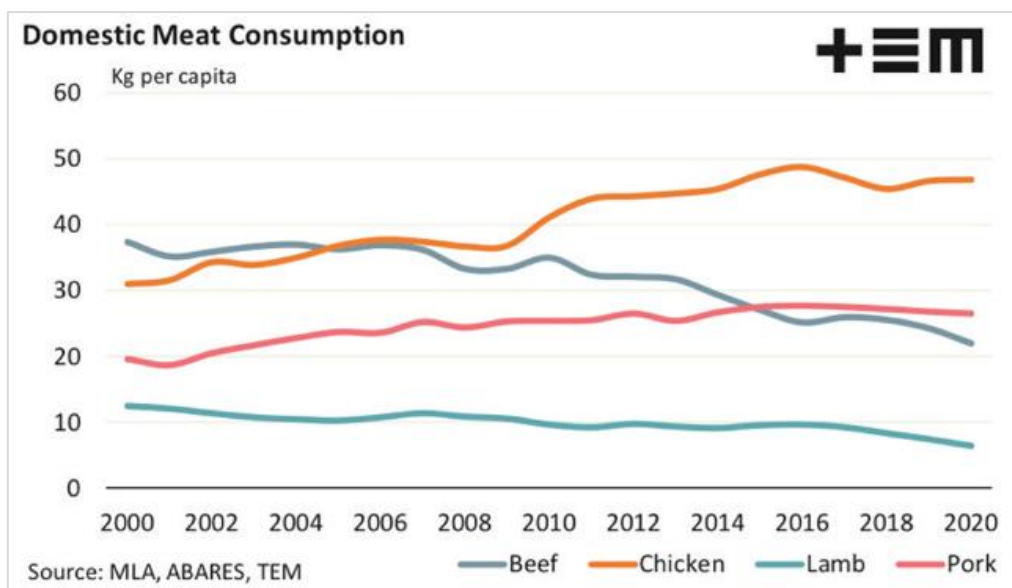


Figure 2. Australian meat consumption²².

Pork is the second most consumed meat in Australia²³. Demand for pork by Australian consumers has remained relatively constant in recent years with a per capita consumption rate of 27 kg/year (fresh and processed pork). A contributing factor to this demand is the relative price of pork compared with other red meats; in recent years pork prices have increased at or below the rate of consumer inflation²⁴.

Around 1.2 million pigs were processed in Victoria in 2020-21, producing 96,000 tonnes of pork. Victoria’s pork production accounts for 22 per cent of Australia’s total pork production (432,000 tonnes), making Victoria the third largest pork-producing state²¹.

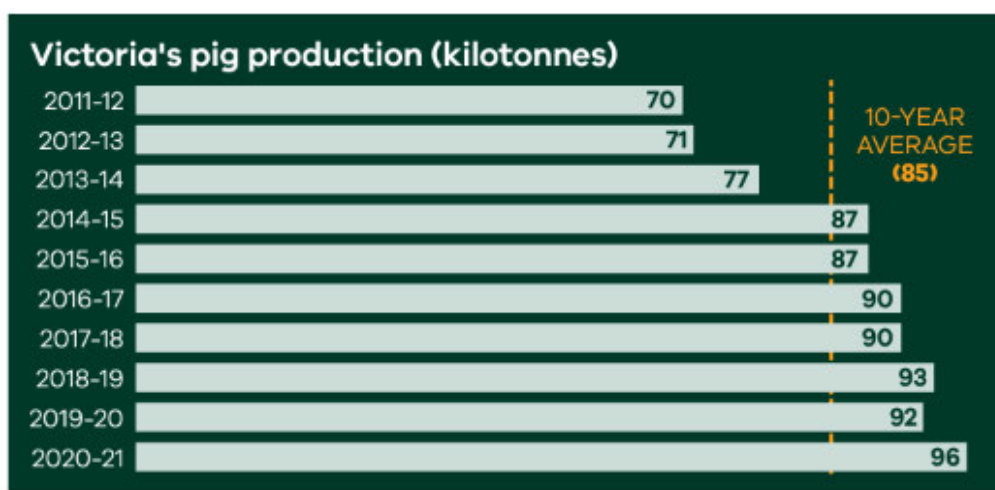


Figure 3. Victoria’s pork production²¹.

²³ IBIS World. Pig Meat Consumption. <https://bit.ly/48fRkwp>

²⁴ Livestock Pork, DPI, NSW. <https://www.dpi.nsw.gov.au/about-us/publications/pdi/2020/pork#:~:text=Demand%20for%20pork%20by%20Australian,kg%2Fyear%20per%20capita%2037>

Over the last decade, retail red meat prices have risen in line with higher livestock pricing at the saleyard. In contrast, retail pork pricing has shown more moderate growth during the 2009 to 2021 period, increasing by 23% to an average of 1256c/kg in 2021²².

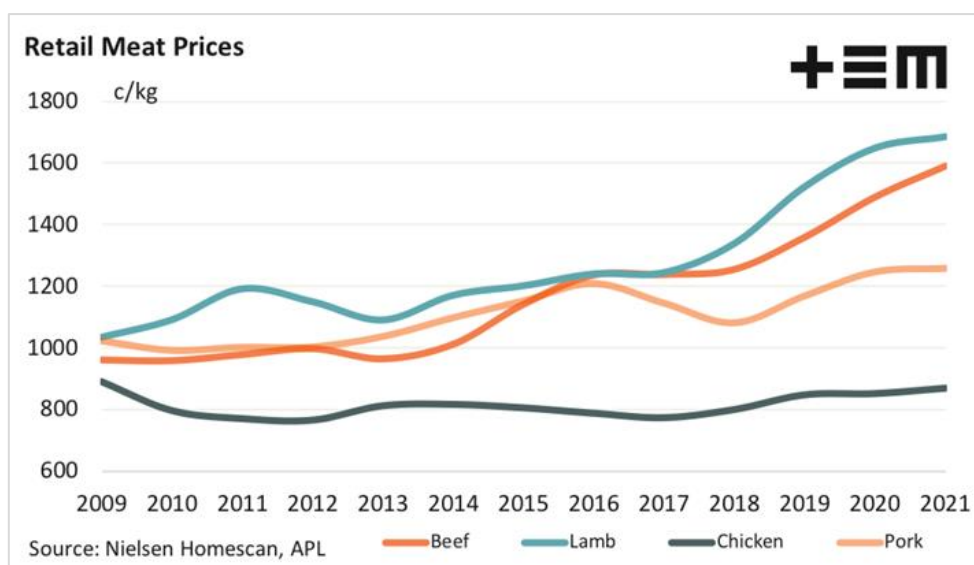


Figure 4. Australian retail meat prices²².

In the last 30 years, with the increased consumption of pork in Australia, the proportion of imported pork has grown notably. During the last decade, the share of domestic consumption of imported pork has averaged around 46% per annum²², highlighting Australia's growing reliance on foreign pork to meet its domestic demand. Denmark, the Netherlands, and the USA have emerged as the major pork exporters to Australia, collectively accounting for 80% of the pork imported in 2022²⁵.

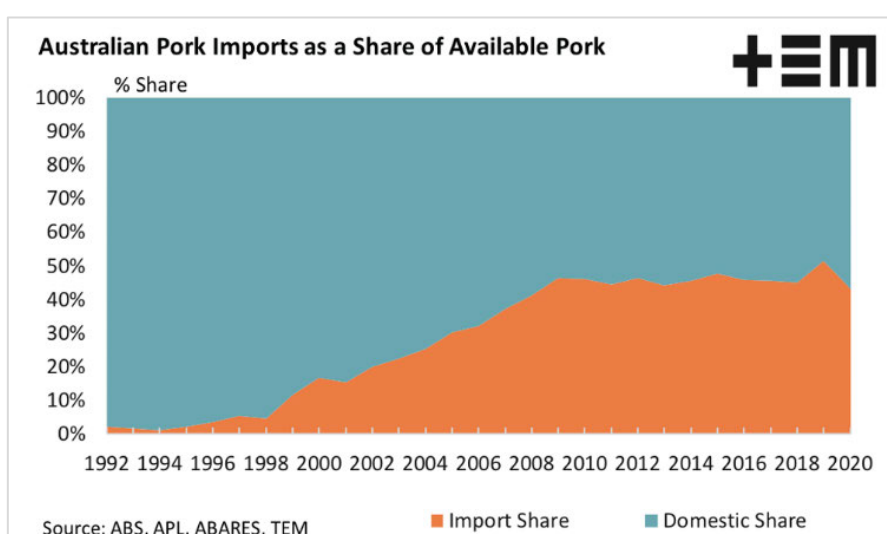


Figure 5. Domestic and imported pork supply share in Australia²².

²⁵ Trade Map. Supplying markets for fresh, chilled and frozen pork imported by Australia. <https://www.trademap.org/>

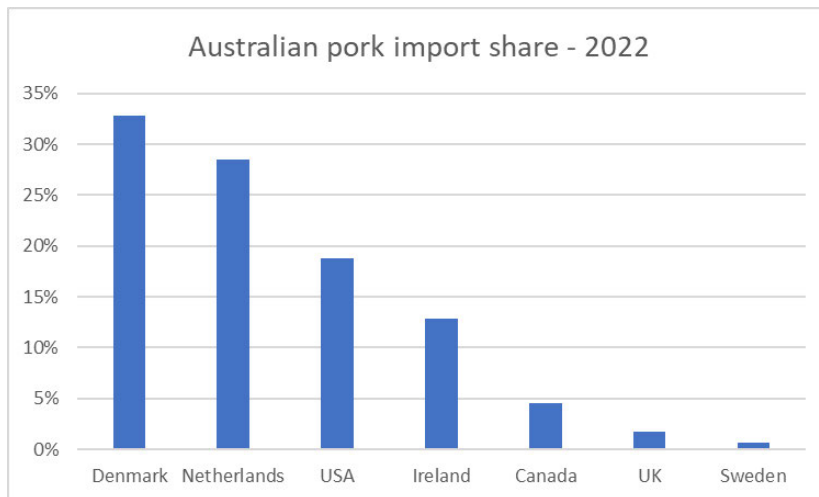


Figure 6. Australian pork import share in 2022 by value (AUD)²⁵.

Victorian Farmers Federation

The voice of Victorian farmers and rural communities since 1979

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