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Department of Foreign Affairs and Trade
by email submission

To whom it may concern,

Thank you for providing Australian Pork Ltd (APL) with an opportunity to respond to the Southeast Asia Free Trade Agreements (FTAs) modernisation review.

APL is the national peak industry representative body for Australian pork producers. APL is a producer-owned company and Research and Development Corporation (RDC) responsible for marketing, export market access, research, innovation and extension and strategic policy advocacy to assist in securing a profitable and sustainable future for the Australian pork industry.

APL is the primary contact regarding pork industry research, development and extension priorities, current industry evidence and information, and strategic policy needs. APL is unique in this way and is the one body representing every aspect of the Australian pork industry. APL holds several official roles on behalf of the Australian pork industry.

APL is:

- The RDC for the Australian pork industry. Established through Federal legislation, APL is responsible for leading research, development, and extension in partnership with the Australian government and the research community. Our statutory obligation is to deliver industry innovation and research and development services on behalf of all industry levy payers.
- The market access, trade and marketing arm of the industry, including managing industry campaigns such as "Get some pork on your fork".

- The national peak body for the Australian pork industry. We represent pork producers and the supply chain across jurisdictions and within national and state and territory representative frameworks.
- Leading the Australian pork industry's Sustainability Framework implementation, supporting benchmarking and accountability against the goals within the four sustainability pillars.
- The pork industry signatory to the Emergency Animal Disease Response Deed (EADRA), representing the entire pork supply chain within Animal Health Australia, and where required, within the decision-making structures which would manage an emergency animal disease response.

During 2024, the Australian pork industry contributed more than \$6.9 billion¹ to the Australian economy. This figure represents the over-arching contribution to the economy including primary and secondary processing. The industry produced 470,502 metric tonnes² of pork. All fresh pork in Australia is domestically sourced, with around 85% of Australian pork produced used domestically and the high value export market supporting the domestic market taking 57,294 metric tonnes³ in the 2024 calendar year.

In 2024, approximately 70% of Australian pork exports, ~40,000 tonnes valued at ~\$183 million AUD, went into the Southeast Asia region.⁴ This represents a 140% increase in value since 2022.⁵ Australia's largest export markets for pork in the region include Singapore, the Philippines, Malaysia, and Vietnam.

Free Trade Agreements in Southeast Asia

APL commends the Department of Foreign Affairs and Trade for its plan to review and modernise Free Trade Agreements (FTAs) within Southeast Asia (SEA). Australia's FTAs in the region have assisted the pork industry's export competitiveness in key markets. We value the ongoing work of the Australian Government in their continual pursuit of trade agreement negotiations and support the continued review of FTAs to improve existing arrangements where opportunities exist, ensuring they remain relevant in a modern context.

Non-Tariff Barriers

While tariff reductions and improved market access through FTAs have been vital in supporting Australian pork exports to SEA, a significant number of barriers to trade persist in the form of

¹ Acil Allen (2025) – 2024 Economic contribution of the Australian pork industry report. Page 17

² ABS (2025) – Table 13. Red meat produced – pig meat: all series (tonnes) (March to December 2024 data). Access 23 June 2025 Livestock Products, Australia, March 2025 | Australian Bureau of Statistics

³ APL (2024) – Import and export report December 2024. Available Import Export Report December 2024.pdf

⁴ APL (2024) – Import and export report December 2024. Available Import Export Report December 2024.pdf

⁵ APL (2022) – Import and export report December 2022. Available Import Export Report December 2022.pdf

non-tariff barriers (NTBs). These include issues with technical listings, product descriptions, permit processes, and protocol negotiations.

APL continues to work closely with the Department of Agriculture, Fisheries and Forestry to address these NTBs. In doing so, APL aims to remove obstacles to trade opportunities for Australian pork in SEA, ensuring that industry can access the benefits of modernised FTAs and continue to contribute to regional economic growth.

Philippines - Review of Tariff Structures

Despite the existence of FTAs between Australia and the Philippines, current tariff structures continue to limit the competitiveness of Australian pork exports in the near term. The Philippines maintains a two-tier tariff system on imported pork under a Minimum Access Volume (MAV) scheme, allowing a set quota of pork imports at a lower tariff rate. Under ASEAN-Australian-New Zealand FTA (AANZFTA), Australia experienced a reduction in the tariffs associated with MAV, from a tariff of 30% to 24% for in-quota pork and 40% to 32% for out-of-quota pork. This tariff rate has been in place since 2015 and provided Australia with a competitive advantage in-market.

However, a reduction to the Most Favoured Nation (MFN) duties in 2021 cut tariffs to 15% for in-quota and 25% for out-of-quota imports. These cuts, which have been extended until the end of 2028, significantly reduce Australia's competitiveness in the Philippines. Under the previous MFN tariff structure, Australia was able to outperform three of the top four major pork exporters to the Philippines when comparing global export prices for chilled and frozen pork. Under the reduced MFN tariffs, Australia can only outperform one of the top four major pork exporters.

Although Australia and the Philippines are both parties to the Regional Comprehensive Economic Partnership (RCEP), the agreement does not provide additional tariff relief for sensitive agricultural products. Under the RCEP, the Philippines has excluded these products, including pork, from its tariff reduction commitments by classifying them as unbound in its Schedule of Commitments. This means the existing AANZFTA and MFN tariffs remain in place.

To remain competitive in this market, the Australian pork industry could benefit greatly from a review of Australia's FTA with the Philippines to ensure that the reduction of MFN tariffs coincides with a reduction in established FTA tariffs. In the current context, this would mean reducing Australia's in-quota tariff from 24% to 12% and reducing out-of-quota tariffs from 32% to 20%.

Future Focused Reviews

To safeguard the competitiveness of Australian pork exports in SEA, future FTAs, or a review of current FTAs, could incorporate adaptive mechanisms that automatically align established FTA tariff rates with changes to MFN duties. Such mechanisms would ensure that Australian

exporters are not disadvantaged when MFN rates are reduced, as has occurred in the Philippines.

In addition to tariff alignment, future agreements should place a stronger emphasis on transparency. The clear disclosure of regulatory requirements, such as export registration processes and permit systems, would help to reduce non-tariff barriers in SEA. Further, greater transparency would support compliance and help in fostering trust between trading partners.

Finally, it is important that DFAT continues to consult with industries throughout FTA negotiation and review processes. Continued engagement with industry ensures FTAs remain responsive to the realities of ever evolving markets, and reflect practical challenges faced by exporters. By embedding genuine consultation and forward focused measures within FTA disciplines, Australia can strengthen its trade system and secure sustainable access for a range of exports across SEA.

Thank you again for the opportunity to provide comment. Please do not hesitate to contact Tanya Pittard, General Manager of Policy, and Industry Relations via email at tanya.pittard@australianpork.com.au, if you would like to discuss the areas raised in this submission.

Yours sincerely



Margo Andrae
Chief Executive Officer