

Supporting document 4

A Brief Description of the Industries being assessed

Proposal P1014

Primary Production & Processing Standard for Minor Meat Species & Wild Game

Minor species

For the purpose of P1014, minor species are those animals currently defined under existing Australian Standards (excluding *AS4464-2007* and cattle, sheep, goats, pigs) i.e. buffalo, antelope, camels, alpacas, llamas, deer, horses, donkeys, rabbits, crocodiles, ostrich, emu.

1. Buffalo

Buffalo (*Bubalus bubalis*) herds are concentrated in the Northern Territory where there are around 15,000 domesticated buffalo and a feral population of around 40,000 buffalo. There are also small herds in all states of Australia; some for dairy production as well as meat production.

Buffalo are processed under the Australian Standard for the *Hygienic Production and Transportation of Meat and Meat Products for Human Consumption (AS 4696:2007)*. In South Australia, approximately 100 animals per year are slaughtered and most carcasses are transported to the Darwin for further processing with some sent to Adelaide and Melbourne. It is estimated that less than 150 beasts are processed across Australia annually for domestic consumption.

Approximately 75% of the buffalo carcasses (27 tonnes per year of carcasses) are manufactured into smallgoods, sausages and hamburgers for use by the Northern Territory catering and hospitality industry. A restaurant trade carcass would retail at \$3.60-\$4.00 per kilogram (farmgate).

2. Camel

The Australian camel industry is largely based on the harvesting of feral camels from arid central regions; however there are some farmed camels in central Australia. Australia's feral camel population is estimated at 1 million with an estimate of 50% in Western Australia, 25% in the Northern Territory and 25% in western Queensland and northern South Australia. The dromedary camel is ideally suited to desert conditions and feral camels now occupy much of the Australian interior.

Farmed production occurs on five properties in central Australia with 3000–4000 breeders. Herds have been established from feral animals which have subsequently been domesticated. Processing is done according to the Australian Standard for the *Hygienic Production and Transportation of Meat and Meat Products for Human Consumption* (AS 4696:2007).

Camel meat production is estimated at 250 tonnes annually with an average wholesale value of \$5/kg. There has been some domestic consumption of camel meat through restaurants and supermarkets predominantly aimed at the tourist market. In recent years, approximately all camel meat produced is exported to the United States, Canada and the European Union.

3. Deer

Deer were introduced to Australia more than 100 years ago. Red deer are becoming the most predominant farmed species in Australia proving advantageous through better production of velvet antler and a larger carcass size which reduces slaughter and processing costs. However, fallow deer are also widely farmed, as are smaller numbers of rusa, chital and sambar.

There are approximately 150 farmers in Australia concentrated in Victoria, South Australia, New South Wales and Tasmania with some production in Queensland and Western Australia. The Australian on-farm deer population in 2002 was estimated at 200,000. However, it has reduced to approximately 50,000 animals as a result of the prolonged drought and farmers exiting the industry when prices were low.

Processing is done according to the Australian Standard for the *Hygienic Production and Transportation of Meat and Meat Products for Human Consumption* (AS 4696:2007).

The Australian deer industry is approximately 5% of the size of the New Zealand industry and produces around 288 tonnes of venison (estimate for 2010). Over 65% of venison is exported, predominantly to the European Union and South-east Asia, with velvet exported to Korea, Hong Kong and China. The domestic market is predominantly restaurants and speciality butchers with retail value ranging from \$35/kg for hind quarter cuts to \$65/kg for tenderloins.

4. Rabbit

Rabbits are mainly farmed intensively but are also shot in the wild. There are twenty-one rabbit farms in Australia, located in New South Wales, Victoria, South Australia and Western Australia. In the early stages of the industry, meat production was contributed by smaller producers but the trend has changed to larger (800–2000 breeders) but fewer farms.

Rabbits are farmed primarily for the human consumption of their meat. This is usually supplied in whole-carcass form, though value-added products such as sausages. Chipolatas are also produced. Rabbit meat is mainly sold through European-style butchers and restaurants, with a limited market also in produce markets and supermarkets. The near-white meat from farmed rabbits varies considerably from the darkish meat of wild rabbits, with farmed rabbit meat selling for a premium over wild meat. It is estimated that 260 tonnes of meat is produced annually with a retail value of \$14.50 per kilogram. All meat produced is consumed domestically and supplied through restaurants and retail outlets (wholesalers, butchers and smaller supermarkets). Some wild rabbits are processed but must be supplied head shot for slaughter.

5. Crocodile

Commercial crocodile farming began in Australia in the 1980s and the main species farmed is the saltwater crocodile (*Crocodylus porosus*). The industry currently comprises 14 farms situated in Queensland, the Northern Territory and Western Australia. The main products are skins and a small quantity of meat.

The Australia New Zealand Food Standards Code only permits meat for human consumption to be derived from farmed animals. Crocodiles are processed under the Australian Standard for the *Hygienic Production of Crocodile Meat for Human Consumption (AS 4467:1998)* and the Code of Practice on the Humane Treatment of Wild and Farmed Australian Crocodiles.

It is estimated that 100 tonnes of meat is processed annually with 60% being exported to Japan, Malaysia, Hong Kong and Taiwan. The remaining 40% is consumed domestically through restaurants and caterers with very little retailed through supermarkets. The retail value for crocodile meat ranges from \$10 per kilogram (boned-in meat) to \$20 per kilogram (high quality cuts e.g. tail fillet, tenderloin and strip loin). Industry advice confirmed that all product is sold frozen and vacuum packing is common.

6. Ostrich

Ostrich comes from the family of ratites and is a flightless bird. The bird is farmed for its meat, leather, oil and feathers. Ostriches are mainly farmed in free-range complexes with targeted breeding for slaughter. The Australian Ostrich Association represents all commercial producers.

In the last five years, ostrich numbers have reduced from 25,000 birds to less than 10,000 birds. As a result of drought conditions, there are only four to five commercially-producing farms with an annual production of 30 tonnes of meat compared to 208 tonnes in 2006. The industry is expected rebuild to about 100 tonnes of product in the next 5 years.

Ostriches are processed at Myrtleford, Victoria under the *Australian Standard for the Hygienic Production of Ratite (Emu / Ostrich) Meat for Human Consumption (AS 5010:2001)*.

All ostrich meat is currently exported to premium markets in the United States, Canada and Japan. When production is larger, the EU market is also a critical market being the largest consumers of ostrich meat. Ostrich meat is a red meat, high in iron and low in cholesterol and is derived from the legs and along the back of the birds, which is chilled after skinning and then boned out into approximately 15 sub-primal cuts of prime fillets steaks and trim. Ostrich meat is highly sought after with significant growth in the health food sector particularly in Canada and the USA. Ostrich meat is usually traded in individual cuts, although at times may be traded as deboned thigh and drum and broken down by the importer. Currently, Ostrich is selling ex processing plant at an average of approximately \$16.50/kg ranging from \$30/kg for premium fillets to \$8/kg for trim. Meat prices have continued to rise over the past few years in spite of the strong Australian dollar.

7. Emu

The emu is a native bird of Australia and farming occurs in all states. Commercial farming of emus began in Western Australia in 1987 and is now practiced in all states. Wild harvesting is prohibited. In 2001, there were 145 farms producing emus, declining to 41 in 2006 and currently there are fifty to sixty licenced farmers around Australia.

Processing of emus is carried out under the Australian Standard for the *Hygienic Production of Ratite (Emu/Ostrich) Meat for Human Consumption* (AS 5010: 2001). The main products from emus are meat, oil and skins with oil being the commercially important commodity. Meat in various cuts is then prepared from the legs of the bird which are removed after skinning.

Wild Game

For the purpose of P1014, wild game is defined as currently under AS4464-2007.

8. Kangaroo

Kangaroos are only harvested on mainland Australia and the industry is based on wild harvest. The average annual harvest since 1997 has been 2.78 million kangaroos. Only four species can be harvested:

- red kangaroo (*Macropus rufus*), harvested in NSW, Qld, SA, WA
- eastern grey kangaroo (*M. giganteus*), harvested in NSW, Qld
- western grey kangaroo (*M. fuliginosus*), harvested in NSW, SA, WA
- common wallaroo or euro (*M. robustus*), harvested in NSW, Qld, SA, WA.

Kangaroo meat is used for human consumption and pet meat, however kangaroos are also harvested for skins and leather. Currently, there are 21 abattoirs processing kangaroos in Australia. Processing of kangaroo meat is regulated by the Australian Standard for the *Hygienic Production of Game Meat for Human Consumption* (AS 4464: 2007).

An estimated 21,000 tonnes of meat is produced for human consumption and 9,000 tonnes produced for pet food. Kangaroo carcasses are processed and packaged in various formats such as pieces of meat packed in overwrap, vacuum and modified-atmosphere packed cuts of meat, chilled trim in tubs and cartons and frozen meat. Meat for human consumption is retailed in butcher shops which receive meat as boneless, bulk meats and in supermarkets in retail-ready packs. Approximately 70% of all kangaroo meat (i.e.15,000 tonnes for human consumption) is exported to a wide range of countries including Russia, France, South Africa and Germany.

9. Wallaby

The wallaby industry is similar to the kangaroo industry as wallabies are harvested in the wild. Wallabies are harvested for their meat and skins. Figures from 2005–2006 indicate that 135.8 tonnes of meat was produced.

10. Mutton birds

The mutton bird, also known as the short tailed shearwater, is an international migratory bird which is harvested commercially and non-commercially in Tasmania each year between 27 March and 30 April. The harvesting of mutton birds is limited by the Tasmanian Parks, Wildlife and Heritage to prevent over-harvesting. Approximately 23 million breed in 285 colonies in south-eastern Australia and 200,000 are annually harvested and sold in Tasmania.

There is a small demand for meat in New Zealand but most meat is sold in the domestic market as the meat has a non-gourmet image with an acquired taste.

11. Wild boar

There are an estimated 23 million feral pigs in Australia however production has been reduced in the last 10 years due to droughts in Eastern Australia. There is little demand for domestic wild pig meat and most is exported to the European Union. In 2007, 1838 tonnes of game pigs were produced in Australia, of which 1818 tonnes were exported.