

Workforce Pressures and Pathways in Red Meat Processing – Final report

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1.0 Abstract

Australia's red meat processing industry has faced persistent workforce pressures, particularly in regional areas where labour availability is constrained. This project examines these pressures from four related perspectives covering:

1. forecasting workforce supply and demand to 2036 for the industry and 10 core occupations
2. assessing mitigation strategies to attract, retain and develop workers
3. examining the contribution of migration and Pacific Australia Labour Mobility (PALM) pathways
4. estimating non-wage costs associated with the industry's current workforce model

Under current trends, slowing workforce demand is expected to ease existing recruitment pressures over the next few years. Workforce shortages are expected to increase again from 2030 and reach around 1,900 workers by 2036, equivalent to 5.7% of requirements. The larger challenge is sustaining the existing workforce, with around 91,300 worker departures projected over the decade. Migration is already central to meeting these needs. Around 9,960 PALM workers were employed in red meat processing in June 2026, equivalent to around one-third of the workforce.

Higher PALM recruitment could address a substantial share of the projected shortage, but requires continuing investment in worker support, administration and workforce management. The estimated non-wage cost to a direct employer is around \$4,000 per PALM worker per year after deductions over a completed four-year placement, with most arising during employment. These costs sit alongside broader workforce pressures, with repeated recruitment, induction and training creating ongoing demands across local employees and other migrant workers.

The longer-term opportunity is to build a more sustainable and diversified workforce pipeline rather than rely primarily on additional recruitment as vacancies arise. Migration will remain an essential pillar, but its contribution can be strengthened through greater retention of experienced migrant workers, where visa conditions allow, and a broader mix of recruitment pathways. Alongside this, processors may build a stronger local workforce by improving both attraction of workers into the industry and the reasons to remain.

The report findings, discussion and recommendations provide industry with an evidence base to plan future workforce needs and prioritise practical responses.

2.0 Executive summary

Australia's red meat processing industry employs an estimated 30,760 workers in 2026, excluding pork processing and downstream value-adding, across production, trade, technical and management roles. Access to suitable workers remains a challenge, with only one of the 10 most important occupations not currently in a state or national shortage (Jobs and Skills Australia 2026a).¹ Recent industry feedback identifies shortages in processing and maintenance roles, alongside difficulties attracting and retaining workers (AMIC 2026a).

Australian Meat Processor Corporation (AMPC) commissioned Oxford Economics Australia to assess future workforce needs and develop options to address these pressures. The workforce analysis projects demand and supply through to 2036 for the industry and 10 core occupations, covering six specialist processing occupations and four enabling trade and management occupations. The findings identify where current workforce arrangements may fall short and support decisions on recruitment, retention, training and migration.

Table 1. Core occupations analysed within Meat Processing (ANZSIC 1111), excluding pork processing

Core Occupation	ANZSCO #	Enabling/Specialist
Meat Process Worker	831311	Specialist
Meat Packer	832114	Specialist
Meat Boner and Slicer	831211	Specialist
Slaughterer	831212	Specialist
Butcher or Smallgoods Maker	351211	Specialist
Meat Inspector	311312	Specialist
Quality Assurance Manager	139914	Enabling
Electrician (General)	341111	Enabling
Fitter (General)	323211	Enabling
Metal Fabricator	322311	Enabling

The outlook suggests that workforce pressures will ease temporarily before becoming more pronounced later in the decade. Slower processing demand is expected to reduce recruitment pressures between 2027 and 2029, although high workforce turnover means processors will continue needing to replace departing workers. Demand begins to outpace supply from 2030, with the shortfall reaching approximately 1,900 workers by 2036, equivalent to 5.7% of requirements. The larger challenge is the scale of workforce replacement required to sustain the industry. Around 91,300 departures are projected over the decade through migration, occupational movements and natural attrition, meaning most new entrants replace workers who leave rather than expand workforce capacity.

Migration will remain central to meeting these workforce requirements, with PALM workers already representing around one-third of industry employment. Higher PALM recruitment could address a substantial share of the

¹ Note: Two of the 10 core occupations, Meat Process Worker and Meat Packer, are not covered by Jobs and Skills Australia's analysis. Quality Assurance Manager is classified as ANZSCO 139916 in the 2022 version, but as ANZSCO 139914 in the 2013 version used for our analysis of the 2021 Census.

projected shortage, but increases the resources needed to recruit, accommodate and support workers. Processors employing PALM workers directly face non-wage costs, while the broader workforce model also incurs costs through repeated recruitment, visa processes and workforce replacement.

Allowing for amounts recovered through worker deductions for expenses such as rent and travel, the estimated employer cost averages around \$4,000 per PALM worker per year over a completed four-year placement. Ongoing welfare support and administration during employment account for most of this cost. Expansion therefore requires planning for these costs and the risks associated with recruitment delays, policy changes and reliance on a concentrated group of source countries for workers.

The longer-term opportunity is to build a more sustainable and diversified workforce pipeline rather than rely primarily on additional recruitment as vacancies arise. Migration will remain a key pillar, but its contribution can be strengthened by retaining experienced migrant workers, where visa conditions allow, and drawing on a broader mix of recruitment pathways. Alongside this, processors may build a stronger local workforce by improving both attraction into the industry and the factors supporting worker retention. Community and school engagement can help address limited awareness and negative perceptions of processing work, while competitive entry-level pay is important where processors are competing with less physically demanding jobs offering similar wages. Once workers enter the industry, a key challenge is shifting perceptions of processing as short-term employment by demonstrating opportunities for career progression. Clearer career pathways and training linked to progression can help them see a longer-term future in processing and retain more of the skills and experience developed within the business.

2.1 Workforce supply and demand projections

Lower workforce demand is expected to ease existing recruitment pressures over the next few years, reflecting the softer processing outlook informed by the Meat & Livestock Australia (MLA) and the Australian Bureau of Agricultural and Resource Economics and Sciences (ABARES) projections (MLA 2026; ABARES 2026). Slaughter numbers are projected to decline, although higher cattle carcass weights are expected to partly offset the impact on production. The production outlook remains sensitive to seasonal conditions, which could change the timing and scale of processing requirements. Under current workforce supply trends, recruitment pressures are expected to ease temporarily over the next two years. This period provides an opportunity for processors to strengthen training, recruitment and retention ahead of the subsequent recovery in demand.

Workforce pressures increase again from 2030 as demand outpaces supply. By 2036, the industry is projected to require around 2,500 more workers than in 2026, while supply increases by just 620. The resulting shortfall reaches approximately 1,900 workers, equivalent to 5.7% of industry requirements. Meeting these requirements will need additional recruitment or stronger retention beyond current trends.

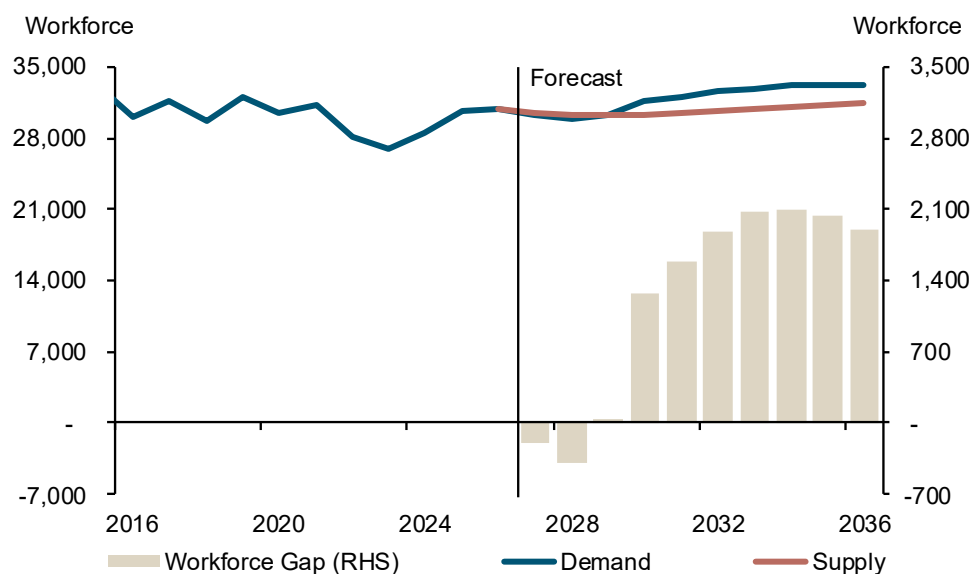


Figure 1. Workforce demand and supply in red meat processing, excluding pork processing, 2016-2036

Replacing departing workers accounts for most of the industry's recruitment task. Cumulative departures are projected to total around 91,300 over the decade, almost three times the 2026 workforce. This repeated turnover absorbs most new entrants and makes it harder for processors to retain experience and maintain continuity. Even where staffing numbers remain steady, businesses face recurring recruitment and training requirements as experienced workers leave and new recruits develop their skills.

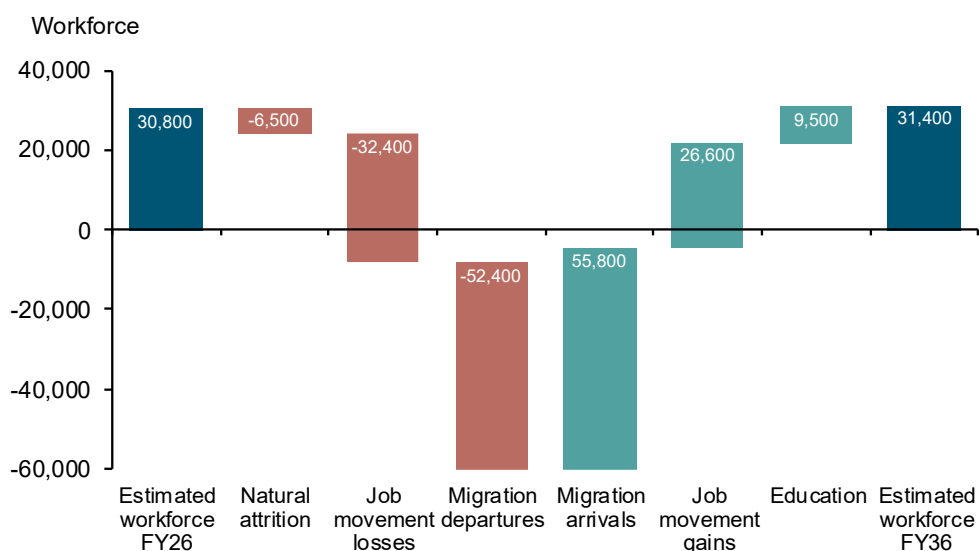


Figure 2. Cumulative workforce movements contributing to supply, 2027-2036

Migration prevents workforce supply from declining, but most of its contribution offsets losses elsewhere in the workforce. Education entrants fall short of replacing workers lost through retirement, other natural attrition and occupational movements by around 2,800 over the decade. Net migration adds approximately 3,400 workers, leaving overall workforce growth of just 620. This contribution depends on around 55,800 migrant arrivals, as approximately 52,400 workers are also projected to depart.

Continued recruitment and growth in the Pacific Australia Labour Mobility (PALM) workforce are already included in the outlook. Sustaining these flows depends on access to migration pathways and the availability of

suitable workers. It also requires processors to provide accommodation, transport, training and other support services as temporary workers depart and replacements arrive.

Eight of the 10 core occupations face deficits by 2036. Meat boners and slicers and meat packers have the largest numerical shortfalls, together accounting for around 1,400 workers. The differences in the occupational outlook largely reflect their projected supply. Meat boners and slicers are expected to lose a substantial share of their workforce to other industries over time and currently don't have a substantial pipeline to refill those losses, while slaughterers receive a sizeable net migration contribution relative to their existing workforce, providing a boost to supply over time.

All four enabling occupations also face shortages, including the trades and management roles that support processing operations. Processors can use the occupation outlooks to identify priorities, plan for replacement needs and connect training to career opportunities. For enabling roles, recruitment from other industries offers another source of experienced workers, although processors will compete with other employers for those skills.

Gap as a share of 2036 workforce demand

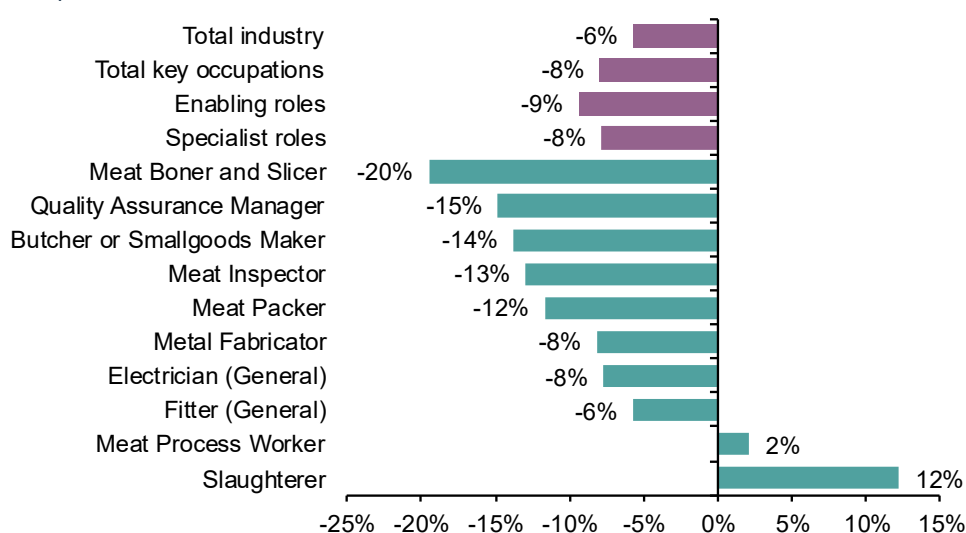


Figure 3. Projected workforce gaps for core occupations within Meat Processing (ANZSIC 1111), excluding pork processing, 2036

Education and career progression can support workforce growth, but their contribution depends on retaining workers. Around 9,540 entrants are projected through education, fewer than the combined losses from natural attrition and net occupational departures. For fitters, education additions are almost entirely absorbed by retirement and other natural attrition. Clear pathways from entry-level positions into skilled roles could help processors retain workers as they gain experience, while developing skills needed elsewhere in the business.

2.2 Migration pathway analysis

Sustaining the processing workforce depends on continued access to migrant workers, particularly in specialist production roles. Temporary and permanent migrants accounted for 43% of meat processing employment in 2021, compared with 22% across Australia. Their contribution was greater among the six specialist occupations, where migrants represented 53% of workers.

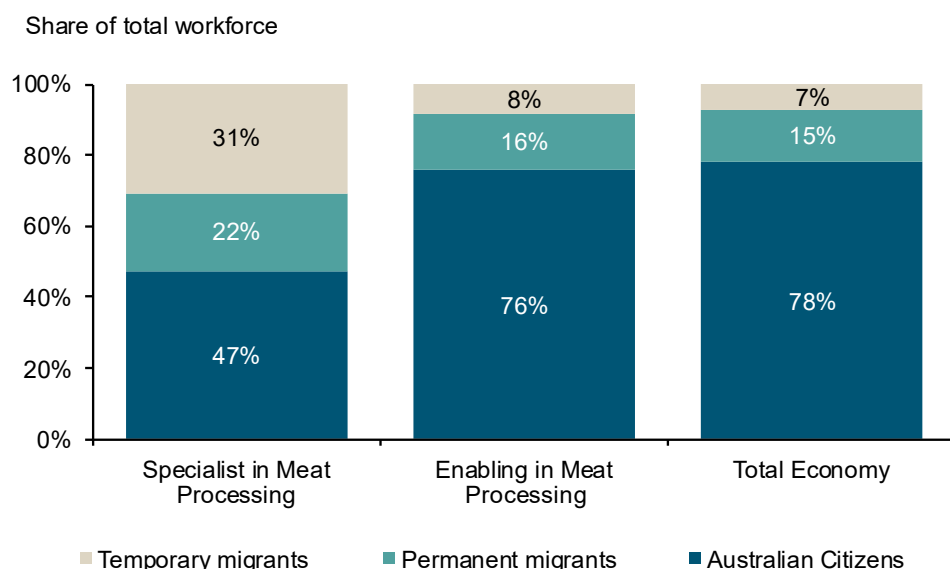


Figure 4. Visa status of the workforce, 2021 census

The expansion of Pacific labour mobility has changed the recruitment options available to processors. PALM brought together the Seasonal Worker Programme, which supported seasonal employment, and the Pacific Labour Scheme, which supported longer-term placements. Reforms introduced in April 2022 established a single visa covering both, alongside longer-term visa options and the removal of recruitment caps for existing employers with a good track record. These changes broadened employers' access to workers and supported the subsequent expansion of the scheme.

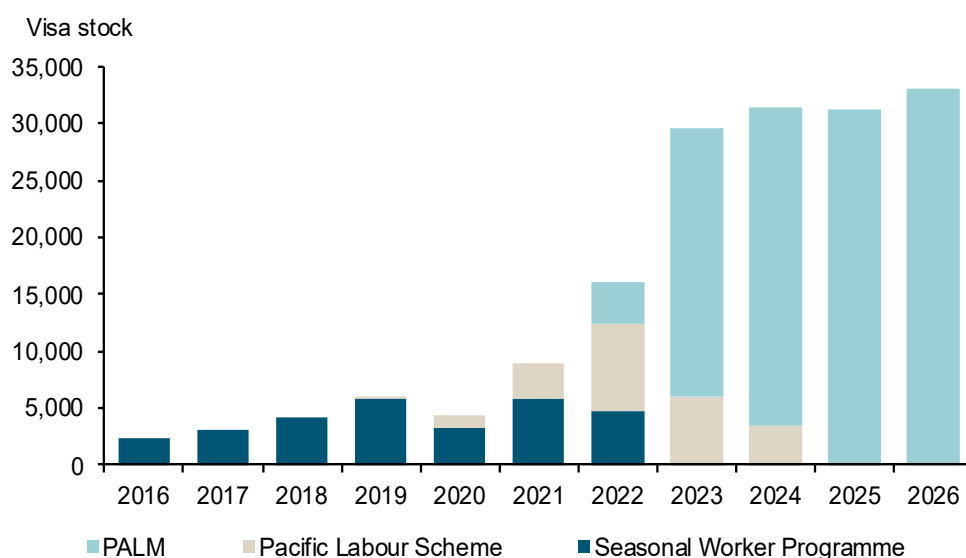


Figure 5. Stock of PALM and predecessor programme visa holders, 2016-2026

An estimated 9,960 PALM workers were employed in red meat processing in June 2026, equivalent to around one-third of the workforce. Long-term placements accounted for 96% of PALM employment in meat processing, allowing workers to develop skills over several years. Maintaining these numbers requires continued recruitment as placements end. Processors described staggering arrivals and seeking returning workers to manage departures and preserve experience.

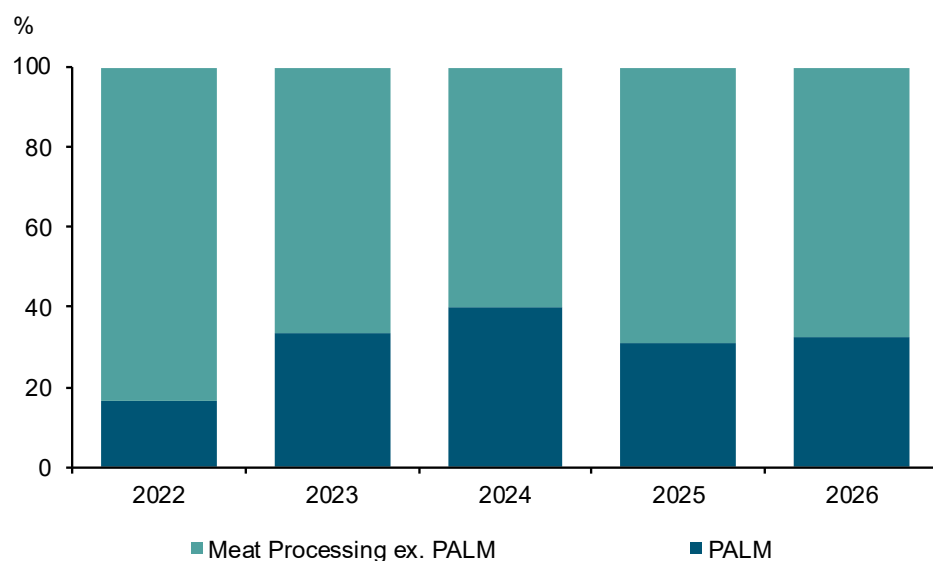


Figure 6. PALM visa holder share of meat processing industry, 2022-2026

The migration intake would need to exceed projected levels to meet future demand if other workforce trends remain unchanged. The baseline scenario already includes continued PALM recruitment and growth, yet a workforce shortfall of 5.7% remains by 2036. Discontinuing the scheme increases the shortfall to 31.8%, potentially constraining processing capacity and putting pressure on plant viability, with flow-on effects for regional economies and livestock supply chains. Doubling annual PALM inflows instead produces an aggregate surplus, although shortages may persist in several occupations without exposure to the PALM scheme.

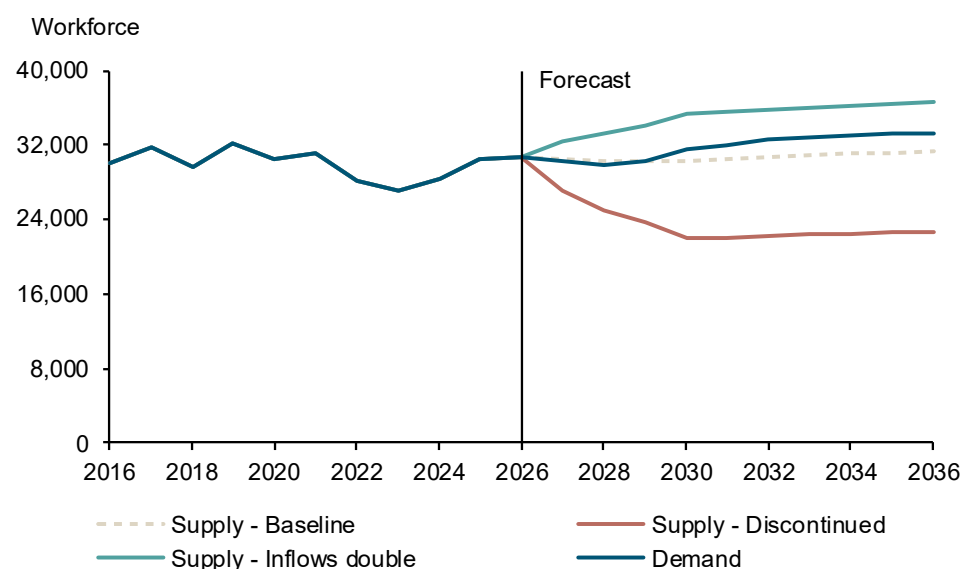


Figure 7. Workforce demand and supply in red meat processing, excluding pork processing by PALM scenario, 2016-2036

Mainstream skilled visas cover all four enabling occupations but only two of the six specialist processing occupations. Meat Industry Labour Agreement (MILA) extends sponsorship to slaughtering, boning and slicing roles. However, meat process workers and meat packers, together representing around one-third of industry employment, remain outside both skilled visa pathways. Migrant recruitment into these roles relies more heavily on PALM and workers already in Australia with suitable work rights.

Recruiting migrants already in Australia and supporting suitable workers to stay longer can preserve skills developed within processing businesses. In 2021, permanent migrants who first entered Australia on temporary visas accounted for 10.4% of meat processing employment, more than half of its permanent migrant workforce. Processors described sponsoring PALM and working holiday workers after they had gained experience. Some had begun identifying candidates earlier and providing English-language training to prepare them for applications.

Reliable access also depends on recruitment arrangements and the resources available to support workers. Processors reported lengthy waits for some skilled recruits, difficulty securing accommodation and substantial welfare and administrative responsibilities. Broad political support for PALM provides some confidence in its continuation, while employer obligations and sending-country decisions remain sources of uncertainty. Workforce planning needs to account for these constraints alongside recruitment targets, with longer-term visa pathways supported by employment conditions and career opportunities that encourage experienced workers to remain.

2.3 Workforce pressure mitigation strategies

Meeting future workforce needs will require processors to build more reliable recruitment pathways and retain more of the experience developed within their businesses. Migration will remain essential to the industry, but a more sustainable workforce model would combine continued overseas recruitment with stronger local attraction, clearer career pathways and greater retention of workers once they have been recruited and trained.

Table 2. Core occupations mitigation strategy recommendation summary

Core Occupation	2036 shortage (% of demand)	Entry-level recruitment	Recruit from other industries	Migrant recruitment	Provide career pathways	Promote from internal	Avoid losses to other industries	Avoid losing migrants
Meat Boner and Slicer	20% deficit			✓	✓	✓	✓	✓
Quality Assurance Manager	15% deficit		✓			✓	✓	✓
Butcher or Smallgoods Maker	14% deficit	✓		✓	✓	✓	✓	✓
Meat Inspector	13% deficit				✓	✓	✓	✓
Meat Packer	12% deficit	✓		✓	✓		✓	✓
Metal Fabricator	8% deficit		✓	✓			✓	✓
Electrician (General)	8% deficit		✓	✓			✓	✓
Fitter (General)	6% deficit		✓	✓			✓	✓
Meat Process Worker	2% surplus	✓		✓	✓		✓	✓
Slaughterer	12% surplus			✓	✓	✓	✓	✓

Note: Dark green indicates a priority strategy for the occupation and light green indicates a supporting strategy.

Reducing workforce turnover is central to this task. Net occupational movements are projected to reduce workforce supply by around 5,850 workers between 2027 and 2036, equivalent to around one-fifth of the industry's 2026 workforce. Nine of the 10 core occupations record a net loss. Some movement reflects progression between processing roles, but the scale of departures means substantial recruitment is required simply to replace existing workers. Changes to induction and training systems, clearer progression pathways and opportunities to develop within the business can help processors retain more of the skills and experience they build.

For many production roles, the main opportunity is to strengthen the pipeline of people entering processing rather than target workers from particular occupations or industries. Most specialist processing workers are already

employed within Meat Processing, while historical recruitment from adjacent occupations has been relatively limited. Entry-level workers instead come from a wide range of backgrounds and develop much of their processing capability after employment. School engagement, site visits, employment programs and community outreach can therefore help broaden awareness of the industry. Competitive entry-level pay and conditions also matter where processors compete with less physically demanding jobs offering similar wages.

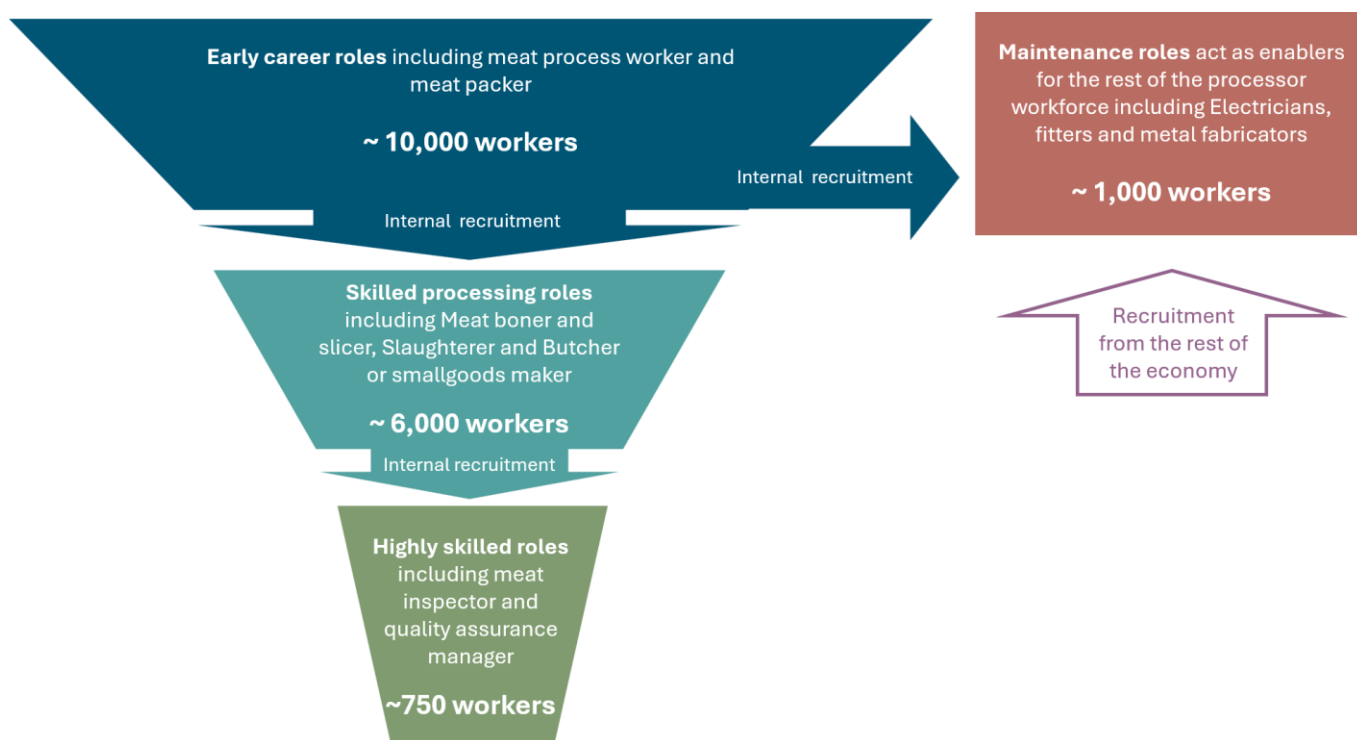


Figure 8. Illustrative career pathway within the red meat processing industry

Education and training are most valuable when connected to employment and career progression. Secondary school is the highest qualification held by many production workers, reflecting the importance of workplace-based skill development. Clearer pathways from entry-level work into specialist processing, quality assurance, supervision and trade roles can give workers a reason to remain as their skills develop. Linking these pathways to recognised qualifications, apprenticeships and other formal training can also demonstrate the employer's investment in the worker. More targeted recruitment and training remain important for enabling occupations such as electricians and fitters, where processors require existing qualifications and compete with other industries for workers.

Migration provides an important source of labour where workforce needs cannot be met through local or adjacent recruitment. Its longer-term contribution depends on maintaining continuity as well as bringing workers into the industry. Better preparation before workers travel, effective settlement support, staggered recruitment and earlier planning for return placements or sponsorship can help processors retain the value of skills developed during temporary placements. Migration is most effective when it complements local recruitment, workforce development and retention rather than operating as a separate response.

A more sustainable workforce approach would connect these strategies across the worker journey. Balancing immediate recruitment with stronger retention, skills development and a broader mix of workforce sources would reduce recurring replacement needs and give processors greater capacity to respond to changing production requirements and regional labour availability.

2.4 Hidden costs of the current workforce model

The current workforce model in the red meat processing industry creates costs for processors beyond the typical wages paid to employees. Worker support, migration processes, administrative workload and the requirement for continual recruitment due to high turnover add additional, relatively unique costs on top of what would be expected for most industries.

Table 3. Summary of cost impacts on key worker pathways in red meat processing

Non-wage cost	Local worker	PALM worker	Skilled visa holder	Working holiday maker
Recruitment	●	●	●	●
Onboarding and training	●	●	●	●
Housing	●	●	●	●
Compliance	●	●	●	●
Welfare support	●	●	●	●
Churn	●	●	●	●
Administrative workload	●	●	●	●

Note: Colours indicate the estimated cost impact, with green representing low, yellow moderate, and red high. The cost assessment also recognises that processors may be able to recoup some costs, subject to government guidelines.

High turnover generates repeated recruitment, induction and training costs, while the significant role of migrant workers creates visa and sponsorship expenses. All recruitment pathways create additional costs for processors under the current workforce model. However, PALM workers now represent around one-third of industry employment and require more complex and ongoing responsibilities across accommodation, transport, welfare and compliance. Supporting a substantial PALM workforce adds a wide variety of unique direct costs to processors, but also creates a substantial staffing and administrative workload. So, alongside the discussion of the impacts of churn and visa fees, we explicitly quantify direct PALM employment costs to better understand how this workforce model impacts processors.

Maintaining the PALM workforce requires continuing investment in accommodation, worker support and administration beyond the wages paid to employees. The estimated non-wage cost to a direct employer is around \$4,000 per worker per year after worker deductions, based on a completed four-year placement. Around four-fifths arises during employment, reflecting the ongoing resources required to support workers throughout their stay.

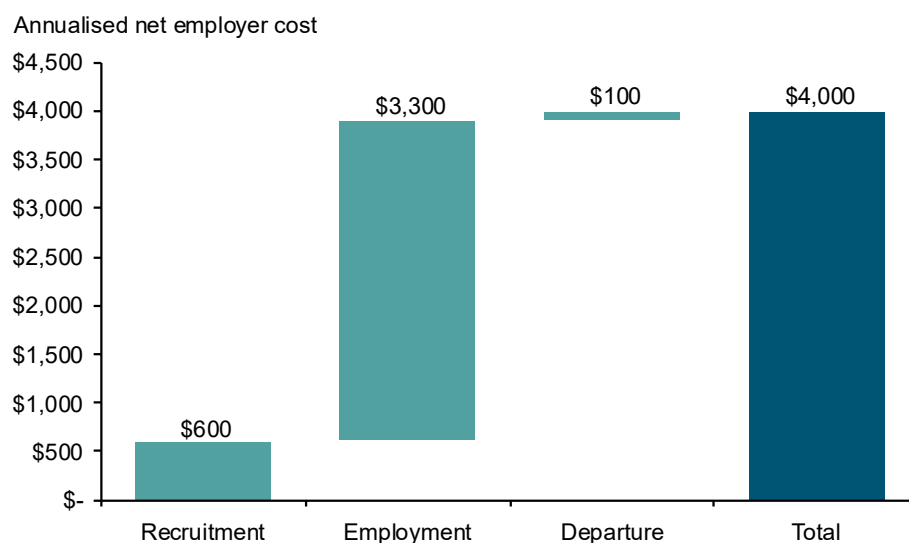


Figure 9. Annualised net employer cost per PALM worker by lifecycle stage

Note: Estimates represent a direct employer and exclude ordinary wages. Net costs are after allowing for assumed deductions from workers' pay for expenses such as visa application fees, transport and accommodation. Recruitment and departure costs are spread over four years for comparison and are not incurred evenly each year.

Dedicated welfare staffing accounts for the largest component of this commitment. However, processors also devote management and administrative time to recruitment, accommodation, worker deductions and compliance, while supervisors deliver induction and training.

Worker deductions reduce the final employer cost but leave processors funding and managing larger gross payments. Accommodation may need to be secured before arrival dates are certain, with consultation participants reporting rent paid for two to three months before occupancy. Businesses also reported subsidising expenses that were not fully covered by worker deductions. Labour hire can transfer some recruitment, support and funding responsibilities to a provider, with these services reflected in its charges.

Labour hire reduces the need to build recruitment and support capacity internally, but adds a continuing charge. Reported premiums of around \$3.50-\$4.00 per hour imply approximately \$6,300-\$7,300 per worker annually, based on 38 hours a week over 48 weeks. These charges can cover recruitment, welfare and some financial risks otherwise borne by the processor. They are not directly comparable with the direct-employment estimate because the services and employment arrangements differ.

High turnover creates a continuing administrative and training workload across local employees and other migrant workers. Processors described recruiting continuously just to sustain production capacity, leaving less room to develop a more sustainable workforce pipeline. Consultation suggested that direct productivity losses while workers learn entry-level tasks were generally a limited concern. The clearer costs arise from repeated recruitment, induction and supervision, while losing experienced workers reduces flexibility and can leave production-critical skills difficult to replace.

Other migration pathways involve different costs and recruitment constraints. Skilled sponsorship requires higher upfront expenditure, with consultation indicating costs of around \$10,000 for a subclass 482 application and initial support. Processors valued the workforce stability this could provide, but reported waits exceeding 12 months for some overseas recruits.

3.0 Introduction

Access to a sufficient and suitably skilled workforce remains a significant challenge for the Australian red meat processing industry. Processing businesses require workers across production, trade, technical and management occupations in regional locations where the available labour pool is more constrained. The Australian Meat Industry Council continues to identify access to labour as an important constraint on processing capacity, alongside the need to attract local workers and maintain suitable migration pathways (AMIC 2026b).

These pressures are reinforced by the characteristics of regional labour markets. Jobs and Skills Australia found that regional employers generally receive fewer applicants and fewer qualified applicants per vacancy than employers in capital cities and experience greater difficulty filling roles. The food supply chain is particularly exposed to these conditions, with a substantial share of its workforce located outside major cities, where housing, transport, access to services and the size of local labour markets can further constrain the ability of employers to attract and retain workers (Jobs and Skills Australia 2025).

Recent AMPC research identifies similar challenges within meat processing. Industry image, working conditions, career development, geographic location and workplace culture have all been identified as factors shaping attraction and retention (Brakenridge, Brough and Troth 2025), affecting the industry's capacity both to recruit new workers and retain its existing workforce.

A 2018 survey by the Australian Meat Industry Council estimated that an additional 3,784 workers were required across the industry, equivalent to around 21% of the workforce at the time. Around 62% of processors also reported operating below 90% of volume capacity because of labour shortages (Hoban, White and Yu 2022).

This report builds on this evidence by examining:

1. How workforce pressures may evolve through to 2036
2. Strategies available to mitigate these workforce pressures
3. The contribution of migration and the industry's exposure to changes in migration and PALM settings
4. The costs associated with the industry's current workforce model.

Workforce modelling provides a clearer view of where shortages are likely to emerge and how much time processors have to respond. Changes in production shape staffing needs, while retirements, migration and the flow of new entrants determine whether enough workers will be available. Understanding how these pressures intersect across the industry and its 10 core occupations helps processors anticipate recruitment and training needs before shortages constrain operations.

The appropriate response to shortages depends on what is driving the shortage. Training can expand the pool of qualified workers, but its contribution will be limited if those workers leave the industry. Better retention can preserve experience, while recruitment from other industries can bring transferable skills into processing. Understanding where these options are most practical helps industry direct resources towards measures that can sustain workforce availability.

Migration plays a central role in the industry, particularly for specialist processing roles where local recruitment is difficult. Conventional migration pathways provide a broader pool of workers, while the PALM scheme supports recruitment directly into eligible roles. However, ongoing reliance on these pathways also exposes processors to changes in migration settings and the recurring need to replace temporary workers. Understanding that exposure supports business planning and gives industry a clearer basis for engagement with government on workforce access.

Sustaining the workforce requires expenditure and staff time beyond the wages paid to employees. PALM employment involves accommodation, transport and welfare responsibilities, while repeated recruitment creates administrative and training costs across the broader workforce. The report estimates non-wage costs for direct PALM employment and examines labour hire and other migration pathways. These findings help explain the resources required to maintain staffing and the costs and risks associated with different recruitment arrangements.

These decisions will shape the industry's capacity to maintain production and support future growth. A clearer understanding of workforce needs, practical responses, migration reliance and associated costs gives processors and industry bodies a stronger basis for investment and policy decisions.

4.0 Project objectives

This project provides AMPC and red meat processors with an industry-specific evidence base to support workforce planning, investment decisions and engagement with government on migration, skills and training policy.

The project has four objectives:

1. **Workforce supply and demand:** Identify the timing and scale of potential workforce shortages through to 2036 across the industry and its core occupations.
2. **Workforce pressure mitigation:** Assess how migration, retention, education and training, and recruitment from other labour pools can address workforce pressures.
3. **Migration and PALM pathways:** Examine the industry's reliance on migrant labour and how changes in migration policy and program settings could affect workforce availability.
4. **Hidden workforce costs:** Assess the broader costs and operational implications of the industry's current workforce model, including the recurring costs of recruiting, training and supporting workers.

The analysis covers the Meat Processing industry under the Australian and New Zealand Standard Industrial Classification (ANZSIC) 1111, adjusted to exclude pork processing in line with AMPC's industry scope. Workforce projections are presented for the industry overall and the 10 core occupations selected for detailed analysis.

5.0 Methodology

This project combines quantitative modelling, desktop research, data and policy analysis, and industry consultation to assess workforce pressures in the Australian red meat processing industry.

5.1 Workforce supply and demand projections

This section outlines the quantitative modelling framework and detailed demand and supply projection methodologies used to estimate future workforce requirements, availability and the resulting workforce gap.

5.1.1 Modelling framework

This modelling framework assesses how workforce demand and supply in the Australian red meat processing industry are expected to change through to 2036 (all years are financial years unless otherwise stated), and the extent to which available workforce is likely to meet future industry requirements.

The modelling is conducted at a detailed occupation-industry level, crossing six-digit Australian and New Zealand Standard Classification of Occupations (ANZSCO) occupations with four-digit Australian and New Zealand Standard Industrial Classification (ANZSIC) industries. The workforce is also segmented into five-year age groups to capture age-related differences in workforce flows over time.

The analysis covers the Meat Processing industry under ANZSIC 1111, with an adjustment to exclude pork-related employment, and 10 core occupations listed in Table 4. Each occupation is identified by its six-digit ANZSCO code and classified as either an enabling occupation or a specialist occupation based on its role and concentration within the red meat processing industry.

Table 4. Core occupations analysed within Meat Processing (ANZSIC 1111), excluding pork processing

Core Occupation	ANZSCO	Enabling/Specialist
Meat Process Worker	831311	Specialist
Meat Packer	832114	Specialist
Meat Boner and Slicer	831211	Specialist
Slaughterer	831212	Specialist
Butcher or Smallgoods Maker	351211	Specialist
Meat Inspector	311312	Specialist
Quality Assurance Manager	139914	Enabling
Electrician (General)	341111	Enabling
Fitter (General)	323211	Enabling
Metal Fabricator	322311	Enabling

Demand and supply are modelled independently. Workforce demand reflects expected production and employment requirements. Workforce supply assumes historical trends continue under current policy settings, despite changes in

the demand outlook. This allows the analysis to identify whether gaps emerge under current workforce arrangements and inform targeted changes to education, recruitment, retention and migration programs.

5.1.2 Workforce demand

The historical workforce is built from Australian Bureau of Statistics (ABS) and Census data, adjusted to reflect the industry scope represented by AMPC, and then projected through to 2036 using Oxford Economics' employment forecasts, refined with industry-specific information on expected red meat production.

Defining the red meat processing industry

The historical workforce estimates draw on three complementary ABS datasets to achieve the required level of industry and occupation detail. Official occupation employment estimates come from the ABS Labour Force Survey, Detailed (ABS 2026b), which provides employment at the four-digit ANZSCO level, while official industry employment estimates come from ABS Australian Industry, at the four-digit ANZSIC level (ABS 2026c). The 2021 Census supplies the detailed occupation-industry cross-section, along with the information needed to allocate employment from four-digit to six-digit ANZSCO occupations (ABS 2021).

This Census cross-section is scaled to align with the official occupation and industry employment estimates, producing a consistent historical workforce time series at the intersection of four-digit ANZSIC industries and six-digit ANZSCO occupations.

The starting industry definition is Meat Processing (ANZSIC 1111), which includes activities beyond AMPC's scope, most notably pork processing. The workforce estimates are therefore adjusted to better reflect the red meat processing industry as represented by AMPC.

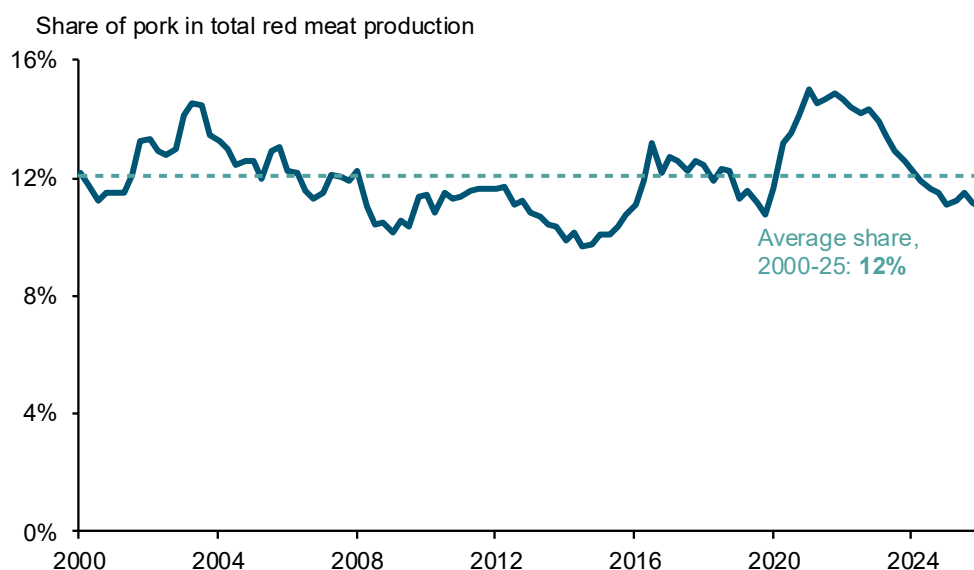


Figure 10. Pork's share of red meat production volume, Australia, 2000-2025

This adjustment draws on ABS Livestock Products data (ABS 2026d). Between 2000 and 2025, pig production accounted for approximately 12% of total red meat production (beef, veal, mutton, lamb and pig meat combined), as shown in Figure 10. While this share has fluctuated cyclically, it has remained relatively stable over the historical period and is used to estimate and remove the pork-processing component from employment in ANZSIC 1111.

An earlier AMPC study estimated 39,561 full-time equivalent workers in red meat processing in 2023–24 (NIEIR 2025), compared with approximately 30,760 workers estimated in 2026 in this study. The difference primarily reflects

different data sources and estimation methods. The earlier study estimated meat processing employment by applying Census employment shares to broader Food Product Manufacturing industry estimates, supported by regional economic modelling and processing data. In contrast, this study uses ABS employment data for the Meat Processing industry directly. These methodological differences mean the estimates are not directly comparable and should not be interpreted as a decline in industry employment.

The workforce demand outlook builds on Oxford Economics' in-house employment forecasts, using the Manufacturing division (ANZSIC Division C) as the underlying employment trajectory. This provides the broader economic and employment context for the red meat processing forecast.

This baseline is then supplemented with industry-specific information on expected cattle and red meat production. Forecasts from organisations such as MLA and ABARES are considered alongside the historical relationship between red meat production and employment, allowing the forecast to be adjusted where industry-specific production trends suggest a different workforce trajectory from the broader manufacturing outlook (MLA 2026; ABARES 2026).

The resulting forecast provides an estimate of workforce demand for the red meat processing industry as a whole, with occupation-specific employment trends and the detailed workforce structure used to develop projections for each of the 10 core occupations through to 2036.

Assumptions and limitations

The demand estimates depend on a number of underlying assumptions and are subject to some data limitations. The detailed industry occupation structure relies on the 2021 Census and assumes that this structure remains a suitable basis for estimating employment in the years beyond the Census itself. Where the relationship between occupations and industries shifts over time, for instance through automation or changes in processing practices, the historical structure may become a less precise guide to current employment patterns.

The adjustment for pork processing relies on the assumption that the historical production share offers a reasonable basis for estimating the corresponding workforce share. This approach assumes that production and employment move in reasonably consistent proportion within ANZSIC 1111.

The forecast also relies on the historical relationship between employment and production continuing in a broadly similar way over the forecast period. Changes in productivity beyond the continuation of current productivity trends or structural changes in technology and operating practices may cause employment and production to move at different rates over time, so a given change in production may not always translate directly into a proportional change in employment. For this reason, the production outlook is used to help inform and refine the employment forecast, rather than to serve as a direct, one-for-one determinant of future workforce requirements.

5.1.3 Workforce supply

The workforce supply model projects how the workforce available to the red meat processing industry is expected to change through to 2036. Starting from the existing workforce, natural attrition reduces supply through retirement and mortality, education adds new entrants to the workforce, and migration and job movements can either add to or reduce supply depending on the balance between inflows and outflows.

The modelling is designed to capture new additions to the workforce while avoiding double counting across these supply pathways. In education, for example, only people entering the workforce for the first time, following school, Vocational Education and Training (VET) or higher education, are counted as new entrants. Existing workers who undertake further study are not treated as an additional source of supply. Where that study supports a move into another occupation, the resulting change is instead captured through job movements. A similar principle applies to migration, where the focus falls on offshore applicants rather than those already onshore, since onshore applicants

are typically already working in Australia and may simply be shifting between visa categories rather than adding new workers to the labour market.

Supply components

Natural attrition

Natural attrition captures changes in the existing workforce as workers age and leave employment through retirement or mortality. These processes are estimated separately by age group, allowing the workforce age profile to evolve over the forecast period. As workers move from one age group to the next, the originating cohort declines by the same amount that the receiving cohort increases.

Retirement rates are drawn from ABS Retirement and Retirement Intentions, Australia and applied across age groups, reflecting the increasing likelihood of retirement among older workers (ABS 2025a). Mortality is estimated in a similar way, using age-specific rates from ABS Deaths, Australia (ABS 2025b).

Migration

Migration captures workforce changes associated with people arriving in and departing from Australia. The analysis distinguishes between skilled overseas arrivals, workers entering through the PALM scheme, Australian citizen arrivals and overseas departures.

Skilled overseas arrivals are estimated separately for permanent and temporary primary visa holders. Permanent migration focuses on offshore primary applicants, so that the estimates reflect workers entering the Australian labour market rather than applicants already onshore (Department of Home Affairs 2025). Forecast arrivals draw on the historical relationship between offshore primary applicants and Migration Program planning levels, applied to assumed future planning levels. Temporary skilled migration is estimated across age groups and broad occupation categories before being allocated to the detailed occupations and industries relevant to red meat processing.

PALM workforce flows are estimated separately using Department of Employment and Workplace Relations data, reflecting the scheme's distinct contribution to workforce supply in the industry (DEWR 2026a). A historical worker stock series is constructed from 2016 to 2026, incorporating the Seasonal Worker Programme and Pacific Labour Scheme before their consolidation into PALM in 2022. Meat-processing-specific data are available from 2022 onwards. For earlier years, the average meat processing share observed between 2022 and 2026 is applied to the combined stock under the predecessor schemes. Annual net additions are then derived from changes in the estimated worker stock.

Historical departures are approximated using the estimated PALM workforce four years earlier, with arrivals derived from the change in workforce stock and estimated departures. For the forecast period, departures are estimated from arrivals over the preceding four years using an assumed profile of worker durations. Forecast PALM workforce growth is informed by desktop research and assessment of the likely future trajectory of the scheme based on current trends.

PALM recruitment responds to employer demand and requires evidence that advertised positions cannot be filled by local workers (Australian Government 2026a). The projections assume continued recruitment and growth in the PALM workforce based on current trends. They do not automatically increase or reduce PALM recruitment to close the modelled workforce gaps. This approach identifies how recruitment, retention or other workforce practices would need to change beyond the assumed trends to meet future demand.

Announced changes to Working Holiday Maker visas will limit the number of workers able to extend their stay in Australia. Second-year places will be capped at 45,000 and third-year places at 5,000, compared with approximately 57,000 and 31,000 workers respectively qualifying in 2025-26 (Australian Government 2026b). The projections

reflect these limits through higher departures over the next two years, allowing for a gradual adjustment as fewer workers extend their stay.

Grants under the Meat Industry Labour Agreement (MILA) are estimated separately because Skilled Meat Workers are no longer reported separately in the available data. Temporary grants recorded under “070499 Specified in LA” within Manufacturing are used as a proxy for MILA grants. For permanent grants, where industry information is unavailable, MILA’s share of this broader category is estimated from historical grants recorded under Skilled Meat Worker (Department of Home Affairs 2026a).

Returning Australian citizens are estimated using Oxford Economics’ in-house migration projections and the expected proportion entering relevant occupations and industries. Other overseas departures are treated as a corresponding outflow, allocated based on the census industry-occupation stock to estimate the number of workers leaving the industry through international migration.

Education

Education captures people entering the workforce for the first time through VET, higher education and school leaver pathways. Each pathway is modelled from enrolment through to completion and subsequent entry into a relevant occupation and industry.

Future enrolments are estimated by applying participation patterns to Oxford Economics’ population forecasts, differentiated by age, field and level of education and, where relevant, by state. A pre-pandemic reference period is used to avoid temporary disruptions to education participation associated with COVID-19.

Forecast completions are then derived from enrolments using observed completion patterns. VET enrolments and completions are treated within the same year, given the generally shorter duration of these courses, while higher education completions are staged over time to reflect differences in course length (NCVER 2025; Department of Education 2025). School leaver completions are estimated using attainment rates published by the Australian Curriculum, Assessment and Reporting Authority (ACARA 2026).

The final stage estimates how many completers enter the workforce for the first time and subsequently work in red meat processing. Census data are used to estimate these entry patterns at the occupation and industry level, drawing on the relationship between field of education, age and subsequent employment. Workers undertaking further education while already in the workforce are excluded, consistent with the focus on new workforce entrants.

Occupation mobility

Job movements capture workforce changes arising from workers moving between occupations. The estimates are based on national occupation-level mobility patterns and account for both workers leaving an occupation and workers entering from elsewhere in the labour market (Jobs and Skills Australia 2024).

The movements reflect the observed propensity for workers to leave an occupation and the extent to which each occupation gains workers through movements from other occupations. Combining these inflows and outflows provides the net contribution of occupational mobility to workforce supply.

The source data is available at the four-digit ANZSCO level. Census data are used to allocate these movements to six-digit occupations before they are incorporated into the detailed workforce model.

Assumptions and limitations

The workforce supply projections rely on historical relationships and observed behaviour remaining broadly representative over the forecast period. Natural attrition assumes that age-specific retirement and mortality patterns remain broadly stable, while education and job-movement estimates use pre-pandemic enrolment, completion and

occupational mobility patterns as the basis for future projections. PALM estimates also rely on assumptions about the industry's historical share of the scheme and the timing of worker departures. Changes in workforce behaviour, participation or labour market conditions could therefore affect the realised supply outlook.

Future policy and institutional settings also introduce uncertainty. Migration outcomes are particularly sensitive to changes in visa policy, Migration Program planning levels and the composition of offshore arrivals. The modelling applies current settings to estimate future inflows, but these may change over the forecast period. Education pathways may similarly be affected by changes in enrolment patterns, training policy or the propensity of graduates and school leavers to enter the industry.

The model is designed to estimate workforce supply at a detailed occupation-industry level, but not all source data are available at this level. Some inputs therefore require allocation from broader occupation or industry classifications using Census and other observed workforce relationships. This is most evident for job movements, where the underlying data capture occupational mobility at the national level but do not identify the industries from which workers leave or subsequently enter. As a result, some components should be interpreted as estimates of likely workforce flows rather than direct observations of movements into and out of red meat processing.

5.2 Migration pathway analysis

The migration analysis examines how migrant workers contribute to red meat processing and how changes in recruitment could affect future workforce supply. It combines Census employment data, visa grant statistics and PALM administrative data with a review of migration settings and industry consultation. The analysis covers the industry overall and the 10 core occupations.

5.2.1 Migrant workforce composition and pathways

Census-based employment data are used to estimate the contribution of temporary and permanent migrants to meat processing (ABS 2021). The analysis compares the industry with the broader Australian workforce and examines differences across the core occupations. Results primarily describe the workforce in 2021, with 2016 providing a historical comparison.

The analysis also examines permanent migrants who first entered Australia on temporary visas. Their initial visa categories provide evidence of the pathways through which temporary migration has contributed to the longer-term workforce.

Industry-level findings are distinguished from occupation-level comparisons covering employment across all industries. This is particularly relevant for enabling occupations, whose workers can be employed in many sectors.

5.2.2 Visa grants into core occupations

Department of Home Affairs visa grant data are used to examine skilled recruitment into the core occupations between 2018 and 2025. Temporary and permanent grants are analysed separately and compared with national totals to identify changes in the occupations' share of skilled migration (Department of Home Affairs 2025, ABS 2026e).

Grants associated with the MILA require estimation because Skilled Meat Workers are no longer reported separately in the data used. Temporary grants recorded under "070499 Specified in LA (Labour Agreement)" within Manufacturing are used as a proxy for grants under the agreement. For permanent grants, where industry is unavailable, the agreement's share of this broader category is estimated using historical grants recorded under Skilled Meat Worker (Department of Home Affairs 2026a).

5.2.3 PALM workforce

PALM administrative data is used to examine the PALM workforce (DEWR 2026a). The historical series incorporates the Seasonal Worker Programme and Pacific Labour Scheme before their consolidation into PALM. The construction of this series and its use in the workforce projections are described in [section 5.1.3](#).

Published meat processing totals are distinguished from estimates excluding pork processing. Employer-type shares and sending-country approvals cover the scheme nationally and are used to describe wider recruitment arrangements.

5.2.4 Policy assessment and sensitivity analysis

The policy assessment examines occupation eligibility, labour agreement access and changes to PALM settings. Four scenarios test the workforce outlook under PALM discontinuation, restriction to direct employers, doubled annual inflows and no net workforce growth. Changes are applied to PALM supply within Oxford Economics' supply model while retaining the other workforce assumptions.

Existing workers progressively depart under the discontinuation scenario, while the expansion scenario incorporates subsequent departures associated with the larger intake. The direct-employment scenario applies the national labour hire employment share of 69% and assumes no additional recruitment by direct employers to replace those workers. The expansion scenario retains the modelled allocation of PALM workers across occupations. Results are compared with the Baseline Scenario through to 2036.

5.3 Workforce pressure mitigation strategies

The mitigation analysis builds on the workforce projections to assess how processors could strengthen supply by retaining and progressing existing workers, recruiting from related occupations and industries, strengthening education and training pathways, and improving continuity through migration. Quantitative evidence, previous research and industry consultation were used to identify where each approach is most relevant and what may constrain its contribution. The analysis does not estimate the number of workers each measure could add or retain, and the potential effects were not incorporated into the baseline projections.

5.3.1 Mitigation assessment framework

The assessment first considered why workforce gaps emerge for the industry and each core occupation. Projected gaps were examined alongside the underlying supply movements to distinguish pressures arising from worker departures, limited new entrants, reliance on migration or rising demand. Understanding the source of the pressure was important because an occupation losing experienced workers requires a different response from one constrained by qualification requirements or a small external labour pool.

The relevance of each pathway was then assessed using the size and location of potential labour pools, the transferability of workers' skills and experience, qualification and training requirements, historical worker movements and practical barriers such as regional labour availability and competition from other industries. Because the pathways operate in different ways and draw on different evidence, they were not assigned a common score or ranking. The analysis instead assessed the role each could play, its limitations and the conditions affecting its use. Connections between the pathways were also considered, since recruitment outcomes depend on how workers are prepared, developed and retained.

5.3.2 Evidence used to assess mitigation options

The workforce modelling identified gaps and the contributions from migration, education, natural attrition and job movement. Jobs and Skills Australia occupation mobility data were then used to examine historical movements into and out of the core occupations (Jobs and Skills Australia 2024). The 2021 Census showed how these occupations are distributed across industries and provided information on workforce size, age, income, regional location and qualification profiles (ABS 2021). Occupation requirements and information on vocational, higher education and apprenticeship pathways provided context on the training needed to enter or progress into different roles.

Previous AMPC research provided further evidence on employee development, workplace leadership, advancement and other factors affecting retention. Migration pathways were assessed using evidence on workforce composition, visa eligibility, program arrangements and consultation with processors who have experience recruiting and supporting migrant workers (Department of Home Affairs 2026a, Department of Home Affairs 2026b).

These indicators show the potential reach of a pathway rather than the number of workers who would be available or willing to enter red meat processing. Historical occupation mobility data are national, largely reflect pre-pandemic movements and occupation based. Census analysis based on ANZSIC 1111 also includes pork processing where available data does not allow it to be separated. These limitations were reflected in the interpretation of the findings.

5.3.3 Industry consultation

Industry consultation added practical evidence on how the identified pathways operate across processing businesses. Semi-structured consultation was conducted during September 2026 with five red meat processing businesses, a workforce service provider and the Australian Meat Industry Council. Participants represented different locations, business sizes and workforce arrangements.

The discussions focused on current workforce pressures, recruitment sources, reasons workers leave or remain, training and progression practices, recruitment from other occupations and industries, and migrant workforce arrangements. These insights were used to test the patterns identified through the analysis and understand the practical barriers affecting each pathway. They also helped distinguish actions available to processors from those requiring wider industry or government involvement. The consultation findings provide examples and industry perspectives rather than representative estimates of how widely each practice is used or how many workers it could attract or retain.

5.4 Hidden costs of the current workforce model

The cost analysis assessed the resources required to recruit, train and support workers beyond their wages. It combined consultation findings, published cost information and employer requirements to quantify costs associated with direct PALM employment. Consultation also informed the assessment of labour hire, other migration pathways and the broader costs of repeated workforce replacement.

5.4.1 Scope of the PALM cost estimate

The PALM cost estimate represents one PALM worker completing a four-year placement with a direct employer. This provided a common basis for assessing initial expenditure alongside costs that continue throughout employment. A long-term placement reflects the predominant arrangement in meat processing, with 97% of the industry's PALM workers in the long-term stream as of December 2025 (DEWR 2026c).

The estimate includes direct expenditure and staff time devoted to recruitment, induction, additional supervision, administration and worker support. It excludes the PALM worker's wages and associated payroll costs. Shared activities were converted to a per worker estimate.

Table 5. Cost groups included in the PALM worker lifecycle estimate

Lifecycle stage	Cost group	Cost components included
Recruitment	Recruitment and selection	Recruitment visits and worker selection
	Administration and approvals	Planning, labour market testing, applications, offers and bookings
	Visa and pre-departure checks	Visa application charge, medical checks and police checks
	Arrival travel and transfers	Arrival airfare and domestic transfers to the workplace or accommodation
	Pre-arrival accommodation and preparation	Rent before occupancy and staff time preparing accommodation
Employment	Induction and training delivery	Staff time delivering induction and refresher training, and training materials
	Additional on-the-job training and supervision	Extra training and supervisor time while workers become proficient
	Health and safety provision	Required workplace vaccinations, protective gear and uniforms
	Welfare and settlement support	Dedicated welfare staff, support from other staff, community activities and health insurance
	Administration and compliance	Compliance staff time and attributable monitoring systems
	Accommodation provision	Rent and utilities during occupancy
	Transport provision	Ongoing worker transport
	Incidents and exceptional support	Incident-related expenditure and additional staff response beyond routine welfare support
Departure	Departure travel and transfers	Return travel and associated transfers
	Departure administration and settlement	Staff time for departure briefing, account reconciliation and coordination
	Accommodation turnover	Cleaning, repairs and staff time preparing accommodation for the next occupants

The assessment focused on costs that could be supported by the available evidence. It did not separately quantify production losses, absenteeism cover or disruption following early departures. The estimate includes ongoing accommodation and transport expenditure, but excludes upfront capital investment in purchasing or constructing accommodation, vehicles and other supporting infrastructure. Initial costs of becoming an approved employer were also excluded. Some included expenses, such as induction and safety provision, apply to local employees as well, so the estimate does not measure the additional cost of PALM relative to domestic recruitment.

5.4.2 Input assumptions

The PALM scheme Approved Employer Guidelines identify employer responsibilities and expenses that may be covered through deductions from workers' pay (Australian Government 2026a). We then considered the resources processors described using to meet those responsibilities. Consultations highlighted recruitment expenditure, dedicated welfare staffing and rent paid on accommodation before workers arrived. Published research and cost information helped inform assumptions that could not be quantified during consultation.

Table 6. Key assumptions underpinning the net employer cost estimate

Assumption	Value	Unit	Source and rationale
Completed placement duration	4	years	Most PALM workers in meat processing are in the long-term stream (97%), assumed completed placement (DEWR 2026c)
Cost of additional staff time	65	dollars per hour	Jobs and Skills Australia Human Resource Professionals earnings used as a proxy, with assumed employer on-costs (Jobs and Skills Australia 2026b)
Recruitment administration	2	staff hours per worker	Assumed additional time for recruitment paperwork and coordination
Training period	8	weeks	Consultation indicates around two months to develop proficiency
Additional training and supervision	2	staff hours per worker each week	Assumed supervisor time beyond induction and ordinary supervision
Annual welfare staffing cost	108,000	dollars per full-time support person	Jobs and Skills Australia Welfare Support Workers earnings used as a proxy, with assumed employer on-costs (Jobs and Skills Australia 2026c)
Welfare staffing ratio	60	workers per support person	Assumed from consultation evidence of more intensive staffing than DEWR's 120-worker benchmark, section 9.6 (Australian Government 2026a)
Health and safety provision	239	dollars per worker annually	Annualised health screening and uniform costs (Dairy Australia 2026; Food Safety Solutions 2026)
Additional compliance administration	2	staff hours per worker annually	Assumed time outside dedicated welfare staffing
Assumed worker deductions			
Visa application and required medical and police checks	100%	of eligible costs	Full deduction assumed under DEWR Guidelines, Chapters 5 and 6 (Australian Government 2026a)
Airfares and transfers	100%	of eligible balance	Full deduction assumed after the \$300 employer contribution, subject to airfare limits under DEWR Guidelines, Chapters 5 and 7 (Australian Government 2026a)
Occupied rent	95%	of eligible costs	Assumed a 5% employer shortfall, informed by consultation and DEWR Guidelines, Chapters 5 and 10 (Australian Government 2026a)
Utilities	100%	of eligible costs	Full deduction assumed under DEWR Guidelines, Chapters 5 and 10 (Australian Government 2026a)
Local transport	100%	of eligible costs	Full deduction informed by consultation and DEWR Guidelines, Chapter 5 and section 10.11 (Australian Government 2026a)

Note: DEWR Guidelines refer to the PALM Scheme Approved Employer Guidelines, version 2.1. The proportions of eligible costs collected through worker deductions are modelling assumptions, subject to lawful deductions and worker agreement. Values are rounded for presentation.

Welfare staffing was costed using an annual welfare worker salary and assumes one support worker is employed per 60 workers. This reflects consultation evidence that processors commonly provide more intensive support than

the minimum PALM requirements, with reported ratios ranging from around one support worker per 40 PALM workers to one per 75. Other staff time was valued using an hourly earnings benchmark with an allowance for employer on-costs.

Costs were calculated according to when and how they arise. Recruitment expenditure for a cohort was divided by the number recruited in each cohort, while shared staffing and accommodation costs were allocated across the workers supported. Recurring expenses were accumulated over four years, with initial recruitment and departure costs included once. The total was then divided by four to express the result as an annual cost per worker.

Amounts collected through worker deductions were subtracted from gross costs to estimate the amount borne by the employer. The PALM Approved Employer Guidelines and travel matrix informed which expenses could be covered through deductions, while modelling assumptions determined the amounts expected to be collected (Australian Government 2026a; DEWR 2024). Permitted deductions and assumed collections were treated separately. A permitted maximum does not establish what an employer paid or collected. Actual collections may vary with employer practices, worker consent and the circumstances of the placement.

5.4.3 Training cost estimate

An illustrative calculation estimates the annual wage cost of initial training required to maintain a full-time position. Each new recruit was assumed to undertake two 7.5-hour training days, informed by consultation, valued at the FY2027 award rate of \$25.74 (Fair Work Ombudsman 2020). This cost was multiplied by the assumed annual number of replacements per position. A historical AMPC turnover benchmark of 35% was applied to local and temporary skilled workers, while completed four-year PALM placements implied a replacement rate of 25% (Mackenzie 2021).² An illustrative 88-day tenure for working holiday makers implied approximately 4.15 replacements annually for a continuously staffed position. The calculation excludes trainer time, payroll on-costs, recruitment administration and subsequent on-the-job training, and is presented separately from the PALM lifecycle estimate.

² Note: Other sources have recorded industry wide turnover at closer to 60% (Glass et al. 2022).

6.0 Results

6.1 Workforce supply and demand projections

The projections show how workforce demand and supply could develop through to 2036 under current trends. They include continued recruitment and growth in the PALM workforce, but do not automatically adjust recruitment to eliminate shortages or surpluses. The resulting gaps indicate where workforce practices would need to change to meet demand. Detailed occupation-level results are provided in the appendix.

6.1.1 Interpreting the workforce projections

A key assumption of the workforce supply analysis is that historical trends continue despite changes in the demand outlook. This includes continued recruitment through education and migration, alongside workers leaving through retirement, migration departures and occupational movements.

The results show whether current workforce arrangements are likely to meet future demand. Projected shortages indicate where additional recruitment, stronger retention or changes to training and migration programs may be needed. Where projected workforce supply exceeds demand, this indicates that recruitment pressures may ease rather than an absence of vacancies. Processors will still need to replace departing workers, while workforce pressures will vary between businesses, locations and occupations.

The projections provide a basis for planning these responses. Actual outcomes will depend on the actions taken by processors, industry and government.

6.1.2 Total red meat processing industry workforce outlook

Workforce pressures are projected to ease between 2027 and 2029 as processing demand slows. Workforce demand falls from approximately 30,760 workers in 2026 to 29,790 in 2028 as breeding animals are retained and fewer livestock are available for slaughter. Under current recruitment trends, the projected workforce temporarily exceeds industry requirements by around 390 workers in 2028 ([Figure 11](#)). In practice, this is likely to mean processors face less pressure to recruit additional workers, rather than an end to vacancies. High turnover will continue to require businesses to replace departing employees, while some processors may be able to slow recruitment as production requirements ease.

The recovery in processing demand brings a return to workforce deficits from 2030. The shortfall reaches approximately 1,270 workers in 2030, widening to 1,900 by 2036. Over the decade, demand increases by around 2,520 workers, while supply grows by just 620.

The supply outlook already includes continued recruitment and growth in the migrant workforce. Around 55,800 migrant arrivals are projected over the decade, largely replacing departing workers. These inflows support the temporary easing in workforce pressures but are insufficient to meet later demand growth. The projected gaps indicate where recruitment and retention would need to improve beyond current trends.

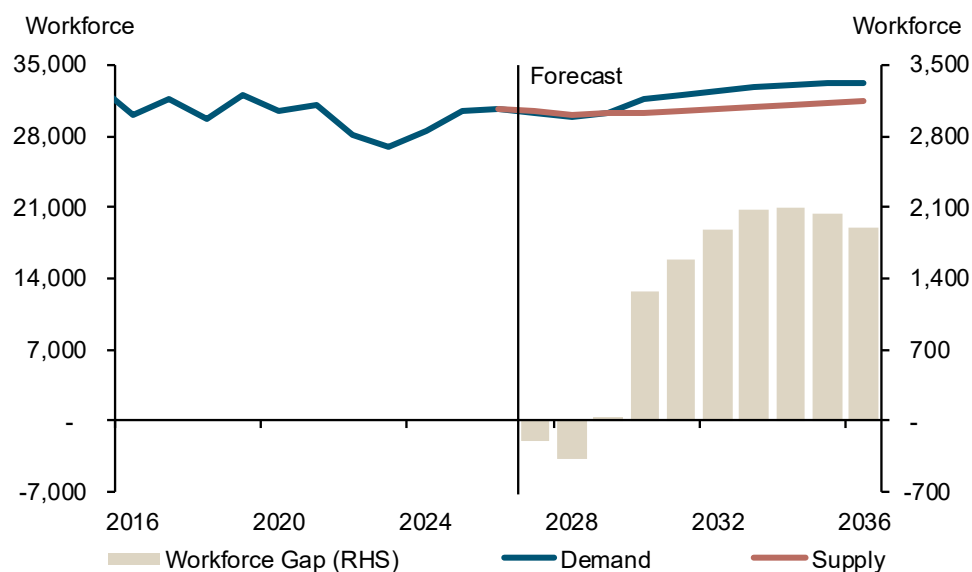


Figure 11. Workforce demand and supply in red meat processing, excluding pork processing, 2016-2036

The industry is projected to require around 8% more workers by 2036. Workforce demand rises from approximately 30,760 workers in 2026 to 33,280 in 2036, equivalent to average annual growth of 0.8%. This outlook combines Oxford Economics' manufacturing employment forecasts with industry-specific production forecasts from MLA and ABARES.

Workforce demand falls to approximately 29,800 workers in 2028, then rises by around 1,800 workers across 2029 and 2030. Growth peaks at 4.4% in 2030, the largest annual increase over the forecast period. This production recovery reflects the favourable seasonal conditions considered by ABARES, with carcass weights and global demand also influencing the outlook (Figure 12).

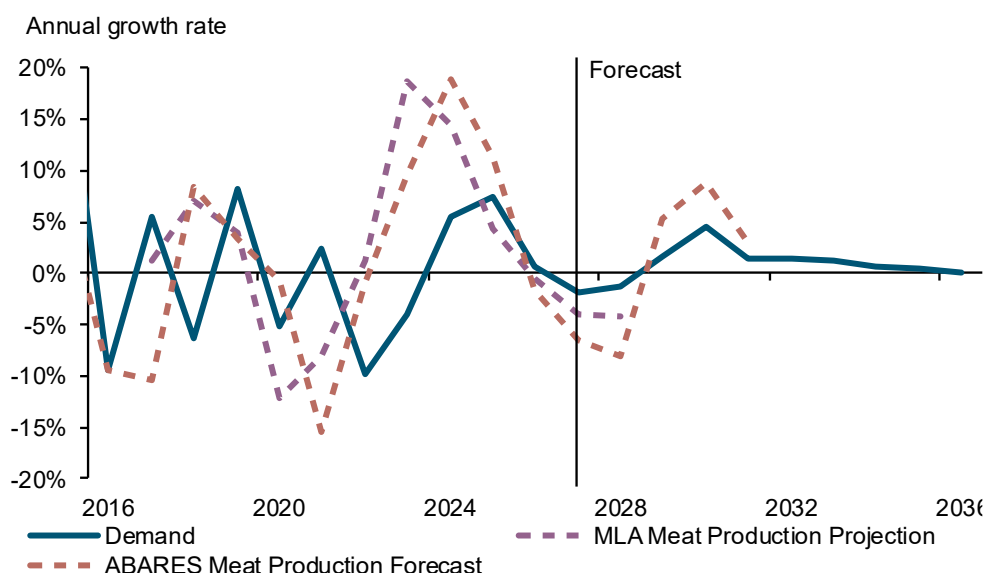


Figure 12. Annual growth in workforce demand and red meat production forecasts

Large numbers of workers are expected to enter the workforce over the coming decade, but a similarly large number are expected to leave through migration departures, job movements and natural attrition. Substantial gross

workforce inflows therefore translate into only modest net supply growth, leaving workforce supply increasingly below projected requirements from 2030 onwards.

Workforce supply is projected to increase from 30,760 workers in 2026 to 31,390 in 2036, a rise of 2.0% over the decade. Average annual growth of 0.2% is well below the 0.8% increase in demand.

Education provides the largest net addition to workforce supply, but much of its contribution is offset by retirement and other natural attrition. Around 9,540 workers enter through education between 2027 and 2036, with school leavers accounting for a substantial share. Natural attrition removes approximately 6,500 workers over the same period (Figure 13).

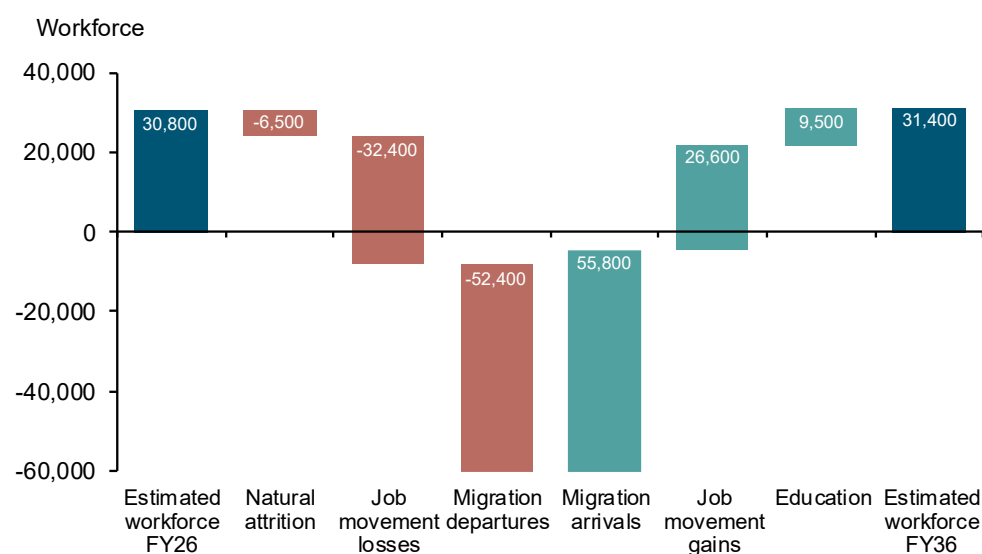


Figure 13. Cumulative workforce movements contributing to supply, 2027-2036

Migration supports workforce growth through a much larger cycle of arrivals and departures. Approximately 55,830 arrivals are projected over the decade alongside 52,390 departures, leaving a net addition of around 3,440 workers. PALM accounts for the largest component of these flows. PALM placements can range from 9 months for short-term workers to up to four years for long-term workers, meaning continued recruitment is required as earlier cohorts depart. Maintaining the current scale of the migration workforce depends on a sustained flow of new arrivals and implies a high level of ongoing worker replacement, with associated operational and logistical considerations for the industry.

Net occupational movements remove more workers than net migration adds, increasing the administrative and training workload associated with significant workforce churn. Around 32,400 workers are projected to leave occupations relevant to red meat processing, compared with 26,600 entering from other occupations. The resulting loss of approximately 5,800 workers, together with natural attrition, offsets most of the additions from education and migration.

6.1.3 Core occupation outlook

Workforce shortages extend across both specialist processing roles and enabling occupations. Eight of the 10 core occupations face deficits by 2036, with a combined net shortfall of approximately 1,550 workers, equivalent to 8.0% of demand compared with 5.7% for the industry overall. Their combined supply remains broadly unchanged from 2026, while demand increases by 7.5%. Shortages begin emerging in 2027 for meat inspector and meat packer, ahead of the industry-wide deficit in 2030.

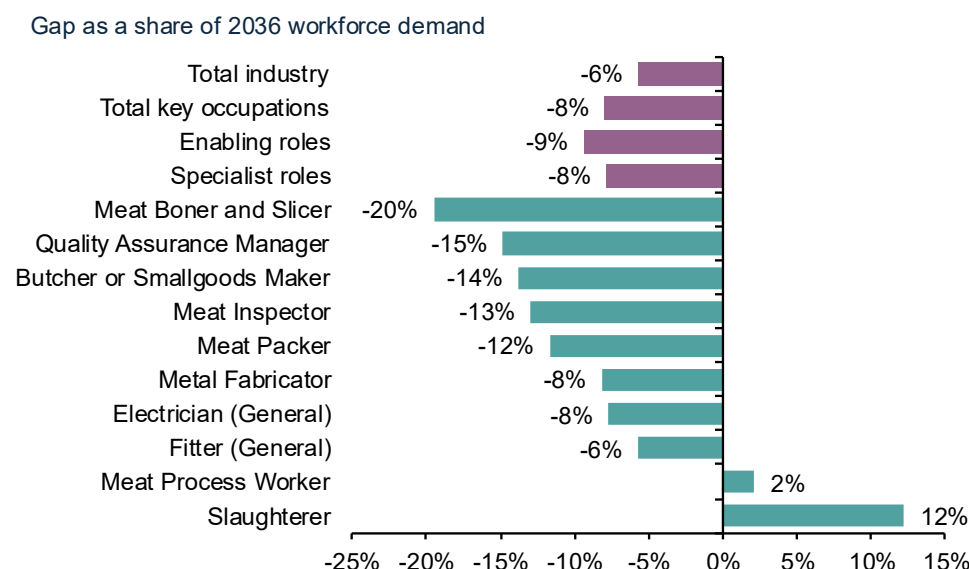


Figure 14. Projected workforce gaps for core occupations within Meat Processing (ANZSIC 1111), excluding pork processing, 2036

Specialist occupations account for the largest numerical shortages, concentrated in meat boners and slicers and meat packers. Their projected deficits reach approximately 730 and 680 workers respectively in 2036, together equivalent to around three-quarters of the industry-wide net shortfall. Meat boners and slicers also face the largest proportional deficit among the core occupations, at 19.5% of demand. Shortfalls for quality assurance managers and butchers or smallgoods makers reach 14.8% and 13.8% respectively.

Declining supply and growing demand contribute differently. For meat boners and slicers, supply falls by 15.3% over the decade while demand increases by 5.3%. Meat packers face stronger demand growth of 10.5%, alongside a smaller supply decline of 2.5%. Workers changing occupations are the largest net loss from supply for both roles.

Migration supports a more favourable outlook for slaughterers and meat process workers. These are the only core occupations with projected surpluses, reaching approximately 150 and 110 workers respectively in 2036. Cumulative net migration, supported particularly by PALM, is equivalent to around 40% of each occupation's 2026 workforce. These outcomes depend on the continued migration recruitment incorporated in the projections.

Shortages are more consistent across enabling occupations, with all four projected to be in deficit by 2036. Shortfalls range from 5.7% of demand for fitters to 14.8% for quality assurance managers, with electricians and metal fabricators also facing insufficient supply. Although smaller in number than the largest specialist shortages, these deficits affect the trade and management roles that support processing operations.

Replacing retiring workers is a particularly significant requirement for some enabling occupations. Natural attrition over the decade is equivalent to 31.4% of the 2026 workforce for fitters and 27.1% for quality assurance managers, compared with around 15-16% for meat packers, slaughterers and meat process workers. For fitters, these losses almost entirely absorb projected additions from education, leaving little contribution towards workforce growth.

Annual demand, supply and workforce-gap projections for all 10 core occupations are provided in the appendix.

6.2 Migration pathway analysis

The purpose of migration in Australia is to build the economy, shape society, support the labour market and reunite families. There are three ways for migrants to enter Australia - on a permanent visa, on a temporary visa or as a New Zealand (NZ) citizen.

A permanent visa lets a migrant become a permanent resident of Australia and allows them to remain in Australia indefinitely. This stream aims to supplement the cohort of working-age people, boost participation rates and increase the size of the labour force.

A temporary visa lets a migrant come to Australia to work or study on a temporary basis. There may be conditions on the visa that limit the type or amount of work or study. Temporary migration is used to respond to key workforce and skill shortages that are difficult to fill domestically in a short time frame. These visas are demand driven with key government policy focusing on setting priority occupations for which applications are prioritised and eligibility criteria to ensure a minimum threshold for the applicants' skills and the nature of work or study in Australia.

Two pathways are particularly important to red meat processing. The PALM scheme provides temporary workers from Pacific countries and Timor-Leste and is particularly important for production roles that do not require a formal skilled occupation pathway (DEWR 2026a). The MILA operates within the skilled migration system and allows employers to sponsor workers in specified meat processing occupations that are not fully covered by mainstream skilled visa settings (Department of Home Affairs 2026a).

Visas can be granted to applicants that are offshore (located in other countries) or onshore (already located in Australia). Those already in Australia (onshore) may already be working and so this grant would not further add to the size of the workforce. However, these visa grants act as a key transition pathway to a permanent visa. Many migrants who first come in on a temporary visa eventually transition to a permanent visa over time. These pathways are vital to support retention.

6.2.1 Migrant workers' contribution to the red meat processing industry

Meat processing relies on migrant workers for a substantially larger share of its workforce than the broader economy. Across specialist and enabling occupations combined, migrants accounted for 43% of employment in 2021, compared with 22% across the Australian workforce. Within meat processing, temporary migrants made up 24% of employment and permanent migrants 19%.³ The overall migrant share had risen from 37% in 2016, reflecting increases in both temporary and permanent migrant employment.

³ New Zealand Citizens (subclass 444) are included in this statistic as temporary

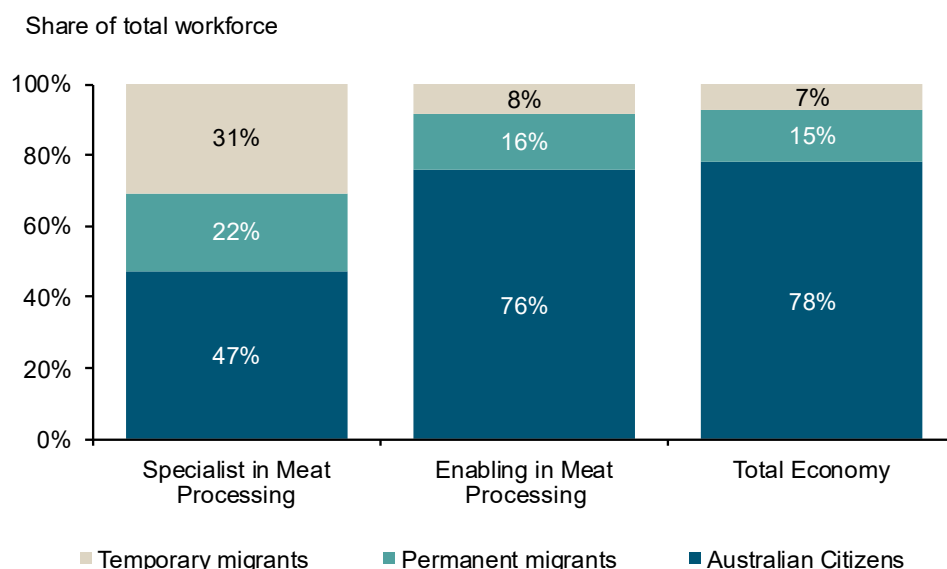


Figure 15. Visa status of the workforce, 2021 census

Migrant workers are particularly important in specialist processing occupations, supporting several of the industry's largest production roles. Across the six specialist roles examined – Meat inspector, slaughterer, butcher or smallgoods maker, meat process worker, meat boner and slicer and meat packer – migrants accounted for 53% of workers employed in meat processing, with temporary migrants making up almost 60% of that group. Migrants represented around two-thirds of meat packers and meat boners and slicers, alongside 57% of meat process workers and 56% of butchers or smallgoods makers.

Enabling occupations – Electrician, fitter, quality assurance manager and metal fabricators – draw more heavily on Australian citizens. Citizens accounted for the majority of workers in the maintenance and management occupations. These differences mean that changes in migration flows will affect occupations differently, with specialist roles more exposed to the availability of migrant labour.

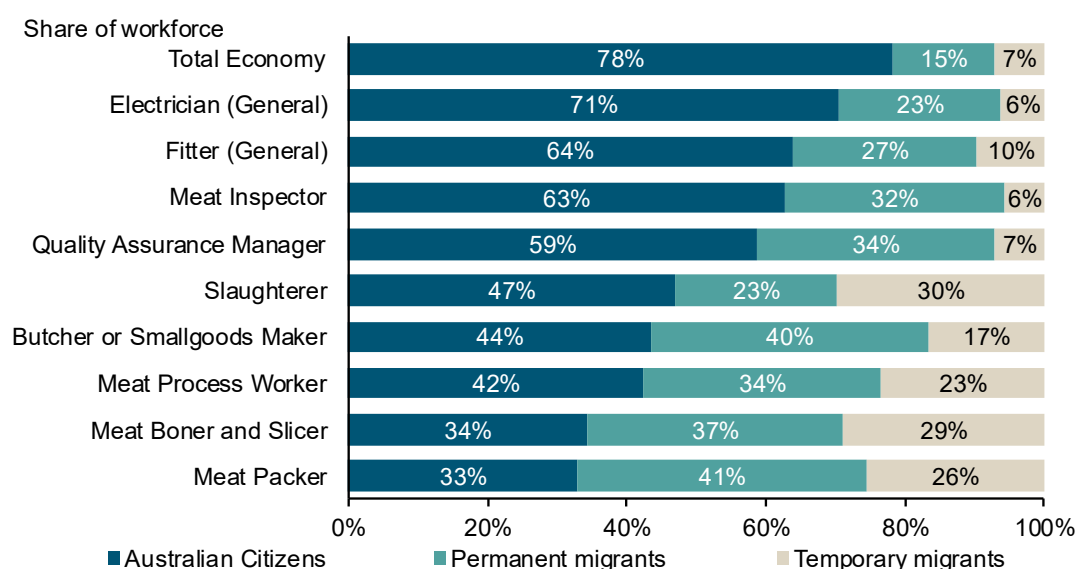


Figure 16. Visa status of the red meat processing workforce by occupation, 2021 census

Note: Data for Metal Fabricators (ANZSCO 322311) in Meat Processing (ANZSIC 1111) is unavailable.

6.2.2 Visa grants into core occupations

Skilled-visa grants for the industry's core occupations have grown faster than economy-wide skilled visa grants since the 2021 pandemic low. Economy-wide skilled visa grants have more than doubled to almost 262,000 in 2025, while the core occupations' share of both temporary and permanent grants has more than doubled over the same period. This means growth in grants to the core occupations has outpaced the broader recovery in skilled migration, rather than simply rising in line with the overall intake.

Enabling occupations accounted for most of the increase, although these workers can enter industries other than meat processing. Grants for the four enabling occupations increased by 478% between 2021 and 2025 to 2,686, accounting for 76% of growth across the core occupations. This expands the potential recruitment pool for processors, but they compete with other industries for these workers. Specialist occupations also recorded substantial growth from a low base. Estimated skilled visa grants increased by 791% between 2021 and 2025 to 799, including estimated grants through the MILA.⁴

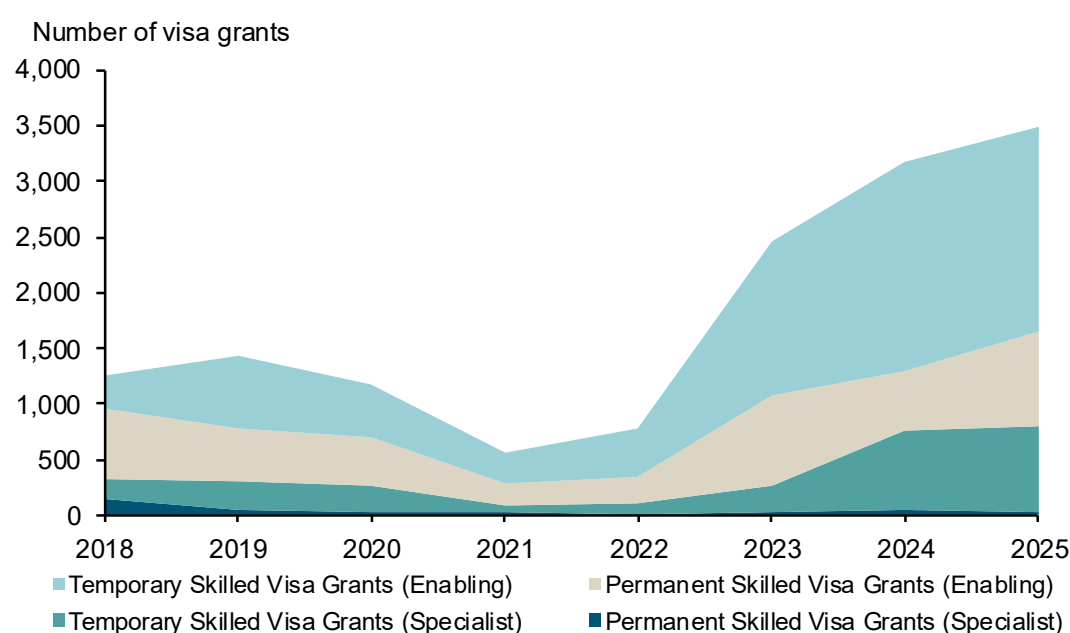


Figure 17. Temporary and permanent skilled visa grants into core occupations, 2018-2025

6.2.3 Pathways into red meat processing

Migration contributes to the processing workforce through recruitment into specific roles and employment of migrants already in Australia. Visa grants linked to core occupations capture only part of this contribution. Processors also recruit from the wider migrant workforce, including arrivals through working holiday, family and other visa pathways.

Consultations identified visa transitions as an established recruitment and retention practice among some processors. Businesses described sponsoring selected working holiday and PALM workers after they had gained experience and demonstrated their suitability for ongoing roles. These transitions can retain workers already trained in processing, although they do not necessarily add a new worker at the point the visa is granted. Their contribution lies in extending the period that experienced workers can remain in Australia and available to the industry.

⁴ For Temporary Skilled Visa Grants (Specialist), we assume grants for "070499 Specified in LA" in Manufacturing reflect grants for 482 Skills in Demand visas under the Meat Industry Labour Agreement (MILA). Likewise, for Permanent Skilled Visa Grants (Specialist), where industry is not reported, we estimate the proportion of "070499 Specified in LA" reflecting grants under MILA using historical grants reported under "Skilled Meat Worker".

The comparison between census and visa grant data suggests that the core occupations draw workers from beyond those who nominated them on their visa applications. Across all industries, the 10 core occupations accounted for 1.3% of permanent migrants' employment at the 2021 Census, compared with 0.4% of nominated occupations on permanent visa grants over the preceding five years. A similar pattern was evident among temporary migrants.

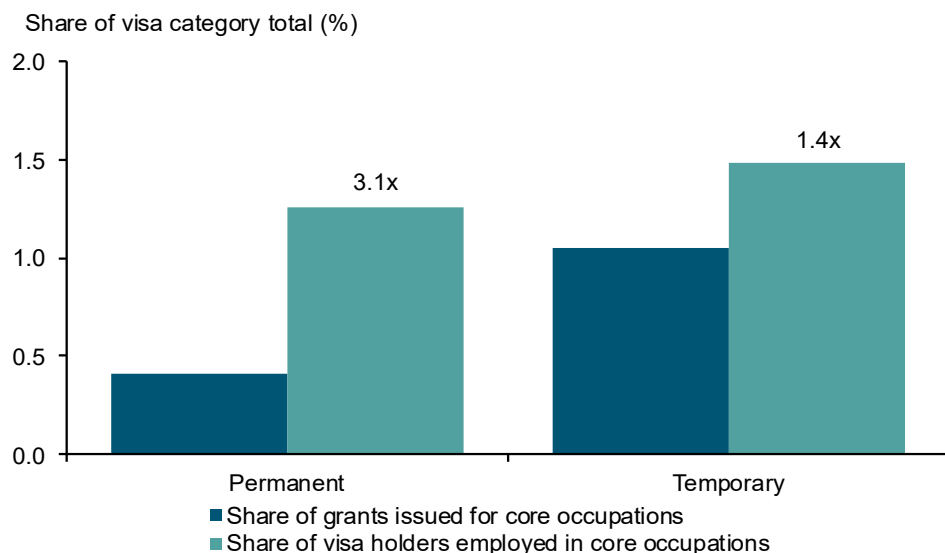


Figure 18. Core occupations as a share of visa grants and visa holders by visa category

Note: Visa grants represent the annual average over the five years to 2021. Visa-holder employment is based on the 2021 Census.

Temporary migration also contributes to the industry's longer-term workforce through transitions to permanent residency. In 2021, permanent migrants who had first entered Australia on a temporary visa accounted for 10.4% of meat processing employment. This represented more than half of the industry's permanent migrant workforce. Skilled temporary visas were a particularly important starting point, accounting for around 7% of total employment through subsequent transitions to permanent residency, compared with 3% across the broader economy.

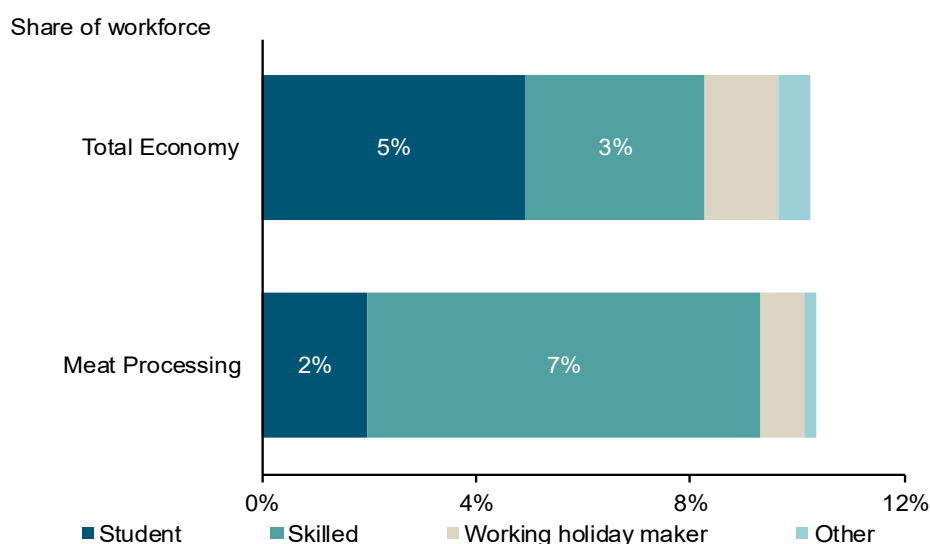


Figure 19. Share of the workforce that first entered Australia on a temporary visa and transitioned to a permanent visa by initial visa type, 2021 census

Temporary-to-permanent pathways have been particularly important for meat boners and slicers. Across all industries, permanent migrants who first entered Australia on temporary visas accounted for 14.9% of employment in this occupation in 2021. Almost all of this contribution came through skilled temporary visas.

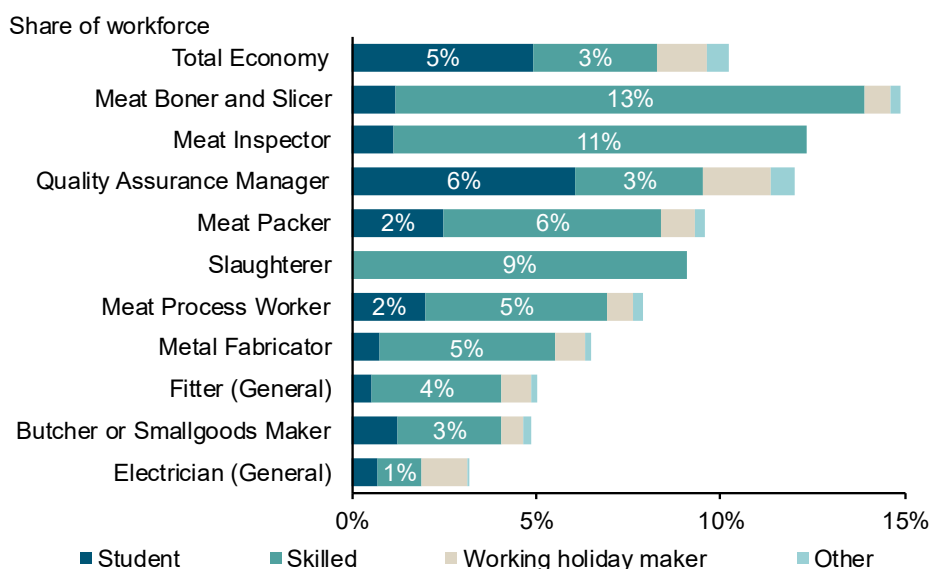


Figure 20. Share of the workforce that first entered Australia on a temporary visa and transitioned to a permanent visa by occupation and visa type, 2021 census

6.2.4 PALM's role in the red meat processing workforce

The PALM scheme allows Australian employers to fill job shortages by recruiting workers from the Pacific Islands and Timor-Leste on short- to long-term contracts. The PALM scheme provides employers with a tool to directly resolve shortages in targeted occupations, particularly those that conventional migration streams do not typically facilitate. The scheme was expanded in 2022 after consolidating two related streams – the Pacific Labour Scheme and Seasonal Worker Programme.

The expansion of Pacific labour mobility has changed the recruitment options available to processors. PALM brought together the Seasonal Worker Programme, which supported seasonal employment, and the Pacific Labour Scheme, which supported longer-term placements. Reforms introduced in April 2022 established a single visa covering both, alongside longer-term visa options and the removal of recruitment caps for existing employers with a good track record. These changes broadened employers' access to workers and supported the subsequent expansion of the scheme (DEWR 2026a, Department of Home Affairs 2026c).

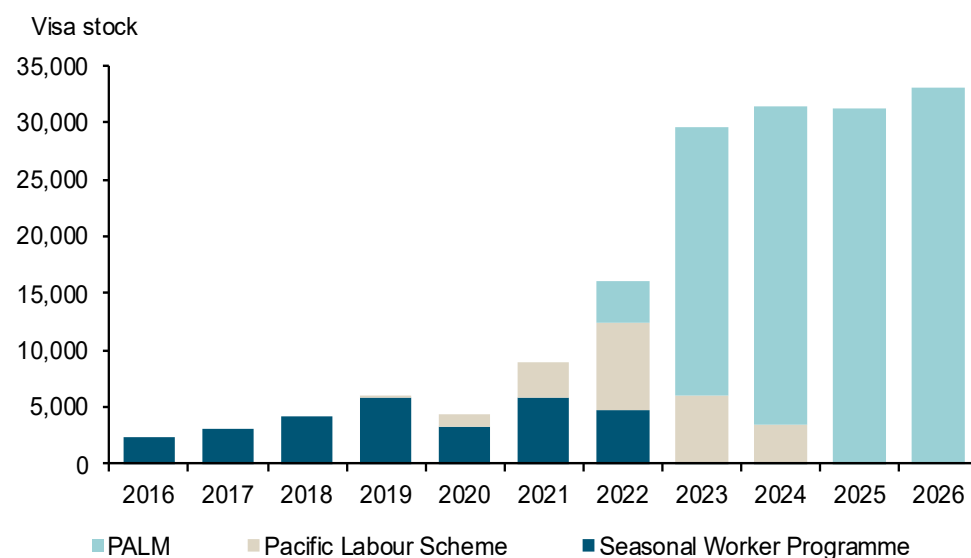


Figure 21. Stock of PALM and predecessor programme visa holders, 2016-2026

PALM has become a major source of workers for red meat processing. As of June 2026, there were 32,645 PALM visa holders in Australia, of whom 11,400 were employed in Meat Processing. We estimate 9,961 of these are working in red meat processing specifically, equivalent to around one-third of the total red meat processing workforce. The share increased sharply following the scheme's expansion in 2022, reaching around 40% in 2024 before returning to approximately one-third in 2026.

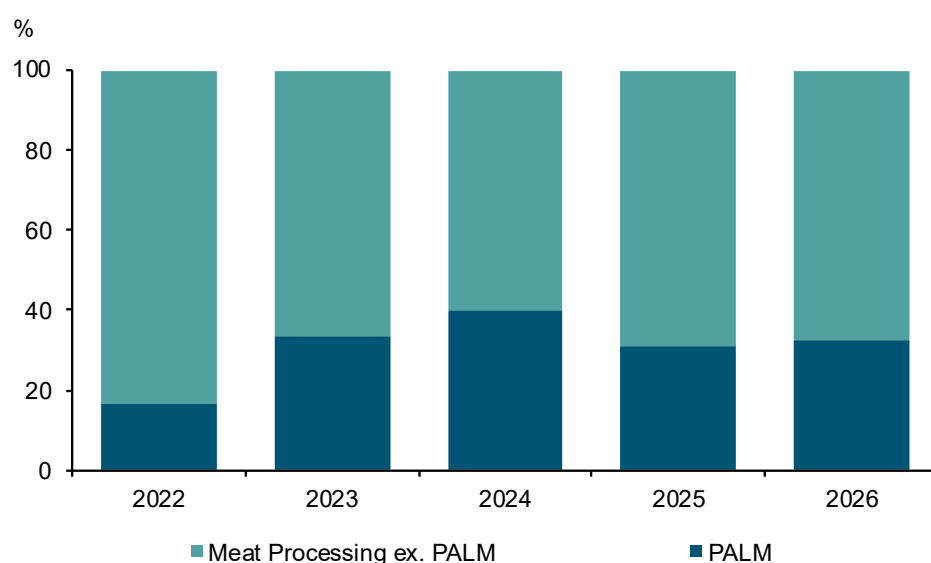


Figure 22. PALM visa holder share of meat processing industry, 2022-2026

PALM primarily supports ongoing staffing needs in meat processing. Long-term placements accounted for 96% of the industry's PALM workforce, compared with 27% across other industries. These placements allow workers to develop processing skills over several years. Processors described seeking to bring experienced workers back for subsequent placements, preserving skills and familiarity with the workplace. Others staggered recruitment to limit the number of experienced staff departing at the same time.

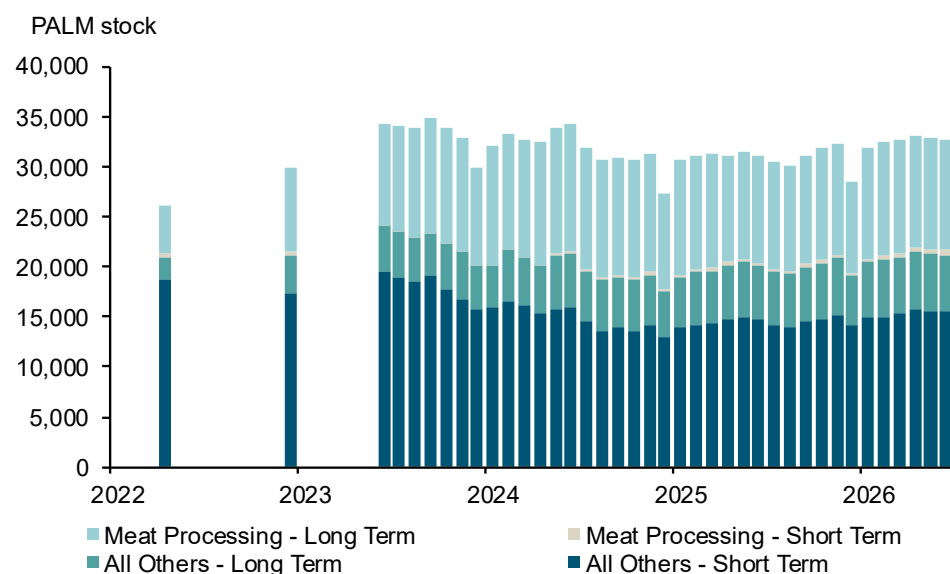


Figure 23. Total number of short- and long-term PALM visa holders in meat processing and all other industries, 2022-2026

Labour hire providers account for a large share of PALM employment, giving processors an alternative to recruiting and supporting workers directly. Across the scheme nationally, labour hire providers employed 69% of PALM workers in September 2024, despite representing only around 20% of approved employers. Direct employers accounted for the remaining 31% of workers.⁵ Consultations identified different approaches to managing PALM employment among processors. Some used labour hire providers to arrange recruitment, accommodation and worker support. Others had established internal teams and invested in housing and transport to manage these responsibilities directly.



Figure 24. Total number of approved PALM employers by type and labour hire share of PALM employment

⁵ Employment shares by employer type cover the PALM scheme nationally. Data on the equivalent split in the meat processing industry is unavailable.

6.2.5 Migration policy

The industry's access to migrant workers depends on the composition and settings of migration programs. Permanent migration planning levels influence the number and types of places available, while occupation eligibility determines which roles employers can sponsor. PALM provides a separate, demand-driven recruitment pathway. Changes to any of these arrangements can affect processors' ability to recruit, retain and replace workers.

Table 7. Core occupations analysed within Meat Processing by visa category eligibility

Core Occupations	482 Skills in Demand	186 Employer Nomination Scheme	PALM
Meat Process Worker			✓
Meat Packer			✓
Meat Boner and Slicer	✓*	✓*	✓
Slaughterer	✓*	✓*	✓
Butcher or Smallgoods Maker	✓	✓	✓
Meat Inspector	✓	✓	✓
Quality Assurance Manager	✓	✓	✓
Electrician (General)	✓	✓	✓
Fitter (General)	✓	✓	✓
Metal Fabricator	✓	✓	✓

*Meat Boner and Slicer & Slaughterer are not included on the Core Skills Occupation List (CSOL). However, they are eligible for the 482 and 186 visas via the MILA

Mainstream skilled migration provides access to all four enabling occupations, but fewer specialist processing roles. Six of the 10 core occupations appear on the Core Skills Occupation List: quality assurance managers, electricians, fitters, metal fabricators, meat inspectors and butchers or smallgoods makers. This supports recruitment through the Skills in Demand Core Skills stream and the Employer Nomination Scheme Direct Entry stream, subject to the relevant requirements (Department of Home Affairs 2026b).

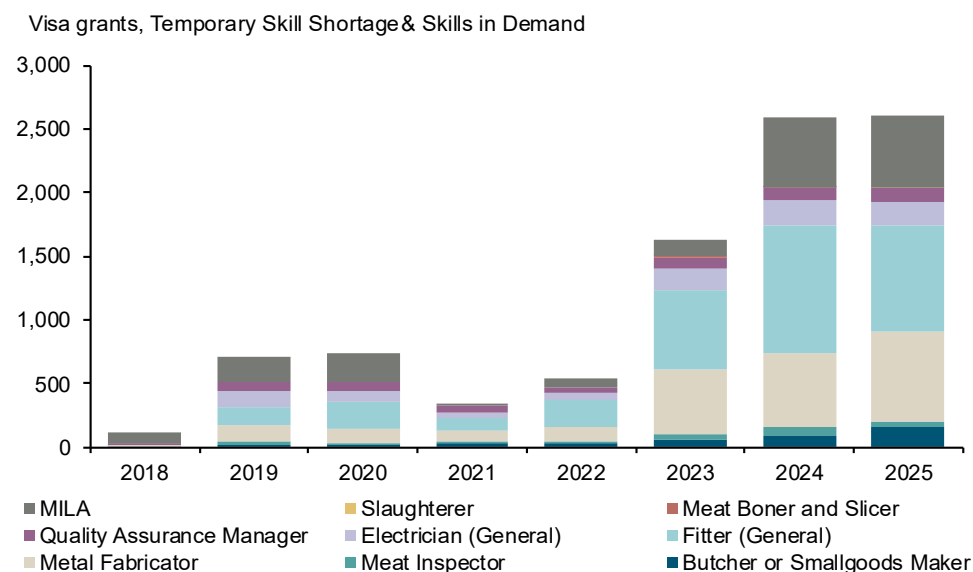


Figure 25. Visa grants into core occupations by selected visa categories, 2018-2025

The Meat Industry Labour Agreement extends access to workers performing slaughtering, boning and slicing duties. These roles are covered by the agreement's Skilled Meat Worker category, providing access to temporary skilled sponsorship and a pathway to permanent residency (Department of Home Affairs 2026a).⁶

Meat process workers and meat packers have fewer options for targeted skilled recruitment. Together, these occupations account for an estimated 33% of the industry's workforce, but neither appears on the Core Skills Occupation List (CSOL). The standard Meat Industry Labour Agreement also excludes unskilled labouring positions. PALM and working holiday makers consequently provide an important recruitment pathway for these roles.

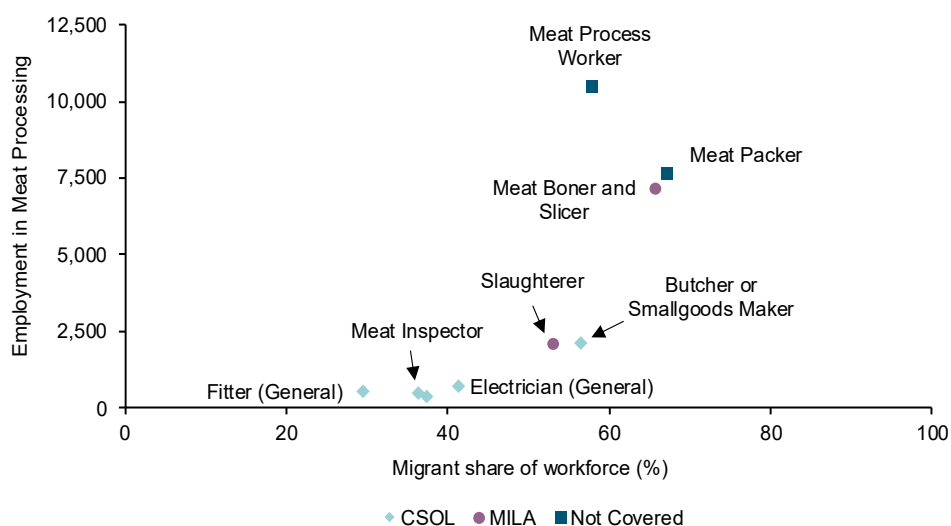


Figure 26. Employment in meat processing industry and migrant share of workforce by visa eligibility coverage

⁶ Under MILA, visa applications are lodged under the occupation 'Skilled Meat Worker'. However, official data on the 'Skilled Meat Worker' occupation has not been accessible since 2020. Instead, all applicants approved under labour agreements that did not correspond to a specific ANZSCO occupation code are listed under the occupation 'Specified in LA'.

PALM appears to retain broad political support, with current differences focused more on how the scheme should operate than whether it should continue. Labor has committed to growing and strengthening PALM, while the Coalition has indicated that PALM workers would not be targeted as part of its proposed reduction in migration, reflecting the scheme's role in addressing regional labour shortages. One Nation has also acknowledged the importance of PALM to regional employers. Recent reforms have largely adjusted operating requirements rather than fundamentally changing the scale or role of the scheme, including the introduction of a \$200 per week minimum post-deduction take-home pay requirement (Australian Government 2026a). The immediate policy risk for Meat Processing therefore appears to be less about the scheme being substantially reduced or removed, and more about future changes to its design, operating requirements and employer obligations.

Table 8. Announced position on PALM visa stream by selected political party

Party	Date	Most recent PALM position
Labor	September 2026	"Our preferred agriculture visa has always been the PALM scheme ... the Pacific Labour Scheme right now has extra capacity. Those extra workers are available." – Tony Burke (SBS 2026)
Coalition	August 2026	"The ... PALM contribution to net overseas migration is minimal, ... I don't envisage we'll be cutting those at all" – Jonno Duniam (ABC 2026)
One Nation	August 2026	"... rural and regional Australia would die if they didn't have the [PALM] workers coming in" – Pauline Hanson (The Guardian 2026)

Domestic policy is not the only source of uncertainty for PALM employers, as worker access also depends on decisions in participating sending countries. Recruitment is concentrated in a small number of countries, so changes to registration, selection or deployment can affect the pipeline available to Australian employers. Vanuatu accounted for around 35,900 approvals nationally from 2022 to December 2025, more than twice the number from either Timor-Leste or Tonga. While covering all industries, these figures highlight the importance of individual countries to the recruitment pool. A labour hire provider also identified differences in arrangements for returning workers, which can affect employers' ability to re-engage experienced staff.

These recruitment relationships also bring economic benefits to sending countries through remittances that support families and local businesses. Across the PALM scheme, workers are estimated to have sent home A\$556 million in 2025 (Australian Government 2026c). Vanuatu received A\$126 million, equivalent to approximately 6% of its GDP, highlighting the scheme's importance to the country's economy.⁷

⁷ Estimated PALM remittances of A\$126 million were divided by Vanuatu's 2025 nominal GDP of approximately A\$2.10 billion (FRED 2026). World Bank GDP data, accessed through FRED, were converted from US dollars using the US Federal Reserve's 2025 annual-average rate of A\$1 = US\$0.6450 (Federal Reserve 2026).

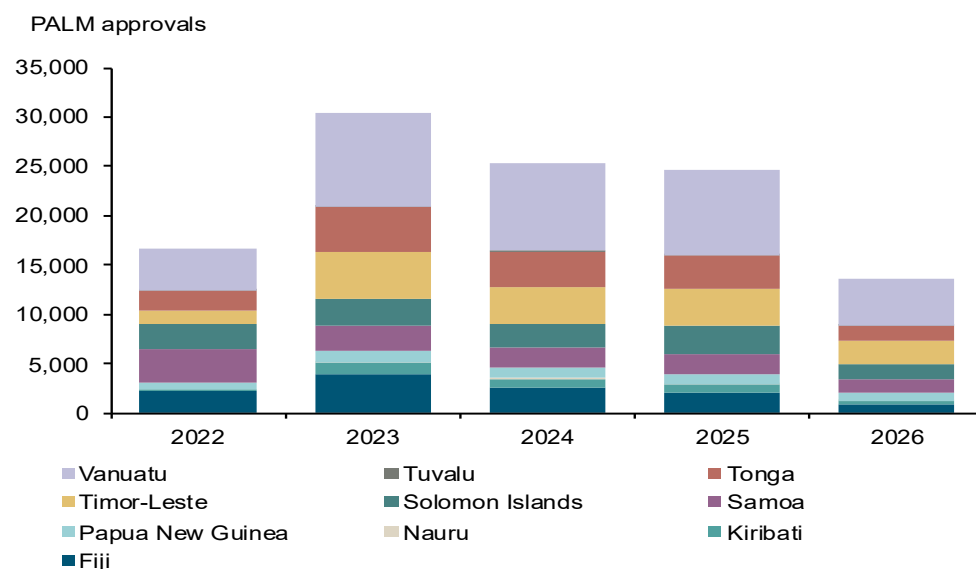


Figure 27. Total PALM visa approvals by country of origin, 2022-2026

Fiji provides one example: after registrations to its labour mobility work-ready pool increased sharply, the government suspended new registrations in 2024 to address a large backlog before reopening a limited number of places in 2025. For meat processing, this creates an additional policy exposure: even if Australian PALM settings remain supportive, the availability of workers can be affected by administrative and policy changes in the countries from which the scheme recruits.

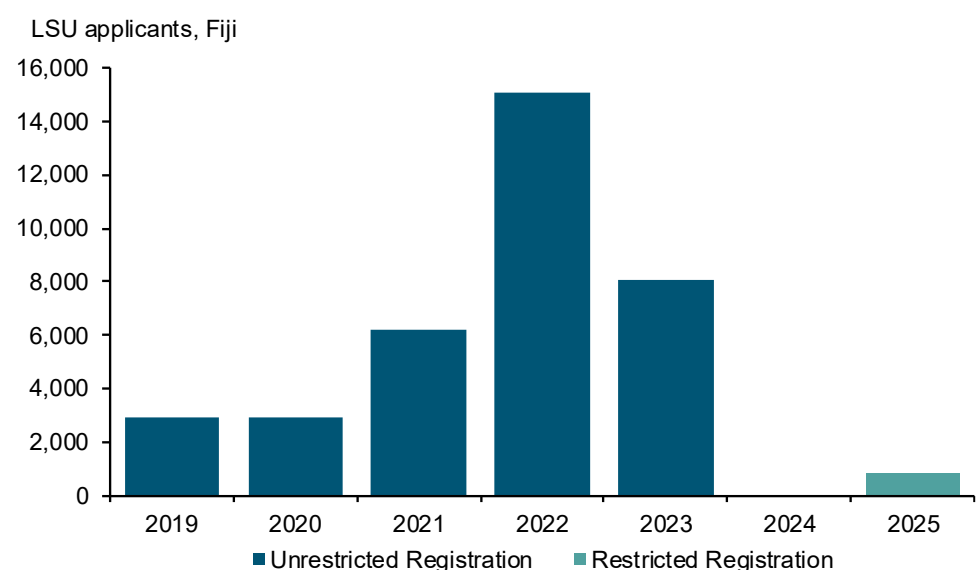


Figure 28. New Labour Sending Unit (LSU) Applications, Fiji, 2019-2025

6.2.6 Migration sensitivity analysis

Continued PALM recruitment and growth are already needed to sustain the projected workforce. The Baseline Scenario includes recruitment to replace departing workers and expand the number employed through the scheme. Even with these additions, the industry faces a workforce shortfall equivalent to 5.7% of requirements by 2036.

Current and announced policies suggest that wholesale changes to PALM are unlikely. However, the red meat processing industry's reliance on the scheme means that any changes to its scale or operating model could have

significant workforce implications. We test four alternative scenarios to examine how changes in PALM recruitment could widen or reduce workforce supply.

- ◆ **Scenario 1 – PALM discontinued:** No new PALM workers enter from 2027. Existing workers progressively depart over the following four years.
- ◆ **Scenario 2 – PALM restricted to direct employers:** Labour hire participation ceases. The scenario applies the scheme-wide labour hire employment share of 69%, with no offsetting increase in recruitment by direct employers.
- ◆ **Scenario 3 – PALM inflows double:** Annual PALM arrivals double relative to the Baseline Scenario.
- ◆ **Scenario 4 – No net PALM growth:** Arrivals match departures in each forecast year, maintaining the existing number of PALM workers.

These scenarios test the industry's exposure to changes in recruitment. Discontinuation represents an extreme downside case. Unforeseen disruptions, such as COVID-19 border closures, could also prevent processors from replacing departing workers, even where visa settings remain unchanged. The direct-employment scenario uses the national employment split across participating industries, as an equivalent estimate for meat processing is unavailable.

Losing access to PALM would leave a substantial share of workforce demand unmet. By 2036, the shortfall reaches 31.8% of requirements under discontinuation and 23.6% under the direct-employment-only scenario, compared with 5.7% in the Baseline Scenario. Doubling annual inflows instead lifts supply to 10.0% above projected demand.

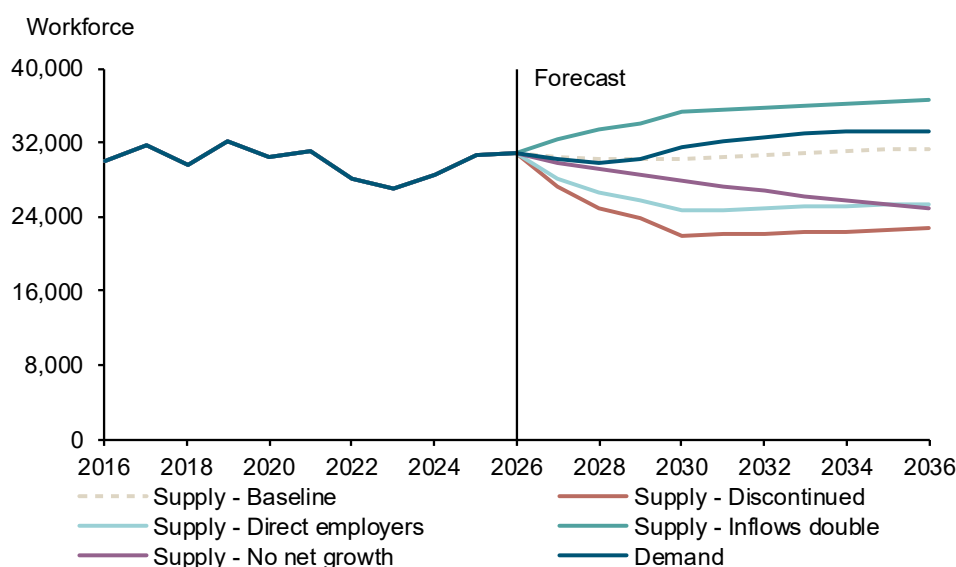


Figure 29. Workforce demand and supply in red meat processing, excluding pork processing by PALM scenario, 2016-2036

Replacement needs make the workforce particularly sensitive to recruitment changes over the next four years. Under discontinuation, existing workers leave as their placements end, without new arrivals to replace them. Restricting recruitment produces a similar, smaller decline. This aligns to the current recruitment cycle identified throughout consultation, where processors were entering a more significant round of recruitment over the next six months as they look to replace the large cohorts of PALM workers that arrived when the program was first introduced.

Expansion produces the reverse pattern. Additional arrivals increase supply immediately, while the associated departures occur later. Most of the separation between these scenarios emerges by around 2030. Thereafter, departures increasingly reflect the changed recruitment levels, slowing the adjustment in workforce supply.

Maintaining the existing PALM workforce also leaves a widening gap. In the no-net-growth scenario, recruitment continues to replace departing workers but provides no additional supply. The remaining workforce components produce a gradual decline in total supply, while demand increases over the decade.

The direct-employment result depends heavily on processors' assumed response. The scenario removes labour hire participation without allowing direct employers to take over that recruitment. Consultations identified businesses that had made this transition, alongside others that rely on providers. One processor managing PALM employment directly had four welfare staff and managed around 40 accommodation properties. Replacing labour hire recruitment would require processors to establish or expand these services alongside their production operations.

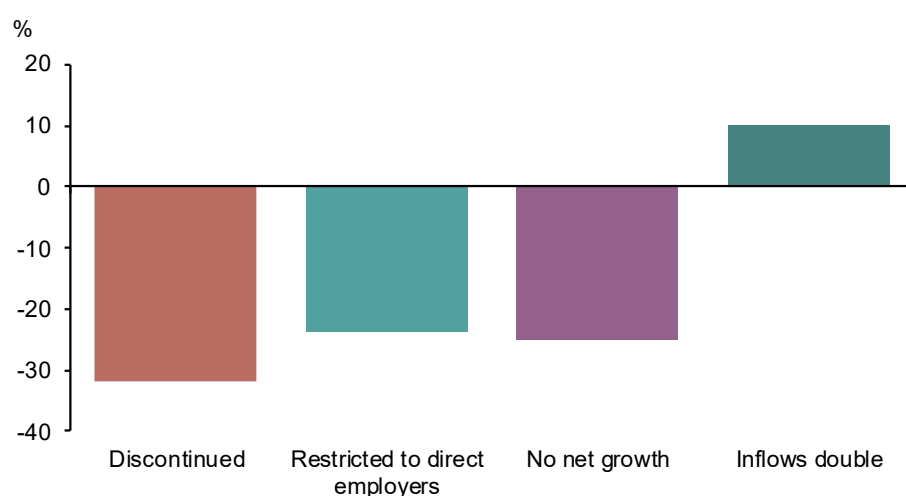


Figure 30. Projected workforce gaps in red meat processing, excluding pork processing by PALM scenario, 2036

Workforce exposure is greatest in specialist processing roles. Discontinuing PALM leaves meat process workers and meat packers more than half below projected requirements in 2036. Butcher or smallgoods makers face a shortfall of almost a third. Doubling inflows moves most occupations into surplus, while meat packers and butchers or smallgoods makers reduce their deficits to less than one-tenth.



Figure 31. Projected workforce gaps in selected PALM eligible occupations by PALM scenario, 2036

6.3 Workforce pressure mitigation strategies

Creating a more sustainable workforce depends on attracting new workers and retaining the skills they develop within processing. Many production roles draw recruits from varied backgrounds, with most skills developed through on-the-job training. This makes local recruitment, workplace training and career progression closely connected. Qualified trade and technical roles require more targeted approaches, while migration remains essential to meeting workforce needs across much of the industry.

The opportunities differ across occupations and locations. Consultation and workforce analysis identify practical ways to strengthen recruitment and retention, alongside constraints on the workers available locally and from other industries. For migration, worker support and effective forward planning influence how reliably processors can maintain an experienced and sustainable workforce.

This section draws on industry consultation and supporting data analysis to examine how processors can retain and develop their existing workforce while broadening the pathways through which new workers enter the industry. The strategies are discussed separately, but they overlap in practice. Many potential strategies are examined to provide the evidence base for why or why not they are viable and practical recommendations for building a sustainable workforce.

6.3.1 Retaining experience through stronger support and career progression

Retaining experienced workers reduces the recruitment required to sustain operations and preserves skills developed within processing businesses. Previous AMPC research identifies induction, employee development, career progression and workplace leadership as important influences on retention (Glass et al. 2022; Mackenzie 2021). For some workers, processing is seen as a temporary source of employment rather than a long-term career. Consultation reinforced these findings, particularly the difficulty of retaining some new recruits and the value of giving established workers opportunities to develop.

The workforce projections show that occupational movement remains a substantial source of workforce loss. Between 2027 and 2036, more workers are projected to move out of the 10 core occupations than move into them, reducing workforce supply by around 6,600 workers. Nine of the 10 occupations record a net loss, with meat boners and slicers and meat process workers accounting for the largest negative movements.

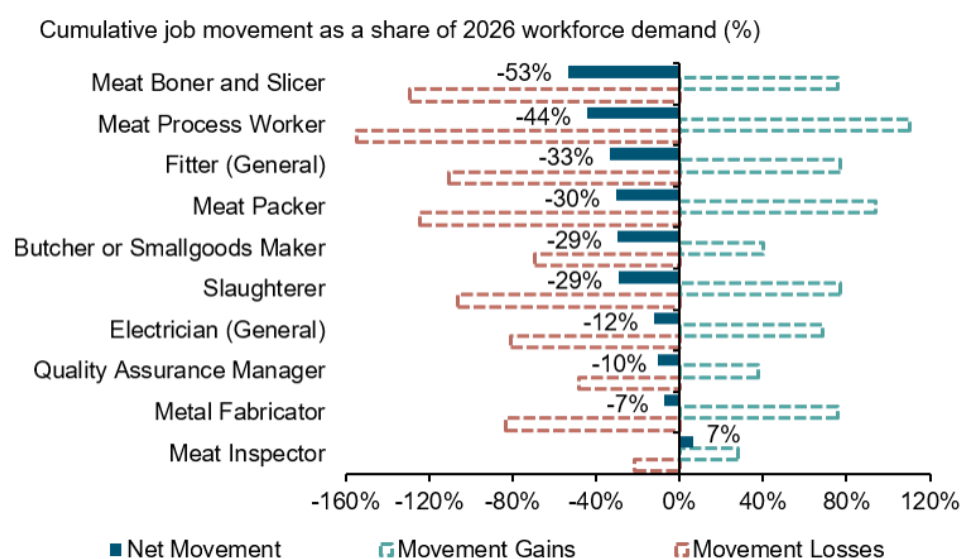


Figure 32. Cumulative job movement across core occupations, 2027 to 2036

However, not all movement represents a loss of experience to the industry. Historical data show close connections between the main processing occupations. For meat boners and slicers, the largest identifiable movements are to and from meat process workers, with meat packers, butchers or smallgoods makers and slaughterers also prominent. Meat process workers show a similar pattern. Consultation also identified workers progressing from production roles into quality assurance, supervision, administration and maintenance apprenticeships. Together, this points to an established pathway through which workers can build skills and move into more specialised roles within processing. Detailed historical occupation movements are provided in [Appendix 3](#).

Making this pathway more visible can support both retention and recruitment. For existing workers, clearer progression shows how experience gained in an entry-level role can lead to higher-skilled and higher-paid positions without leaving processing. For prospective workers, particularly those entering meat process worker and meat packer roles, it can make the longer-term career opportunity clearer at the point of recruitment. Formal training and recognised qualifications can reinforce that pathway by making skill development tangible and demonstrating the employer's investment in the worker.

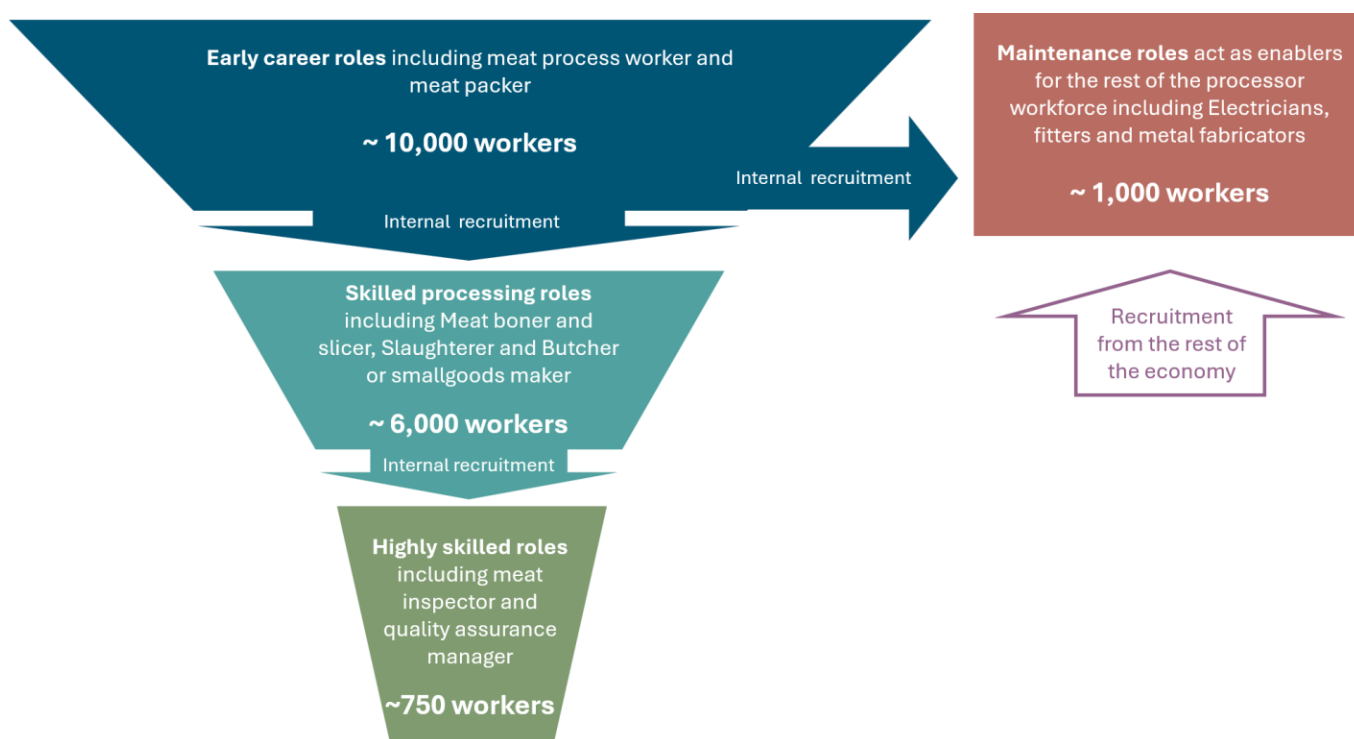


Figure 33. Illustrative career pathway within the red meat processing industry

Internal progression will still create vacancies that need to be backfilled, but it retains industry experience and can help develop workers for positions that are difficult to recruit externally. This is particularly valuable where specialist knowledge is developed through time in processing rather than acquired before employment.

Early employment experiences influence whether recruits remain long enough to pursue these opportunities. Consultation identified the physical demands and working environment as reasons some workers leave soon after starting. Site visits and realistic preparation can help applicants understand the work before accepting a role. Once employed, induction, supportive supervision and assistance developing the required skills can support adjustment, particularly during the early months when retention difficulties are greatest.

Workplace and community connections also influence whether workers stay. Processors described social activities, supportive working relationships and engagement with local services as ways to help employees establish themselves. These connections can be particularly important for workers who have relocated or have limited local

networks. Alongside visible career development, they can help workers see a longer-term future with the business and the local community.

6.3.2 Building recruitment pipelines through local engagement and targeted recruitment

Recruitment into many processing roles draws on people from varied backgrounds, making broad local attraction an important source of new workers. Consultation participants described recruiting people from retail, labouring, seasonal work and periods outside employment. For meat process workers and meat packers, no single occupation provides an obvious recruitment pool. Employers can develop the required skills after recruitment, placing greater weight on applicants’ willingness and suitability for processing work.

School and community engagement can help processors reach people who may have limited knowledge of the industry or the careers it offers. Some processors described established school employment programs, alongside school tours, holiday employment and community open days. Some students subsequently moved into ongoing employment. These activities introduced prospective workers to production roles and to opportunities in maintenance, quality assurance and management.

Building these relationships takes time, and results differ across locations. Other processors reported continued difficulty attracting school leavers despite promoting career opportunities. Consultation identified perceptions of processing work, its physical demands and competition from other employers as barriers to local recruitment. Community engagement can improve awareness and understanding, while the attractiveness of the job itself influences whether that interest translates into employment.

Entry-level pay is part of this recruitment challenge. Several participants reported competing with retailers and other local employers offering similar pay for work perceived as less demanding. Based on the available four-digit ANZSCO earnings data, Figure 34 shows that earnings for Meat, Poultry and Seafood Process Workers were only moderately higher than for selected retail occupations and broadly comparable with those of Storepersons (ABS 2026f). Some processors paid above award rates or offered production incentives but still experienced difficulty recruiting into entry-level roles. These findings suggest that the pay available at entry, alongside hours, working conditions and opportunities to advance, affects the industry’s ability to attract local workers.

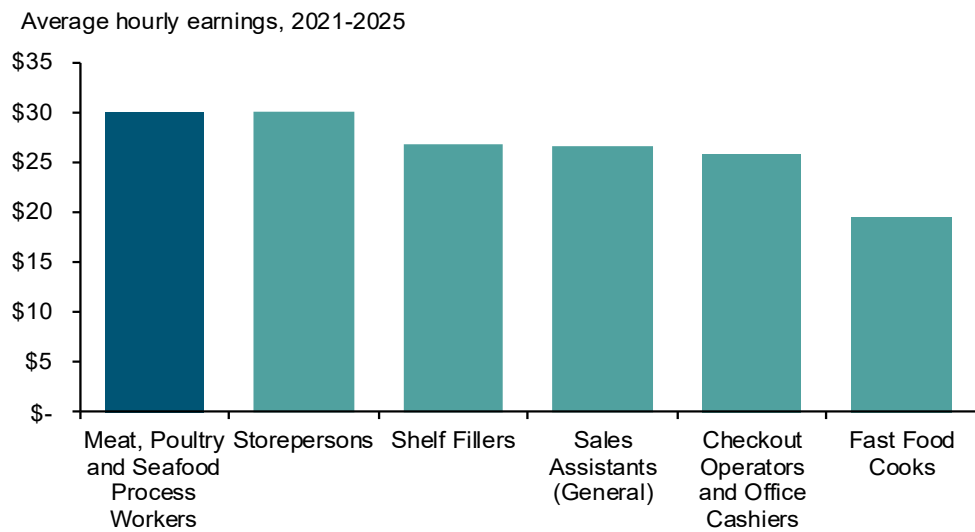


Figure 34. Pay comparison for Meat, Poultry and Seafood Process Workers and selected comparable occupations, 2021-2025 average

The scope to recruit experienced workers from other industries is a weaker opportunity relative to other mitigation strategies and also varies considerably by occupation. Around 90% of workers in some specialist processing roles are already employed within Meat Processing (Figure 35). This leaves a small external pool of people performing the same work. Enabling occupations are employed more widely across the economy, giving processors access to larger potential pools of qualified workers, although there is much more competition from other industries to attract these workers. The potential occupation-specific opportunities for specialist workers are discussed in greater detail in Appendix 2.

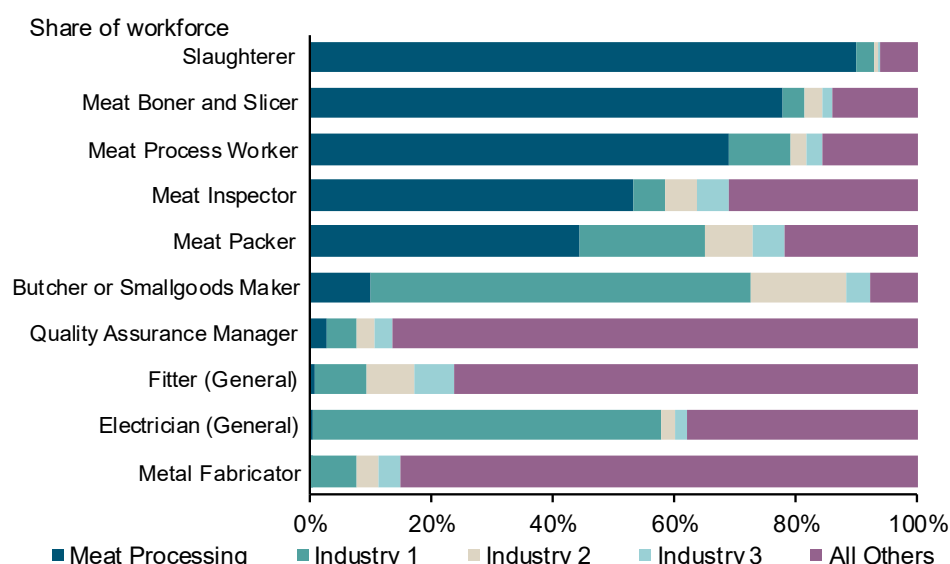


Figure 35. Composition of employment for core occupations in Meat Processing (ANZSIC 1111) and the three largest employing industries, 2021

Note: Figures in this section represent the Meat Processing industry, as per ANZSIC 1111 including pork processing.

Recruitment from other industries has a clearer role in meeting demand for qualified tradespeople. Electricians, fitters and metal fabricators can bring occupational skills developed elsewhere, supplemented by training in the plant's equipment and operating requirements. Potential sources include food manufacturing, repair and maintenance, and metal manufacturing. Each employs a substantially larger workforce in the relevant occupation than Meat Processing (Table 9).

Table 9. Potential industry recruitment pools for enabling occupations

Core	Electrician (General)		Fitter (General)		Metal Fabricator	
Target	Food Product Manufacturing (excluding Meat Processing)		Repair and Maintenance		Primary Metal and Metal Product Manufacturing	
	Core	Target	Core	Target	Core	Target
Size	421	1,388	373	9,096	76	7,166
Average Age	36.7	41.8	39.5	37.6	27.1	38.1
Average Income	\$70,929	\$86,012	\$74,186	\$71,658	\$78,606	\$62,126
Regional Share	71.7%	57.5%	66.2%	54.6%	77.6%	49.9%

Processors reported recruiting maintenance workers from nearby food and dairy businesses, alongside developing existing production workers through apprenticeships. However, qualified tradespeople remained difficult to attract where other employers offered higher pay or more favourable conditions. The external workforces identified in Table 9 are also less concentrated in regional areas than their counterparts in Meat Processing. Their national size therefore provides only a broad indication of the workers potentially accessible to individual processors.

The recruitment opportunity is consequently different across the workforce. Broad local engagement can bring new entrants into roles where skills are developed on the job. Targeted recruitment is more relevant where workers already hold the trade qualifications or specialised experience required. Recruitment between processors can help individual businesses fill vacancies, but expanding the industry's workforce depends on attracting additional people and supporting them to develop and remain in processing.

6.3.3 Connecting workplace training to career progression

Workplace training is central to developing the processing workforce, with many workers gaining their occupational skills after recruitment. Formal education supports this development by preparing entrants for the work and helping existing employees progress into more specialised roles.

Education and training can influence both whether people consider a career in red meat processing and whether they see opportunities to remain in the industry. Before entry, exposure to processing work can help prospective workers understand the roles available and what they involve. After recruitment, access to further training can give employees a clearer route into more skilled positions. These two contributions connect education with the industry's broader efforts to attract and retain workers.

Secondary school is the highest qualification held by many workers in production occupations, while vocational and tertiary qualifications are more common in trade, technical and management roles (Figure 36). Consultation findings on workplace learning suggest that many entrants develop their processing skills after recruitment. For these roles, engagement with schools and training providers offers an opportunity to reach people who may have little previous knowledge of the industry and show them how they could build a career within it.



Figure 36. Highest qualification obtained by core occupation in Meat Processing (ANZSIC 1111), 2021

Preparation before employment can help recruits understand the work and begin developing relevant knowledge. Some processors have partnered with VET providers to deliver the theory component of a Certificate II program

before domestic recruits commenced, with an abbreviated program for overseas workers. The approach introduced workers to what they would encounter on their first day and the training opportunities available afterwards. Alongside the school and community engagement discussed in [section 6.3.2](#), this provides a practical connection between initial interest and entry into employment.

Once employed, access to further learning can help workers build towards more skilled positions. Certificate III pathways provide specialised training in processing, while apprenticeships develop the skills required for maintenance trades. Table 10 outlines qualification requirements and training pathways for selected core occupations. Connecting these pathways to specific roles gives workers a clearer understanding of how further learning can support advancement.

Table 10. Qualification requirements and training pathways for selected core occupations

Core occupation	Qualification requirement	Relevant qualification or licence	Apprenticeship pathway
Butcher or Smallgoods Maker	No	Certificate III in Meat Processing (Retail Butcher or Smallgoods)	Yes
Meat Inspector	Yes	Certificate IV in Meat Safety Inspection	No
Quality Assurance Manager	No	Relevant tertiary/VET qualification or substantial industry experience	Not typically
Electrician (General)	Yes	Electrical licence	Yes
Fitter (General)	No	Certificate III in Engineering (Mechanical Trade)	Yes
Metal Fabricator	No	Certificate III in Engineering (Fabrication Trade)	Yes

Maintenance apprenticeships illustrate how training can address business needs while creating opportunities for existing employees. Processors described selecting suitable production workers for apprenticeships, alongside recruiting local students and school leavers. Existing employees bring familiarity with the plant and its operations, while the business develops trade skills that can be difficult to recruit locally. These pathways require supervision and several years of development, making early identification of future skill needs important.

Quality assurance provides another route through which workplace experience and formal learning can support progression. Consultation participants also identified movement from production into quality assurance roles. Relevant training can help employees build on their operational knowledge as they take on responsibilities beyond the production floor. Existing quality assurance managers have varied educational backgrounds. Engineering was the most common broad field of study, with qualifications within Process and Resources Engineering relating to Food Processing Technology and including vocational study ([Figure 37](#)).

Access to qualifications can demonstrate an employer's investment in an employee's development, while opportunities to take on more skilled work give that investment practical meaning. Making the relationship between training, responsibility and advancement explicit can help employees see a future within the business.

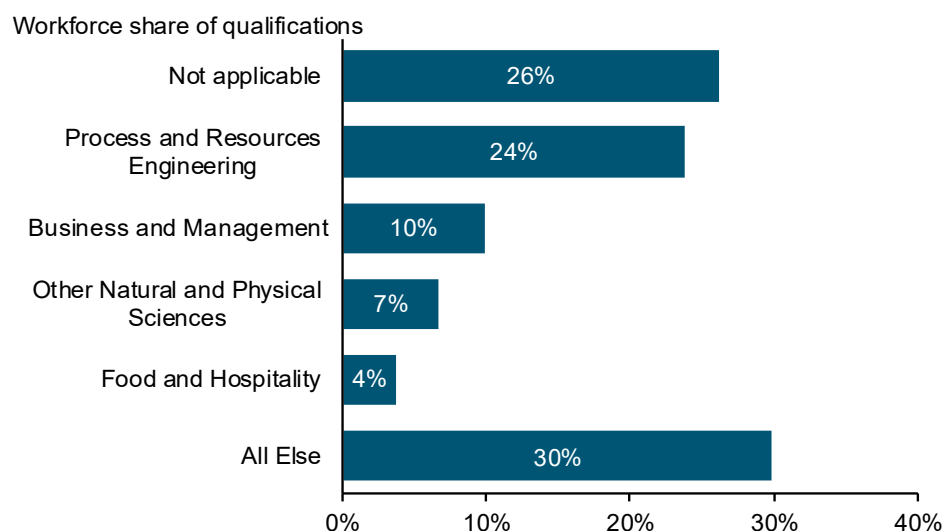


Figure 37. Field of study for Quality Assurance Managers in Meat Processing, 2021

For some experienced migrant workers, English-language preparation can help them access longer-term employment pathways. Consultation participants identified English requirements as a barrier to sponsoring some PALM workers whose processing skills had already been developed. Experiences included reduced access to training funding and difficulty helping workers reach the required standard through workplace classes. Addressing these barriers could support the retention of experienced workers and preserve the benefit of earlier training. The available migration pathways are examined further in the migration analysis.

6.3.4 Building workforce continuity through migration

Migration provides an essential source of workers, and its longer-term contribution depends on how reliably processors can recruit, develop and retain them. The industry predominantly uses PALM, working holiday makers and skilled sponsorship visa streams to meet different staffing needs. These pathways contribute to a sustainable workforce pipeline when recruitment is planned alongside expected departures, production requirements and opportunities to retain experienced staff. These pathways are further examined in [section 6.2](#).

Preparing PALM workers for their roles starts before they travel to Australia. Workers receive pre-departure training, but consultation participants were unclear about how closely it reflects the jobs they will perform. Greater employer input could help workers understand their duties, working hours, accommodation arrangements and location before accepting a placement. Site induction could then reinforce this preparation and focus on the requirements of the specific workplace.

Support after arrival forms part of the same process. Housing, transport and welfare arrangements help workers settle into their new workplace and community. Issues relating to accommodation, transport or personal welfare can affect attendance and retention. Some processors manage these responsibilities through internal teams, while others use labour hire providers. Under either approach, the support provided throughout the placement affects the stability of the workforce.

The importance of continuity grows as workers gain experience. Over time, they develop processing skills, require less supervision and become familiar with the plant. If a large intake reaches the end of its placement together, the business may lose a substantial share of that experience at the same time. Some employers manage this risk by staggering recruitment and seeking to bring experienced workers back for subsequent placements. Planning around expected departures allows recruitment and preparation to begin before gaps arise.

Longer-term sponsorship can preserve that experience beyond the original temporary placement. Consultation participants described sponsoring selected PALM and working holiday workers after they had demonstrated their suitability for ongoing roles. Identifying interested and potentially eligible candidates early creates time to document their skills and work experience and help them meet English-language requirements. It also allows potential transitions to be incorporated into workforce planning before the original visa or placement approaches its end.

Maintaining continuity requires employers to understand how the available pathways can be combined within their workforce planning. PALM supports roles with limited access to skilled migration, while skilled and employer-sponsored visas provide options for eligible processing, trade and management occupations. Drawing on several pathways allows employers to match recruitment to the role, expected period of employment and time required to bring a worker into the business.

Employer workforce planning is also shaped by policy and administrative settings in Australia and participating Pacific countries. Pacific governments influence which workers can be recruited or return for another PALM placement, while Australian visa processing times affect when skilled workers can arrive or transition. These settings can disrupt workforce plans even where employers begin recruitment early. A broader mix of suitable recruitment countries and visa pathways can reduce this exposure, supported by clearer transition arrangements and more predictable processing times.

A more sustainable approach to migration connects recruitment, settlement and longer-term retention. Better preparation and support can help workers establish themselves, while staggered recruitment, return arrangements and suitable longer-term visa pathways can preserve skills developed within the industry. These activities require staff time, accommodation and other resources throughout employment. The following cost analysis examines the scale of that commitment and the extent to which it may be absorbed into existing business operations.

6.4 Hidden costs of the current workforce model

The current workforce model in red meat processing creates costs beyond the wages paid to employees. High turnover requires processors to continually recruit, induct and train workers to maintain existing production capacity, while the industry's reliance on migrant labour creates additional visa, sponsorship and workforce management requirements.

Table 11. Summary of cost impacts on key worker pathways in red meat processing

Non-wage cost	Local worker	PALM worker	Skilled visa holder	Working holiday maker
Recruitment	Low	Moderate	High	Low
Onboarding and training	Moderate	Moderate	Moderate	High
Housing	None	High	Low/None	Low/None
Compliance	Low	High	Moderate	Low
Welfare support	Low	High	Moderate	Low
Churn	High	Moderate	Low	High
Administrative workload	Moderate	High	Moderate	Moderate

The scale and nature of these costs differ across recruitment pathways. Local workers generally create lower migration and support requirements but contribute to higher replacement costs where turnover is high. Skilled visa holders involve greater upfront recruitment and sponsorship costs but can provide longer-term workforce continuity. Working holiday makers provide flexibility but often require more frequent replacement. PALM workers involve the broadest set of ongoing employer responsibilities across accommodation, transport, welfare and compliance.

PALM workers now represent around one-third of industry employment, making these additional responsibilities particularly significant for processors. Supporting a substantial PALM workforce requires dedicated staffing and administration alongside direct expenditure on worker support. The analysis therefore quantifies direct PALM employment costs while examining the broader workforce costs associated with migration and repeated recruitment.

6.4.1 High workforce turnover creates ongoing recruitment costs

High workforce turnover means processors must continually recruit simply to maintain existing production capacity. This creates repeated recruitment, induction and training requirements across local employees, PALM workers and other migrant workers. Even when total employment remains stable, businesses continue to devote staff time and resources to replacing departing workers.

Processors described recruitment as largely reactive and driven by turnover, with some businesses recruiting continuously rather than waiting for vacancies to arise. This approach helps maintain production requirements but leaves less capacity to focus on longer-term workforce development and building a more sustainable pipeline of workers. The scale of replacement required is substantial, with around 91,300 workforce departures projected over the decade through migration, occupational movements and natural attrition.

Consultation suggested that the direct productivity effects of replacing workers are generally less significant than the administrative burden created by repeated recruitment. Much of the training for entry-level processing roles occurs on the job, with workers developing proficiency across multiple positions within several months. Participants did not identify a consistent, substantial loss of production while new workers developed these skills. The clearer costs arise from repeating recruitment, induction and supervision processes each time workers leave.

Experienced workers nevertheless provide capabilities that take longer to replace. Processors described established employees becoming proficient across several tasks and progressing into specialist, supervisory and other roles within the business. Losing these workers reduces workforce flexibility and removes people who support less experienced colleagues. Delays in filling production-critical roles can also constrain throughput even where overall staffing levels appear sufficient.

The cost of turnover differs across workforce pathways. Local workers and working holiday makers can require more frequent replacement, while migrant workers may involve greater upfront recruitment and support requirements. The overall workforce model therefore involves a trade-off between the cost of recruiting and replacing workers and the resources required to support workers who remain in the industry.

Shorter employment periods increase how often processors pay for initial training to maintain the same staffing level. Assuming two days of paid training per recruit, the annual wage cost is around \$100 per full-time position under a completed four-year PALM placement and \$140 using the 35% annual turnover benchmark applied to local and temporary skilled workers.⁸ An illustrative 88-day working holiday placement increases this to around \$1,600 because the position requires repeated replacement during the year.

⁸ Note: Other sources have recorded industry wide turnover at closer to 60% (Glass et al. 2022). If this alternative turnover rate estimate was assumed the estimated workforce average annual wage cost of induction and training per full-time position would be \$230 rather than \$140.

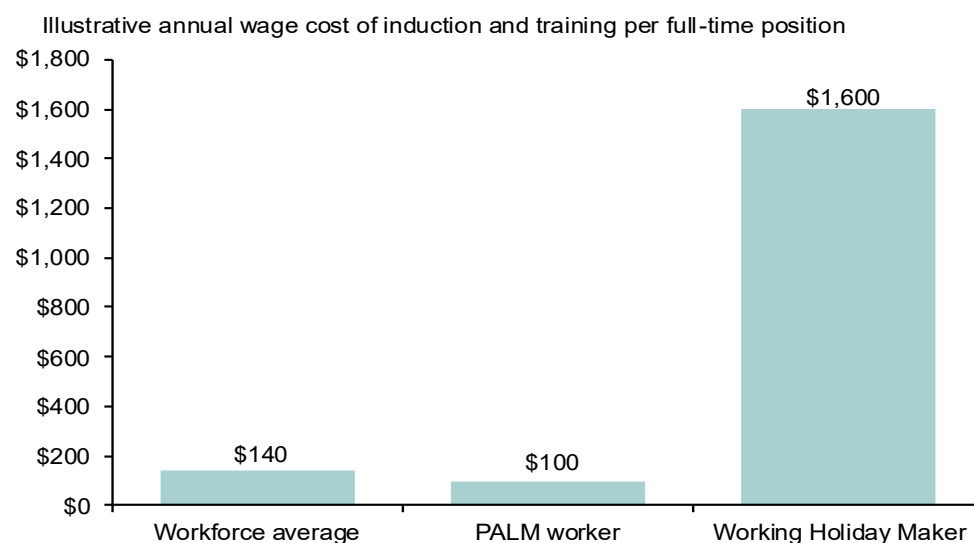


Figure 38. Illustrative annual wage cost of induction and training per full-time position by worker type

Note: Some migrant workers receive pre-arrival training, which may reduce training needs after arrival (Agri Labour Australia 2026). These costs are excluded from the estimates and may be reflected in recruitment or labour hire charges.

6.4.2 PALM requires additional workforce management

PALM has expanded the recruitment options available to processors, but maintaining a large PALM workforce requires additional systems, staffing and resources beyond ordinary employment arrangements. An estimated 9,960 PALM workers were employed in red meat processing in June 2026, equivalent to around one-third of the industry workforce. The scale of this workforce means that the accommodation, transport, welfare and compliance requirements associated with PALM represent a significant commitment for processors.

The estimated non-wage cost to a direct employer is around \$4,000 per PALM worker per year after worker deductions, based on a completed four-year placement.⁹ This estimate includes ongoing accommodation and transport costs, alongside welfare staffing, compliance, induction and additional supervision. However, it excludes major capital investments in housing, vehicles and other supporting infrastructure, which can represent a substantial additional commitment for processors. Around four-fifths of the estimated cost arises during employment, reflecting the ongoing resources required to support workers throughout their placement.

⁹ Some included expenses also arise when employing local workers, so this estimate does not represent a cost premium over domestic recruitment.

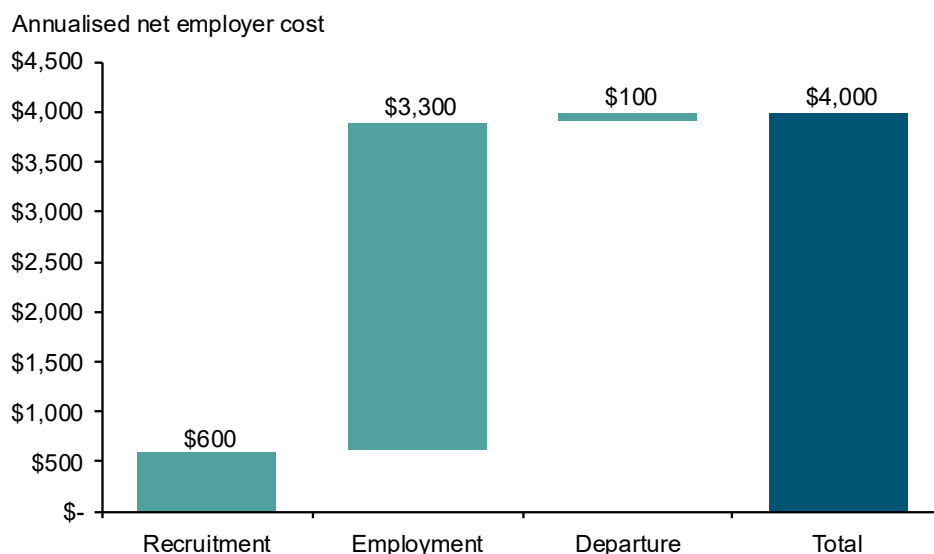


Figure 39. Annualised net employer cost per PALM worker by lifecycle stage

Note: Estimates represent a direct employer and exclude ordinary wages. Net costs are after allowing for assumed deductions from workers' pay for expenses such as visa application fees, transport and accommodation. Recruitment and departure costs are spread over four years for comparison and are not incurred evenly each year. Capital expenditure on accommodation, vehicles and other supporting infrastructure is excluded, although ongoing costs associated with accommodation and transport are included.

Dedicated welfare staffing represents a substantial component of this commitment. The PALM Approved Employer Guidelines specify minimum welfare and wellbeing support requirements, although consultation identified processors providing more intensive support than the minimum settings. The estimate uses a welfare staffing ratio informed by consultation, with processors reporting ratios ranging from one support worker per 40 PALM workers to one per 75 workers. Beyond dedicated welfare teams, processors also devote management and administrative capacity to accommodation, worker deductions, compliance and resolving issues as they arise. At the assumed ratio of one support person per 60 workers, dedicated welfare staffing costs around \$1,800 per PALM worker annually, accounting for approximately 45% of the estimated net employer cost.

The resources required can also increase when individual circumstances require additional support. The cost estimate includes routine welfare and support requirements, but does not capture every operational disruption or exceptional circumstance that may arise during placements. Consultation identified businesses spending additional time resolving worker issues, coordinating support and managing unexpected costs. These experiences highlight that the resources required to support PALM workers depend not only on the number of workers employed, but also the capacity of the business to manage the workforce.

Recruitment requires substantial expenditure and staff time before workers arrive in Australia. Processors described travelling overseas to interview and assess candidates, with businesses viewing in-country recruitment as a way to improve worker suitability and retention. Preparing applications, completing documentation and coordinating travel create financial and administrative commitments before workers contribute to production. The estimate allows \$500 per recruit for these visits, based on consultation evidence of a \$20,000 recruitment trip to select 40 workers.

Accommodation creates a further commitment before employment begins. Processors need to secure suitable housing ahead of arrival, with consultation participants reporting rental payments for two to three months before properties became occupied when arrivals were delayed. Some processors have also invested directly in accommodation assets to support workforce expansion, although these capital investments are excluded from the lifecycle cost estimate. Once workers arrive, worker contributions offset much of the accommodation and transport

expenditure. However, processors remain responsible for managing these services and often absorb costs that are not fully covered by worker contributions.

Worker deductions reduce the final cost borne by processors but do not remove the requirement to manage these arrangements. For example, occupied accommodation and utilities cost around \$9,800 per worker annually before deductions, while the assumed worker contributions reduce the net employer cost to around \$440. Businesses often need to fund costs before deducting contributions from workers' pay. Consultation participants reported securing accommodation before workers arrived, resulting in rent payments for vacant properties when arrivals were delayed. Processors also described absorbing costs where expenses were not fully covered by worker contributions, including accommodation repairs, transport shortfalls and other unexpected expenses.

The cost of PALM also depends on how processors choose to manage recruitment and support responsibilities. Labour hire providers can reduce the need for processors to establish internal recruitment, welfare and administration capability by managing these functions on their behalf. However, these services are reflected in provider charges. Consultation identified reported labour hire premiums of around \$3.50-\$4.00 per hour, equivalent to approximately \$6,300-\$7,300 per worker annually based on a 38-hour week and 48 weeks of employment. These charges are not directly comparable with the direct-employment estimate because they include different responsibilities and risk allocations.

Part of this charge covers the financial risks and unexpected costs of maintaining the workforce. A labour hire provider described absorbing expenses associated with delayed arrivals, vacant accommodation and worker illness, although responsibility for some costs was negotiated with the processor. Providers may also fund travel and other expenses before collecting worker contributions. Outsourcing these arrangements can therefore reduce both the processor's administrative workload and its exposure to costs when placements do not proceed as planned.

The value of labour hire depends on the processor's capacity to manage these responsibilities itself. Some consulted processors considered direct employment more economical once they had established their own welfare teams, accommodation and transport. Others relied on providers to organise these services and respond to worker support needs. The choice involves weighing the provider's charge against the staffing, expenditure and risks the business would otherwise retain.

The cost estimate captures the resources required to maintain a PALM workforce rather than the cost difference between PALM and other recruitment pathways. PALM remains an important source of labour for roles where alternative recruitment pathways are limited, but expansion requires processors to account for the ongoing workforce management capability needed to support workers throughout their placement.

6.4.3 Costs and support needs differ across migration pathways

Other migration pathways create different cost profiles depending on the level of recruitment effort, employer obligations and expected workforce continuity. While PALM involves more extensive ongoing support requirements, skilled migration typically involves higher upfront recruitment and sponsorship costs, while working holiday makers can require more frequent replacement as workers leave.

Skilled sponsorship requires greater upfront expenditure but can support longer-term workforce continuity. During consultation, several processors estimated costs of around \$10,000 for a subclass 482 application and initial support to get a worker settled, viewing this expenditure as necessary to maintain workforce and production stability. These costs are incurred to retain workers with demonstrated skills and experience, with processors describing sponsorship as a way to preserve capability developed within the business. However, recruitment processes can take considerable time, with some processors reporting waits exceeding 12 months for overseas recruits.

The standard Skills in Demand charge is around \$4,000, although eligible Pacific Island and Timor-Leste applicants have access to a lower charge from July 2026 (Department of Home Affairs 2026d).¹⁰ Under PALM, employers pay the application charge upfront and may collect the eligible amount through permitted deductions from workers' pay.

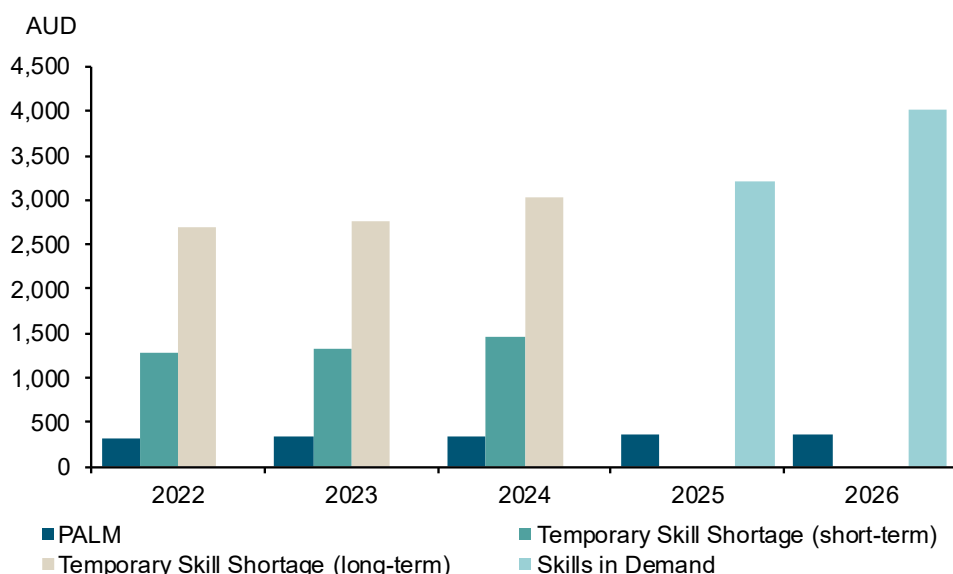


Figure 40. Visa application charges by category, 2022-2026

Visa charges represent the largest component of the overall cost of skilled migration. However, workers may also require additional support to transition into the workplace and community. Consultation identified processors assisting sponsored workers with accommodation and settlement activities, although these requirements are generally less extensive than those associated with PALM.

Skilled pathways can reduce repeated recruitment requirements where workers remain with the business, but do not remove all workforce management costs. Some processors reported transitioning suitable PALM and working holiday workers into skilled pathways after they had demonstrated their capability and suitability for longer-term employment. These pathways allow businesses to retain workers who already understand the workplace, reducing the need to repeat recruitment and initial training.

Working holiday makers provide processors with flexibility but contribute to higher replacement requirements. These workers can be recruited quickly and help businesses respond to changing production needs, but shorter stays mean processors frequently repeat recruitment and onboarding activities. Consultation identified working holiday makers as a significant source of workforce turnover for some processors, with businesses increasingly seeking to transition suitable workers into longer-term arrangements.

Median processing times for temporary skilled visas have risen sharply and remain much longer than those for Working Holiday Maker visas (Department of Home Affairs 2026e). These are medians, and processors commonly reported much longer waits for some applications during consultation. Processing times can also shift as government priorities change. PALM has a separate lead time, with at least eight weeks required to mobilise workers

¹⁰ The Skills in Demand visa also requires the sponsoring employer to pay a levy to the Skilling Australians Fund. For businesses with annual turnover exceeding \$10 million, the cost is \$1,800 per year of the visa. For businesses with less turnover, it's \$1,200 per year of the visa. For a four-year Skills in Demand visa, this amounts to either a \$7,200 or \$4,800 levy. The entire levy is payable upon nomination application and can't be passed on to the applicant. This is in addition to the \$420 fee to become an approved sponsor as well as the \$330 nomination fee.

from a decision-ready recruitment application. These lead times require processors to plan recruitment well ahead of production needs and reinforce the value of retaining skilled workers already in the business.

Median number of days to process visa applications

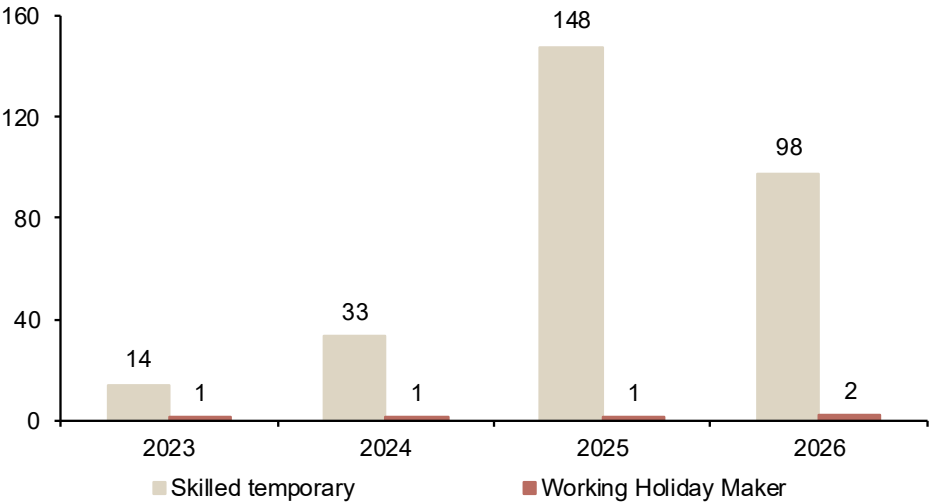


Figure 41. Median visa processing times for selected visa categories, 2023-2026

7.0 Discussion

A more sustainable workforce will require processors to strengthen both migration pathways and the recruitment and development of local workers. Migration will remain a substantial part of the industry's workforce and could meet a considerable share of future shortages. However, expanding recruitment also increases the resources needed to support workers and manage their replacement. Building more reliable workforce pipelines and retaining experience can help processors meet future demand with less disruption, and reduce risk, administrative costs and exposure to changes outside their control.

7.1 Softer near-term demand provides time to prepare for future workforce needs

Softer processing demand over the next few years gives processors time to prepare for workforce shortages later in the decade. Under current supply trends, the industry is expected to face less pressure to recruit over the next two years before deficits emerge from 2030. This easing will not be felt equally across businesses or occupations, but it provides an opportunity to develop existing workers and establish recruitment plans before competition for labour intensifies.

Workforce decisions made during this period will affect how readily processors can meet the recovery in demand. Staffing requirements rise by around 1,800 workers across 2029 and 2030, while apprenticeships, local recruitment relationships and overseas recruitment all take time to deliver workers with the required skills. Retaining experience through the slowdown, preparing employees for future vacancies and planning recruitment around expected departures would reduce the need to rebuild capability as production increases.

7.2 Most recruitment replaces departing workers rather than building sustainable workforce growth

High workforce turnover absorbs most new entrants, leaving limited growth despite substantial recruitment. Between 2027 and 2036, workforce demand increases by around 2,520 workers, while supply grows by just 620. The resulting shortage of approximately 1,900 workers sits on top of the much larger recruitment task already required to replace departing staff.

The scale of replacement is particularly evident in migration. Around 55,800 arrivals are projected over the decade, alongside 52,400 departures. Education pathways, including school leavers, add approximately 9,500 workers, but retirement and other natural attrition remove around 6,500. Net occupational movements reduce supply by a further 5,800. Some occupational changes reflect progression within processing, where experience remains in the industry, but overall migration offsets losses elsewhere and supports only modest workforce growth.

Maintaining staffing numbers through repeated recruitment creates continuing administrative and training costs. Processors described recruitment as largely reactive and driven by turnover, absorbing staff time simply to sustain existing production capacity. Consultation did not identify a consistent, substantial loss of production while new workers learned entry-level tasks. The clearer costs arise from repeating recruitment, induction and supervision, alongside the loss of experienced workers who can cover several positions and support less experienced colleagues. Delays in replacing workers in production-critical roles can also constrain throughput.

Retaining more workers would allow a greater share of recruitment to support expansion. Clear progression opportunities can help employees advance within processing, while returning migrant workers and suitable longer-term pathways can preserve skills developed during temporary placements. Without improvements in entry and

retention, meeting future demand will require migration to contribute more than the substantial recruitment already assumed.

7.3 Expanding PALM recruitment can ease shortages but adds costs and increases exposure to disruption

Increased PALM recruitment could address much of the projected workforce shortage. Doubling annual inflows lifts aggregate supply to 10.0% above demand by 2036, although shortages persist in several trade and specialist occupations. Expansion would deepen the industry's dependence on the scheme, which already accounts for around one-third of employment and is projected to supply close to half of the workforce by 2036 under current recruitment trends.

Expanding PALM recruitment requires processors to increase their capacity to accommodate, support and manage workers throughout employment. The estimated non-wage cost to a direct employer is around \$4,000 per worker per year after deductions, based on a completed four-year placement. Around four-fifths arises during employment, reflecting welfare staffing alongside training, administration and other support. The estimate incorporates consultation-informed welfare staffing, although exceptional support needs can create additional demands beyond those captured.

Although the estimated net employer cost of around \$4,000 per worker per year accounts for worker deductions, processors must fund larger amounts upfront and administer deductions from workers' pay for eligible expenses. Accommodation may also need to be secured before workers arrive, with consultation participants reporting rent paid for two to three months before occupancy. Costs that are not covered by worker contributions remain with the business. Labour hire can transfer some recruitment, support and funding responsibilities to a provider, although these services are reflected in its charges.

Dependence on continued arrivals exposes production to recruitment delays and changes in worker availability. As temporary placements end, replacements must arrive and develop the skills needed to maintain throughput. Australian policy changes can alter employer obligations and recruitment costs, while sending-country policies affect access to new and returning workers. Early departures can add further replacement costs and disruption beyond those captured in the completed-placement estimate.

PALM remains a practical response where local recruitment cannot meet workforce needs. Some processors considered it more stable and commercially attractive than local recruitment, and the costing does not establish a cost ranking between these options. Its contribution is to make the employer commitment clearer. Decisions about expansion should consider the resources required throughout employment, the capacity to provide effective support and the risks of relying more heavily on a single workforce pathway.

7.4 Returning workers and longer-term visas can reduce repeated recruitment requirements, retain experienced workers and diversify the industry's exposure to visa pathways

Returning placements and longer-term visas allow experienced workers to contribute beyond their initial stay, reducing the need to train replacements. These pathways already make a substantial contribution to the red meat processing workforce. Permanent migrants who first entered Australia on temporary visas accounted for 10.4% of meat processing employment in 2021, representing more than half of its permanent migrant workforce. Migration will remain a substantial part of the workforce, but its contribution can become more sustainable if experienced workers stay longer and businesses have several reliable recruitment sources.

Identifying suitable and interested workers earlier, and supporting their skills development and English-language preparation, would give businesses more time to organise these transitions before placements end. Processors already sponsor selected PALM and working holiday workers after they have gained experience. Incorporating this preparation into employee development would help businesses retain skills they have invested in and anticipate where replacement recruitment will still be needed.

The hidden cost analysis strengthens the case for preserving experience already developed within the business. Recruiting a new worker can repeat selection, preparation, induction and additional supervision requirements, while an experienced returning worker may need less time to regain proficiency. Ongoing accommodation, welfare and compliance commitments continue during employment, and return placements or visa transitions can create their own costs. The financial benefit of greater continuity therefore depends on which recruitment and learning requirements can be reduced and how long the worker remains with the processor.

Diversifying migrant recruitment would reduce the production risk associated with disruption to a single source of workers. Broader recruitment relationships would give processors alternatives when an established source becomes constrained. Greater use of suitable skilled pathways and recruitment from a wider range of countries could complement PALM while reducing dependence on individual sending countries. However, reported waits exceeding 12 months for some skilled recruits show that employer planning also depends on predictable application processing.

Gaps in occupational coverage prevent longer-term sponsorship from becoming a broader retention option. Meat process workers and meat packers account for around one-third of industry employment but have fewer options under the skilled pathways examined. The Meat Industry Labour Agreement covers skilled slaughtering, boning and slicing duties without extending across the processing workforce. Reviewing coverage where workforce needs justify it could help retain more established workers. Under existing arrangements, progression into eligible roles requires genuine development of the skills and experience those positions demand.

Longer-term visas increase workers' ability to remain in Australia, but do not ensure they remain in processing. One processor raised concerns about employees leaving after obtaining permanent residency. Competitive employment conditions, career progression and community connections are therefore integral to a sustainable migration workforce. Access to longer-term pathways gives processors the opportunity to retain experience.

7.5 Attracting and retaining local workers requires competitive jobs and clear career pathways

A stronger local workforce would reduce the additional migration needed to meet future demand and give processors a broader recruitment base. Many production roles draw workers from varied backgrounds, with skills developed after employment. However, some workers enter processing viewing it as a short-term job rather than a long-term career, contributing to high turnover as they pursue other opportunities. Changing these perceptions and making career pathways more visible could encourage workers to remain in the industry as their skills develop. Targeting particular adjacent industries offers less scope where previous occupational experience is not a major requirement.

Community and school engagement can build recruitment relationships that extend beyond immediate vacancies. Processors described school employment programs, tours and open days that introduced people to processing and the wider careers available within a plant. Some participants subsequently entered ongoing employment. These activities can address limited awareness and negative perceptions of the industry, although other processors continued to struggle to attract school leavers.

Entry-level pay affects whether that interest translates into recruitment. Several processors reported competing with retailers and other employers offering similar wages for less physically demanding work. A larger pay premium,

where commercially feasible, could make processing more attractive relative to these alternatives. Its value would depend on whether improved recruitment and retention justify the additional wage cost, taking account of the costs businesses already incur through repeated replacement. Working hours, supervision and conditions also influence whether new recruits remain.

Clear career pathways can strengthen retention by allowing workers to advance without leaving processing. Consultation identified production employees progressing into quality assurance, supervisory positions and maintenance apprenticeships. Making the skills, training and experience required for these moves explicit would help workers understand how to reach higher-skilled and better-paid roles. Internal progression creates vacancies to backfill, but retains experience within the business and can fill positions that are difficult to recruit externally.

Formal education can support these pathways while demonstrating the employer's investment in workers' development. Connecting workplace learning to recognised qualifications gives employees skills they can use as they take on greater responsibility. For many production roles, this offers a more direct contribution than broad changes to education before employment, because much of the training occurs after recruitment. The retention benefit depends on employees having opportunities to use their new skills and progress within the business.

Trade occupations require a targeted response because employers need qualified workers and compete with other industries for them. For fitters, projected education additions are almost entirely absorbed by retirement and other natural attrition, which removes the equivalent of 31.4% of the 2026 workforce over the decade. Apprenticeships and recruitment from other industries remain important to replacing these skills. Developing suitable production employees through apprenticeships can connect career progression with the business's future workforce needs.

Building local recruitment and development takes time and requires investment before shortages become acute. The near-term easing in demand provides an opportunity to establish these relationships and prepare workers for future roles. Alongside sustainable migration pathways, stronger local attraction and retention could reduce dependence on repeated overseas recruitment while preserving more of the experience developed within processing.

8.0 Conclusions

Meeting future workforce needs will require red meat processors to build more reliable recruitment pathways and retain more of the experience developed within their businesses. The near-term easing in workforce demand gives processors time to prepare for shortages later in the decade. Under current workforce trends, recruitment pressures are expected to ease over the next two years, driven by the softer production outlook. Recruitment needs will nevertheless continue as workers leave and vacancies arise in certain roles and locations. Shortages emerge from 2030 and reach approximately 1,900 workers by 2036, equivalent to 5.7% of requirements.

Substantial recruitment is already included in this outlook, but most new entrants replace departing workers, leaving limited growth to meet increasing demand. Our analysis estimates 91,300 departures from the industry through migration, occupational movements and natural attrition over the decade, compared with growth in demand of around 2,520 workers. Some occupational movements retain experience within the industry, but the scale of replacement still creates substantial recruitment and training requirements. The projected shortage therefore sits alongside a much larger continuing task of sustaining the existing workforce.

Migration prevents an otherwise declining workforce, with PALM now supplying around one-third of red meat processing employment. Recruitment would need to exceed current levels if other workforce trends remain unchanged. Expanding PALM arrangements may be achievable in the near term, although it would deepen exposure to Australian policy changes and access to workers from a limited group of sending countries.

Sustaining this contribution requires continuing investment in worker support and administration. Direct PALM employment has an indicative non-wage cost of around \$4,000 per worker per year after deductions over a completed four-year placement. Around four-fifths arises during employment, reflecting the ongoing resources required to accommodate, support and manage workers. Processors also fund expenses before collecting worker contributions and absorb costs that are not fully covered by those contributions. Labour hire can transfer some of these responsibilities to a provider, with the cost reflected in its charges.

Repeated recruitment adds to these demands. Consultation identified administration, induction and supervision as clearer sources of cost than production losses while new recruits learn. Greater continuity can reduce this repeated effort and preserve experienced workers' skills, strengthening the case for planned recruitment and retention alongside measures to increase workforce supply.

A more sustainable migration workforce would combine continued recruitment with greater retention of trained workers and a broader range of recruitment sources. Returning placements and suitable longer-term visas can extend workers' contribution beyond their initial stay. Preparing workers earlier for sponsorship would give businesses more time to organise transitions, while more predictable visa processing times and appropriate occupational coverage would improve access to these pathways.

Strengthening local recruitment would give processors a broader workforce base and reduce the additional migration needed to support growth. Community and school engagement can introduce people to processing, while competitive employment conditions influence whether they join and stay. Clear career pathways, supported by formal learning within employment, can help workers advance, retaining their experience within the industry. For many production roles, these measures offer greater scope than targeting particular adjacent industries.

Connecting recruitment and career development to future needs would help processors fill roles that are difficult to recruit externally. Eight of the 10 core occupations face projected shortages, including all enabling occupations, even as supply remains sufficient in some production roles. Progression from entry-level work into specialist positions can retain industry experience while addressing these gaps. For trade and technical roles, apprenticeships and targeted recruitment of qualified workers will also be needed to replace retiring employees and support future growth.

9.0 Recommendations

9.1 Industry applications

Guiding planning and policy engagement

Industry bodies should use the projections alongside production plans and site-level workforce information to identify recruitment and training priorities.

The modelling provides a detailed evidence base on future workforce pressures in the red meat processing industry and its core occupations. The findings can support industry workforce planning, inform engagement with government and provide a foundation for further research, development and extension. The occupation-level results are particularly important because workforce conditions differ considerably across roles, and adequate supply in one occupation does not necessarily address shortages elsewhere. The long-term outlook should also guide migration strategy, helping processors anticipate recruitment needs before vacancies arise. Planning the contribution of different migration pathways alongside expected placement departures would allow businesses to prepare recruitment and worker support earlier.

Informing engagement on migration and training policy

AMPC and industry bodies should use the analysis to explain the scale of ongoing recruitment required to sustain the workforce and the additional supply needed to meet projected demand. Engagement should make clear that the projected shortage already assumes continued migrant recruitment and growth in the PALM workforce.

Occupation-level findings should inform these discussions. Migration supports workforce availability in some processing roles, while shortages persist in specialist and enabling occupations with different skill requirements. Policy engagement should reflect these differences and the practical requirements of recruiting, accommodating and training workers.

This engagement should address gaps in MILA's occupational coverage and the delays processors encounter when recruiting skilled workers. Evidence of workforce needs and recruitment difficulties can inform proposals for broader access where justified, clearer application requirements and more predictable processing times.

Strengthen retention and career pathways within processing

The industry should make existing career pathways more visible and actively promote the opportunities available beyond entry-level roles. Consultation identified progression from production roles into quality assurance, supervision, specialist processing and maintenance apprenticeships. Clearly communicating these pathways during recruitment and employment can help workers see processing as a longer-term career rather than a short-term job.

Formal education and training can reinforce these pathways. Linking workplace learning to recognised qualifications, apprenticeships and other training gives workers a clearer sense of progression while demonstrating that the business is investing in their development. This can support retention as workers build skills and move into higher-skilled roles that are often harder to recruit externally.

For migrant workers, the same approach can also support progression into skilled roles and, where appropriate, longer-term visa pathways. Identifying suitable workers early and aligning training with the skills and evidence required for progression can help retain experience already developed within the business.

Improve preparation and support for PALM workers

Government, industry bodies and processors should jointly develop practical guidance covering the preparation and support of PALM workers. Pre-departure preparation should provide realistic information about processing work, including its physical demands, expected hours, workplace requirements, location, accommodation and transport. This should be reinforced through site-specific induction after workers arrive.

The guidance should clarify responsibilities for accommodation, transport, welfare support and community integration under direct employment and labour hire arrangements. It should also help processors identify the staffing and coordination required to meet those responsibilities, including support provided alongside employees' normal duties. Clear allocation of responsibilities and resources would help businesses prepare for new cohorts and maintain support throughout the placement.

Processors should manage PALM recruitment as an ongoing workforce pipeline. This includes staggering placements where practical, facilitating the return of experienced workers and identifying potential candidates for longer-term visa pathways early. Greater clarity from government and participating countries on return arrangements and lead times would help processors retain experience and reduce disruption when placements end.

Include the full cost of maintaining the workforce in recruitment decisions

Processors should assess recruitment options against the resources required throughout employment. This includes dedicated support staff, demands on existing employees and accommodation commitments before workers arrive. Budgets should distinguish gross payments from amounts collected through worker deductions and allow for delays or expenses that remain with the business.

Comparisons between direct employment, labour hire and other migration pathways should cover equivalent services and identify the responsibilities retained by the processor. The assessment should also consider expected tenure and repeated recruitment costs. This would help businesses assess whether investment in retention or longer-term sponsorship offers better value than replacing established workers.

Broaden overseas recruitment sources to reduce workforce disruption

Industry bodies and government should consider supporting expanded access to a wider range of overseas recruitment sources to reduce processors' dependence on individual sending countries. Consultation identified differences in countries' arrangements for returning workers, which can interrupt access to experienced staff. Broader recruitment relationships would give processors more options when established sources become constrained.

This should include greater use of existing skilled migration pathways and recruitment relationships with countries that already supply processing workers. Complementary labour mobility arrangements, including with South-East Asian countries, could also be investigated where existing pathways do not meet workforce needs. Any proposed arrangements would need to account for worker protections, practical recruitment requirements and Australia's relationships with Pacific partners.

9.2 Opportunities for further research

Maintain and update the workforce model

AMPC should consider maintaining the demand and supply model as an ongoing workforce planning tool. The current projections provide a baseline through to 2036, but the outlook will evolve as production, migration, education and broader labour market conditions change.

Periodic updates using new ABS, Census, migration, education and production data would allow AMPC to assess whether workforce pressures are developing as expected and identify emerging changes in the outlook. Particular attention should be given to migration flows and PALM workforce patterns given their importance to projected supply and the scale of ongoing worker movements.

Extend the workforce projections through targeted scenario modelling

Future research, development and extension should test how the workforce outlook changes under alternative assumptions for the factors that have the greatest influence on demand and supply.

Building on the PALM sensitivity analysis, further scenarios could examine stronger or weaker production, different retention outcomes, and improvements in productivity or automation. Migration scenarios could test recruitment directed towards shortage occupations and longer retention of established migrant workers. This would provide a clearer indication of the range of possible workforce outcomes around the baseline and identify which changes have the greatest potential to widen or reduce future workforce gaps.

This analysis would be particularly useful for policy and planning purposes, as it would allow AMPC and processors to assess the workforce implications of developments that are uncertain but material to the industry outlook.

Assess the economic contribution of migrant workforce arrangements

Further research could quantify the economic contribution of visa pathways supporting red meat processing in Australia and participating sending countries. In Australia, this could examine the production, exports and regional employment supported by migrant workers, alongside the potential effects of disrupted worker access. For sending countries, it could assess remittances, household income and skills gained through employment in Australia.

This would provide a stronger evidence base for migration policy discussions by showing how these arrangements support processing capacity and create benefits for workers and their home communities.

10.0 Project outputs

The project will deliver a range of outputs to support AMPC and industry stakeholders in understanding future workforce pressures and considering appropriate responses. These include the underlying analysis and data, project reporting, industry consultation, and communication of findings to support workforce planning and policy engagement. The project outputs are summarised below.

1. Project planning and milestone reports
2. Industry consultation with red meat processors and other relevant stakeholders
3. Integrated workforce analysis covering workforce supply and demand, workforce pressure mitigation strategies, migration and PALM pathways, and hidden workforce costs
4. Confidential internal report presenting detailed findings, supporting analysis and practical implications
5. Public-facing report summarising key findings for industry, stakeholder and government audiences
6. Supporting chart book and underlying project data
7. Presentation of findings to AMPC and an industry webinar
8. Post-release support for stakeholder discussions

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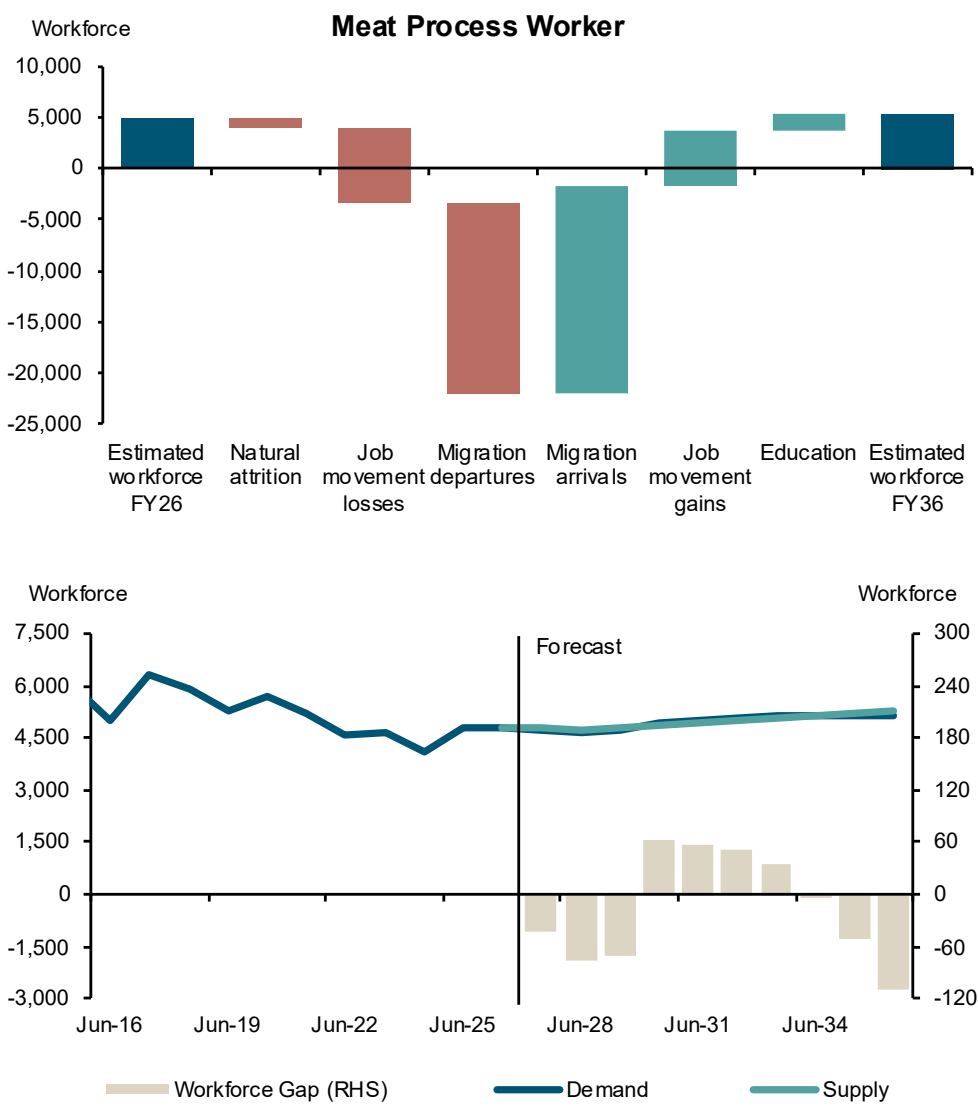
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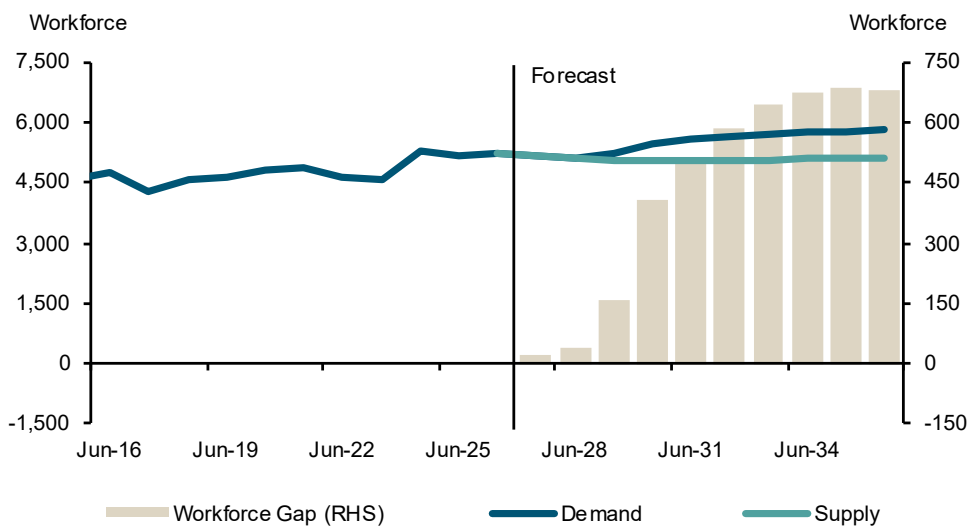
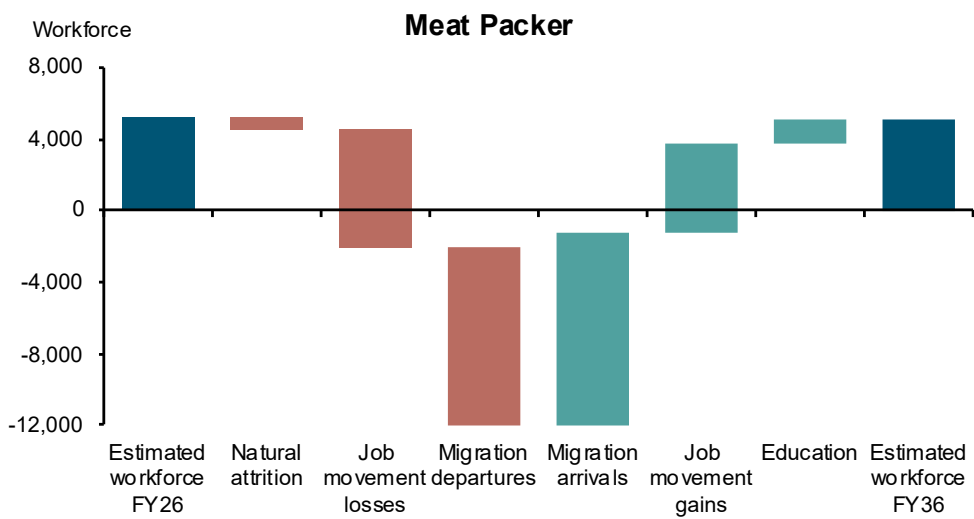
12.0 Appendices

12.1 Appendix 1 Workforce modelling results for the 10 core occupations

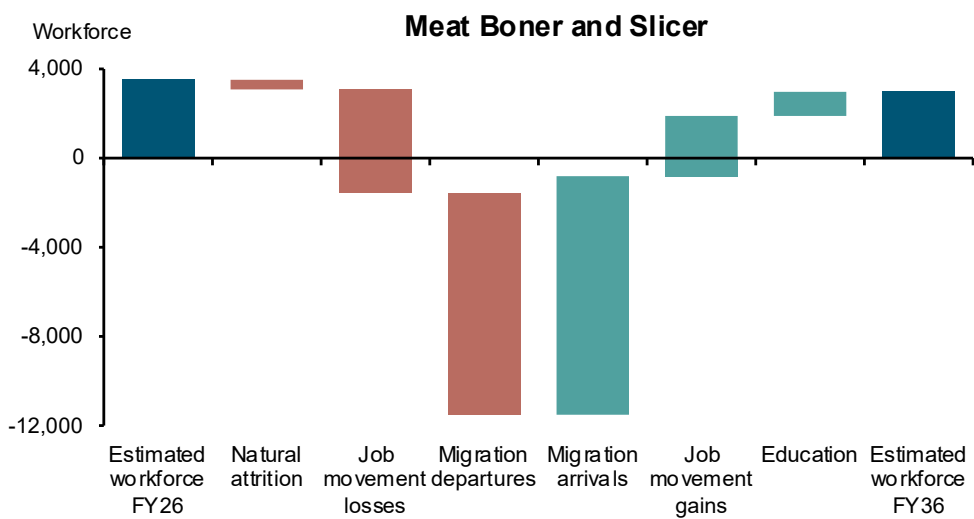
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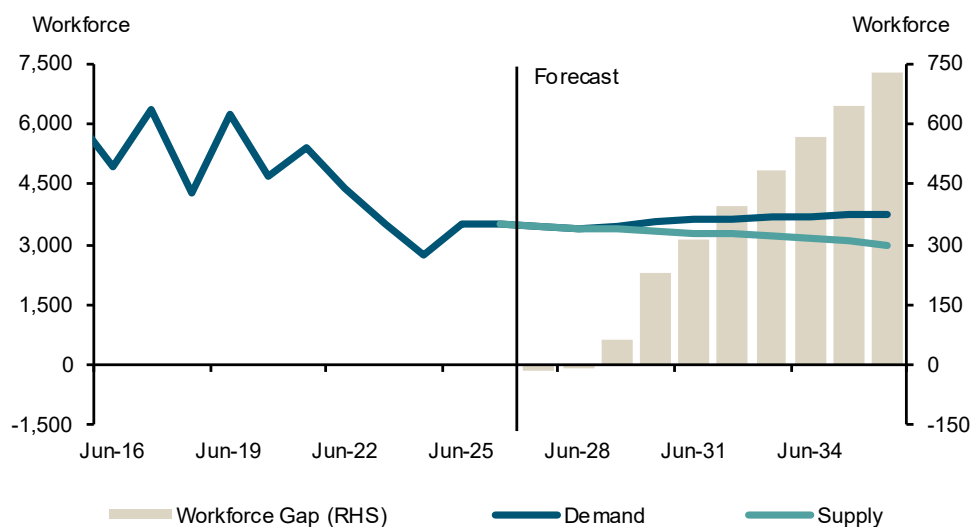


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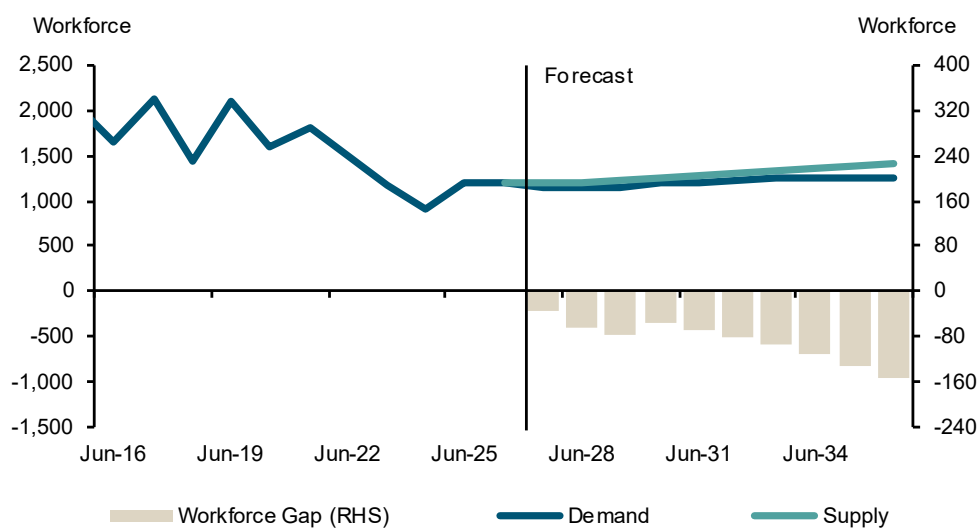


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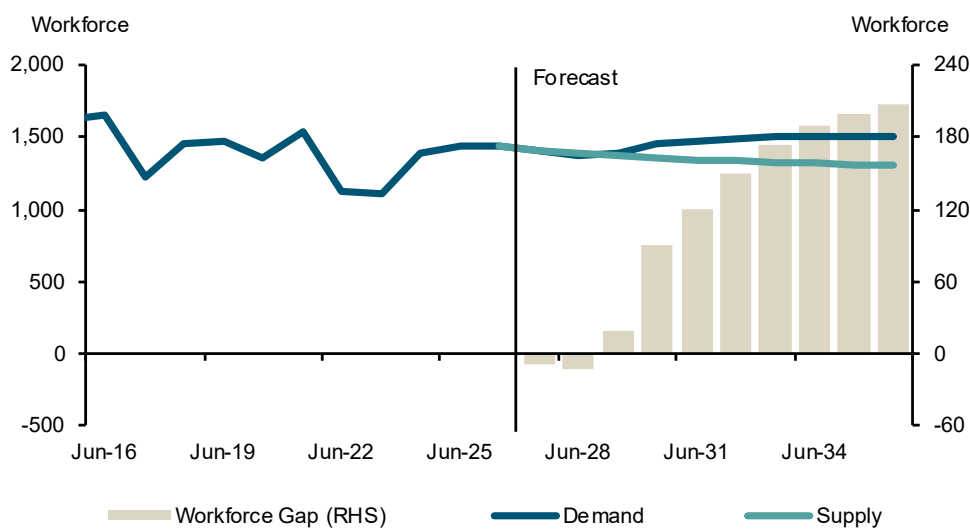
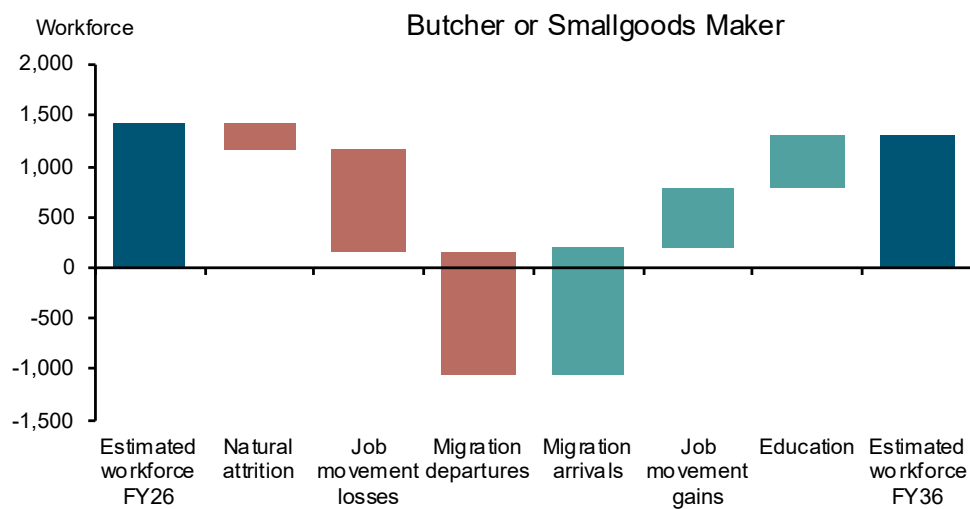




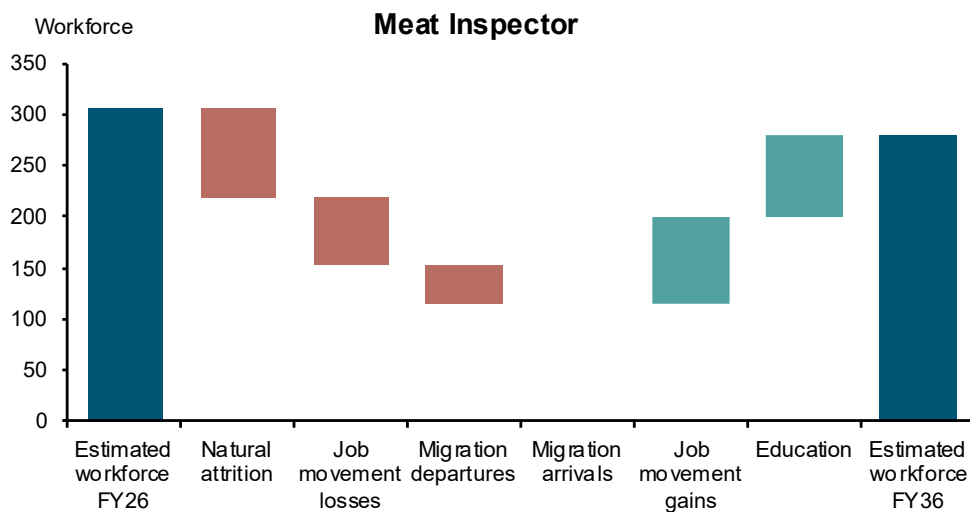
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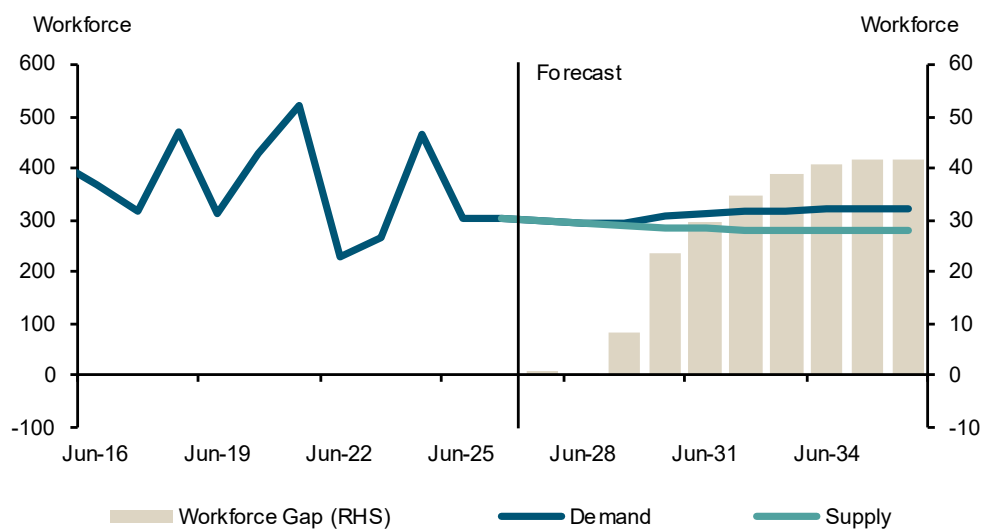


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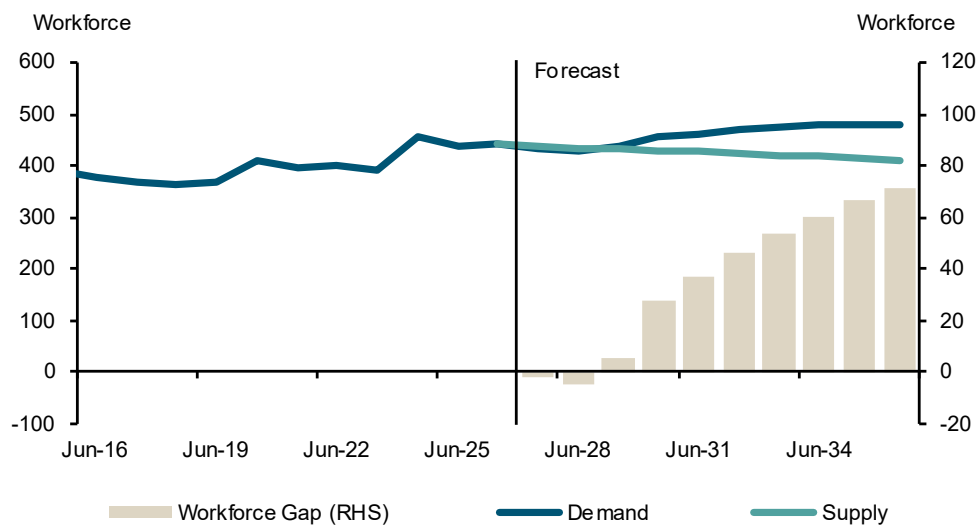
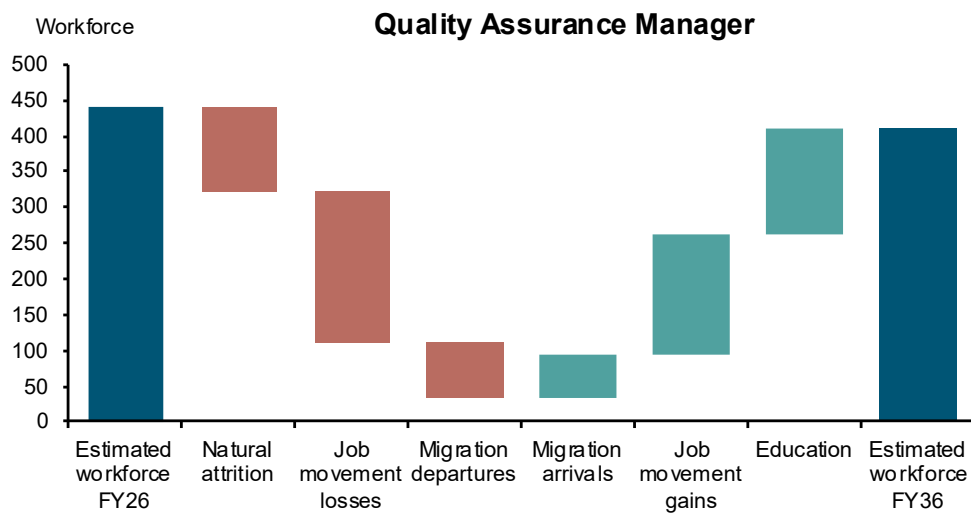


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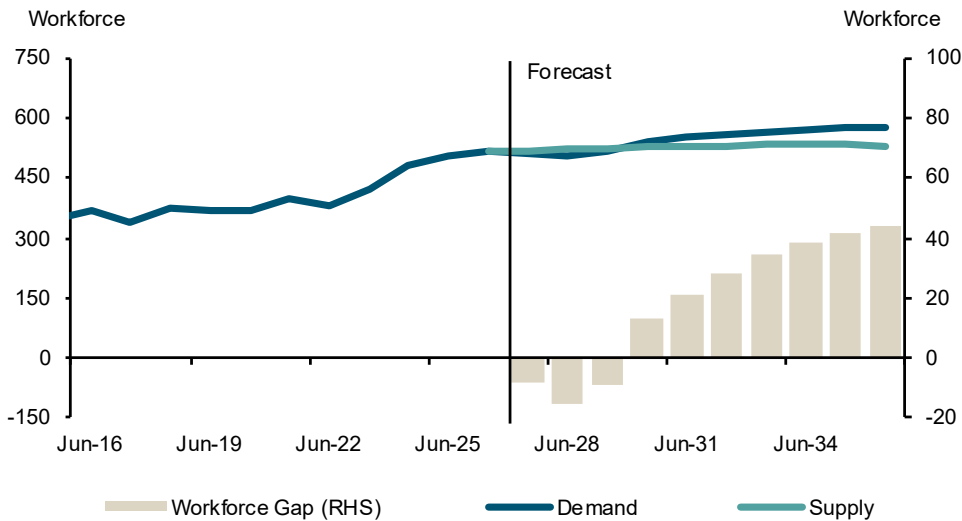
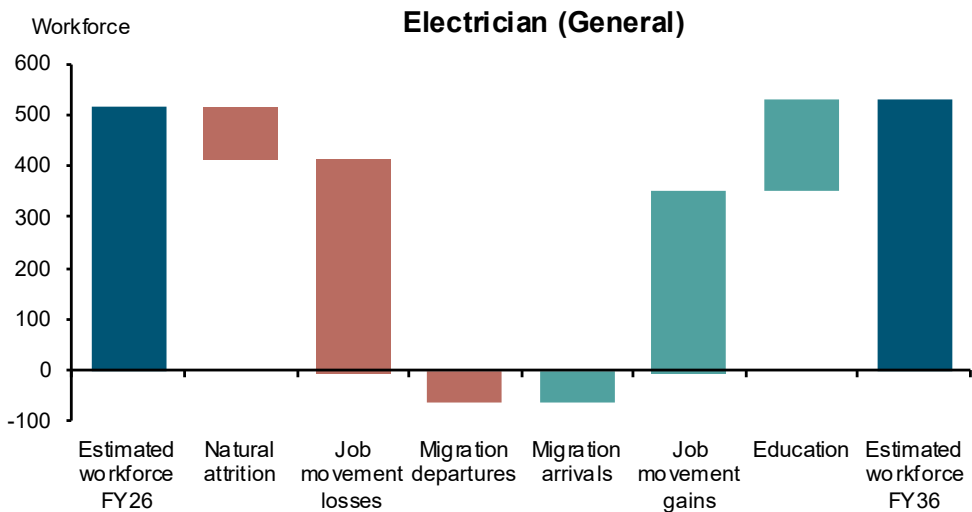




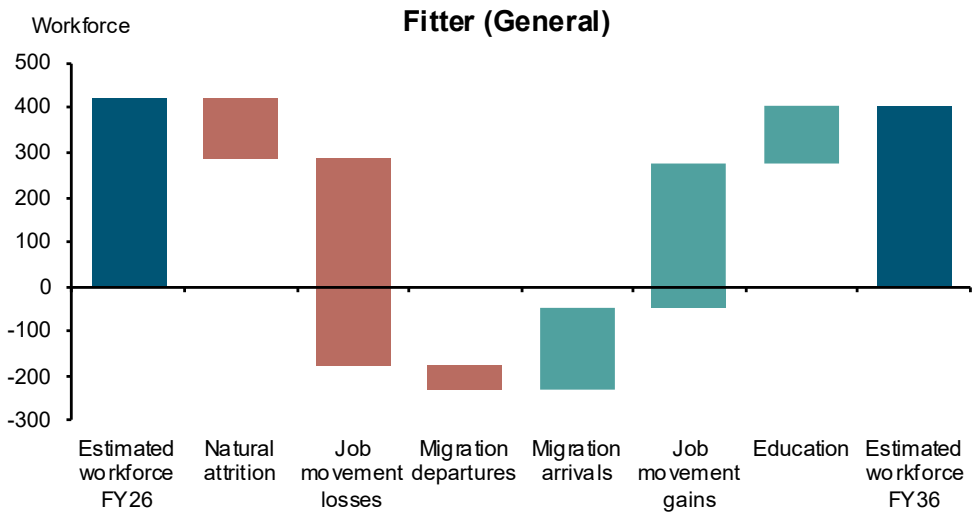
7) Quality Assurance Manager (ANZSCO 139914)

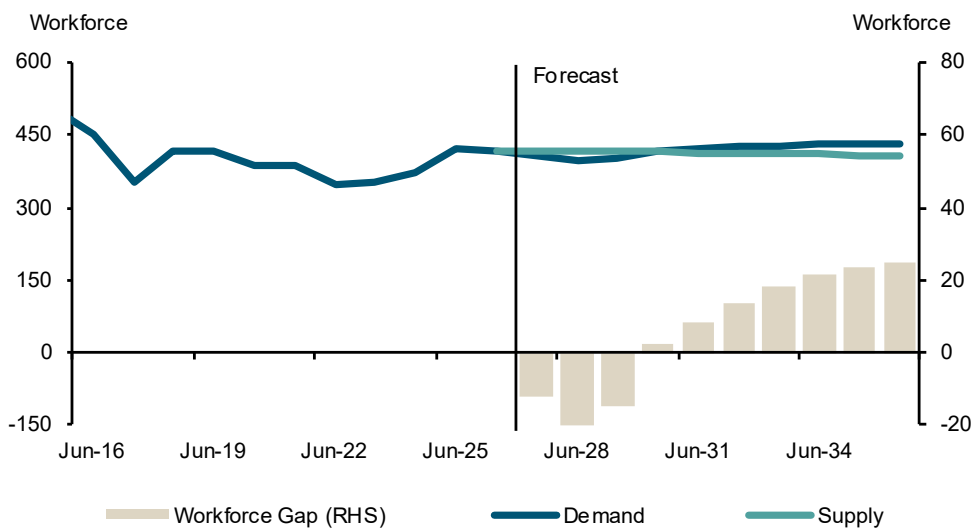


8) Electrician (General) (ANZSCO 341111)

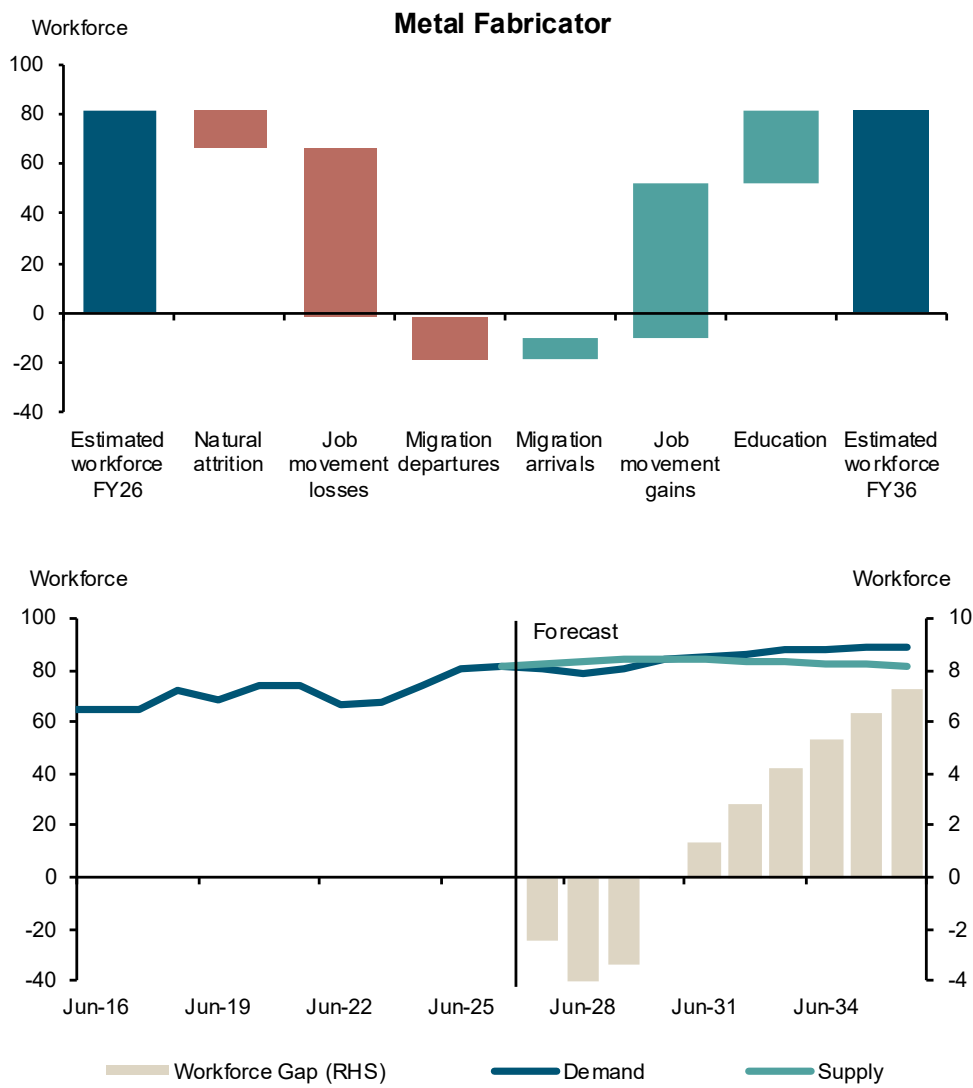


9) Fitter (General) (ANZSCO 323211)





10) Metal Fabricator (ANZSCO 322311)



12.2 Appendix 2 Specialist occupation recruitment options from the secondary workforce

Related occupations offer some additional recruitment opportunities for specialist roles. Poultry process workers, livestock farm workers and chefs have experience relevant to aspects of processing, animal handling or food preparation, although each transition would require further training. Table 12 compares these workforces with selected processing occupations.

Table 12. Potential adjacent roles for specialist processing occupations

Core	Meat Boner and Slicer		Slaughterer		Butcher or Smallgoods Maker	
Target	Poultry Process Worker		Livestock Farm Workers		Chef	
	Core	Target	Core	Target	Core	Target
Size	4,764	6,251	1,598	1,780	1,381	90,053
Average Age	36.6	40.3	37.2	38.3	38.6	37.5
Average Income	\$55,225	\$50,504	\$55,944	\$44,459	\$53,294	\$52,803
Regional Share	68.8%	35.0%	79.9%	88.8%	43.7%	29.6%
Share of Inflow		4%		0%		6%

Historical movements suggest these pathways have made a limited contribution to recruitment. Poultry process workers accounted for around 4% of inflows into meat boning and slicing, livestock farm workers for less than 1% into slaughtering, and chefs for 6% into butchery and smallgoods making. These figures describe national occupational movements rather than recruitment specifically into red meat processing.

The size of an adjacent workforce also overstates the number of potential recruits available to a particular plant. Chefs form a large workforce, but many work in metropolitan areas and may have less interest in moving into processing. Livestock farm workers have a closer regional profile to slaughterers, but consultation identified limited historical interest in making that transition. These occupations may provide suitable individual recruits, with their contribution dependent on local availability, interest and the training required.

For meat inspection and quality assurance, processing experience can be particularly valuable. Agricultural technicians and general clerks provide possible supplementary recruitment pools, but the comparisons in Table 13 do not establish that they could readily move into these roles. Applicants would need the relevant technical knowledge, training and experience. Processors described internal progression from production into quality assurance and administrative positions as an established way to develop this capability.

Table 13. Potential adjacent roles for Meat Inspector and Quality Assurance Manager

Core	Meat Inspector		Quality Assurance Manager	
Target	Agricultural Technician		General Clerk	
	Core	Target	Core	Target

Size	263	2,403	509	244,457
Average Age	47.4	39.3	40.6	43.6
Average Income	\$63,477	\$62,147	\$68,966	\$53,794
Regional Share	76.8%	67.3%	57.7%	32.4%
Share of Inflow		0%		8%

12.3 Appendix 3 Historical job movements between occupations

For meat boners and slicers, meat process workers are the largest identifiable source of entrants and destination for departing workers. Meat packers, butchers or smallgoods makers and slaughterers also feature among the main occupations involved. Movements involving poultry processing, broader labouring roles and other factory work are comparatively small (Figure 42). The concentration among closely related processing roles is consistent with workers moving between different tasks, skill levels or positions as they gain experience.

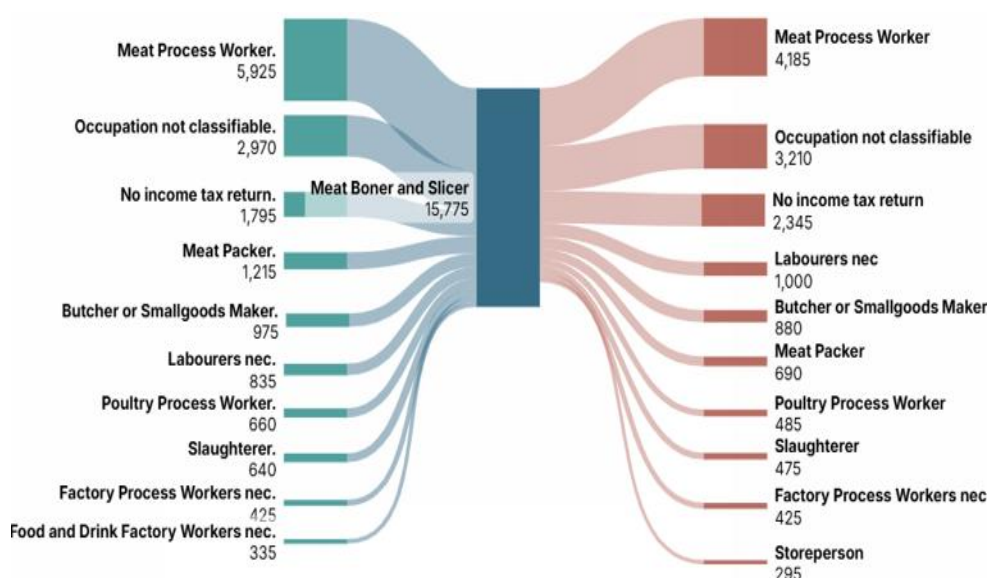


Figure 42. Historical occupation inflows and outflows for Meat Boner and Slicer, 2012-2021

Meat process workers show a similar pattern, with meat boners and slicers the largest identifiable occupation on both sides of the movement (Figure 43). These connections suggest that experience gained in one processing role

can support movement into another.

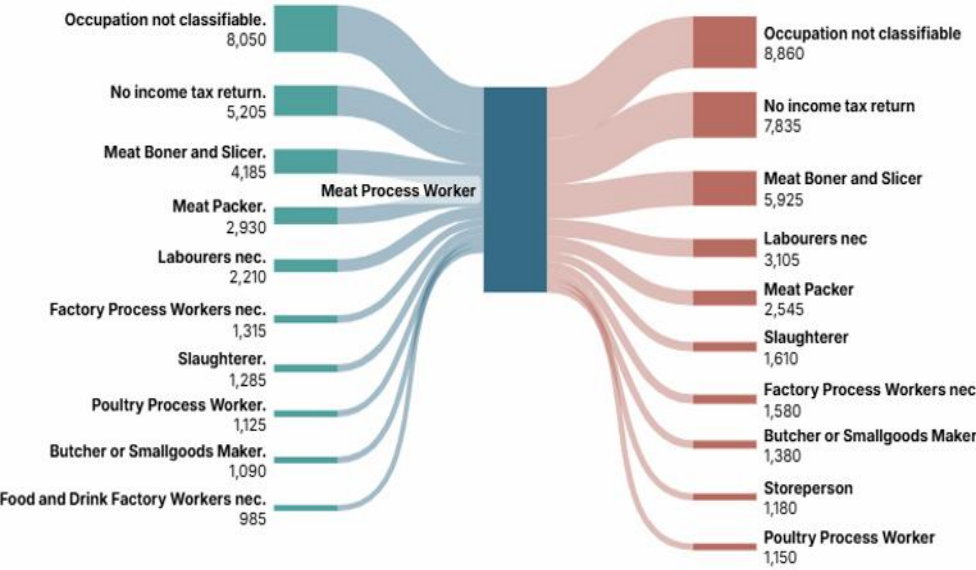


Figure 43. Historical occupation inflows and outflows for Meat Process Worker, 2012-2021