

4.7 Oceania

4.7.1 Regional Demographics and Poultry Stocks

An estimated 84,129 farms in Oceania are poultry farms (Figure 253). The Oceania broiler industry has 4,078 farms with 797 (19.5%) of those being commercial farms and 3,281 (99.8%) being household or micro-producer farms.

Oceania broiler farms have stocks of 139 million chickens with 97.4% being on commercial farms and 2.6% being on household or micro-producer farms. The average size of commercial broiler farms is 170,022 head. The average size of the household or micro-producer farms is 1,109 head.

There are 79,820 duck farms in Oceania with an inventory of 1.6 million head. The average size duck farm is 20 head.

There are 231 turkey farms in Oceania with 1.2 million head of inventory. The average turkey farm has an inventory of 5,124 head.

Overall poultry stocks have increased slightly since 2010. Chicken stocks have increased 22.4%, duck stocks have increased 3.2%, and turkey stocks have declined 13.2% (Figure 254).

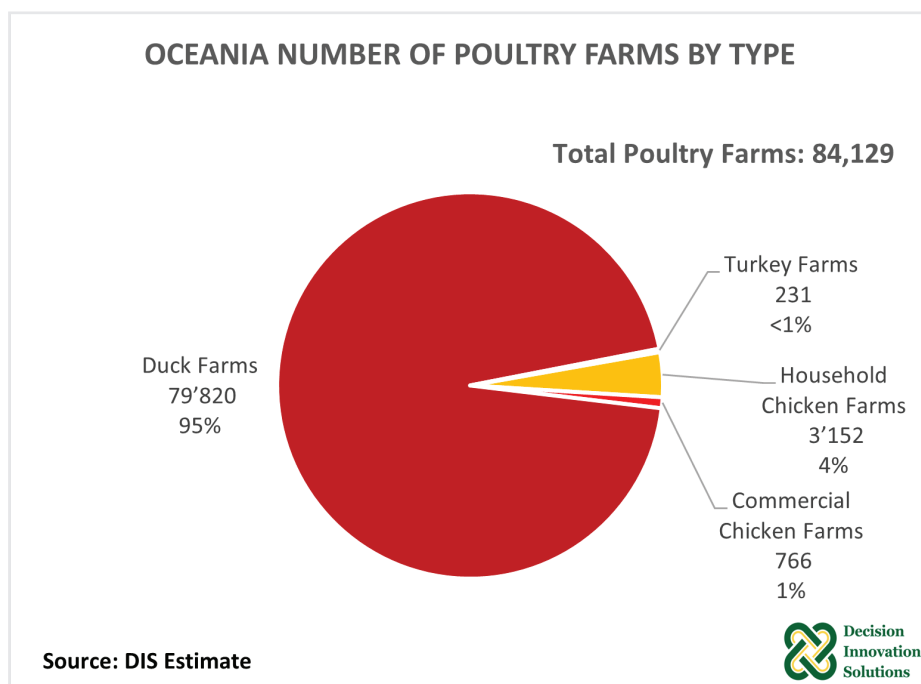


Figure 253. Oceania number of poultry farms by type

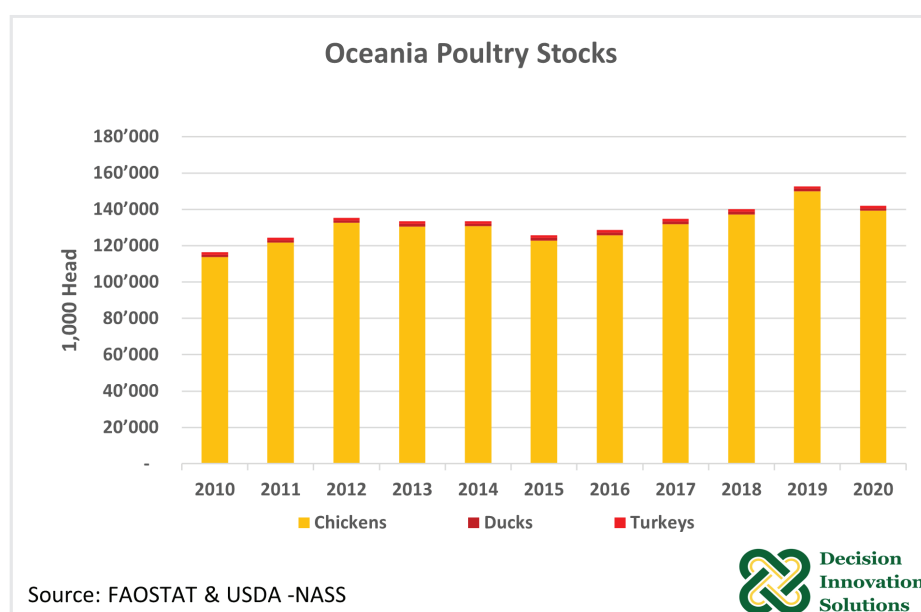


Figure 254. Oceania poultry stocks

4.7.2 Regional Economics

The total GDP for Oceania was valued at \$1.7 trillion in 2020. The agricultural production sector was approximately 3% of the total red meat and crop production contributing \$27 billion and \$26 billion, respectively. Poultry production was less than 1% of the total GDP for Oceania (Figure 255).

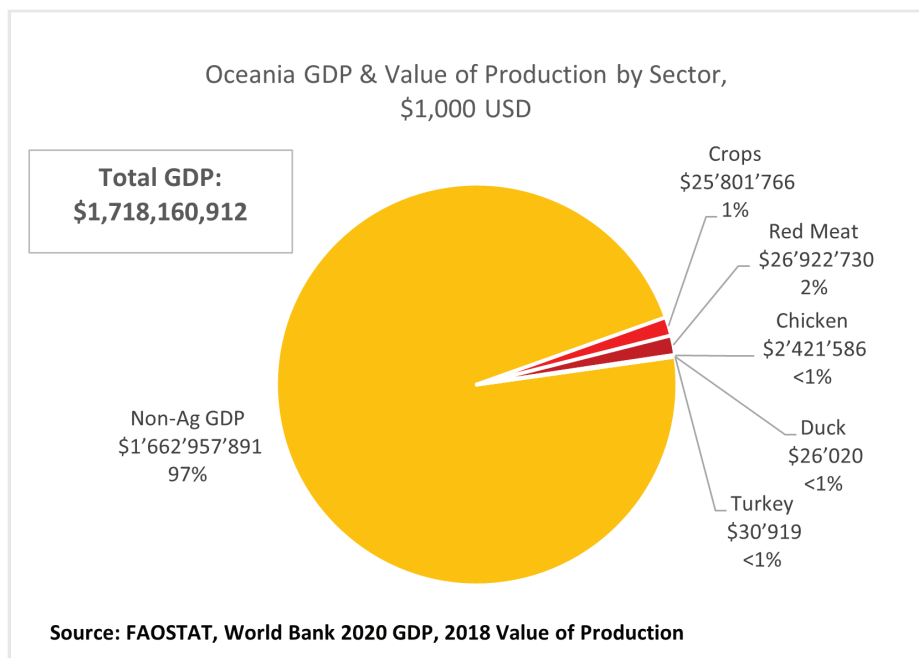


Figure 255. Oceania GDP & value of production by sector

4.7.3 Regional Poultry Production Volume and Value

Oceania poultry production has increased 21.8% since 2010. Oceania produced 1.5 million metric tons of poultry meat in 2020 with 98% being chicken meat, 1% being duck meat, and 1% being turkey meat (Figure 256).

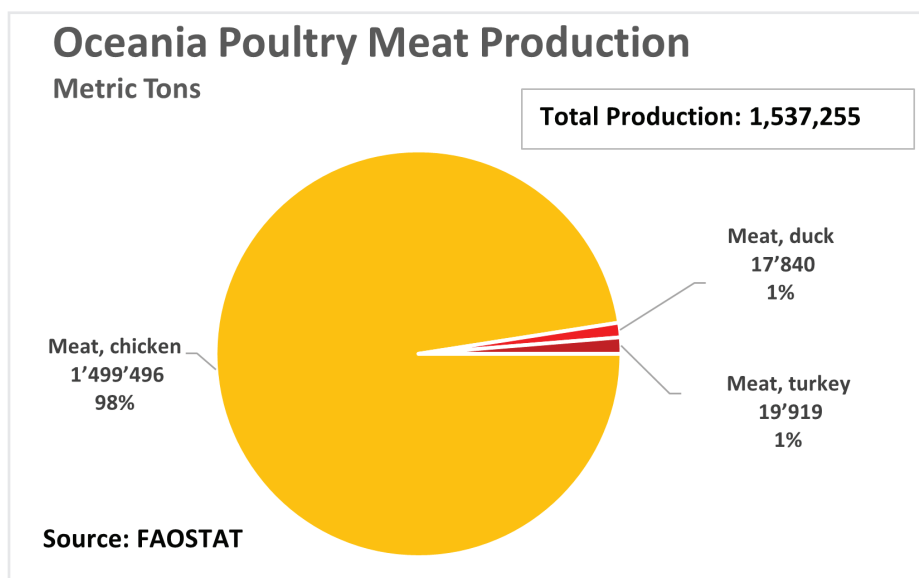


Figure 256. Oceania poultry meat production

The value of poultry production in Oceania during 2020 was \$2.5 billion. Approximately 98% of poultry production in Oceania was chicken production, 1% was turkey production, and 1% was duck production (Figure 257).

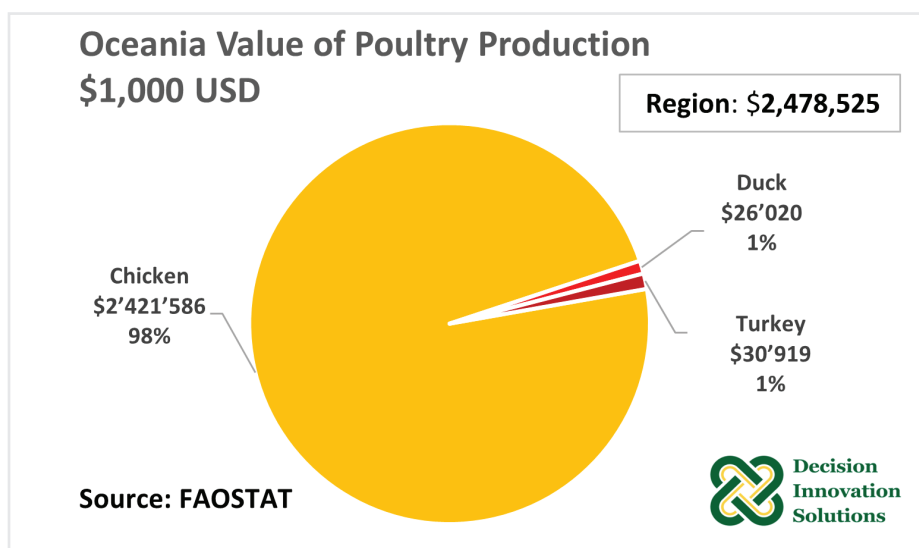


Figure 257. Oceania value of poultry production

4.7.4 Australia

4.7.4.1 Demographics

The total number of poultry farms in Australia was estimated at 2,883. The largest share of poultry farms were household or micro-producer chicken farms, accounting for 54% or 1,581 poultry farms (see Figure 258). The average size of household/micro-producer farm was 1,712 head. Approximately, 700 poultry farms were commercial chicken farms. Commercial chicken farms had an average of 128,646 head. An estimated 12% or 349 poultry farms were duck farms with an average of 3,515 head. Turkey farms comprised 9% or 253 of the total poultry farms with an average of 3,985 head.

Figure 259 indicates Australia's poultry production increased 35% in 2021 to 1.32 million metric tons compared with 2010 (977,330 metric tons). In 2010 Australia consumed 947,730 metric tons of poultry, by 2021 the volume consumed increased to 1.3 million metric tons representing an increase of 34% between 2010 and 2021. Over the last 12 years, Australia poultry production has been about 4% above poultry consumption.

The total number of poultry stocks was 103.1 million head (see Table 78). Approximately 101.9 million head were chickens, 1.2 million head were ducks, and 1.0 million head were turkeys.

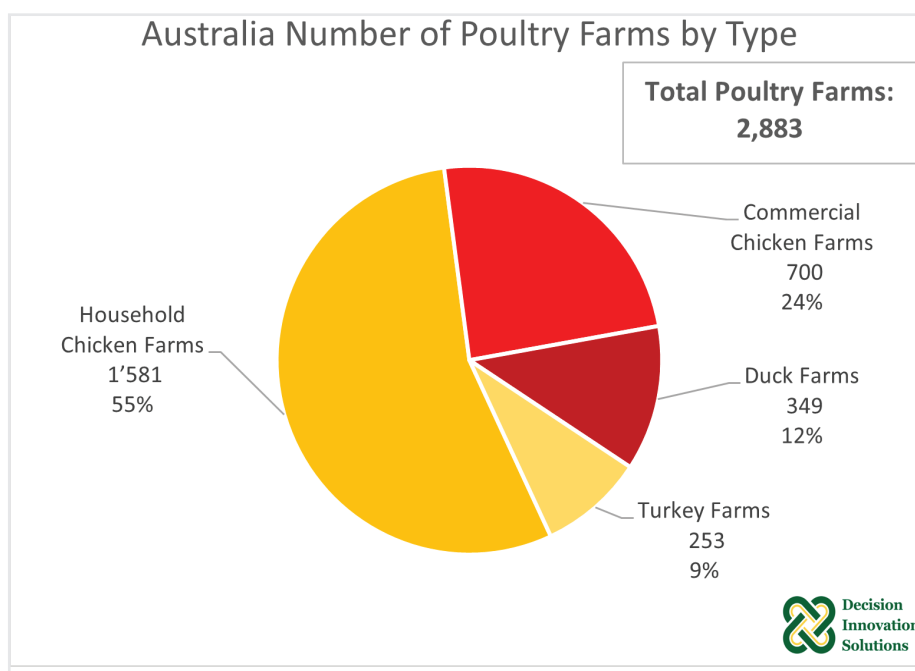


Figure 258. Australia number of poultry farms by type

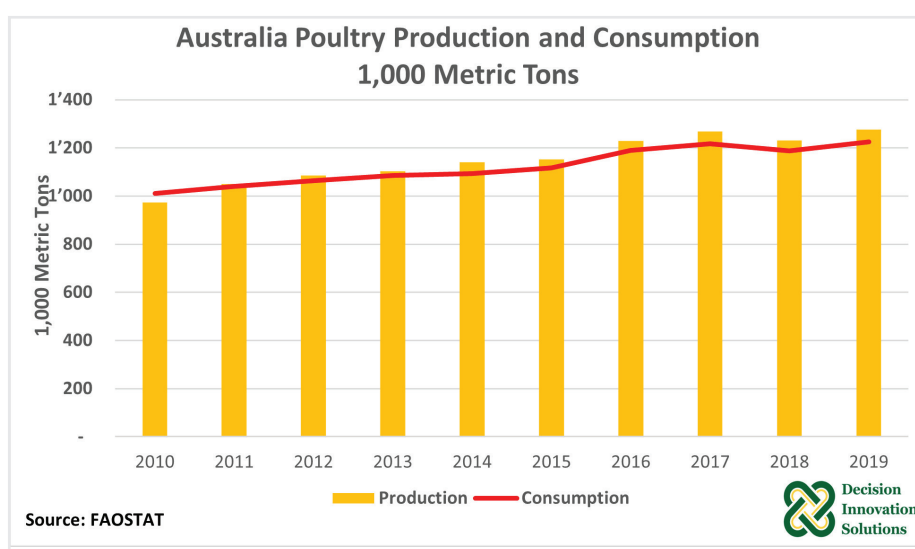


Figure 259. Australia poultry production & consumption

AUSTRALIA POULTRY STOCKS, SLAUGHTER, AND PRODUCTION				
1,000 head	Chickens	Ducks	Turkeys	Total
Stocks	100'894	1'226	1'009	103'129
Producing Animals/Slaughtered	658'261	7'844	5'296	671'401
Production (1,000 MT)	1'247	17	19	1'282

Sources: FAO, 2020

Table 78. Australia poultry stocks, slaughter & production

Since 2010, Australia's chicken stocks increased 22%, duck stocks increased 2%, and turkey stocks decreased 16% since 2010.

Poultry slaughter in Australia totaled 671.4 million head in 2020. An estimated 658.3 million head of poultry slaughter were chickens, 7.8 million head were ducks, and 5.3 million head were turkeys. Chicken slaughter increased by 29% compared to 2010. Duck slaughter decreased 2%, and turkey slaughter decreased 16% compared to 2010.

Australia's poultry production included 1.2 million metric tons of chickens, 19,000 metric tons of turkey, and 17,000 metric tons of duck. Compared to 2010, chicken production increased 33%, duck production remained the same as in 2010, and turkey production declined 16%.

4.7.4.2 GDP and Value of Production

The total value of GDP in Australia was valued at \$1.3 trillion in 2020. Nearly \$1.3 billion or 97% of the total GDP was derived from non-agricultural sectors. The crop production sector was estimated to contribute nearly \$22 billion or 2% of the total GDP. Red meat production represented \$13.6 billion or 6% of the total GDP. Chicken production contributed \$13.3 billion and represented less than 1% of the total GDP. Turkey production also represented less than 1% or \$27.4 million of the total GDP. Duck production also represented less than 1% or \$25 million (Figure 260).

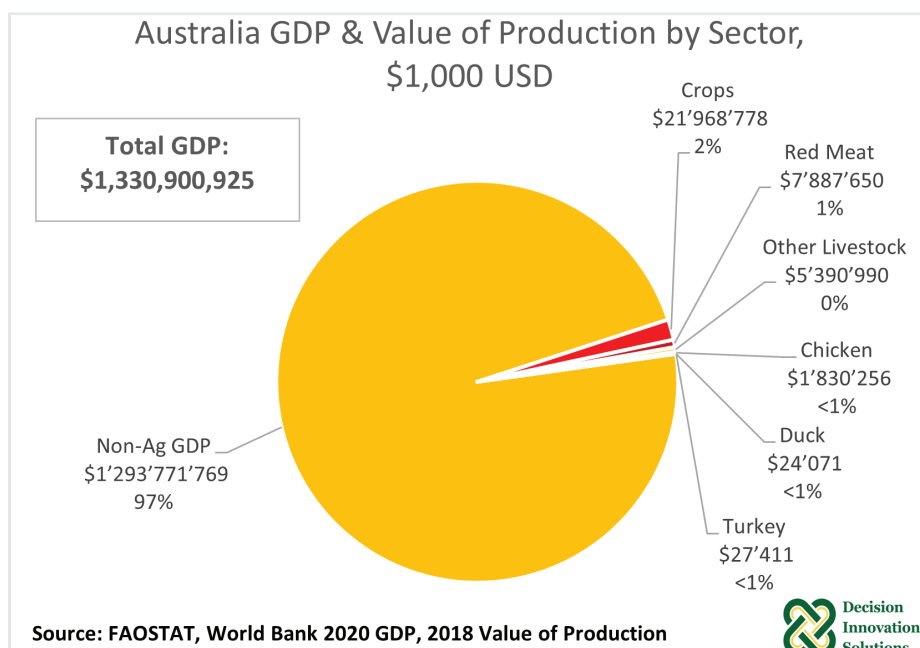


Figure 260.

Australia GDP & value of production by sector

The combined (direct and indirect) effects of agricultural production in Australia are estimated to be \$86.3 billion. Of this amount, \$5.1 billion comes from the poultry industry, with \$4.9 billion from chicken meat production, \$64 million from duck production, and \$73 million from turkey production. Agriculture pays a net value of \$466 million in taxes, \$19 million of which is estimated to be from the poultry industry (Table 79).

ECONOMIC EFFECTS - AUSTRALIA (\$1,000 USD)				
	Direct	Indirect	Total	Taxes paid*
All agriculture	\$37'129'156	\$49'129'123	\$86'258'279	\$466'294
Livestock	\$15'160'378	\$20'060'140	\$35'220'518	\$190'395
Poultry	\$1'881'738	\$3'174'492	\$5'056'230	\$19'162
Chicken	\$1'830'256	\$3'087'642	\$4'917'898	\$18'637
Duck	\$27'071	\$40'608	\$64'679	\$245
Turkey	\$27'411	\$46'242	\$73'653	\$279

Source: FAOSTAT, OECD Input-Output Tables. *Taxes is equal to total taxes net of subsidies

Table 79. Economic effects - Australia

4.7.4.3 Labor

Nearly 13.5 million people worked in Australia's labor force in 2020 (Table 80). Non-agricultural sectors supported an estimated 13.1 million jobs.

Approximately 336,478 people worked in the agricultural sector. Of that total 2,537 people worked in poultry production.

The total number of meat processing jobs in Australia was 60,374 during 2020. The total wages earned from meat processing was \$2.4 billion.

AGRICULTURAL LABOR FORCE CHARACTERISTICS - AUSTRALIA			
	Total	Female	Male
Total Country Labor	13'481'621	6'413'045	7'398'214
Non-Agricultural Labor	13'145'078	6'307'502	7'167'213
Agricultural Labor	336'543	105'542	231'001
Total Non-Poultry Agricultural Labor	334'006		
Total Poultry Labor	2'537		
Chicken Labor	2'077		
Turkey Labor	245		
Other Poultry Labor	215		
		Wages (\$1,000 USD)	
Total Meat Processing Labor	60'374	\$2'440'205	
Livestock Processing Labor	48'745	\$1'970'183	
Poultry Processing Labor	11'629	\$470'022	

Source: ILO 2020, World Bank 2020, UNIDO Database, INDSTAT 4 2021, ISIC Revision 3

Table 80. Agricultural labor force characteristics - Australia

Livestock meat processing was the largest share of meat processing labor with 48,745 jobs and nearly \$2.0 billion in wages earned. Poultry meat processing accounted for 11,629 jobs or \$470.0 million in wages earned.

4.7.4.4 Trade

Papua New Guinea, Singapore, and China, Hong Kong were the three largest markets for Australia's poultry exports in 2020. Australia exported more than \$19.2 million in poultry meat to Papua New Guinea. Also, Australia's value of poultry exports to Singapore and China, Hong Kong were estimated at \$9.1 million and \$6.8 million, respectively (see Figure 261 and Figure 262). Overall, Australia exported 39,491 MT of poultry meat products valued at \$58.4 million.

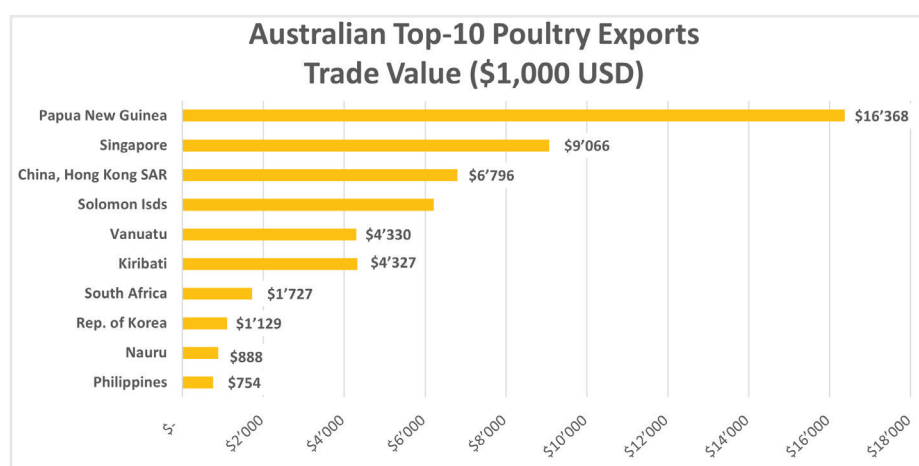


Figure 261. Australia top 10 poultry exports, trade value

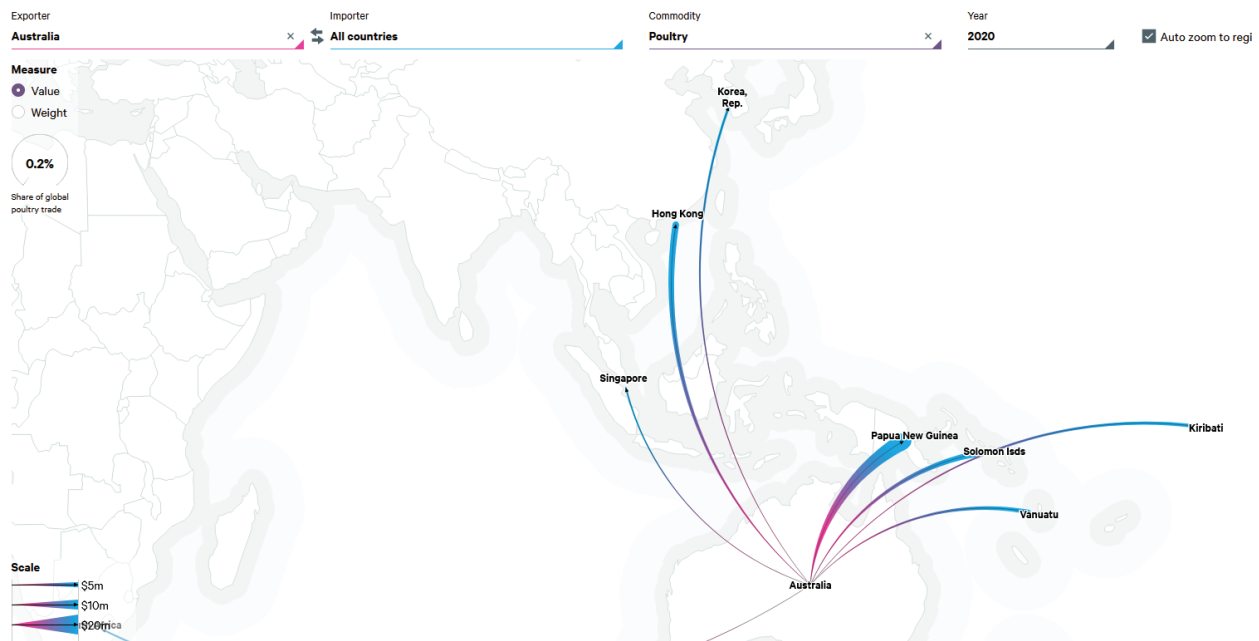
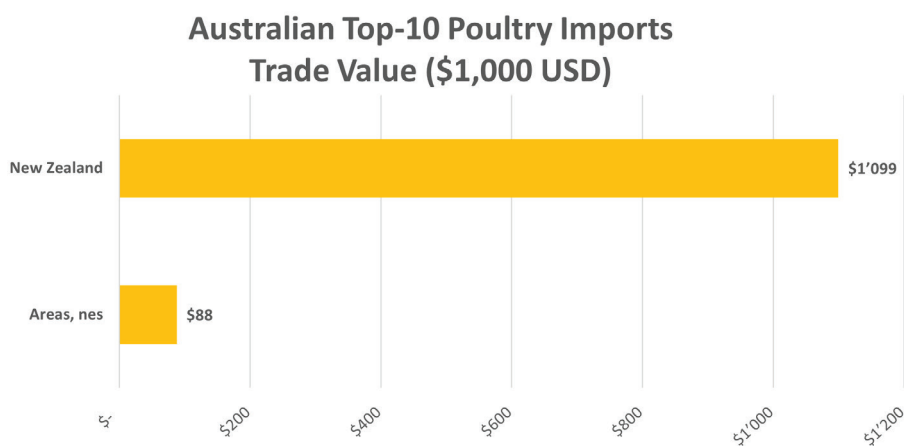


Figure 262. Australia top 10 poultry exports, trade value



The value of Australia's poultry imports was assessed at \$7.4 million. Thailand, New Zealand and the Netherlands supplied 72% of the total value imported (see Figure 263 and Figure 264).

Figure 263. Australia top 10 poultry imports, trade value

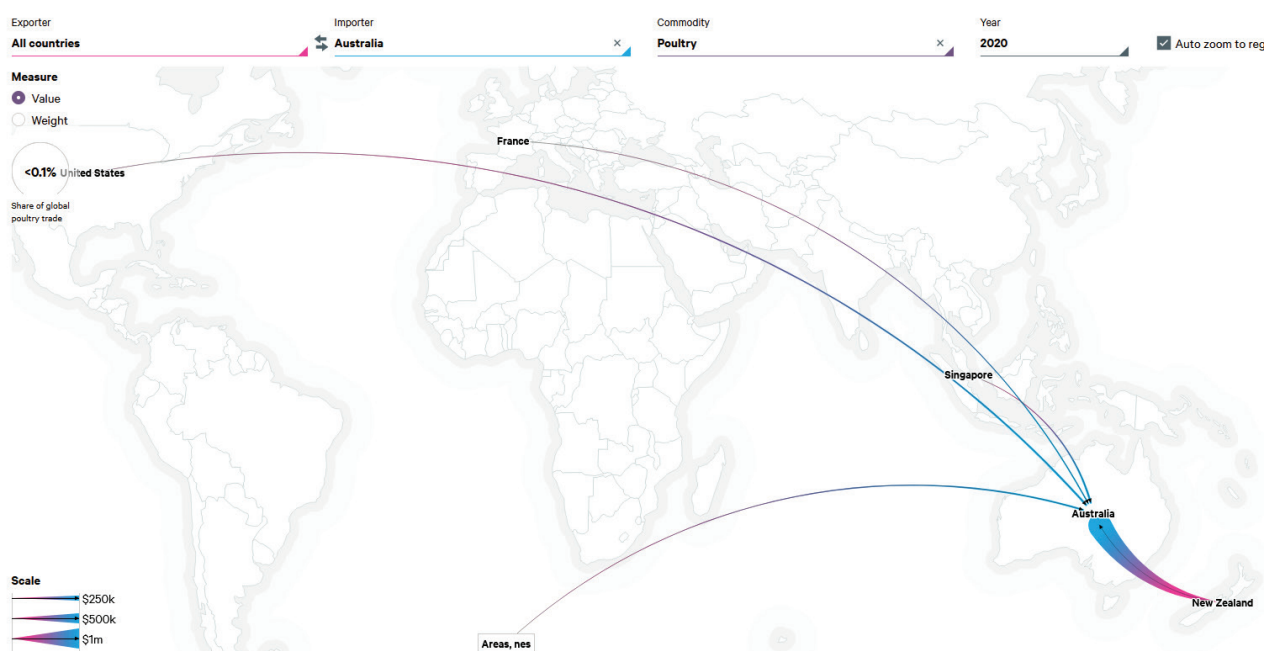


Figure 264. Australia top 10 poultry imports, trade value

4.7.5 New Zealand

4.7.5.1 Demographics

The total number of poultry farms in New Zealand was estimated at 2,154. The largest share of poultry farms were household or micro-producer chicken farms, representing 92% or 2,020 farms (Figure 265). The average size of household/micro-producer farm was 100 head. Commercial chicken farms contributed the remaining 6% or 134 poultry farms. On average, commercial chicken farms had 170,579 head.

New Zealand's poultry production consistently increased from 2010 (148,720 metric tons) to 2021 (237,660 metric tons), indicating a 60% increase during that period. At the same time, New Zealand poultry consumption expanded 56%. In 2021, New Zealand's poultry production volume was 6.4% higher than the poultry consumption volume (Figure 266).

In 2020, the total number of poultry stocks in New Zealand was 25.1 million head (see Table 81). Of the total poultry stocks, an estimated 99% (24.8 million head) were chickens, less than 1% (181,000) were ducks, and less than 1% (78,000) were turkeys. Since 2010, chicken stocks in New Zealand increased 34%, duck stocks increased 1%, and turkey stocks increased 3% since 2010

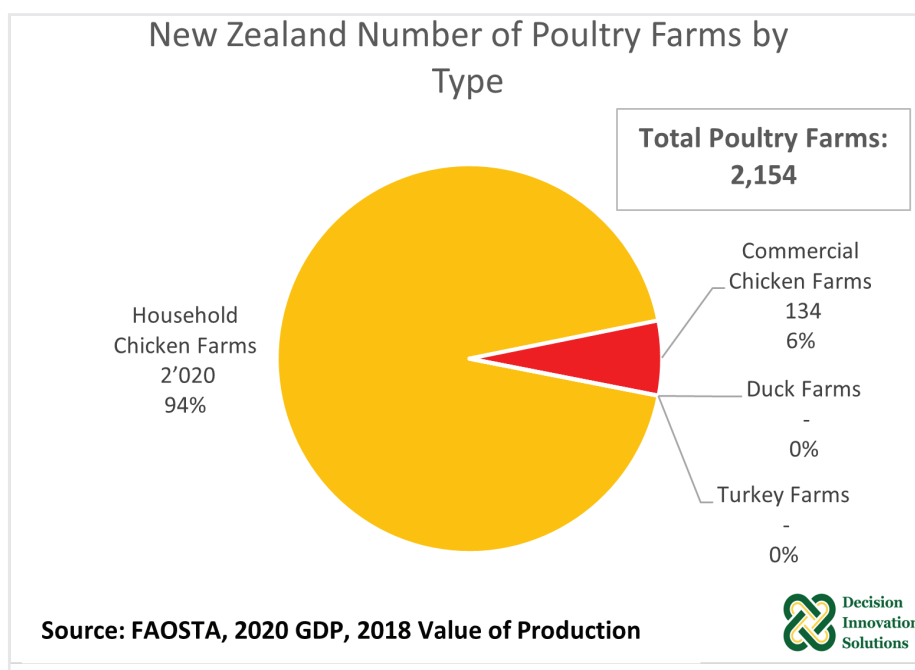


Figure 265. New Zealand number of poultry farms by type

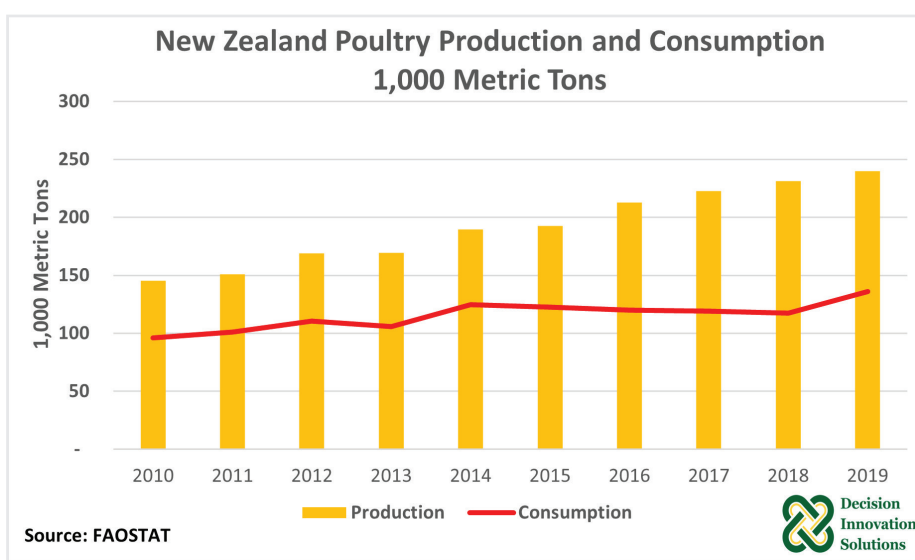


Figure 266. New Zealand poultry production & consumption

NEW ZEALAND POULTRY STOCKS, SLAUGHTER, AND PRODUCTION				
1,000 head	Chickens	Ducks	Turkeys	Total
Stocks	24'849	181	78	25'108
Producing Animals/Slaughtered	119'640	361	252	120'253
Production (1,000 MT)	217	1	1	218

Sources: FAO, 2020

Table 81. New Zealand poultry stocks, slaughter & production

Poultry slaughter in New Zealand totaled 120.3 million head in 2020. An estimated 99% (119.6 million head) of poultry slaughter were chickens. Duck slaughter outnumbered turkey slaughter and represented 361,000 head or less than 1% of poultry slaughter. Approximately, 252,000 turkeys accounted for less than 1% of total poultry slaughter. Chicken and turkey slaughter increased 46% and 1%, respectively. Duck slaughter decreased 2% compared to 2010.

New Zealand's poultry production included 217,000 metric tons of chicken, 1,000 metric tons of ducks, and 1,000 metric tons of turkey. Compared to 2010, chicken production increased 51%, duck production decreased 3%, and turkey production increased 1%.

4.7.5.2 GDP and Value of Production

In 2020, the total GDP in New Zealand was valued at \$212.5 billion. An estimated 92% or \$195.4 billion of the total GDP was represented by non-agricultural production sectors. The red meat production sector, was the largest agricultural production sector, representing 6% or \$13.6 billion in total GDP. Crop production was the second largest agricultural production sector, contributing to an estimated \$3.2 billion or 2% of the total GDP. The poultry production sector was the smallest, with chicken production representing \$387.1 million, and turkey production representing \$2.1 million (Figure 267).

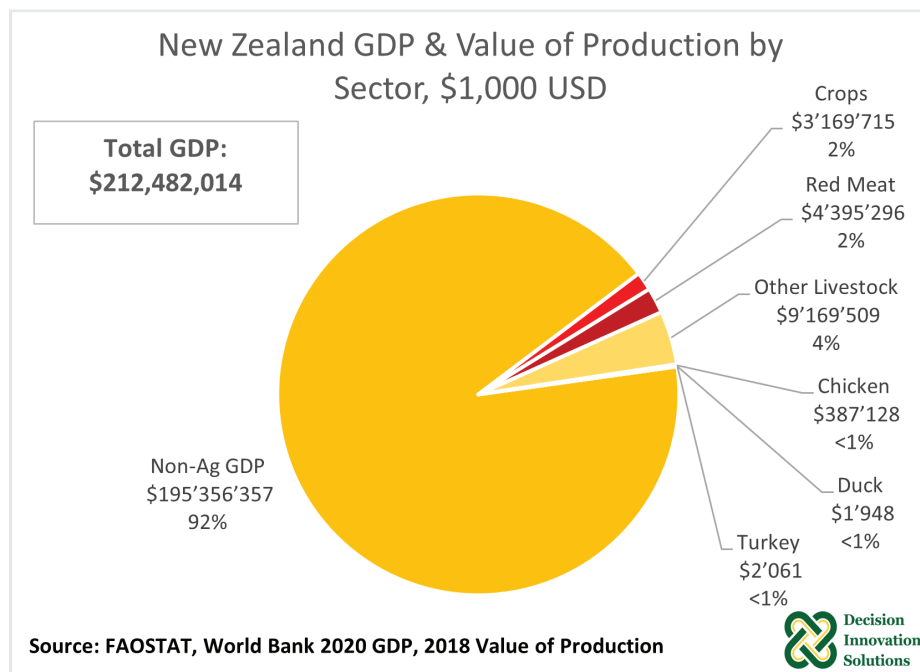


Figure 267. New Zealand GDP & value of production by sector

The combined (direct and indirect) effects of agricultural production in New Zealand are estimated to be \$38.9 billion. Of this amount, \$1.0 billion comes from the poultry industry, with \$1.0 billion from chicken meat production, \$5 million from duck production, and \$5 million from turkey production. Agriculture pays a net value of \$321 million in taxes, \$8 million of which is estimated to be from the poultry industry (Table 82).

ECONOMIC EFFECTS - NEW ZEALAND (\$1,000 USD)				Taxes paid*
	Direct	Indirect	Total	
All agriculture	\$17'125'657	\$21'741'595	\$38'867'252	\$320'890
Livestock	\$13'955'942	\$17'717'536	\$31'673'478	\$261'498
Poultry	\$391'137	\$627'384	\$1'018'521	\$8'139
Chicken	\$387'128	\$620'953	\$1'008'081	\$8'056
Duck	\$1'948	\$3'125	\$5'073	\$41
Turkey	\$2'061	\$3'306	\$5'367	\$43

Source: FAOSTAT, OECD Input-Output Tables. *Taxes is equal to total taxes net of subsidies

Table 82. Economic effects - New Zealand

4.7.5.3 Labor

The labor force in New Zealand was comprised of nearly 2.9 million people in 2020. Non-agricultural sectors employed 2.7 million. The agricultural sector employed 161,909 people with approximately 3,651 working in poultry production (Table 83).

In 2020, an estimated 31,100 people worked in the meat processing sector. Wages earned in meat processing totaled nearly \$1.1 billion. Livestock meat processing dominated the sector with 28,559 jobs and \$979.6 million. Poultry meat processing accounted for 2,541 jobs and \$87.1 million in wages earned.

AGRICULTURAL LABOR FORCE CHARACTERISTICS - NEW ZEALAND			
	Total	Female	Male
Total Country Labor	2'877'711	1'373'299	1'504'412
Non-Agricultural Labor	2'715'802	1'322'168	1'393'634
Agricultural Labor	161'909	51'131	110'778
Total Non-Poultry Agricultural Labor	158'258		
Total Poultry Labor	3'651		
Chicken Labor	3'614		
Turkey Labor	19		
Other Poultry Labor	18		
Wages (\$1,000 USD)			
Total Meat Processing Labor	31'100	\$1'066'246	
Livestock Processing Labor	28'559	\$979'114	
Poultry Processing Labor	2'541	\$87'131	

Source: ILO 2020, World Bank 2020, UNIDO Database, INDSTAT 4 2021, ISIC Revision 3

Table 83. Agricultural labor force characteristics - New Zealand

4.7.5.4 Trade

New Zealand's poultry meat largest export market was Papua New Guinea in 2020. The share of the value of poultry exported to Papua New Guinea represented 30% of the total value of poultry exported by New Zealand (\$26.5 million). The second largest market for New Zealand's poultry exports was Fiji with a total value of exports equal to \$5.0 million (see Figure 268 and Figure 269).

New Zealand Top-10 Poultry Exports Trade Value (\$1,000 USD)

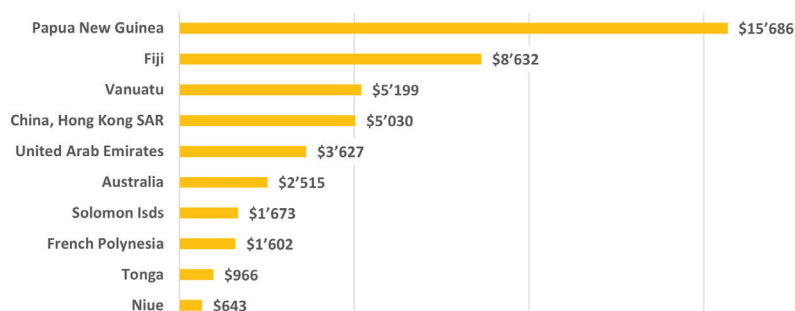


Figure 268. New Zealand top 10 poultry exports, trade value



Figure 269. New Zealand poultry export flows

Most of New Zealand's imports of poultry meat were from the Thailand in 2020. Imports of poultry meat from the Thailand were valued at \$2.1 million (see Figure 270 and Figure 271). The USA exported 350,323 MT of poultry products valued at \$321,921.

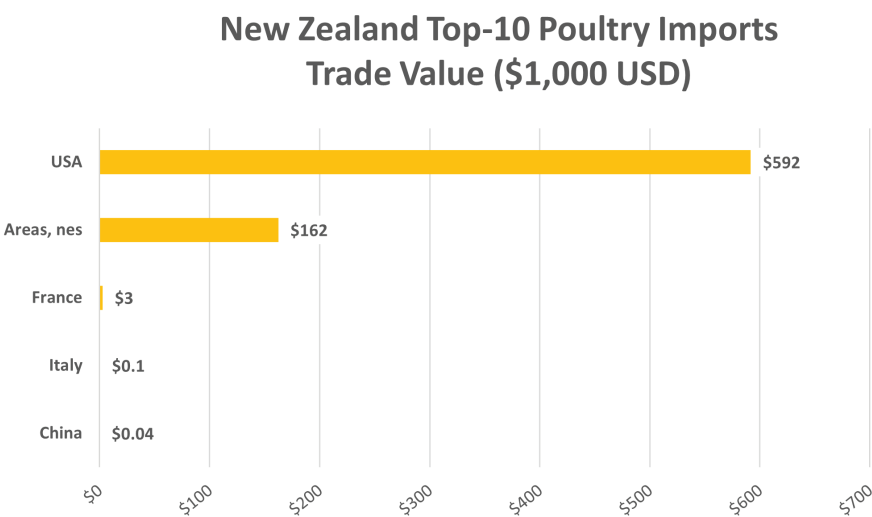


Figure 270. New Zealand top 10 poultry imports, trade value

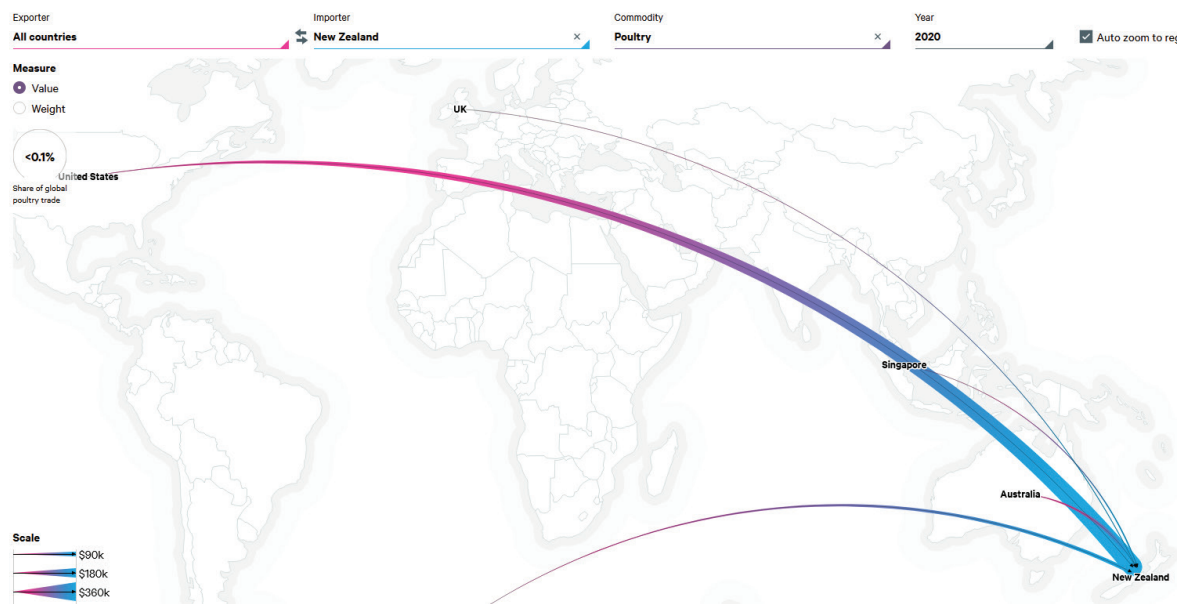


Figure 271. New Zealand poultry import flows