

Submission to the Productivity Commission
Inquiry into Bilateral and Regional Trade Agreements

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AUSTRALIAN PORK LIMITED



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Executive Summary

APL continues to support the government's current approach to trade negotiations. It is in the future interests of Australia's pork producers that no sector misses out on being part of a free trade agreement.

The notable success of the Australia-ASEAN-New Zealand Free Trade Agreement (FTA) clearly demonstrates that an outcome on agriculture is still possible, despite ASEAN expressing concerns over the reliance of subsistence farming to their respective national economies. In such cases, APL has suggested that flexibility can be found in negotiating longer lead times for full tariff liberalisation for pork, or for lower import duties.

APL supports greater pork export market access, despite any agricultural 'sensitivities.' There are a number of countries where agriculture is considered 'sensitive' to trade liberalisation. India, China, the Republic of Korea and Japan are typical examples.

Countries with sensitive agricultural sectors are generally those with high expectations for meat quality and pork as their preferred meat source. Additionally, China, Japan, Korea, as well as niche markets in Hong Kong and countries within the ASEAN region are increasingly high value export markets for Australian pork exports.

Astoundingly, these same high value pork export destinations still have high producer support estimate (PSE) levels, or significant government support. High PSE levels place Australia at a competitive disadvantage when trying to access these export markets. Until countries with significant PSE levels are liberalised in the WTO Doha round, where Australia negotiates free trade agreements this should be borne in mind and reflected where possible in the agreement.

It is this distinct lack of a level playing field, not just in relation to the level of financial support provided to commodities and producers by some countries (both directly and indirectly), but the impact of growing domestic regulatory and compliance requirements that impact Australian producers' costs of production. This in turn affects the Australian pork industry's competitiveness in export markets and also in those sectors of the domestic market which compete with imports.

It concerns our industry that its competitors are in the process of finalising FTAs with these same high value markets, like Korea. A case in point is the US-Korea FTA negotiations where negotiations will yield improved export market access for US pork in Korea. To remain competitive in high value markets the government's priority for the pork industry should be to negotiate FTAs that deliver international pork export market competitiveness.

In keeping with the above concerns, APL also broadly supports RIRDC's principles for a best practice agreement. These principles support access to FTAs for all industries and suggest that reform in 'sensitive' industries provides competition and the potential for the greatest gains from trade liberalisation.

The Australian pork industry has much to gain from improved market access via FTAs. The role FTAs have in reducing the export prohibitive tariff measures, where Australian pork has been accorded market access will ensure industry's future viability and export success in the longer term.

Introduction

The Australian pork industry is one of few Australian food industries operating in a global market in the true sense. The industry competes in the export arena, with markets in Asia, and products are imported into Australia from North America and Europe. There is huge potential for Australia to exploit the growing demand for pig meat. Over several years, APL has taken part in the Australian Government's industry consultations to negotiate FTAs with our major trade partners to reduce tariff and non-tariff barriers to trade to provide greater export opportunities for Australian industry.

Export business today

Currently Australia's pork exports are primarily built around the markets of Singapore, New Zealand and Hong Kong.

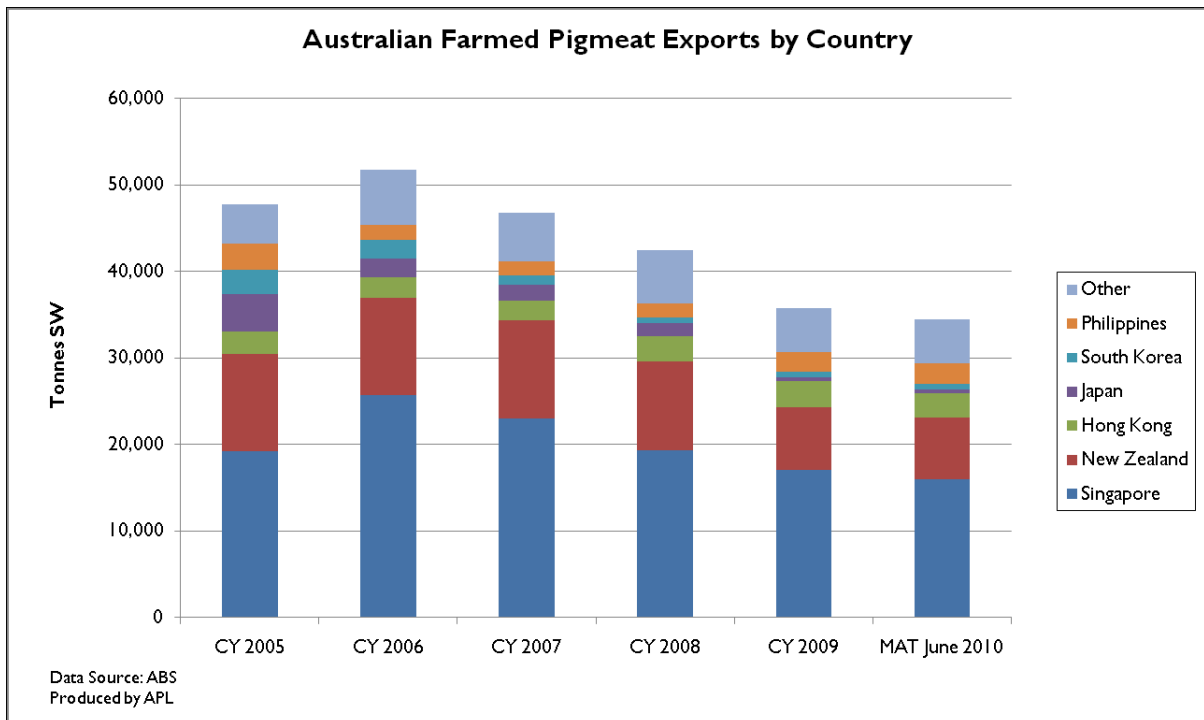
The types of pork exported from Australia fall into two broad categories, being (1) fresh pork cuts or carcasses often sold as chilled product and (2) offal which is a lower value product but has almost no value in the Australian domestic market but is of demand in Asian markets.

Pork export volumes increased quickly in the late 90's when a Nipah Virus outbreak decimated Malaysian pig production. Malaysia had been the traditional supplier to Singapore and this disease outbreak led to Australia becoming a major supplier to Singapore – a status we have held ever since.

Today, Singapore remains APL's key market in Asia, comprising more than 50 per cent of Australian pork exports. Australia is the dominant supplier of chilled (as opposed to frozen) pork exports to Singapore which is mostly air freighted in daily. The ability to supply chilled pork into Singapore is limited to very few countries and is an asset the Australian market has leveraged very well.

The volume of Australian pig meat exports has declined from its peak in mid 2003. Declines since mid 2008 were partly caused by a shortage of pork in Australia after the 2007/8 industry profitability crisis. The strong A\$ has also played a role in recent years making it more difficult to compete with Indonesian, Chinese and Brazilian pork into Singapore.

Creating and sustaining relationships and trading alliances between commercial entities in both Australia and Singapore are crucial to maintain Australian pork consumption in Singapore. These relationships and activities have contributed to sales in Singapore remaining relatively stable despite continued high prices driven by the exchange rate and domestic supply issues. The entrenched Australian branding and quality perceptions of Australian product overseas will continue to be a valuable asset of the Australian pork industry in years to come.



Singapore contributes to 46.4% of MAT June 2010 export volume market share and 59% of MAT June 2010 export value share.

The role of free trade agreements to the industry

Free trade agreements are a pathway for the Australian pork industry to access new, high value markets. South-east Asia, Japan, China and Korea are markets where the industry hopes to open new export opportunities.

The success of the AANZFTA

The ASEAN remains a major market for Australian pork exports, in particular Singapore. It demonstrates a clear match between industry priorities in export markets, the expected long-term demand in export growth, and the link back to long-term industry sustainability. Despite commercial exporting risks, such as residue restrictions or the inappropriate use of quarantine restrictions to block Australian exports, the Australian industry can still expect a viable long-term outcome from a reduction in tariffs.

This is supported by the strong economic growth in many ASEAN countries in the past decade, increasing local meat consumption, especially pork. In the Philippines, Vietnam and Cambodia, pigmeat is widely consumed. In Laos both beef and pigmeat are important. Consumption of pigmeat is relatively small in Indonesia and Malaysia, where the majority of the population is Muslim.

Most nations in the ASEAN are developing economies and demand for quality pork meat from Australia is likely to increase in the long term; it is important to lock in these potential markets. This has been realised with the Australian-ASEAN-New Zealand Free Trade Agreement (AANZFTA) coming into force in 2010.

The AANZFTA helps the Australian pork industry set the groundwork for future export growth in south-east Asia, increasing pork product competitiveness (in particular, offal exports) in the region.

ASEAN-Australia-New Zealand FTA

The Australia-ASEAN-New Zealand Free Trade Agreement (FTA) was signed-off in February 2009 and entered into force in 2010:

- **Indonesia** will eliminate 5 per cent tariffs in 2010 except for the 5 per cent tariff on frozen boneless pork which is reduced to 4 per cent in 2015, and then to 3.75 per cent in 2025. Edible pork offal tariff of 5 per cent will be eliminated in 2010.
- **Malaysia** will eliminate pigmeat tariffs in 2010. The country-specific tariff quota (initially 500kg for fresh or chilled, and 4000kg for frozen) provided to Australia for pork carcasses and half carcasses with in-quota tariffs at 25 per cent phasing to 0 per cent in 2013 and out of quota tariffs at 50 per cent phasing to 25 per cent in 2013. Malaysia will eliminate edible offal tariffs in 2010.
- **The Philippines** will phase down 40 per cent tariffs on most fresh or chilled pork to 0 per cent by 2020; 40 per cent tariffs on frozen pork and boneless cuts (fresh or chilled) reduced to 32 per cent (out of quota) in one step in 2020. The 3 per cent and 10 per cent tariffs on pork offal phase to 0 per cent by 2010, 2011 or 2012, except for 5 per cent tariff on frozen livers that is reduced to 4 per cent in 2015.
- **Thailand** – Pig meat tariffs of 30% and 40% on fresh, chilled or frozen pork are eliminated in one step in 2020. However, the earlier Thailand-Australia FTA signed means earlier scheduled tariff reductions will still take place. For some pork exports to Thailand, this means, a two per cent annual tariff reduction until full tariff duty elimination in 2020.
- **Vietnam** will reduce the 30 per cent tariffs on fresh, chilled or frozen pork to 0 per cent by 2020 with reductions commencing in 2010. Edible offal tariffs will also be phased out to 0 per cent.

Australia-Republic of Korea Free Trade Agreement

Pork is Korea's most consumed protein, with up to 17.9kg pork consumed per capita annually. Pork constitutes 44 per cent of Korea's daily protein consumption. Korean consumers are wary about the safety and quality of imported beef and avian influenza in poultry, encouraging increased demand for pork protein. In turn there is an acute short supply of pork from domestic production, pushing up prices. Korean pork production is geared towards supplying the domestic market, but is facing new regulatory conditions and a shift towards more efficient, large-scale and commercially-oriented enterprises.

Korea is the 7th largest export market for Australian pork and with Australia's high herd health status Korea can become an even larger export market. In 2005, Korea was the 6th largest importer of pork worldwide. However, Korea has trade prohibitive tariff barriers in place and has trade distorting domestic support available to domestic producers, valued at up to 63 percent of the value of domestic production in 2005.

Agriculture is a sensitive topic for Korea in its FTAs. Despite this, the Korea-U.S. FTA, when ratified, will reduce the level of tariffs applied to U.S. pork exports to Korea. Similarly, the Korea-Chile FTA is already in force and stipulates a commitment by Korea to liberalise all pork tariffs in the tenth year following FTA enforcement, in 2014. Both the Korea-U.S. FTA and the Korea-Chile FTA will put Australian pork exporters at a significant disadvantage.

Korea will be a key commercial market for Australian pork producers. APL believes that opening and developing the Korean market will be in the Australian pork industry's long term interests. The Australian pork industry's focus on growing key niche export markets will ensure long-term growth and profitability, in spite of exchange-rate movements, competition within the Australian pigmeat market and seasonal events including drought effects and grain prices.

Australia-Japan Free Trade Agreement

The Australian pork industry's priorities in Japan are to target expatriates, tourists and high-quality food services niches in Japan and not the Japanese market en-masse. Japan comprises a small but important niche market for Australian pork exports due to their demand for high value fresh meat cuts; growth of market share is inhibited by the restrictive import tariff arrangements in Japan.

APL identifies the Japanese market as being a key focus for future improvement in value and volumes. Our competitive advantages in this market are our clean, green disease-free status and our ability to supply grain fed pork that has white fat colouring, as opposed to the corn-fed North American product that results in yellow fat. With growing global consumer concern for food safety in the wake of increasing disease outbreaks, such as the 2010 foot and mouth disease outbreak in Japan, Australia's highly regarded health status becomes even more desirable in export markets and is a competitive advantage.

The simplification of Japan's complex tariff regime on pork is important to future success. Japan's tariff regime on pork imports is a combination of a snap-back tariff, safeguard tariff, the gate price mechanism and the import quota. The level of the gate price ensures that only premium pork (loin and tenderloin) is sold into the Japanese market. Japanese consumers in particular prefer tenderloin and loin to other pork cuts. Prices for cuts from the carcass that are co-products of the premium cuts (the shoulders, belly, and legs, for example) are depressed by Japan's price discrimination and have a negative impact on the domestic price of Australian pork by-products. It is imperative that tariffs are liberalised to a minimum level to improve market access for Australian pork products in the Japanese market.

Australia-China Free Trade Agreement

APL supports an early elimination of tariffs equivalent or better than the terms afforded in the New Zealand-China FTA (from a base level as high as 20 per cent to 0 per cent). Australian pork exporters to China will incur this base rate until tariff reductions on pork exports to China via the China-Australia FTA are eliminated. Chile, also one of Australia's greatest competitive threats in Asia, has already negotiated an FTA with China where some tariffs on Chilean pork will be reduced to zero percent by 2010 or 2015 at the latest.

APL believes that there is opportunity to export Australian pork to China and believes that opening and developing the China market will be in the Australian pork industry's long term interests. Pork, as China's most consumed protein is high on the Chinese political agenda. Although China has a policy of agricultural self sufficiency, the acute short supply of pork in China gives impetus to promote Australian pork exports. Australia is offering to supplement China's short supply in niche markets. Australia's small production scale and interest in securing niche markets therefore does not threaten China's long term interest but rather complements it.

China has on a number of occasions in its communications to the Australian Quarantine Inspection Service (AQIS) linked reciprocal access for pork products to progressing Australia's draft protocols. Without reciprocity, Australia may not gain export access to China. Further, APL is concerned about an 'early FTA outcome' to China's proposal on quarantine. APL reiterates that it cannot support an FTA which seeks to reduce its approach to import risk analyses, quarantine standards or systems for assessing food safety risks.

To fully exploit the opportunities from Australia-China Free Trade Agreement, the agreement at the minimum must:

- Recommend that China in consultation with AQIS, seek acceptance of our production system as a whole without the necessity to have a specific protocol agreed and for AQIS to be able to list establishments (as Australia does not have formal pork export market access to China);
- Highlight the miniscule competitive challenge to Chinese local production from the acceptance of Australian pork and pork offal exports;
- Remind China that Australia will not seek to have an early outcome on quarantine that compromises Australia's quarantine requirements nor establish a Committee on Sanitary and Phytosanitary Matters (SPS) as is in the Chile-China FTA;
- Recommend China adopt international standards, such as maximum residue levels (MRLs) as defined by Codex;
- Reduce the tariff rates on all pork products on a faster schedules as outlined in the NZ-China FTA or the Chile-China FTA; and
- Record as a priority for tariff duty reductions, frozen pork products and pork offal.

APL's trade policy priorities

APL's strategic trade policy priorities are below:

1. Commitment to contribute to current FTA consultation and feasibility studies

APL is committed to contributing to current Australian FTA negotiations and feasibility discussions with China, India, Indonesia, Japan, Korea and Malaysia.

2. Reduce the producer support estimate (PSE)

Until countries with significant PSE levels are liberalised in the WTO Doha round and beyond, where Australia negotiates free trade agreements this should be borne in mind and reflected where possible in the agreement.

High PSE levels place Australia at a competitive disadvantage when trying to access export markets. For example, this is still an issue in Korea and Japan.

For example, the signing of the Australia-United States Free Trade Agreement (AUSFTA) without addressing the support for US agricultural producers, puts Australian agricultural exports and especially Australian pork at a disadvantage; we cannot “compete on a level playing field” for exports and domestically with imports.

In the AUSFTA, agriculture was considered the area where Australia was to benefit from the gains in trade. With Australian agriculture in general competing on zero or low tariffs and subsidies, a market opening via the AUSFTA would have been expected to help Australian agricultural exporters given the US' significant tariffs, quotas and agricultural subsidies. Under the AUSFTA, Australia removed all tariffs, quotas, seasonal restrictions and subsidies upon enforcement of the AUSFTA on 1 January 2005. Conversely, the US maintained some tariffs, quotas, seasonal restrictions and subsidies.”¹

Compared to Australia, Denmark, the United States and Canada have high levels of government support that shield producers from market risk and secure their income. On top of this, tariffs and import barriers existing in North America and Europe prevent these two continents effectively from trading with each other in pig meat (their preferences for different parts of the carcass being quite well established) which means that they look for —other “freer” markets, such as Australia, to export their surplus product to. Additionally, the sheer scale of Danish, U.S. and Canadian production means that they are better able to contain financial risk and reduce costs involved in producing and exporting pork products. Australian producers operate on a much smaller scale in the world market, comparatively have very low government support, in effect no trade barriers and as a consequence are vulnerable to import competition.

¹ Weiss, L., Thurbon, E. And Mathews, J., (2004). *How to kill a country: Australia's Devastating Trade Deal with the United States*. Allen & Unwin, Crows Nest, NSW, p. 35.

3. Foster agreements that can quickly improve Australia's position against other major agricultural exporters and other export competitors.

Meat and Livestock Australia (MLA) have consistently urged for timely negotiations with Korea given the impending ratification of the US-Korea FTA. APL agrees with MLA's assessment that to remain competitive Australia should negotiate FTAs that are on-par or more competitive than our competitors. The longer Australia delays FTAs the longer it will take Australia to "catch up" with our competitors and realise trade gains.

This is also the case with New Zealand having negotiated a free trade agreement with China.

4. Encourage a good outcome for Australian pork exports, despite agricultural sensitivities

In its submissions to the Australian Government, APL has always supported a 'comprehensive' FTA that does not exclude any sector from potential tariff liberalisation. In all our submissions, APL:

- acknowledges the concern some countries have in relation to increased imports and their objective to protect industries from competition, whether due to subsistence farming or otherwise;
- advocates that the Australian pork industry only services niche export markets which cannot threaten local production – it represents a very small competitive challenge and is not a competitor on price;
- advocates that the Australian pork industry is small and produces less than one percent of world pigmeat production;
- advocates that the Australian pork industry is punished by high tariff and non-tariff barriers;
- advocates that the Australian industry competes at home and internationally against international producers with proportionally higher levels of government support; and
- understands that the Australian pork industry, like the rest of Australian agricultural production services domestic markets as well as other international markets.

5. Pursue high value markets

Asia remains a major opportunity for an enlarged and more profitable Australian pork industry. APL in consultation with our Marketing Development Committee will target efforts at a small number of valuable markets, Hong Kong, South Korea and Japan and over the next five years to build international business based on high quality niches in the ASEAN region.

There are new opportunities to supply growing world demand for foodstuffs given our geographic proximity to China, Japan and the ASEAN and growing tourism to the Asian region and other export markets. APL is seeking to increase the number of markets into which Australia sells pork. Yet to successfully achieve this, we need to focus on those markets which can be sustained over the cycle of exchange rate fluctuations, and that can support a high quality/high price chilled pork positioning.

6. Support RIRDC principles for a best practice agreement

APL believes that no industry or sector should be excluded from the agreement and reiterates its support, in particular for the Rural Industries Research and Development Corporation's, 'Features of a 'good' preferential trade agreement – RIRDC'², in particular:

- Do not exclude 'problem' industries – while typically sensitive, reform in these industries can be the most beneficial; Preferential Trade Agreements (PTAs) provide a good opportunity to gently expose sensitive industries to international competition, as well as those sensitive industries delivering some of the greatest price reductions from trade liberalisation;
- Make PTAs comprehensive – no industry or sector should be exempted from a PTA, as this creates distortions and entrenches protection and special treatment; and
- Avoid 'new protectionism' – there is some shift towards including issues such as intellectual property, competition laws, labour market regulations and the environment into PTAs. However, since there is disagreement about how these issues should be managed, it is best not to let these issues cloud the more important ones of trade and investment liberalisation.

² Humphreys, J. and Stoeckel, A.(2005). 'Free' Trade Agreements: Making Them Better. Report prepared by the Centre for International Economics for the Rural Industries and Research Development Corporation. (2005). Online. Last Accessed: 8 September 2010: http://www.thecie.com.au/content/publications/CIE-free_trade_agreements_making_them_better.pdf

Conclusion

APL continues to support the government's current approach to trade negotiations. It is in the future interests of Australia's pork producers that no sector misses out on being part of a free trade agreement.

The notable success of the Australia-ASEAN-New Zealand FTA clearly demonstrates that an outcome on agriculture is still possible, despite ASEAN expressing concerns over the reliance of subsistence farming to their respective national economies. There are a number of free trade agreements where agriculture is considered 'sensitive' to trade liberalisation. India, China, the Republic of Korea and Japan are typical examples of countries where there are high expectations for pork meat quality where the Australian pork industry has much to gain from improved market access into the future.

There is potential for Australia to exploit worldwide growing demand for pig meat. APL recognises the opportunity of operating in a global trading environment and endorses trade efforts which maintain and build on the pork industry's competitive advantages.

By reducing trade barriers for Australian pork exports, the government will also improve the pork industry's international competitive position considering the level of financial support (both directly and indirectly) provided to commodities and producers in competing countries. It will also help ease the impact of growing domestic regulatory and compliance requirements that impact on Australian pork producers' costs of production but which are not necessarily required by our competitors.

Exports and capacity to access these markets competitively will be important for the Australian pork industry's future viability and export success.

Appendices

Australian Pork Limited

APL is a unique rural industry service body delivering integrated services to enhance both the viability of Australia's pig producers and opportunities for the sustainable growth of the Australian pork industry. APL pursues opportunities for the Australian pork industry on both a domestic and international level and works in close association with key industry and government stakeholders. Funding for APL is primarily derived from statutory pig slaughter levies collected under the *Primary Industries (Excise) Levies Act 1999* with additional matching research and development funds provided by the Australian Government.

The Australian pork industry

The pork industry's future in Australia is well placed, being an industry with excellent herd health status, having an attractive emissions profile, being close to Asia (where pork consumption is high and wealth is increasing) and having a world leading R&D system.

The Australian pork industry accounts for 0.4 per cent of world pork production and around 1 per cent of world pork exports. The Australian pork industry is technically proficient and has advantages over its international competitors largely in terms of health and disease. This is important for continued trade access and market share growth in Australia's key pork export markets such as Singapore.

Whilst Australia has the more common pig diseases such as *Mycoplasma pneumonia*, swine dysentery, pleuro pneumonia and ileitis, it is free of the more devastating diseases such as Post-weaning Multi-systemic Wasting Syndrome (PMWS), Porcine Reproductive and Respiratory Syndrome (PRRS) and Swine Influenza Virus, which have had marked adverse effects on animal mortality and the efficiency of production in virtually all other countries over the last 5-10 years. Australia is also free of exotic diseases such as Foot and Mouth and Swine Fever. Australia's strong quarantine systems are a key strategic international marketing and production advantage and are vital to the competitiveness and growth of the industry.

Slaughter numbers

Up until 2008, the Australian pork industry had had relatively stable annual slaughters for some years at around 5.3 to 5.4 million head. Record grain prices and record levels of pork imports in 2007 and 2008 forced the exit of many Australian pork producers from the industry causing a decline in domestic pork production. This decline forced numbers down to around 4.5 million in mid 2009 – a reduction of some 15 per cent from the traditional production level.

It is estimated that associated with this production decline was the exit of hundreds of smaller pig producers from the industry – a repeat of similar waves of producer rationalisation that have occurred several times over the past four decades in Australia. Despite this, volume production trends over the longer term have been positive; leading to the clear conclusion that average pork producer size has increased markedly and continues to do so.

This profitability driven reduction predictably led to an undersupply of pork and numbers since the middle of last year have been slowly starting to rise again, accelerating in more recent months. Price is of course the major driver in pork production volumes – as a reflection of demand – but there is a significant lag (around one year) between the market signals being observed and farmer's ability to change supply to the market.

Trade environment

APL estimates that up to 70 per cent of the ham and bacon sold in Australia contains imported pig meat. With a persistently high Australian dollar, this encourages many processors, to import and store vast quantities of Australian pork, flooding the market and thus depressing domestic pork prices. This has steadily eroded the Australian pork industry's share of the smallgoods markets.

Current quarantine requirements prohibit the import of fresh pork for sale into Australia. Pork imported into Australia must meet strict quarantine conditions and processing requirements, amongst which are specific cooking time and temperature protocols to eliminate disease incursion risk.

This must take place before processed pork products made from imported pork such as ham or bacon can be sold in Australia. Most imported pig meat arriving onshore frozen is ready to be cooked and processed on arrival under the supervision of the Australian Quarantine and Inspection Service (AQIS).

Pig meat imported into Australia comes primarily from Canada, Denmark and the US. In 2008/09 the proportion of pig meat imported from each of these three countries was roughly equivalent with only 1% coming from other countries. This ratio seems to be continuing into the 2009/10 financial year.

The Australian pig industry competes with increasing volumes of imports. In the twelve months to June 2010, approximately 140,000 tonnes shipped weight were imported primarily from Canada, Denmark and the United States.

World pork market

Top World Pork Import and Export countries (1000 metric tonnes)			
Import		Export	
Country	2005	Country	2005
Japan	1339	EU (15)	1350
United States	464	Canada	1083
Russia	675	United States	1207
Mexico	420	Brazil	761
Hong Kong	305	China (mainland)	331
South Korea	328	Chile	129
China (mainland)	41	Hungary	95
Canada	139	Poland	70
Romania	185	Mexico	59
Australia	99	Australia	53

Source: FAS/USDA, 2006.

From 1997 to 2005, world consumption of pork increased by 27 per cent, or 93 million metric tonnes (MT). The top pork producing countries in 2005 were China with 50 per cent of the world herd, followed by the European Union (primarily Denmark), the United States, Brazil and Canada.

Despite the unfavourable trading environment, globally, pork is the most highly consumed meat with one and a half times more pork consumed than beef. Australia stands to benefit from this popularity, particularly in Asia where the majority of the Australian pork industry's products are exported. The Australian Farm Institute predicted in a study of twelve Asian nations that by 2020 pork consumption would increase by 17.7 million metric tonnes, of which 1.2 million metric tonnes will be imported and 16.5 million metric tonnes will be produced domestically (Keogh, M., 2007). The forecasted additional import requirements of these nations would be equivalent to 260 per cent of Australia's current total pork production. However, this is contingent on significantly lower barriers to trade that include import tariffs and competitor subsidies.

Table 1 – Projected import demand characteristics for specified Asian countries in 2020

Country	Pork imports (000 tonnes)	Population (millions)	GDP per capita (\$)	GDP Growth (6 year average) %
China	814	1,314	7,198	9.6
India	3	1,095	3,320	6.7
Indonesia		246	4,459	4.8
Pakistan		166	2,653	5.3
Bangladesh		147	2,011	5.7
Japan	66	128	32,647	1.7
Philippines	250	90	4,923	4.6
Vietnam		84	3,025	7.6
Thailand		65	8,368	5.0
South Korea	111	49	20,590	4.6
Malaysia	68	24	11,201	4.7
Sri Lanka		20	4,384	4.8
TOTAL	1180	3,428		Average - 5.425

Source: Keogh, M. (2007).³

³ Keogh, M. (2007). *The implications for Australian agriculture of changing demand for animal protein in Asia*. Australian Farm Institute & the Rural Industries Research and Development Corporation. Online. Last Accessed, 8 September 2010:
http://www.farminstitute.org.au/_product_31033/The_Implications_for_Australian_Agriculture_of_Changing_Demand_for_Animal_Protein_in_Asia