



ABARES Australian chicken meat industry review

Terms of reference

The Australian Bureau of Agricultural and Resource Economics and Sciences (ABARES) will undertake an independent review into the relationship between growers and integrated producers in the Australian chicken meat supply chain.

This review will examine whether there is evidence of market failure within the industry. If market failure is identified within the industry, ABARES will examine the nature, drivers and effects of this market failure, and the costs, benefits, and impacts of potential regulatory and non-regulatory actions that could be introduced to address identified issues.

The review will have particular reference to the following:

- a. Information, outcomes, and recommendations from recent government, industry, and parliamentary reports;
- b. Submissions and other information provided by growers and integrated producers to recent government, industry, and parliamentary inquiries;
- c. Market value and direct economic contribution of the chicken meat industry;
- d. Evolution of the chicken meat industry over time, including industry growth and chicken meat production and consumption;
- e. Industry structure, commercial arrangements, and other relevant matters;
- f. Whether there is evidence of other significant issues that have a negative impact on grower and integrated producer commercial relationships or market outcomes for the chicken meat industry;
- g. Potential regulatory and non-regulatory responses available to government if market failure or other significant issues are found to exist;
- h. The possible net costs, benefits, or impacts to the government, industry and the consumer of any potential regulatory and non-regulatory responses;
- i. Adequacy of current laws and regulations to address any potential market failure or significant issue/s; and
- j. Any other relevant matters.

Delivery

ABARES will undertake consultation with as many relevant stakeholders in the chicken meat industry as possible during the review.

ABARES will release an issues paper and provide a draft report for stakeholder review and comment by mid-2025, and as soon as practicable following this, deliver a final report to government for consideration.