Reclaiming the Means of Meat Processing

Legal Reforms and Practical Steps to Building the Intrinsic Infrastructure of Agroecology

Prepared by:

Tammi Jonas, PhD

for the

Australian Food Sovereignty Alliance

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This document was created where I live and farm on Dja Dja Wurrung Country (djandak), and I acknowledge the care and custodianship of Djaara. I pay my deepest respects and thanks for how life here was and continues to be sustained through dhelkunya dja – making good country / making country healthy, and commit my support in returning country and people back to health.

Acknowledgements

The detailed work to understand the state of abattoir access in what is now called Australia was only possible with a team of farmers and allies in all states, including my eldest son Oscar Jonas, who did the original data collection from a variety of sources (government and animal rights activist websites as well as individual abattoir websites). He then generated the maps with colour coded dots to visually represent what has been lost in the past decade and what remains for small- and medium-scale farmers. AFSA General Coordinator Jessie Power did the research on which species each abattoir processes and created the tables under each map, carefully cross referencing with Oscar's work and the websites mentioned already. Farmers in each state validated the information to the best of their local knowledge, and they have also given a great deal of time to provide feedback and helpful edits. Thank you to Glen Chapman, Patrick O'Neill, Matthew Tack, Trevor Paech, Steve Slape, Liz Sanders, Jacki Hinchey, Susan Wardell-Giles, Sam Trethewey, Grant Hilliard, and Randall Breen for your invaluable input.

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Background

A recent survey of farmers by the Australian Food Sovereignty Alliance (AFSA) found that nationally, 80% of respondents have lost access (or are about to lose access) to service kills at their closest abattoir in the past five years[1]. (A '**service kill**' is a fee-for-service model in which farmers retain ownership of the carcass after slaughter to sell the meat as they choose, as opposed to selling livestock to the abattoir for processing and sale by the processor.) Communities across the country are collectivising to build micro-abattoirs, and AFSA and state-based allied organisations are lobbying for reforms to simplify this process given its increasing urgency.

Tammi and Stuart Jonas are nearing completion of a micro-abattoir build at Jonai Farms & Meatsmiths on unceded Djaara Country in the central highlands of Victoria. Tammi has personal expertise as a farmer, butcher, meat inspector, and AFSA's focal point for farmers, and in 2024, completed a PhD on the rise of agroecology and a new peasantry in Australia, who face many legislative barriers to rebuilding the supply chain infrastructure intrinsic to direct sales models that feed local communities.

This research has been deeply enriched by the camaraderie and knowledge sharing of many Australian and international comrades in the global food sovereignty movement: farmers, community activists, and NGOs.

This document has been primarily created on unceded Dja Dja Wurrung Country to support local communities in all states and territories across what is now called Australia to navigate planning and food safety regulations, and consider all of the variables from site selection and construction details, to the funding and governance options to build micro-abattoirs. It is a piece of active optimism to help others achieve in a year what has taken us eight to research, reflect, plan and develop in the face of many hurdles, with recommendations of policy reforms to reduce the barriers to local food economies.

[1] https://afsa.org.au/survey-report-secure-the-future-of-small-scale-livestock-farming/

Part 1: Where have all the abattoirs gone and what can governments do about it?

Farmers and eaters had an historic win in July 2025, as the Victorian Government supported reforms to remove the requirement for a planning permit for micro-abattoirs.

The Australian Food Sovereignty Alliance (AFSA) has advocated for this reform since 2017, on the basis that a micro facility is an ancillary use to farming - slaughter is in fact intrinsic to our capacity as livestock farmers to get meat to the table. 'Ancillary use' is not a land use change, therefore should not be subject to planning controls beyond the normal duty of care in the rural and agricultural zones. Of course, a micro-abattoir is subject to the same rigorous environmental, food safety, and animal welfare regulations (and will typically exceed their minimum expectations), and will need the appropriate state-based food safety licence.

Where have all the abattoirs gone?

Key Points

- Abattoir numbers have declined sharply due to uneven **market power**:
    - large companies dominating the meat industry, pushing out smaller, locally focussed operations
    - supermarket and export demand for large volumes of cheap, standardised meat
    - vertical integration, which has reduced competition and market share for local production and processing.
- The **closure of local abattoirs offering service kills**:
    - makes it harder for people to **access** fresh, locally grown meat
    - limits opportunities for farmers who want to sell direct to local communities
- **There are no measures in place to stop this trend which, left unchecked, will result in total control of meat processing by corporate interests.**
- **Small-scale farmers** are pursuing their own solutions to **build micro-abattoirs**, but face an uphill battle against:
    - environmental and **planning requirements** designed for large scale, industrial systems
    - associated prohibitive infrastructure costs
    - **policy development strongly influenced by peak industry bodies which focus on large-scale enterprise and export growth**.

Consolidation of ownership of all aspects of the food system into ever fewer hands – most notably processing infrastructure – is accelerating the decline of small- and medium-scale farms, and the erosion of rural communities globally[2]. The Australian government aims to support agriculture through a focus on competitiveness and export markets[3], yet, in the years 2016-2017, this paradigm has resulted in just 14 per cent of the nation's farms enjoying 59 per cent of market value[4].

Industrial livestock produced for the export market are bred to maximise productivity and profitability, resulting in uniformity of animal carcasses suited to the standardisation required by high-volume slaughter facilities such as those processing up to 2,500 pigs per day. The demand for carcass uniformity is yet another barrier to those rearing slow-growing heritage breed livestock on pasture,

[2] McMichael 2009, 2013; Muir 2014; Berti 2020
[3] Richards et al. 2016; Iles 2020
[4] ABARES 2021: 4

whose variable carcasses are frequently damaged by the highly mechanised processing equipment. The concentrated processing sector also brings heightened food security and food safety risks[5], as witnessed when many abattoirs were forced to close during COVID outbreaks. In the state of Victoria, abattoirs were throttled to 80 per cent capacity during repeated restrictions, leaving some farmers with no access to processing for months at a time, as larger producers were given priority.

The loss of the 'infrastructure of the middle'[6] – abattoirs, grain mills, dairy processing, and local markets – particularly impacts on the 'agriculture of the middle'[7], the mid-sized farms operating in the space between the vertically-integrated commodity markets and direct markets, and on what is seen as a 'missing middle', by which some assert a need for a 'mechanism by which small producers can collectively access a middleman facility that enables them to trade with large customers'[8]. The need for a middleman is 'common sense', in which the dominance of commodity markets is rarely contested, leading to many proposed business-as-usual solutions for small- and medium-scale farmers to continue to operate by aggregating their efforts in order to access middlemen to process and distribute their produce within commodity markets.

Common sense advocacy for such middle infrastructure fails to centre farmers' knowledge and skills to build solutions collectively for the infrastructure that is intrinsic to local agricultural production, with aims to re-embed food systems in local economies[9]. Historically, and still today in many parts of the Majority World (a.k.a. the Global South), the notion of a supply chain makes little sense as smallholders grow, harvest, process, and distribute their produce in local 'nested markets'[10]. As the process of re-localisation counters the longer process of globalisation, many farmers are (re)turning to direct sales and social solidarity economies, and in doing so, recognising the need to (re)gain control of the means of production[11]. In these models, instead of a middle, there is a web of farmers embedded in local communities – feeding them food rather than commodities - and reducing emissions while increasing resilience by doing so[12].

Agroecology asserts the importance of economic diversification through farmer-owned or controlled intrinsic infrastructure, not to access commodity markets, but to enable sustainable food production to feed local communities[13], reducing emissions and strengthening resilience in the face of a rapidly changing climate.

In this context, farmers across Australia are interested in developing micro-abattoirs – the infrastructure that is intrinsic to direct sales of meat from animals raised in their regions. A key question in such developments is what role should the state play, and so first it is worth a brief review of actions being undertaken in other international jurisdictions.

International policy and funding support for small-scale abattoirs

Key Points

International pathways to assure the future of small-scale, sustainable local meat production include:

- financial support and grants, including for infrastructure
- regulatory simplification, including risk-based inspections and streamlining licenses
- increased traceability and animal welfare.

[5] Wallace 2021
[6] Stahlbrand 2018
[7] Kirschenmann et al. 2008: 3
[8] Morley et al. 2008: 2
[9] Wezel et al. 2020
[10] van der Ploeg et al. 2012
[11] van der Ploeg 2008
[12] Wittman 2009
[13] Gliessman 2007; Rosset & Altieri 2017; Wezel et al. 2020; van der Ploeg et al. 2022

A 2019 UK report by the All-Party Parliamentary Group for Animal Welfare entitled '[The Future For Small Abattoirs In The UK: Report on an Inquiry into Small Red Meat Abattoir Provision'][14] recommended the following:

> Government should consider low capacity abattoirs processing under 1,000 LSUs[15] and running alongside other farming and processing activities being deemed agricultural buildings with respect to business rates and building control.
>
> Government should ensure that public bodies and in particular, economic partnerships or forums see small abattoirs as essential infrastructure supporting the rural economy.
>
> Local government should seek to support local food production by procuring locally supplied meat where possible, including using the local abattoir network.
>
> Building regulations classifying in "Sui Generis" terms should be changed to regard small abattoirs as agricultural facilities.

Subsequently in 2019, the Prince of Wales convened a roundtable of farmers, butchers, grocers, abattoir owners and others in the meat supply chain to better understand the context of the declining number of abattoirs in the UK, and to explore the sustainability and viability of small-scale abattoirs that offer service kills. The roundtable recommended that the Royal Countryside Fund[16] commission research into:

> 'the rapid shrinkage in the number of local abattoirs – from 1,146 licenced red meat abattoirs in Great Britain in 1979, to just 213 such abattoirs across the UK in August 2020 (with 13 smaller abattoirs who offered private kill having closed in the 20 months prior).'

Of 17 key conclusions, several point to the essential nature of service kills to the viability of small-scale livestock farmers, and one refers specifically to the need for government intervention to maintain diversity in the scale and model of slaughter options:

> [3] Without support to rebalance these economic forces, for example to help smaller abattoirs purchase species-specific specialist equipment and to simplify the regulations they operate under (perhaps using the "de minimis" derogations available to European abattoirs under EU Directive 853/2004/EC (European Commission, 2004: p 47)), smaller abattoirs will continue to close.

The eight recommendations include a range of targeted areas for policy reform and funding support, including by redirection of a proportion of the slaughter levy to fund a small abattoir advisory group. Most of the recommendations underscore the importance of applying a scaled lens to regulations of abattoirs, including:

> applying the "de minimis" derogation to reduce the regulatory burden imposed on small abattoirs which supply meat locally.

In 2023, the UK Government responded to the reports with the creation of The Smaller Abattoir Fund (Dec 2023)[17], which offers funding support to small abattoirs in the range of £2,000 to £60,000.

[14] https://apgaw.org/wp-content/uploads/2020/06/The-Future-for-Small-Abattoirs-in-the-UK.pdf
[15] 'Livestock Units' – a measure of livestock equivalent nutrient inputs and outputs similar to the more common DSE (dry sheep equivalent) used in Australia, in which a two-year-old-plus steer or dry heifer = 1 LSU.
[16] https://www.royalcountrysidefund.org.uk/our-impact/our-research/all-on-the-table/
[17] https://www.gov.uk/government/news/applications-open-for-new-4-million-fund-to-support-smaller-abattoirs

Aotearoa/New Zealand also recognises the importance of scale in its regulatory approach to abattoirs, and has developed a Risk Management Template for Micro-Abattoirs[18] that process fewer than 20 large animals or 50 small animals per day. In 2021, Canada also produced its Farmgate and Farmgate Plus licences[19], which take a lighter regulatory approach to very low throughput facilities selling into direct markets, and since 2020, the USDA has offered funding support to micro-abattoirs through its USDA Assistance for Small-Scale Meat Processors[20] program.

A brief history of abattoirs in Australia

Those who cannot remember the past are condemned to repeat it.

~George Santayana

Until the 1980s, there were abattoirs in most regional towns across Australia, many of which were government owned and operated. A 2019 ABC article[21] examining the history of abattoirs in Australia found that at the dawn of the 20th century, state governments and councils determined to take control of slaughter after Upton Sinclair's ground-breaking book *The Jungle* shone a spotlight on the horrific conditions for animals and workers in many meat processing works in the US, a situation mirrored in Australia and elsewhere. Large abattoirs were built in the capital cities and governments began implementing higher standards of hygiene, animal welfare and work safety. The article claims that:

> At the same time that governments were building large-scale abattoirs to supply the domestic markets, entrepreneurs were investing in private abattoirs looking to export.

By the 1950s, there was a move to decentralise, and councils built many abattoirs in regional towns, shifting slaughter back away from cities and closer to where animals were grown.

In the 1970s and 80s, many regional abattoirs closed, in part due to price volatility in the increasingly export-focused market (especially during the 1970s energy crisis), and partly due to extreme drought across the eastern states between 1979 and 1983. According to a 1983 Parliamentary Commission Report[22], many abattoirs in regional towns had been and still were the major employer, key to the town's economic base. But variability in demand was causing considerable market uncertainty for processors, and the Australian Exporters' Federal Council made a recommendation towards 'rationalisation [...] to increase capacity utilisation and increase returns within the industry,' suggesting that the government use 'closure compensation schemes' to encourage smaller facilities to close. The government declined.

Today, there are less than 300 abattoirs in Australia, 148 which process red meat, on which this report primarily focuses. Approximately 30% of them offer service kills to small-scale farmers who wish to retain ownership of their meat for direct sales. **Poultry is not substantively dealt with in the report**, as an industry whose origin story is built on vertical integration, meaning there has never really been easy access to slaughter facilities for those wishing to do small volumes of poultry to sell into local markets. However, there is a small but growing number of poultry and egg growers constructing and operating micro-facilities on farms, which seems to be the most viable way forward.

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[18] https://www.mpi.govt.nz/dmsdocument/29528-Risk-Management-Programme-RMP-Template-for-Micro-Abattoirs

[19] https://www2.gov.bc.ca/gov/content/industry/agriculture-seafood/food-safety/meat-inspection-licensing/farmgate-and-farmgate-plus-licences

[20] https://www.fsis.usda.gov/shared/pdf/USDA-Assistance-for-Small-Meat-Processors-7-28-2020.pdf

[21] https://www.abc.net.au/news/rural/2019-06-29/animal-welfare-expectations-change-the-meat-industry/11173092

[22] The Abattoir and Meat Processing Industry, Industries Assistance Commission Report, No. 155/1983, The Parliament of the Commonwealth of Australia.

The Canberra Abattoir: a government-owned example

Key Points

- **Government ownership** servicing the domestic market became the norm in the early 20th century largely in response to hygiene concerns.
- Private companies (many overseas-owned) invested in new abattoirs to service an increasing **export market** as refrigeration became common.
- In the 1950s, abattoir access decentralised, with many local councils investing in local facilities.
- Many of these **closed in the 1980s and 90s** - unable to contend with price fluctuations associated with the **globalisation of meat markets**, climatic variations (especially **drought**), and increasingly **neoliberal policy** environments.
- A return to government ownership is not a 'silver bullet' solution, though could be effective with appropriate **governance** arrangements that prioritise local food production and **farmer participation in decision making**.

While not unique among government-owned abattoirs, the case of the Canberra Abattoir provides useful insights into what can go wrong with a government-owned facility, while also highlighting how it could work where governance is robust. In 1942, the Commonwealth built the Canberra Abattoir, which commenced operations in 1943. The abattoir was governed by the Department of Health, but it

> was not conducted as a full service abattoir in that the Department provided only the facilities for slaughter, storage of carcases in chillers and the handling of by-products. Slaughtering was carried out by a number of licensed operators who paid a killing charge for each animal slaughtered and provided their own labour for this purpose.[23]

The Government sold the Canberra Abattoir to the primary user of the facilities – Red Hill Meat Supply – in 1969, a process that triggered a Senate Inquiry, which was underway when the sale was made, pre-empting the findings. The Select Senate Committee examined the reasons for the sale of the abattoir, but the Minister for Health blocked the Committee's access to an inter-departmental report that it believed was influential in the decision. In the absence of the report, the Committee examined statements by the Minister and found the rationale presented publicly included:

- The expenditure necessary to bring the abattoir up to an acceptable standard.
- The decline in the proportion of meat supplied to the Canberra market.
- The excess capacity of New South Wales country abattoirs.
- The availability of stock to meet the needs of the Canberra abattoir.
- It was not now an economic proposition to continue the abattoir operation at standards appropriate to a modern abattoir.
- It is cheaper to transport livestock over long distances to slaughter.
- Closure of the Canberra abattoir would contribute to the development of the region around it.

In the course of taking evidence, the Committee found that 'there was **almost universal support for a full service abattoir being operated as a public utility and little support for the points listed above**.' The Committee found that the facility should have continued as a government-controlled abattoir, but that the purchaser was deemed fit to continue operations with several urgently needed upgrades, subsidised by the government.

The Canberra Abattoir closed permanently in 1997, having suffered temporary closures in 1982[24], and 1991[25]. The latter closure occurred when the new national budget withdrew support for meat inspector

[23] Report from the Senate Select Committee on the Canberra Abattoir, Parliament of the Commonwealth of Australia 1969. Parliamentary Paper No. 99 https://www7.austlii.edu.au/au/other/cth/AUSSelCPubInq/1969/8.pdf
[24] Canberra Times, 19 August 1982, p. 15
[25] Canberra Times, 12 April 1991, p. 1

salaries (previously the government paid 40% of those wages), leaving many abattoirs with a deficit for which they were unprepared.

WAMMCO in WA is another example of a former government-owned abattoir that transitioned (via an act of parliament) into a cooperative serving over 700 commodity export farmers to this day. MEAB in SA was another large government-owned abattoir that serviced the Adelaide domestic market as well as export, which was sold in 1997 and closed in 1999, while the Homebush Abattoirs operated under government control from 1915 until its closure in 1988.

Which abattoirs are left?

Key Points

The remaining abattoir footprint across Australia demonstrates a rapid and ongoing decline:

- **50 abattoirs closed in the last ten years alone** across all states and territories.
- **Less than 30% of remaining abattoirs provide access to service kills**, with increasing restrictions on access.
- Increasing **export focus**, **international ownership** and **vertical integration** (leading to **uneven market power**).
- **Fewer options for farmers seeking to grow and retain control** of how to sell their meat, and assure **quality** and **animal welfare**.

While there are still many abattoirs across Australia processing the same volume of meat as was processed in the 1990s, less than 30% offer service kills to local farmers who wish to retain control of the meat after slaughter. Most are partly or fully vertically integrated – that is, they own the supply chain from production to processing and retail of meat from their own livestock. Most cattle and sheep abattoirs are 'purchase-process-sell' models, which are supermarket and export oriented and purchase livestock through saleyards or on contract from medium and large-scale operations, including feedlots. While historically many offered service kills to local farmers and butchers, very few continue to offer this service.

We have mapped the status of abattoirs in each state and territory below. It paints a grim picture of the difficulties smallholders face in accessing slaughter, and underscores the urgency of the need to construct local micro-abattoirs. It is important to note that where we have identified abattoirs that continue to offer service kills (orange), many of these are tightly constrained in various ways, such as: no kill spots for new farmers, provision of service to only some with whom they choose to work, or confining farmer access only through aggregation by a butcher. Also, where we have identified some as not offering service kills (red), some of those still offer large-volume service kills to those supplying supermarket or export channels.

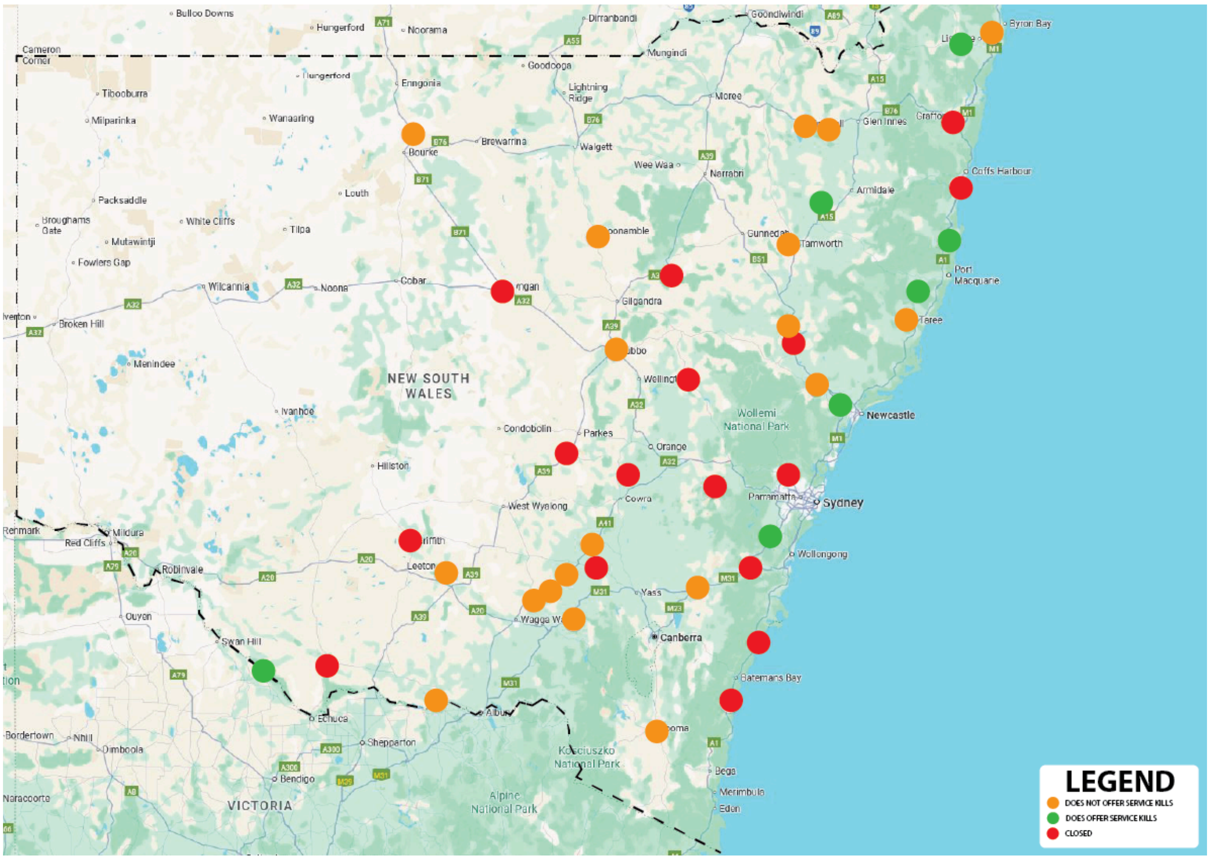
Disclaimer: AFSA has put these maps together voluntarily using data available by businesses, government and not-for-profit websites. We have cross referenced maps in each state and territory to the best of our ability, however there may be some inaccuracies. If you notice any incorrect data in these maps, please get in touch: admin@afsa.org.au.

ACT

There are no abattoirs in the ACT.

New South Wales

Until the last decade, there were at least 40 abattoirs operating across NSW, but 16 have closed, leaving just 25 operational. Of these, just 7 offer service kills.



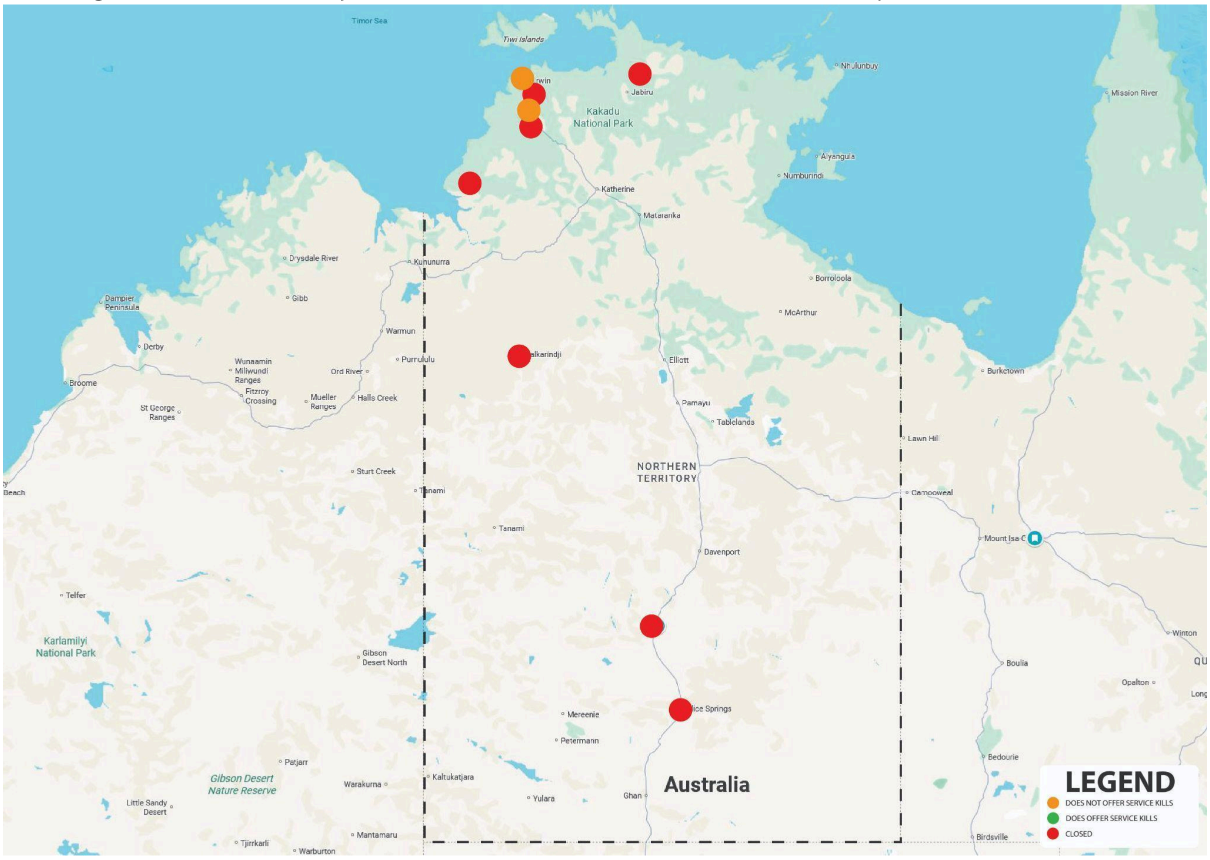
Abattoir	Open/closed	Offer service kills	Species
Aberdeen Abattoir	Closed	NA	NA
AD Meats	Open	Yes	Cattle Pigs
Afflick Meats (D&S Afflick)	Closed	NA	NA
Australian Meat Group	Open	No	Cattle
Bindaree Beef Abattoir	Open	No	Cattle
Bindaree Beef Cooma (formerly Monbeef Abattoir)	Open	No	Cattle
Binnaway Meat Processing	Open	Yes	Sheep Goats
Bourke Abattoir	Open	No	Goats Sheep
Cargill Beef - Tamworth Abattoir	Open	No	Cattle
Castlereigh Halal Regional Abattoir	Open	No	Cattle Goats Sheep
Certified Meat Co.	Open	Yes	Cattle

Cowra Meat Processors	Open	No	Pigs Cattle Goats Sheep
Danthonia Community Facility	Open	No	NA
Denilquin Abattoir	Closed	NA	NA
EC Throsby Abattoir	Open	No	Cattle
Ethical Endings	Open	Yes	Pigs Poultry
Fletcher International Abattoir	Open	No	Sheep
Goulburn Abattoir	Open	No	Sheep
Griffith Abattoir	Closed	NA	NA
Gundagai Meat Processors	Open	No	Sheep
Harden Abattoir	Closed	NA	NA
JBS Australia - Scone Abattoir	Open	No	Cattle
Junee Abattoir	Open	No	Sheep
Lachley Meats	Closed	NA	NA
Macleay River Meats (Eversons Food Processors)	Open	Yes	Lamb Sheep Cattle Goats
Milton Meats	Closed	NA	Alpacas
Moss Vale Abattoir	Closed	NA	NA
Mudgee Regional Abattoir	Closed	NA	NA
Murray Plains Meat Cooperative	Open	Yes	Poultry Lamb Goats Pigs Cattle
Northern Meat Coop - Booyong Pork	Open	No	Pigs
Northern Meat Coop - Casino Food Company	Open	Yes (but not taking new members)	Cattle
Northern Tablelands Meat Packers	Closed	NA	NA
Nyngan Fine Meats	Closed	NA	NA
Oberon Abattoir	Closed	NA	NA

Ramsey Food Processing	Closed	NA	NA
Riverina Beef Abattoir (JBS subsidiary)	Open	No	Cattle
Tablelands Premier Meats	Closed	NA	NA
Thomas Foods International - Tamworth Abattoir	Open	No	Sheep
Western Sydney Meat Worx	Open	Yes	Cattle Pigs Sheep
Wingham Beef Exports	Open	No	Cattle

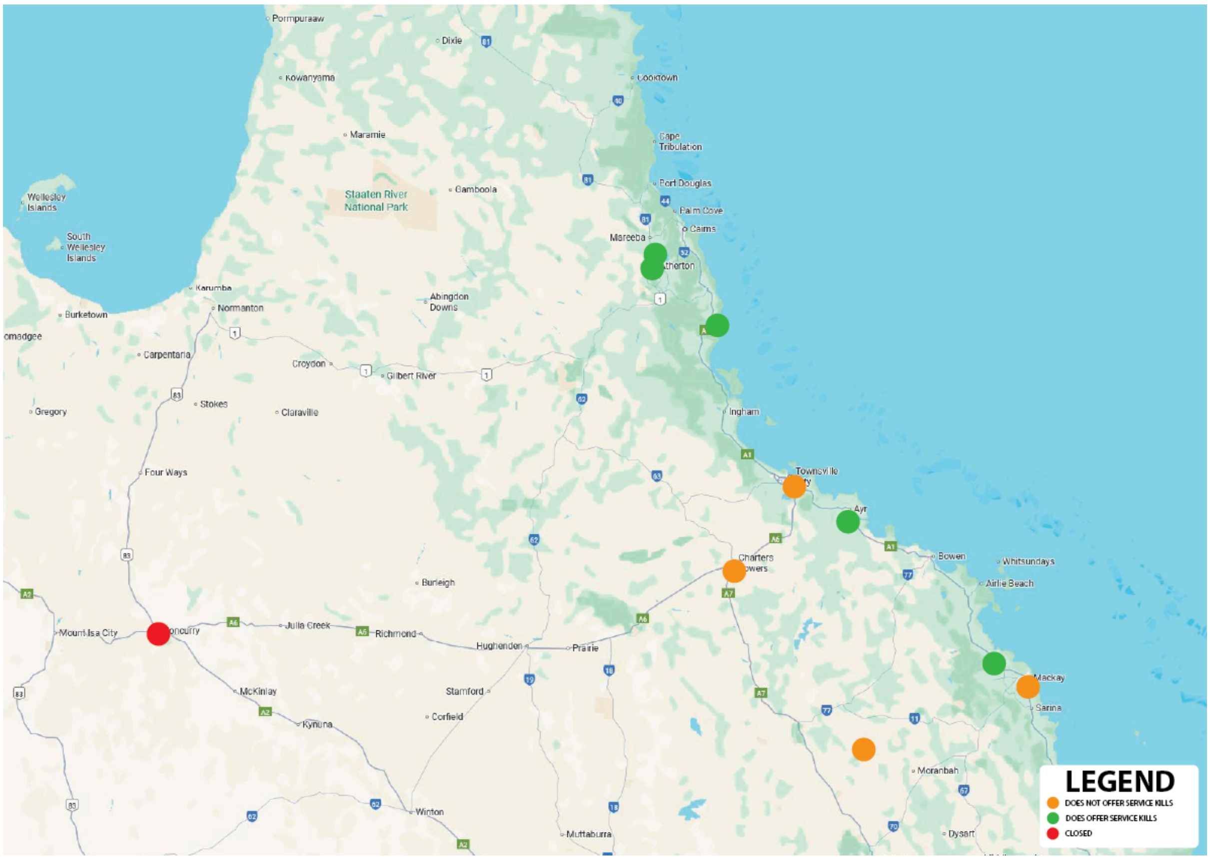
Northern Territory

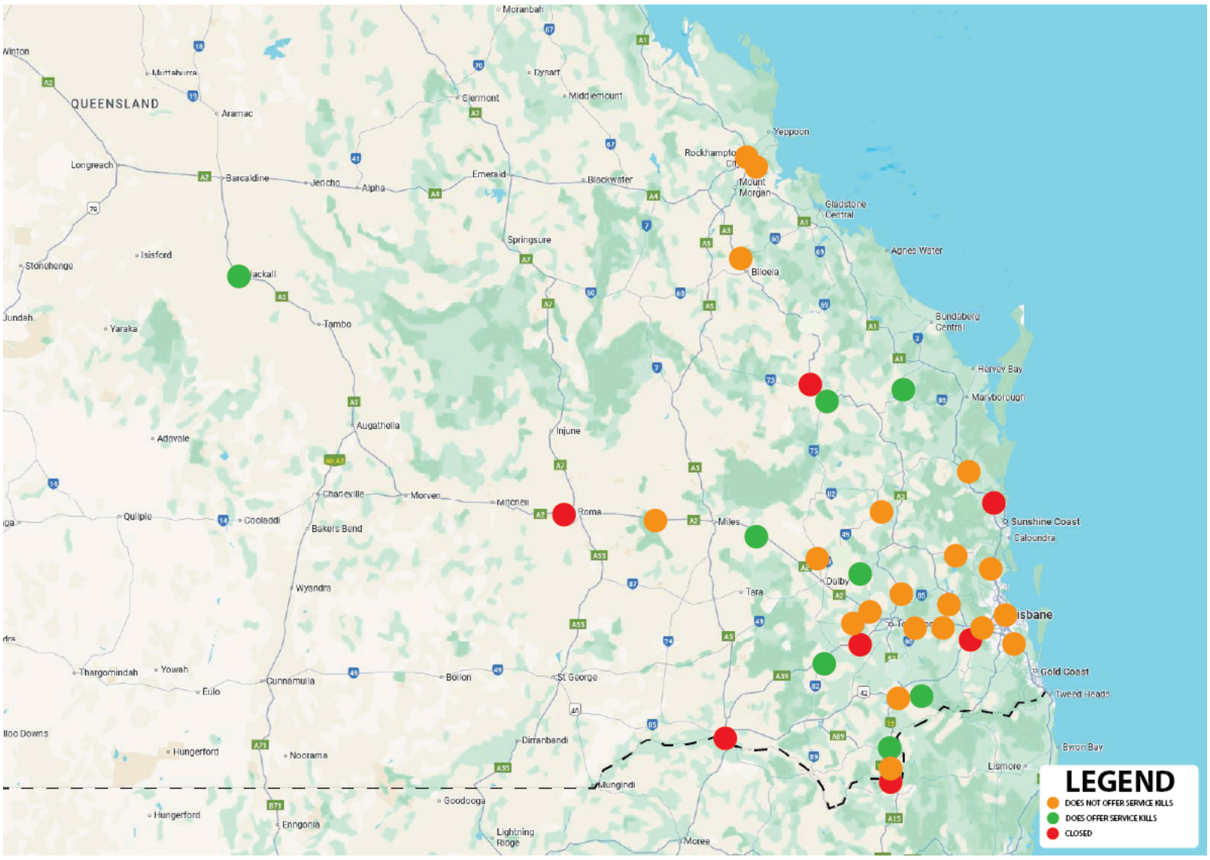
The Northern Territory has no abattoirs offering service kills. The only remaining abattoirs are Rum Jungle Meat Exports and Crocodylus Park Farm and Abattoir servicing the export and game markets, and Indigenous-run Gundalanya Abattoir, which services the local community.



Queensland

Until the last decade, there were 46 abattoirs operating across Queensland, but eight of those have now closed, leaving 37 operational. Of those, 13 offer service kills.





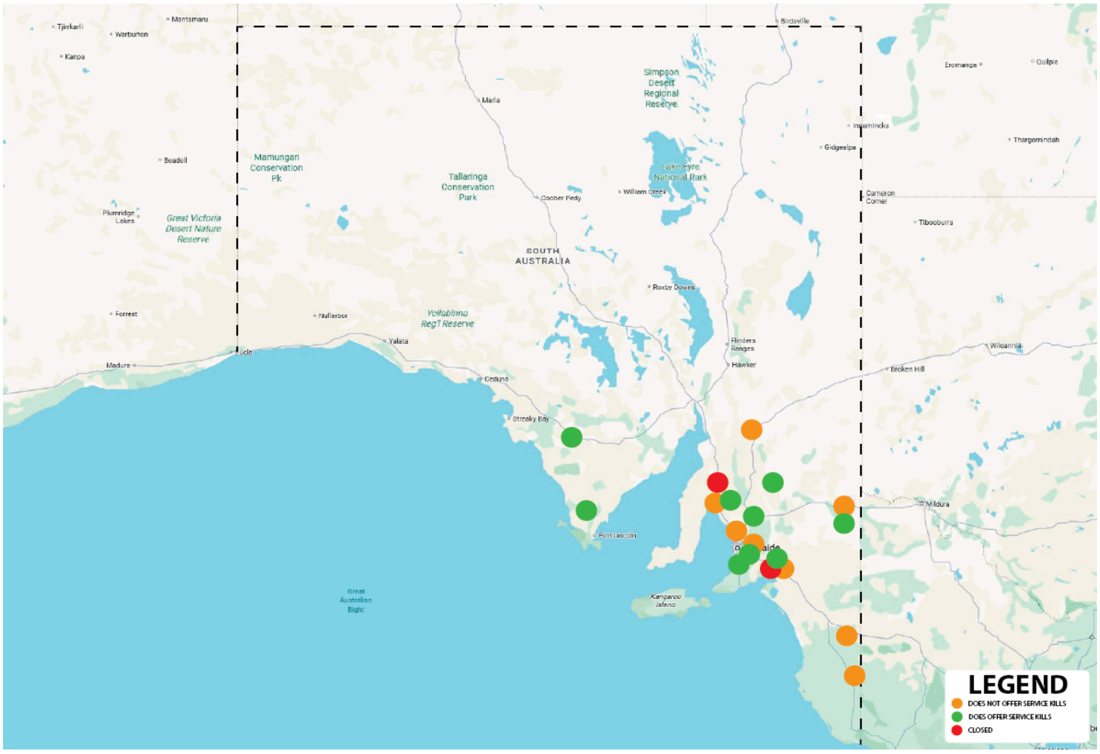
Abattoir	Open/closed	Offer service kills	Species
Australian Country Choice Abattoir	Open	No	Cattle
Barcoo Butchery	Open	Yes	Cattle Pigs Sheep
Biggenden Meatworks	Open	Yes	Cattle Sheep Pigs Goats
Blenners Wholesale Meats	Open	Yes	Cattle
Bones Knob Cash Butchery and Local Trade	Open	Yes	Pigs Cattle Sheep Goats
Boss Meats	Open	No	Cattle Sheep
Brisbane Valley Meats	Open	Yes	Cattle Sheep Goats Pigs Camels Buffalo
Burnett Butchery Slaughter Yards	Closed	NA	NA
Carey Bros Abattoir	Open	Yes	Cattle Sheep Goats Pigs
Churchill Abattoir	Closed	NA	NA
Cloncurry Abattoir	Closed	NA	NA
Crows Nest Meatworks	Open	No	Sheep Goats Pigs Cattle Calves
Full Circle Butchery	Open	Yes	Cattle Pigs Sheep Goats
Grays Slaughteryards	Closed	NA	NA
Greenmountain Food Processing	Open	No	Cattle

JBS Australia - Beef City Abattoir	Open	No	Cattle
JBS Australia - Dinmore Abattoir	Open	No	Cattle
JBS Australia - Rockhamption Abattoir	Open	No	Cattle
JBS Australia - Townsville Abattoir	Open	No	Cattle
Jimbour Butchery Abattoir	Open	No	Cattle
John Dee Export Abattoir	Open	No	Cattle
Kilcoy Pastoral Company	Open	No	Cattle Sheep Goats
Kuttabul Abattoir Plant	Open	Yes	Cattle Pigs
Ladbrooks Slaughterhouse (Roma Abattoir)	Closed	NA	NA
Maclagan Meats	Open	Yes	Goats Sheep Pigs Cattle
Meramist Abattoir	Open	No	Horses Cattle Camels
Miller's Gourmet Meats Slaughterhouse	Open	Yes	Cattle Sheep Pigs
Millmerran Meats	Open	Yes	Cattle Sheep Pigs
Moya Valley Poultry	Open	?	Poultry
Mundubbera Butchering Co Abattoir	Open	Yes	Cattle Pigs Sheep
Nolan Meats	Open	No	Cattle
Oakey Abattoir	Open	No	Cattle
Pittsworth Regional Abattoir	Closed	NA	NA
Plants Meats	Open	No	NA
Rocky Creek Abattoir (Byrnes)	Open	Yes	Cattle Pigs Goats
Schulte's Meat Tavern	Open	No	Cattle Pigs

			Lamb
Signature Beef Slaughterhouse	Open	No	Cattle
Stanbroke Beef	Open	No	Cattle
Stanthorpe Abattoir	Open	Yes	Cattle Sheep Goats Pigs
Steve's Country Kills	Open	Yes	Cattle Sheep Goats Pigs
Swickers Kingaroy Bacon Factory (SunPork)	Open	No	Pigs
Teys Australia - Beenleigh Abattoir	Open	No	Cattle
Teys Australia - Biloela Abattoir	Open	No	Cattle
Teys Australia - Rockhampton Abattoir	Open	No	Cattle
The Oak's Abattoir	Closed	NA	NA
Thomas Borthwick & Sons	Open	No	Cattle
Wallangarra Abattoir	Closed	NA	NA
Western Exporters Abattoir	Open	No	Goats Sheep

South Australia

Until the last decade, there were 19 abattoirs operating in South Australia, but two have recently closed, leaving 17 operational. Of those, eight offer service kills.

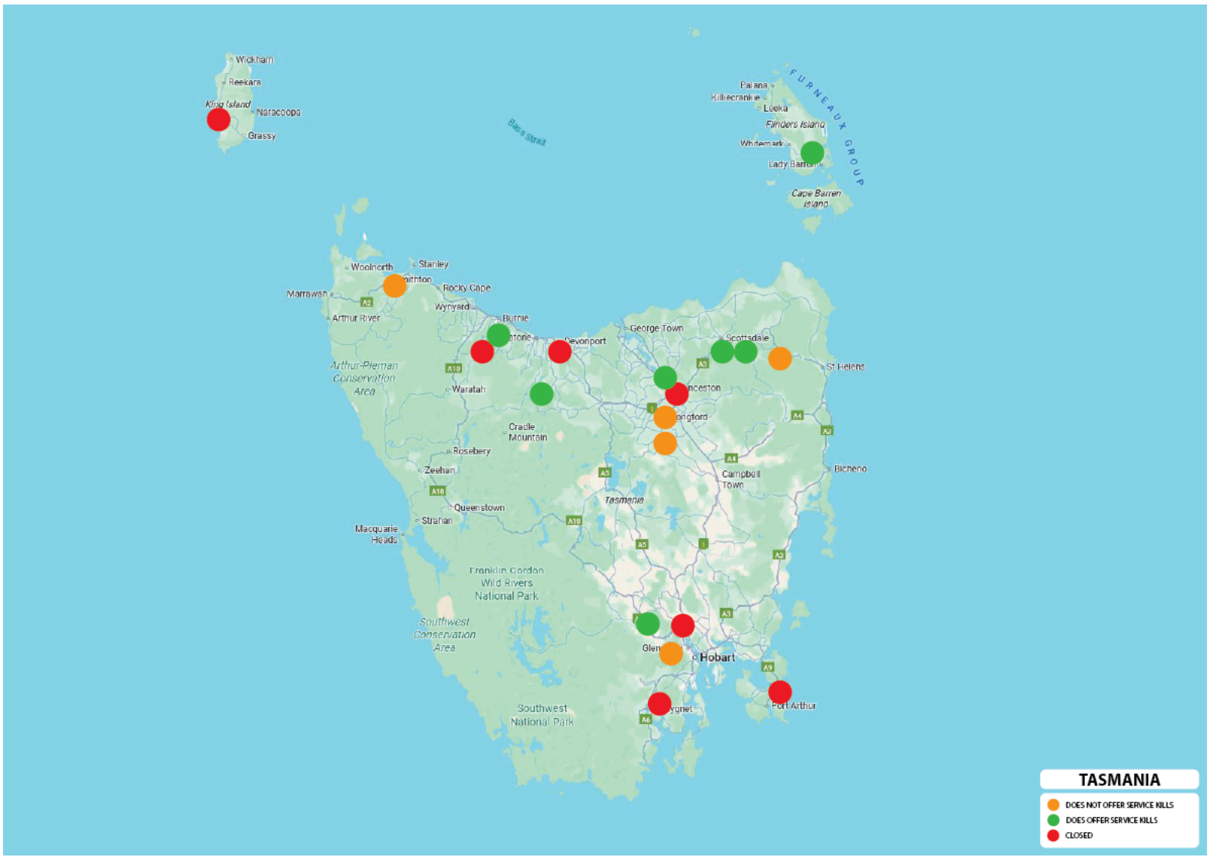


Abattoir	Open/closed	Offer service kills	Species
Big River Pork Abattoir	Closed	NA	NA
BMK Food Slaughterhouse	Open	Yes	Pigs
Crystal Brook Abattoir	Open	Yes	Cattle Sheep
Cummins Meat Processing	Open	Yes	Cattle Pigs Sheep
Hahndorf Venison	Open	No	Deer
JBS Bordertown Processing Plant	Open	No	Sheep
Kangarilla Abattoir	Open	Yes	Cattle Sheep
Lobethal Abattoir (Thomas Foods Subsidiary)	Open	No	Sheep Goats
Loxton Abattoir	Open	Yes	Cattle Sheep Pigs
Carnevore Hahndorf	Open	Yes	Cattle Sheep Pigs Poultry

Menzel's Meats	Open	Yes	Cattle Pigs Sheep Goats
Peterborough Camel Abattoir	Open	No	Camels
Primo Port Wakefield Abattoir (JBS Subsidiary)	Open	No	Pigs
Rosendale Kangaroo Meats	Open	No	Kangaroo
Snowtown Abattoir	Closed	NA	NA
South Ozzy Meats	Open	Yes	Cattle Sheep Goats
Tailem Bend Abattoir	Open	No	Pigs
Teys Australia - Naracoorte Abattoir	Open	No	Cattle
TPL Meat Exports	Open	No	Cattle Sheep Goats Camel Buffalo Deer
Wudinna Meat Store	Open	Yes	Cattle Pigs Sheep

Tasmania

Until the last decade, there were 20 abattoirs operating in Tasmania, but seven have closed, leaving just 12 operational. Of those, seven offer service kills, concentrated in the north of the state.

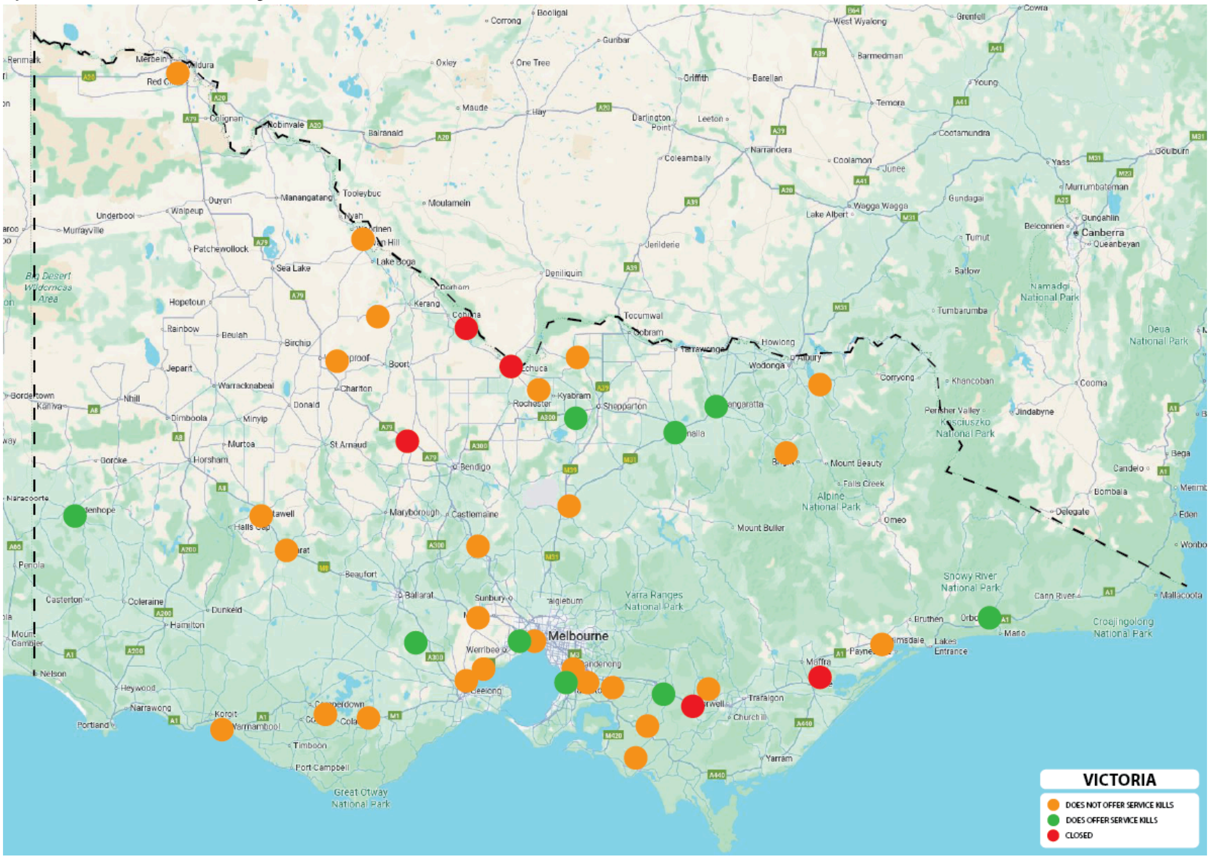


Abattoir	Open/closed	Offer service kills	Species
Bridgewater Abattoir	Closed	NA	NA
Collinsvale Abattoir	Open	No	Pigs
Devonport Pork Abattoir	Closed	NA	NA
Doo-Town Game Meats	Closed	NA	NA
Fingal Meatworks	Open	Yes	Sheep Cattle Pigs
Flinders Island Meat	Open	Yes	Cattle Lamb Wallaby
Greenham Abattoir	Open	No	Cattle
Gretna Meatworks	Open	Yes	Pigs Sheep Goats Cattle
Highclere Abattoirs and Butchery	Closed	NA	NA
King Island Prime Meats	Closed	NA	NA

Legerwood Abattoir	Open	Yes	Cattle Sheep Goats Pigs
Lenah Game Meats	Open	Yes	Wallaby Possum Venison
Lethborg Smallgoods	Closed	NA	NA
Longford Processing Plant (JBS Subsidiary)	Open	No	Cattle Sheep
Pyengana Quality Meats	Open	No	Cattle
Scottsdale Pork	Open	Yes	Pigs
Skyview Processing	Closed	NA	NA
Tasmanian Quality Meats Abattoir	Open	No	Sheep Cattle
The Local Meat Co	Open	Yes	Cattle Sheep Pigs
Wal's Bulk Meats	Open	Yes	Pigs Sheep Cattle Deer

Victoria

Until the last decade, there were 40 abattoirs operating in Victoria, but five have closed, leaving 35 operational. Of those, just nine offer service kills.



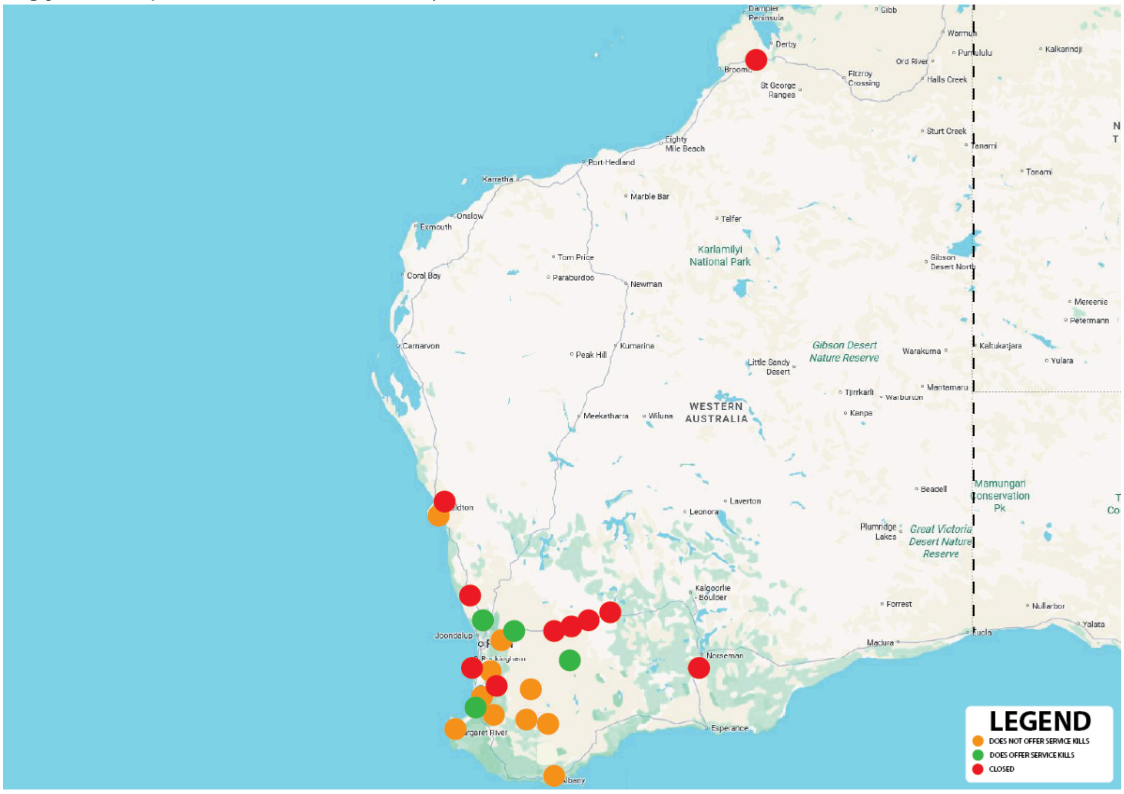
Abattoir	Open/closed	Offer service kills	Species
Ararat Meat Exports	Open	No	Sheep Goats
Australian Lamb (Colac)	Open	No	Sheep
Australian Meat Group	Open	No	Cattle
Baramul Emu Processing	Open	No	Emu
Castle Estate	Open	No	Cattle Sheep Pigs Goats Deer Llama Alpaca Buffalo
Cedar Meats Australia	Open	No	Sheep Goats
Eastern Abattoirs	Open	Yes	Cattle Sheep Pigs

Echuca Abattoir	Closed	NA	NA
Edenhope Abattoirs	Open	Yes	Cattle Sheep Pigs
G & K O'Connor	Open	No	Cattle
G.A. Gathercole	Open	Yes	Cattle Sheep Goats
GBP Australia	Open	No	Cattle
Gippsland Meats	Open	No	Rabbits Sheep Goats
Gordyn Abattoir	Closed	NA	Sheep Cattle Pigs
Greenham Gippsland	Open	No	Cattle
Gunbower Abattoir	Closed	NA	NA
H.W. Greenham & Sons	Open	No	Cattle
Inglewood Abattoir	Closed	NA	NA
JBS (Formerly Diamond Valley)	Open	Yes	Pigs
Kilcoy (Formerly Hardwicks)	Open	No	Cattle Goats Sheep
Kilcoy Lance Creek	Open	No	Cattle
M C Herd	Open	No	Cattle Sheep
Meredith Abattoir	Open	Yes (Service kills for sheep only)	Goats Sheep
Midfield Meat International	Open	No	Cattle Sheep
Mildura Meat Co	Open	No	Sheep Goats
Provenir	Open	No	Cattle
R. Radford & Son	Open	Yes	Cattle Sheep
Ralph's Abattoirs	Open	No	Cattle
Ryan Meat Company	Open	No	Sheep

Sinclair Meats	Open	Yes	Pigs
Swan Hill Abattoir	Open	Yes	Cattle Sheep Goats
Tallangatta Meat Processors	Open	No	Sheep
Tatura Abattoirs	Open	Yes	Sheep
The Emu Farmers Co.	Open	No	Emu
The Game Meats Company of Australia	Open	No	Goats Deer Emus Ostriches
Thomas Foods International	Open	No	Cattle
Victoria Valley Meat Exports	Closed	NA	NA
Wagstaff Cranbourne	Open	No	Cattle Sheep
Westside Meats	Open	No	Cattle Sheep

Western Australia

Until the last decade, there were at least 23 abattoirs operating across WA, but nine have closed, leaving just 14 operational. Of those, only four offer service kills.



Abattoir	Open/closed	Offer service kills	Species
Avon Valley Abattoir	Open	Yes	Cattle Sheep Lamb
Beaufort River Meats	Open	No	Sheeps Goats
Cataby Abattoir (Joanna Plains)	Closed	NA	NA
Corrigin Meatworks	Open	Yes	Cattle Goat Sheep Lamb Pigs Camel
Cowaramup Abattoir	Open	No	Cattle
D&K Hagan Bros Abattoir	Open	No	Cattle Sheep Pigs
Dardanup Butchering Company	Open	Yes	Cattle Goat Sheep Pigs Rabbit
Eastern Districts Abattoir	Closed	NA	NA
Geraldton Meat Exports	Closed	NA	NA
Gingin Meatworks Abattoir	Open	Yes	Cattle Sheep
Great Eastern Abattoirs (Minerva Subsidiary)	Closed	NA	NA
Harvey Beef	Open	No	Cattle
Hillside Meat Processors	Open	No	Sheep
Karnet Prison Farm Abattoir	Open	No	Cattle Sheep Goats Pigs
Kellerberrin Abattoir and Butchery	Closed	NA	NA
Kimberley Meat Co	Closed	NA	NA
Linley Valley Pork (Craig Mostyn Group subsidiary)	Open	No	Pigs
Minerva Foods	Closed	NA	NA
Narrikup Export Abattoir	Open	No	Sheep Goats

Shark Lake Food Group Abattoir	Closed	NA	NA
Southern Brook Abattoir	Closed	NA	NA
V&V Walsh Abattoirs	Open	No	Cattle Sheep
West Australian Meat Marketing Co-Op	Open	No	Sheep

Status of Australian Red Meat Abattoirs - August 2025

State	Abattoirs closed in past decade	Total abattoirs remaining	No. abs not offering service kills	No. abs offering service kills
NSW	13	26	20	8
NT	6	3	3	0
QLD	8	38	24	14
SA	2	18	9	9
TAS	7	12	4	8
VIC	5	34	26	8
WA	9	14	10	4
Australia	**50**	**145**	**96**	**51**

What about feasibility?

There is a commonly held view that in order to commit to a significant infrastructure project, one must undertake a feasibility study. Micro-abattoirs are no exception, and all too often governments believe that the first step they should take to support community development is to fund a feasibility study. However, in the case of the need for local micro-abattoirs, there is a known supply–farmers in need of abattoirs–and a known market–the communities these farmers have fed until they lost access to local slaughter options. All that is missing is an abattoir.

If the question is how to run a viable micro-abattoir, then the guidance in part 2 of this report goes to a great deal of trouble providing that advice. There are also dozens of feasibility studies already completed from which we can learn, so the author undertook a desktop review of nine such reports in a bid to avoid diverting funds to any more, and instead investing funding into actually building micro-abattoirs.

Summary of feasibility study review

Key Points

- Feasibility and economic viability is always the first question raised of proposals for new abattoirs, including on-farm and micro facilities.
- Studies conducted to date highlight the following key factors:
    - the need for **farmer representation in governance structures**
    - the need to **avoid debt-based capital raising** for construction
    - **high costs to meet planning** and development approval requirements
    - prohibitive construction costs associated with adherence to industrial requirements
- **Issues raised in existing feasibility studies** highlight real challenges associated with abattoir establishment and sustainability - but also **point to practical, often low cost regulatory solutions**.

A review of nine reports was undertaken, seven Australian, one from Aotearoa/New Zealand, and one from Scotland. The two international examples were included due to their distinct relevance to the situation Australian farmers find themselves in regarding loss of access to abattoirs and investigations into a small, locally-controlled facility focused on service kills. The reports range from pre-feasibility and feasibility studies to high level mapping of the need for more meat processing capacity, revealing many commonalities, and a wide spectrum of cost estimates to build new facilities.

All refer to **industry consolidation** and the **shrinking number of abattoirs offering service kills**, citing vertical integration, acquisitions by multinational corporations, and volatility in livestock availability due to drought and unfavourable export markets. The seasonal nature of beef and lamb throughput is cited as a challenge, but the reports that focus on throughput from this perspective are primarily concerned with the 'purchase-process-sell' model. Those with a focus exclusively on service kills do not anticipate as much seasonal variation, as direct-to-market farmers more often finish animals fairly consistently year round, though farmers consulted for the Aotearoa/New Zealand report note the need to improve their grazing practices to achieve year-round finishing of cattle. Several assert that there is no room in the existing highly consolidated market to competitively establish a new purchase-process-sell abattoir, but that **small facilities to serve local farmers who sell directly are needed and likely to be viable as long as they are built without debt.**

Nearly every report recommends **funding support for construction**, with most recommending government funding mixed with philanthropic funds and farmer shareholder buy-in. Only the Meridian Agriculture report for the Tasmanian Government recommends against government intervention, citing the importance of free markets as its rationale. Meridian and two other reports note the high regulatory burden that makes Australia less competitive than other high exporting countries, but for a facility focused on domestic sales, this is less relevant, though costs of compliance must be understood.

In **selecting a site**, most reports highlight the importance of considerations of **zoning**, **access to power and water, waste management, and proximity to sensitive uses, such as waterways and residential areas**. The few reports that consider mobile abattoirs discount this option due to cost and viability. Several refer specifically to ensuring abattoirs are **sited centrally to need**, to achieve their stated aims of **higher animal welfare** from shorter distances travelled, and ensuring higher meat quality.

In terms of **ownership** and **governance**, most recommend strong **representation from farmers** whether owned by a public or private third party, or by a cooperative of farmers. As the facilities proposed vary a great deal in size and throughput, the **number of staff** proposed is quite variable, but for the smallest (with a throughput of 5-10 cattle or equivalent per processing day), there is **generally consensus that two to four workers are sufficient** (two to three drover and slaughter people and one part-time admin). According to the author's experiences of working in a small-scale goat abattoir, having three people on stun and slaughter is quicker, but two is sufficient.

Of the nine studies reviewed, only two have progressed to construction of an abattoir – a large-scale export abattoir in north-western WA and a small-scale service kill facility, the Murray Plains Meat Cooperative in NSW. Given that many of the reports reviewed saw a clear and viable case for a new abattoir and yet have not to date resulted in their development, further research is warranted to better understand the **barriers to progress**. Reports from farming communities cite **access to funding for construction (without debt)** and **restrictive land use legislation** as significant barriers to autonomous local development of processing facilities. Later in this report there is a review of three Australian micro-abattoirs, none of which conducted feasibility studies. **Appendix A contains more detailed summaries** of each of the reports reviewed.

Demand for a local abattoir

In spite of the loss of access to local abattoirs, farmers have persevered, driven longer distances, collaborated and formed regional organisations such as Southern Harvest in the ACT, Southern Tasmanian Association of Meat Processors (STAMP) and Sprout Tasmania, and WA Small Farmers in the west to keep farming and feeding the local community. **Without abattoirs, numbers of smallholders will keep diminishing**, and there is **little opportunity for those selling into commodity markets who wish to transition to direct sales** to achieve this.

Many of the feasibility studies reviewed pointed to the opportunity in the market for a purpose-built service kill abattoir, noting that this is probably the only viable model of new abattoir in the present context of a high throughput, export-focused, consolidated slaughter industry. A first step in developing a micro-abattoir project should be to establish the average number of livestock currently processed and sold by local farmers within a region. These farmers should organise participation in a community-led process towards a facility to service their needs.

Planning and land use regulations: Reforms needed

As abattoirs industrialised their operations, they increasingly have been considered industrial in nature rather than agricultural. Current legislation in all states requires small-scale farmers to operate under the same regulatory system as large, industrial processors. For example, from a waste management perspective, abattoir legislation does not distinguish between a farm harvesting 1 beast per week, a micro-abattoir slaughtering 15 per week and an intensive operation slaughtering upwards of 6000 animals per week. The impacts of these approaches are clearly not even close to comparable from an ecological or development perspective – yet the development and environmental requirements are standard.

This frustratingly extends beyond just abattoirs, for example, running a flock of pasture-raised laying chickens at 10 birds per hectare is subject to the same oversight as million bird operations. Many diversification options for small scale farmers are met with prohibitive and self-evidently inappropriate regulation.

RECOMMENDATIONS FOR ALL STATES AND TERRITORIES

RECOMMENDATION ONE

First, to interpret a **micro-abattoir as ancillary use in the rural and agricultural zones**, and therefore exempt development that does not require a planning permit.

RECOMMENDATION TWO

A second approach desired by many smallholders across Australia is the **application of 'field harvest' standards to domestic livestock,** enabling them to be slaughtered on farm, chilled and inspected, and subsequently transferred to a licensed butcher for processing - noting similar arrangements have been successfully operating in the game industry for many decades under the *Australian Standard for the Hygienic Production of Wild Game Meat for Human Consumption – AS4464:2007*. There are clear low stress / animal welfare benefits to this approach which would support the survival of small-scale farmers. **Note there is already a legal precedent for this practice in NSW on Lord Howe Island, where there are no conventional abattoirs.**

RECOMMENDATION THREE

Establish working groups in each state and territory similar to the Victorian **Access to Abattoirs Working Group** convened by Ag Vic. Membership should at a minimum include representatives from:

- Australian Food Sovereignty Alliance
- any state-based non-commodity farmers' organisation (e.g. WA Small Farmers, Southern Harvest, STAMP/Sprout Tasmania)
- operators of a service-kill abattoir
- whole-carcass butchers
- disaster resilience experts

RECOMMENDATION FOUR

There are currently very few RTOs in Australia offering the requisite training for meat inspection **(Cert. III in Meat Processing (Meat Safety)**), as training has been vertically integrated along with slaughter access. State and Territory Governments should urgently address this gap with targeted policy and funding strategies, such as by including Meat Processing in fee-free TAFE schemes to address labour shortages.

Precedent for reforms

It is worth turning to the precedent set by the 2024 VCAT decision to grant a permit to Jonai Farms for a micro-abattoir for administrative guidance on how best to apply the objectives of agricultural zones to micro-abattoir developments. Below I quote at length from the VCAT Order in which Senior Member Rachel Naylor issued her decision.

> 26 There is nothing in the agricultural or industrial land use policies that discourage an abattoir land use from being located in a Farming Zone. Mr O'Neill & others have submitted this is an industrial land use on farming land with no intrinsic link to agriculture. I am not persuaded of this submission in regard to this proposal. 'Intrinsic' is defined in the online Macquarie Dictionary as an adjective meaning 'belonging to a thing by its very nature'. I agree with Mrs Jonas' submission that it is inherent in farming that livestock is grown for consumption (amongst other purposes), so the slaughtering of livestock does belong by its very nature to the growing of livestock. Mrs Jonas points out farmers can legitimately slaughter their own livestock for their own consumption on their farms. An abattoir is then a place in which livestock can be slaughtered for a larger cohort of consumers. How large a scale this may be depends upon the characteristics of the particular abattoir. In this proposal, Mrs Jonas is referring to it as a micro abattoir.

27 It must be remembered that there are only two rural industrial land uses that require planning permission in the Farming Zone, being a sawmill and an abattoir. I agree with Mrs Jonas that it is possible that these two land uses require permission because they have the potential to be large scale operations that can create adverse impacts. So, the acceptability of an abattoir land use in a Farming Zone is dependent upon its potential impacts being acceptable.

28 Furthermore, the 'as-of-right'/ no permit required nature of rural industries generally in the Farming Zone provides recognition that rural industries can be located amongst the traditional productive agricultural land uses. This is because the nature of farming is changing and the Victorian Planning Practice note 42: Applying rural zones (PPN42)[26] acknowledges this. PPN42 explains farming is becoming more diverse and 'becoming more industrialised'. In regard to diversity in farming related practices, PPN42 acknowledges that farming is expanding to respond to changing world and domestic consumption patterns and the need to remain profitable and sustainable. In regard to industrialisation, PPN42 explains modern farming practices use machinery and operate all hours. PPN42 identifies the desire for sound strategic planning to ensure farmland and farming industries of state, regional or local significance are protected. It explains:

The Farming Zone is primarily concerned with keeping land in agricultural production and avoiding land uses that could limit future farming or constrain agricultural activities. In this zone:

- farming is the dominant land use and all other land uses are subordinate to farming
- farming uses are encouraged to establish and expand with as little restriction as possible, subject to proper safeguards for the environment

The VCAT member's decision clearly established a micro-abattoir as ancillary use to farming - not a change in land use - and therefore not subject to planning controls so long as it sits under certain thresholds particularly protecting the environment through responsible waste management.

On 31 July 2025, the Victorian Government released its response to the report from the Inquiry into Securing the Victorian Food Supply, which gave its full support to recommendation 27 - to support the establishment of micro-abattoirs for small-scale livestock producers. The support Victoria has committed to removes the requirement to seek planning permission for a micro-abattoir as below:

The Government will amend the VPP to make it easier to establish micro-abattoirs in appropriate rural and regional areas. Micro-abattoirs (including mobile models) will be a Section 1 use in the FZ, RAZ and GWZ. Micro-abattoirs will remain prohibited in the GWAZ, consistent with the zone's purpose to protect the amenity of rural living areas. All facilities will remain subject to appropriate regulatory requirements to safeguard public health, environmental values and community amenity.

Recommended reforms by state and territory

Key Points

- Farmers are seeking **practical reforms to clarify existing planning schemes** to boost local food systems and foster sustainable, ethical farming practices by **reducing regulatory cost and complexity**.
- Proposals for reform are **not aimed at establishing a two-tier system** or one which lowers food safety, animal welfare or environmental standards.
- Local, micro-processing presents opportunities to **improve traceability** of meat from farm to table and **reduce animal stress**, including transport.

[26] https://www.planning.vic.gov.au/guides-and-resources/guides/planning-practice-notes/applying-the-rural-zones

- Micro-abattoirs give farmers the chance to **close the loop on waste**—turning offal, bones, and other by-products into compost, pet food, or other useful resources—keeping nutrients on farm and reducing reliance on extractive systems. It's a practical way to meet environmental responsibilities while caring for land, animals, and community.

Below, we offer recommendations for each state and territory for reforms in line with Victoria's recent precedent.

ACT

In the Territory Plan, 'abattoir' is listed as an example in the definition of 'offensive industry':

> **offensive industry** means an industry, not being a general, hazardous, light, or mining industry, which by reason of the process involved or the method of factory manufacture or the nature of the materials or goods used, produced, or stored requires to be isolated from other buildings, when all measures to reduce or minimise impact have been employed. (e.g. abattoir, factory)

Should the governing authorities determine that an abattoir is *by definition* an 'offensive industry', the only option for siting a facility will be in the Industrial Zone 1 (IZ1). However, while it is listed as an example, nowhere in the Territory Plan is 'abattoir' *defined* as offensive industry.

According to the Territory Plan, 'ancillary use means the use of land for a purpose that is incidental and subordinate or secondary to the primary use of the land.'

AFSA recommends that 'micro-abattoir' is classified as 'ancillary use' in NUZ1 – Broadacre Zone and NUZ2 – Rural Zone, subject to District and Zone policies and strategies, so long as the land continues to be used primarily for agriculture, and an abattoir is a secondary use.

New South Wales

For NSW, **AFSA recommends** classification of micro-abattoirs as 'exempt development' within RU1 and RU2 zones, and as complying development in RU4. This would require distinguishing thresholds for a 'micro-abattoir' into relevant legislation, as an abattoir processing a set maximum of animals per annum, and/or generating less than 200 tonnes of organic waste, processed and retained on farm according to Environmental Protection Authority Guidelines.

Queensland

In Queensland, the Planning Act 2016 defines the framework for rural industry in the rural zone, which is then interpreted by local government planning schemes. Under current Queensland state and local government planning schemes, ***rural industry*** means the use of premises for—

a. storing, processing or packaging products from a rural use carried out on the premises or adjoining premises; or
b. selling products from a rural use carried out on the premises or adjoining premises, if the use is ancillary to the use in paragraph (a).

Abattoirs with the capacity to process 2,000 cattle, 3,000 pigs, 10,000 sheep, or 200,000 birds are considered a 'high impact industry', but the Planning Regulation 2017 does not identify a class of 'micro' or 'mobile' abattoirs (e.g. those processing up to 10 cattle, 30 pigs, 50 sheep, or 1000 birds). Such a distinction should be drawn to reflect the critical role of a micro-abattoir as 'rural industry' - processing and selling meat from livestock raised on or near the farm.

AFSA therefore recommends that the Queensland Government:

1. Include a definition for 'micro-abattoir' as a meat processing facility processing a set maximum of animals per annum, and/or generating less than 200 tonnes of organic waste, processed and retained on farm (this is in accordance with *Environmental Protection Act 1994* (EP Act)).

2. Include ‘micro-abattoir’ in the list of activities nested under ‘rural industry’ in the Planning Regulation 2017.
3. Interpret micro-abattoirs as a rural industry use (accepted development) in the Rural Zone, distinguishing them from large, industrial abattoirs.

South Australia

Our research reveals that South Australia currently has the most enabling legislation for micro-abattoirs in the country. In SA, regardless of scale, a 'stock slaughter works' is a 'deemed-to-satisfy' development in the Rural Zone, and Rural Industry is encouraged in the Rural Zone and the Productive Rural Landscape Zone, so while it is assessed by an assessment manager, they fast track these development proposals, and there is no notice and review (advertising) period.

Tasmania

The Tasmanian Planning Scheme defines land uses via the State Planning Provisions (SPP), which are interpreted through draft and interim Local Planning Schedules (LPS). Under the SPP, the definition of ‘resource processing’ is:

Use of land for treating, processing or packing plant or animal resources.

- Examples (among others) include:
    - Abattoir
    - Animal saleyard
    - Cheese factory
    - Fish processing
    - Milk processing

The examples make no reference to scale, so an abattoir processing 1000 cattle in a day is treated the same as one processing 10. Resource Processing is a permitted or discretionary use in several zones (including Rural and Agricultural Zones, as well as some of the Industrial Zones). However, micro-abattoirs (processing a set maximum of animals per annum) should be considered an ancillary use - no permit required - when constructed on farms in Rural and Agriculture Zones.

AFSA recommends the Tasmanian Government to amend the Primary Produce Safety (Meat and Poultry) Regulations 2014 to allow ‘micro-meat processing businesses’ to be classified as small-scale ‘resource processing’ in the SPP, so that no permit is required in the Rural Zone, and amend it to ‘no permit required’ in the Agriculture Zone. This would recognise on-farm micro-abattoirs as an appropriate and accepted land use in the Rural and Agriculture Zones.

Victoria

In Victoria, an abattoir is nested under ‘rural industry’, which in the Farming Zone does not require a permit, however, abattoirs and sawmills are exempt and made a Section 2 use - requiring a permit. In July 2025, the Victorian Government committed to amending the Victorian Planning Provisions to introduce micro-abattoirs as a Section 1 use in the Farming Zone, Rural Activity Zone, and Green Wedge Zone.

AFSA commends the Victorian Government for its action to support smallholders in the state, and further **recommends** that the Victorian Government provide financial support for small-scale livestock producers to establish micro-abattoirs in communities which demonstrate a need for this critical shared agricultural infrastructure.

Western Australia

In WA, the Planning and Development Local Planning Scheme Regulations provide the framework for rural industry in the Rural Zone, which is then interpreted by local government planning schemes. Under current WA state and local government planning schemes, ***rural industry*** is undefined, however, one of the objectives of the Rural Zone is:

> To protect broad acre agricultural activities such as cropping and grazing and intensive uses such as horticulture as primary uses, ***with other rural pursuits and rural industries as secondary uses in circumstances where they demonstrate compatibility with the primary use***.

Micro-abattoirs clearly serve the objectives of the Rural Zone to protect agriculture. They are critical to assuring the ongoing viability and continued existence of smallholders whose access to vertically-integrated and export-focused abattoirs has been steadily foreclosed.

The 2007 Water Quality Protection Note: Rural Abattoirs offers an insight into the Government's position on the lower risk posed by small-scale abattoirs. The note states that the Environmental Protection (Abattoirs) Regulations 2001 apply to abattoirs processing between 100 and 1000 tonnes (live weight) in animals per annum, in which case the abattoirs must apply and pay a one-off fee for registration, which has no expiry date. They must adhere to the regulations therein to maintain their registration. Abattoirs processing more than 1000 tonnes per annum must apply for a licence, renewable every one to five years. The note is silent on abattoirs that process less than 100 tonnes per annum, implying they are sufficiently below environmental risk thresholds as to not require registration.

These distinctions rightly reflect the critical difference between large-scale abattoirs and micro-abattoirs. The latter, as rural industry - ancillary use to primary production - processing and selling meat from livestock raised on or near the farm do not require a permit.

AFSA therefore recommends the WA Government classify 'micro-abattoir' (a meat processing facility processing less than 1000 tonnes (live weight) in animals per annum) as rural industry in the Planning and Development Local Planning Scheme Regulations, making it exempt from the requirement for a permit.

Part 2: The steps to build a multi-species micro-abattoir

Executive Summary

The **executive summary below captures the high level findings** around regulatory and operational requirements, a risk and benefit assessment, and proposed next steps, and is followed by the detailed technical guidance to develop a micro-abattoir.

Part 2 is an AFSA member-only resource. If you are a member, please drop us an email on admin@afsa.org.au to request your copy.

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Appendix A: Summary of Nine Reports into Need and Feasibility of Abattoirs

Wattle Range Council (SA) Service Kill Abattoir Review by Hood Sweeney (2019)

Wattle Range Council in SA commissioned the Hood Sweeney report to review two feasibility studies in excess of 15 years old, and to consider a smaller-scale facility for the Limestone Coast region. The report notes that consolidation in the industry has been due to several factors, including vertical integration and multinational ownership, but also highly volatile availability of livestock due to drought and unfavourable export markets. For large-scale facilities, Hood Sweeney asserts the importance of maintaining throughput to remain viable, while noting that a smaller facility with lower fixed costs can have greater flexibility to absorb variability.

The report documents the site selection needs based on zoning, power and water access, and the infrastructure requirements for waste management. It states that Australian Micro Abattoirs (AMA) could provide a modular solution for small or large stock, at approximately $400,000 and $950,000 respectively, with a weekly capacity of 107 head for beef, 142 head for pigs and 213 for sheep. Ownership and funding models are summarised. Note that AMA no longer exists. No abattoir has yet been built in the Wattle Range region.

Economic Analysis of Meat Processing Options on Kangaroo Island (2019)[27]

In 2018, Primary Industries and Regions South Australia (PIRSA) released a discussion paper, *Artisan On-Farm Meat Processing on Kangaroo Island*, in response to interest from farmers and others on KI. PIRSA subsequently commissioned a high level feasibility study by BDO EconSearch. The scope included a small- to medium-scale facility either privately owned or in shared cooperative ownership, a mobile facility, or construction of further processing facilities (butchering) only on KI in a business-as-usual scenario, in which farmers would continue to ship live animals to the mainland to the diminishing number of service kill abattoirs.

The report offers detail regarding the existing livestock numbers on KI and what proportion would be likely to be processed on KI were a facility built. Local hospitality providers were surveyed and some interviewed to gauge interest in KI-branded meat, finding a high level of interest. Benefits beyond paddock-to-plate branding were identified, including improved animal welfare (as well as better tourism outcomes with less animals on shared ferries), improved meat quality, and local employment opportunities. The mobile option was discounted by most surveyed as too expensive to be viable and not a priority, with preference established early on for a central fixed facility.

The report found that a small facility would present the most resilient model, processing up to 10,000 sheep, 500 pigs, and 200 cattle per annum, with an estimated construction cost of $1.58 million. A larger facility would also be feasible, though with greater risks if throughput is not achieved, capable of processing up to 25,000 sheep, 2,500 pigs and 1,000 cattle, at a build cost of $3.7 million. To date, no abattoir has been built.

The Feasibility of Establishing Further Meat Processing Capacity In Tasmania (2019)[28]

The closure of the abattoir at Devonport by JBS in 2018 led the Tasmanian Department of Primary Industries, Parks, Water and Environment (DPIPWE) to establish the Tasmanian Meat Industry Working Group. The Government subsequently contracted Meridian Agriculture, a long-established agricultural consulting agency servicing governments and large-scale agriculture. The terms of reference were to assess the state of the meat processing sector in Tasmania, survey producers and other stakeholders, analyse the factors influencing the viability of further meat processing capacity (economic, market & technical), and assess the feasibility of increasing processing in Tasmania via upgrades, expansion or greenfield construction.

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[27] https://pir.sa.gov.au/__data/assets/pdf_file/0004/346873/Economic_Analysis_of_Meat_Processing_Options_on_Kangaroo_Island_-_Prepared_by_BDO_EconSearch.pdf
[28] https://nre.tas.gov.au/Documents/Meat%20Processing%20Feasibility%20Study.pdf

The report cites national and international data, pointing out that Australian prices and access are largely determined by the global market for meat. It also notes the 2018 Australian Meat Processing Corporation's findings that the cost of processing in Australia is significantly higher than in other high-exporting countries such as the US, Brazil and Argentina, partially due to the higher regulatory costs (which are twice what they are in the US and Argentina, and three times those in Brazil).

Meridian asserts that the impact of lost service kills falls mostly on 'niche producers' and 'specialty butchers', and finds that pig production has been declining for many years along with access to abattoirs. Note that in 2021 (two years after the Meridian report), Scottsdale Pork – a medium-scale outdoor-bred pig farm in northern Tasmania – built its own on-farm abattoir, which offers service kills for other local farmers. However, in the south of the island there are no options left after the Cradoc abattoir shut down in 2024, leaving farmers no choice but to drive 4-5 hours each way for slaughter. There is now an organisation representing smallholders – the Southern Tasmania Association of Meat Processors (STAMP) – advocating for government support for micro-facilities.

Despite these realities on the ground for small-scale farmers who sell direct to market, Meridian found that Tasmania has 'sufficient slaughter' capacity, with no mention of distances travelled by farmers and their animals. It cites JBS' Victorian and South Australian sheep capacity (2.8 million lambs, which could go up to 4 million with a second shift at the two abattoirs named), as evidence that there is no need for more facilities. Not only does this finding tacitly accept the lower animal welfare outcomes of shipping live sheep across the Tasman Sea, it elides the fact that neither JBS abattoir in question conducts service kills. The report concludes that there should be 'no government intervention [...] to avoid distortions' in the market, despite JBS' anti-competitive behaviour in Tasmania and on the mainland.

Murray Plains Meat Coop Farming Together Feasibility Study (2018)

The loss of abattoirs in the Murray Plains region led to farmers driving over three hours to the next nearest option at Benalla, requiring the purchase of a refrigerated truck due to limited cold chain logistics between the two regions. The community, led by a pastured pig farmer hard hit by two of the local abattoir closures over the preceding years, came together to commission a feasibility study with a federal Farming Together grant. The report canvasses the usual concerns around rural zoning and Designated Development application requirements, siting in relation to power, water, and the extensive local flood zone on the Murray, as well as a brief summary of ownership and governance models. Costs for a small stock facility built by the company were estimated at $350,000 and for large stock at $650,000, and the report recommends seeking government grant funding, possibly supplemented by crowdfunding.

A facility was constructed by a different contractor under the local council's supervision – not the Murray Plains Meat Coop that formed after the study. There were many issues surrounding governance of that project, resulting in a building not fit-for-purpose (no cattle over 500kg live weight, lairage built not according to the Temple Grandin plan and unable to pass animal welfare audits, inadequate drainage, porous cladding on the boning room walls, and cheap equipment). After extensive retro-fitting of the new facility over 2024, the abattoir was finally licensed for red meat in early 2025 (having obtained a poultry licence in 2024). Total cost was over $2.7 million.

Liverpool Plains Meat Processing Project: Securing Local Control over Beef & Lamb Production on the Liverpool Plains (2017)

Small- to medium-scale producers who needed to shift from commodity production into direct markets formed the Liverpool Group, and in 2017 they obtained a federal Farming Together grant to investigate options for local red meat processing facilities in farmer control. Their motivations included loss of access to local processing facilities, the desire to improve animal welfare and meat quality, and to sell direct to increase profitability by 'shortening the chain'. This report is preliminary scoping for a feasibility study, which did not receive funding to go ahead. No abattoir has been built in the Liverpool Plains to date.

Micro-Abattoir for Great Barrier Island, NZ (2017)[29]

With no abattoir on Great Barrier Island (Aotearoa/NZ), and diminishing access to the extremely consolidated industry on the main islands (the study reports that 75-85% of livestock in NZ go through four chains of abattoirs, who export 96-97% of what they process), the AoteaOra Community Trust – an organisation with aims to improve sustainability practices on GBI – commissioned this feasibility study in 2017. The study identified demand for about 10 cattle per week, with an annual throughput of 460 head, and estimates the capital cost to construct a modular micro-abattoir from 4-5 20-foot refrigerated containers at $650,000, inclusive of all approvals and a project manager for the duration of the project.

It found that farmers' concerns include: ownership, operational structure, capital and operational expenses, the need to improve local farming practices to finish cattle at a higher quality, marketing, sales and branding, the need for meat processing skills locally, purchase and pricing support, and support from the local community. It stresses the importance of producer buy in and majority in the governance of a facility.

Citing concerns that 'Previous evidence suggests that an abattoir model which purchases small quantities of local livestock and trades meat has a low level of feasibility due to low throughput and high operational and regulatory costs,' the study still finds that so long as construction is fully financed through a mix of government and philanthropic grants, with scope for shareholder buy in, a commercial business with social objectives could prove a viable option for GBI. It recommends ownership initially by the Trust, to then be handed over to the GBI's social enterprise company, and ultimately transitioned into a Community Development Company controlled by the farmers.

The report also notes the Ministry for Primary Industry's increasing interest in supporting agriculture and related industries that are focused on domestic consumption. There is no evidence available of an abattoir having been built on Great Barrier Island.

Felix Domus Pty Ltd – King Island Abattoir Feasibility Study (2013)[30]

The closure of the King Island abattoir by JBS in 2012 left farmers with no choice but to ship animals to Tasmania or Victoria for slaughter, with diminished animal welfare outcomes and in some cases, resultant reduced meat quality, with an additional cost to producers of $112 per head. As a result, the Tasmanian Department of Economic Development, Tourism and the Arts (DEDTA) funded a feasibility study into the construction of a new abattoir on King Island. The study found that it would cost approximately $30 million to build an abattoir capable of processing up to 40,000 head per annum, which would cost approximately $14 million to operate. The high costs involved to service a small industry led to recommendations to focus as much on King Island's reputation and the marketing potential for premium prices as much as on the processing, ultimately suggesting that viability would be reliant on collaborative marketing of the King Island brand.

While the report canvasses several options for raising capital and operational models, it stresses the importance of 'protecting' any new facility via producer engagement in governance to support the King Island beef industry. As such, it also advocates ensuring strong producer buy in from commencing any development work. No abattoir has been built on King Island to date.

Preliminary study for micro abattoir in Skye & Lochalsh, Scotland (2013)[31]

This study was commissioned by the Scottish Crofting Federation, whose members were interested in local slaughter options as they had not had an abattoir since the last one closed in the mid-1990s. Previous studies had shown that an abattoir that purchases and processes livestock to sell the meat are not viable in this low density population region due to the low throughput. However, the report finds

29 https://www.aucklandcouncil.govt.nz/about-auckland-council/how-auckland-council-works/local-boards/all-local-boards/great-barrier-local-board/docsfeasibilitystudies/micro-abattoir-feasibility-study.pdf

30 https://australianabattoirs.com/wp-content/uploads/2013/06/kiafsg-final-report-17-jun.pdf

31 https://www.crofting.org/papers/skye-and-lochalsh-abattoir-viability-report/

that a micro-abattoir that could process up to five cattle, 20 sheep, or 10 pigs per day could return a modest profit if the capital cost of construction was entirely funded by a grant or similar. The report states that:

> The simplest scenario to allow the abattoir to operate at a slight profit is for 100% funding of the capital cost. Repayment of a loan is the second largest cost after wages, and a burden that does not change with throughput.

Capital costs have gone up in recent decades as the hygiene standards were harmonised across the EU, requiring micro facilities to meet the same standards as a large-scale export abattoir. However, the Scottish Government is committed to ensuring animals are slaughtered as close as possible to where they are reared, so there is hope that a government grant could be obtained for construction of a facility designed to be 24 by 12 metres, inclusive of chillers and all equipment bar waste disposal. Options for waste, water and energy are all canvassed in the report, as are ownership models, with a preference towards cooperative producer governance. Staffing is expected to be sustainable with two slaughter persons and one part-time admin role. The report states that the facility cannot be built for under £586,000.

Feasibility of Establishing a Northern Western Australian Beef Abattoir (2010)[32]

In 2010, in collaboration with the WA Government, the Australian Government's Rural Industries Research and Development Corporation (RIRDC) jointly funded a feasibility study into establishing a beef abattoir in the northwest of WA, with a view to diversifying markets in a region heavily dependent on live export. While the study found that an abattoir could be of great benefit to the region's beef producers, it would not be commercially viable without government and industry support, including through the development of a backgrounding and agistment sector, noting a facility could not survive on 'live export discards'. Given the seasonality of supply, distances to travel, lack of labour available, and other variables, the estimated $33.8 million needed to construct an abattoir was deemed a risk, and recommendations to ensure producers were engaged in governance and/or ownership were proposed.

In 2016, an abattoir was constructed and operated until going into voluntary administration in early 2024 over millions of dollars of unpaid debts. The facility was purchased in late 2024 by a Canadian super fund manager, with plans to re-open in 2025. Previous to its closure, the facility was reported to have a production capacity of 220 head per processing day, while the 2010 feasibility study predicted the need to process 400 per day to achieve minimum viability.

Summary table of abattoirs assessed for feasibility

Key: small-scale service kill, large-scale purchase-process-sell

Report	Estimated cost to build	Proposed throughput / week	Proposed throughput / annum
Wattle Range (SA) 2019	$950,000	107 cattle 142 pigs 213 sheep	5,000 cattle 6,500 pigs 10,000 sheep
Kangaroo Island (SA) 2019	$1.58 million	4 cattle 10 pigs 217 sheep	200 cattle 500 pigs 10,000 sheep
Murray Plains (NSW) 2018 Actual in 2025	$650,000 Actual cost > $2.7m	2 cattle 80 pigs 17 sheep Permitted for 29 cattle or equivalent pigs & sheep	94 cattle 3,700 pigs 770 sheep Permitted for 1,374 cattle or equivalent pigs & sheep (750 tonnes live weight)

[32] https://agrifutures.com.au/product/feasibility-of-establishing-a-northern-western-australian-beef-abattoir/

Great Barrier Island (NZ) 2017	$650,000	10 cattle	460 cattle
King Island (TAS) 2013	$30 million	870 cattle	40,000 cattle
Scotland 2013	£586,000 (=AUD$938k in 2013)	5 cattle 10 pigs 20 sheep	Not forecast
NW (WA) 2010	$33.8 million	1,100 cattle	50,600 cattle