



The Agricultural Workforce in the 21st Century

About Asian Agribusiness Recruitment

- Asian Agribusiness Recruitment (AARTD) finds great people for companies, and we help people to have great careers.
- We live and work in Asia, our offices are in Beijing, Ho Chi Minh City, and now Bangkok.
- Asian Agribusiness Consulting (AAC) is our sister company that helps companies understand the animal protein market in Asia and make better decisions.

Background

Three surveys of Asian livestock industry participants over the past 24 months

More than 10,000 conversations with candidates in the region over the past 24 months



WHAT MATTERS SURVEY

We asked employees what mattered the most to them at work?



EMPLOYERS WHAT MATTERS SURVEY

We asked employers what they thought what was important for their employees?



ATTRACTION & RETENTION SURVEY

We asked people working in livestock why they joined the industry and why they remain?

“What Matters” - Survey Questions

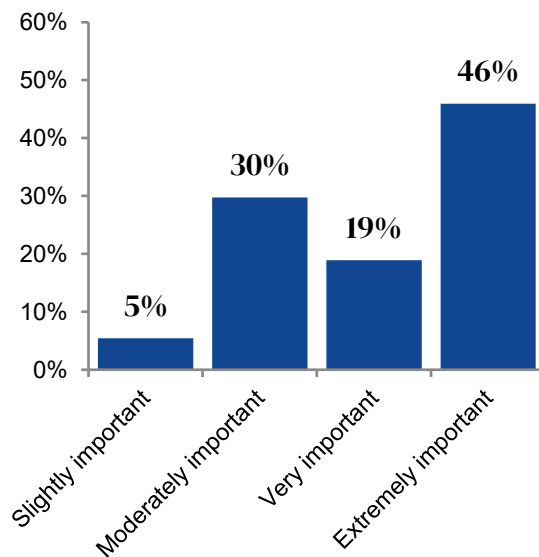
1. Company reputation in the industry
2. Reputation of company's products
3. Company culture and values
4. Corporate welfare
5. Opportunity for your role to expand
6. Promotion opportunities
7. Opportunity to travel
8. Salary
9. Recognition of your work
10. Work life balance
11. Leadership transparency
12. Management leadership style
13. Professional training opportunities

Rate the level of importance from 10 to 1; where 10 is the most important and 1 is the lowest

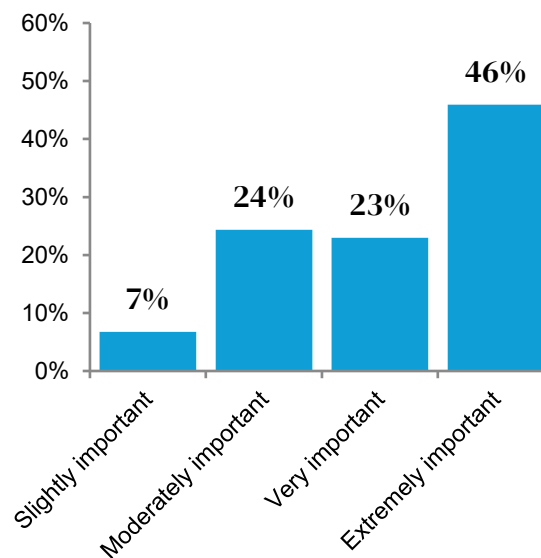
Top Three Findings - China



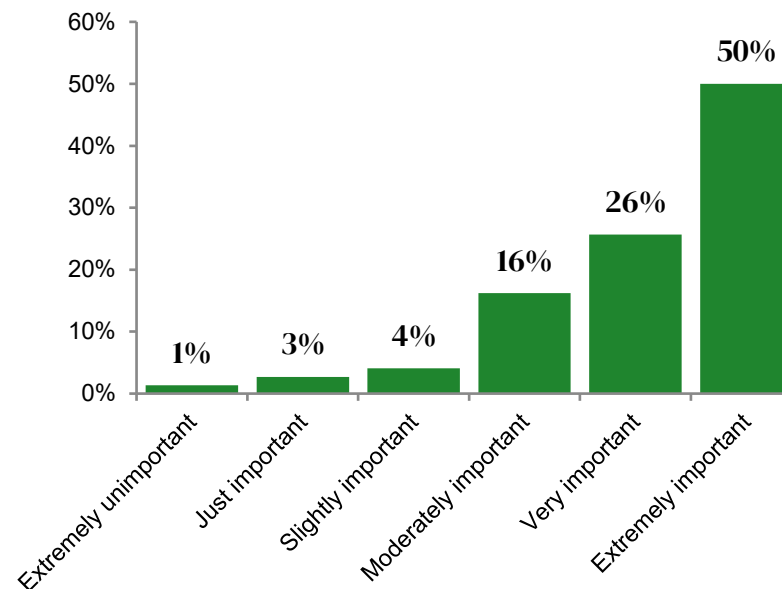
The importance of Company Reputation



The importance of Product Reputation



The importance of Salary



Employees w/annual salary
>USD 138,000
(CNY 1 Million)

Think that **salary** is the
most important.

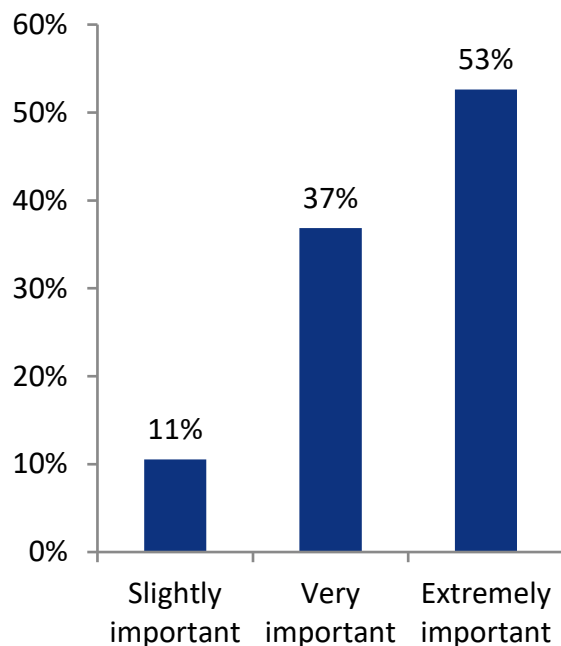
Employees w/annual salary
< USD 69,000
(CNY 500,000)

Think that **company reputation**
and **product reputation** were the
most important.

Management Findings - China

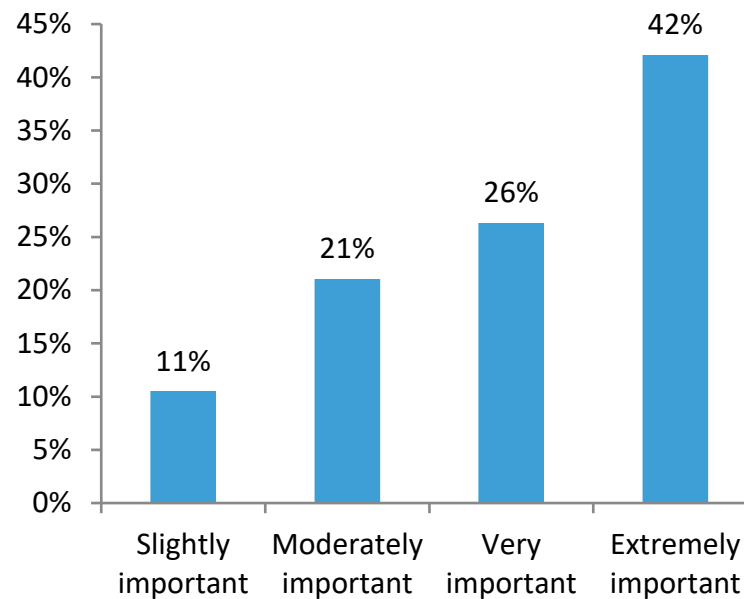


The importance of
reputation of products



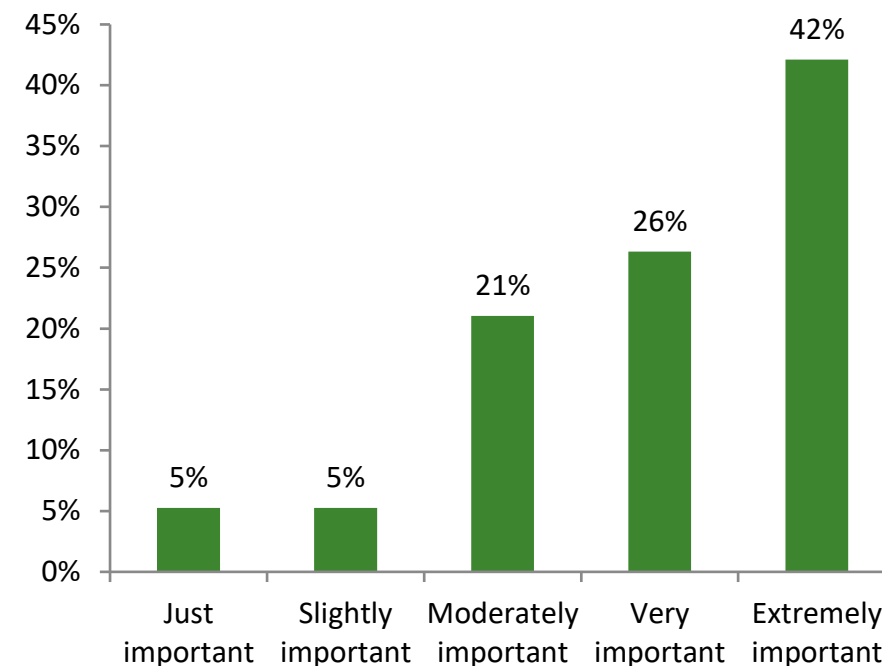
53% management think that **reputation of products** is extremely important.

The importance of
salary



42% management think that **salary** is extremely important.

The importance of
company reputation



42% management think that **company reputation** is extremely important.



Management and Employee Alignment

- Product reputation
- Salary
- Company reputation

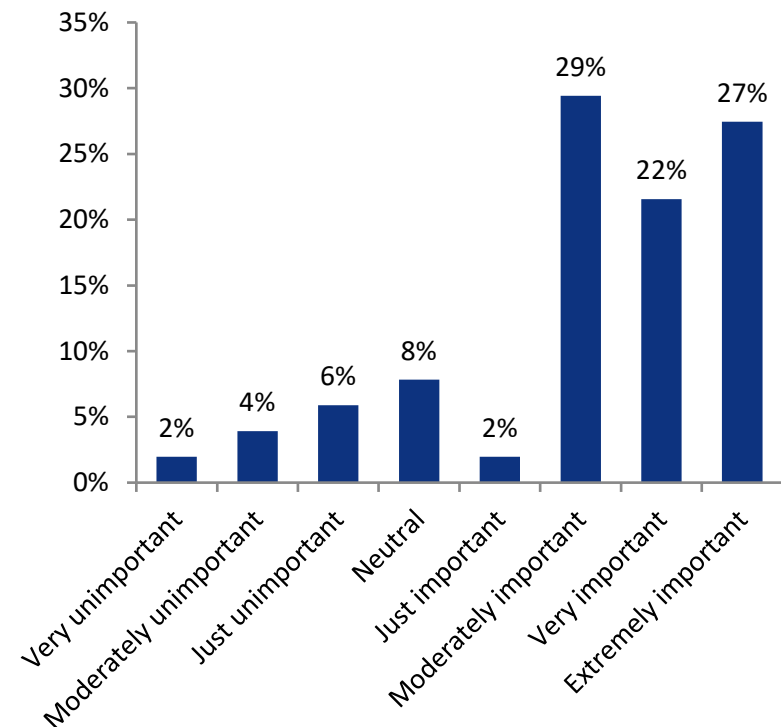
Management and Employee Divergence

- Opportunity to travel
- Work life balance
- Training opportunities
- Job recognition
- Role expansion opportunities

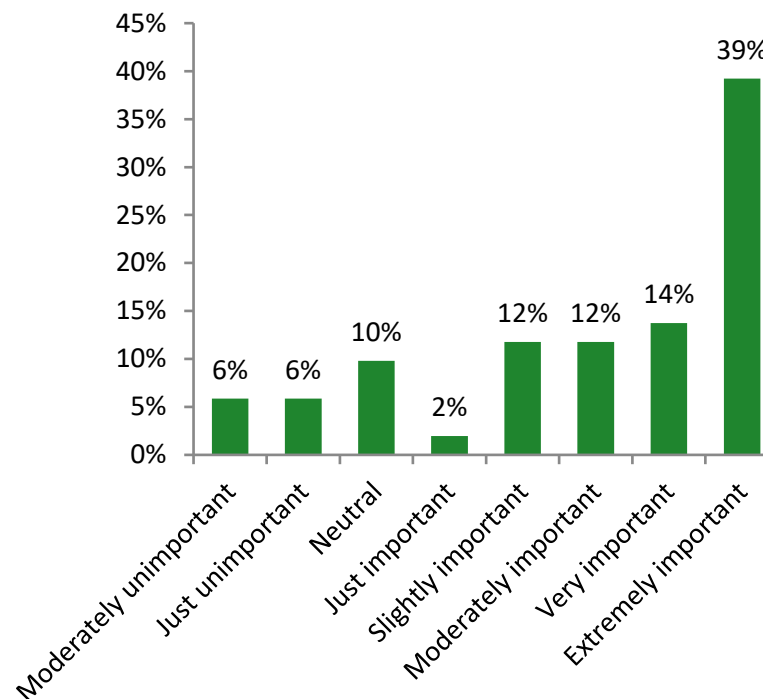
Top Three Findings – Southeast Asia



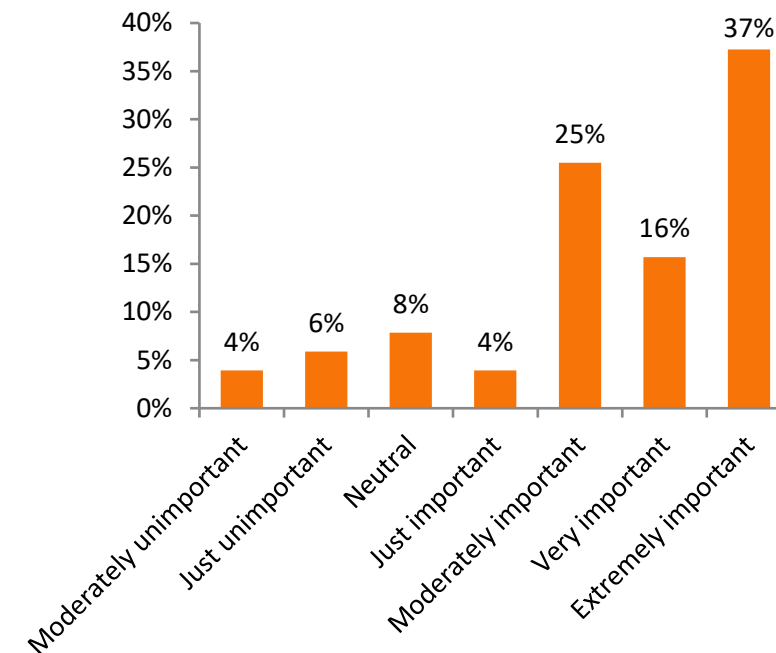
The importance of Company Reputation



The importance of Salary



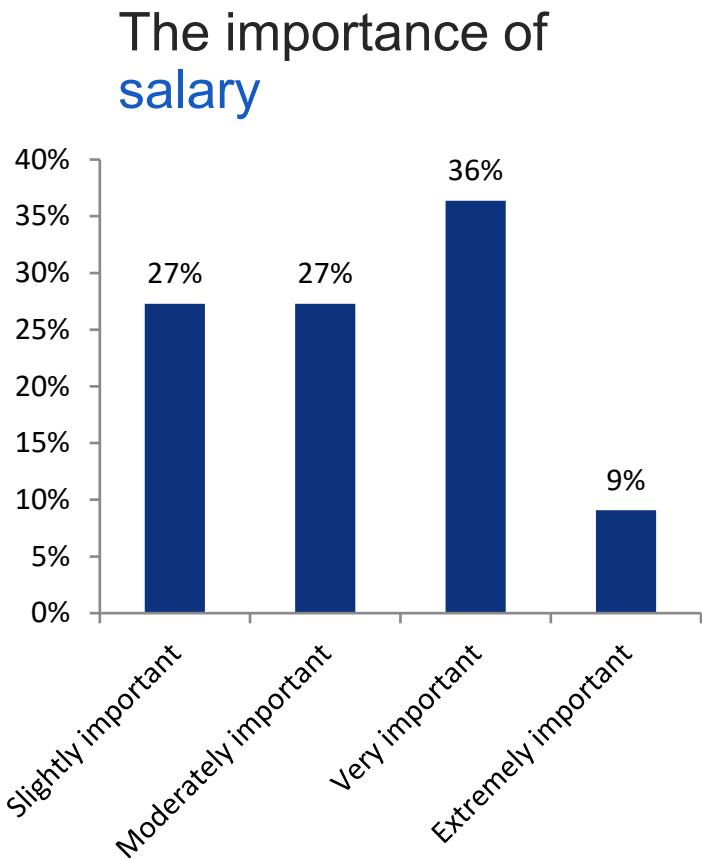
The importance of Culture & Values



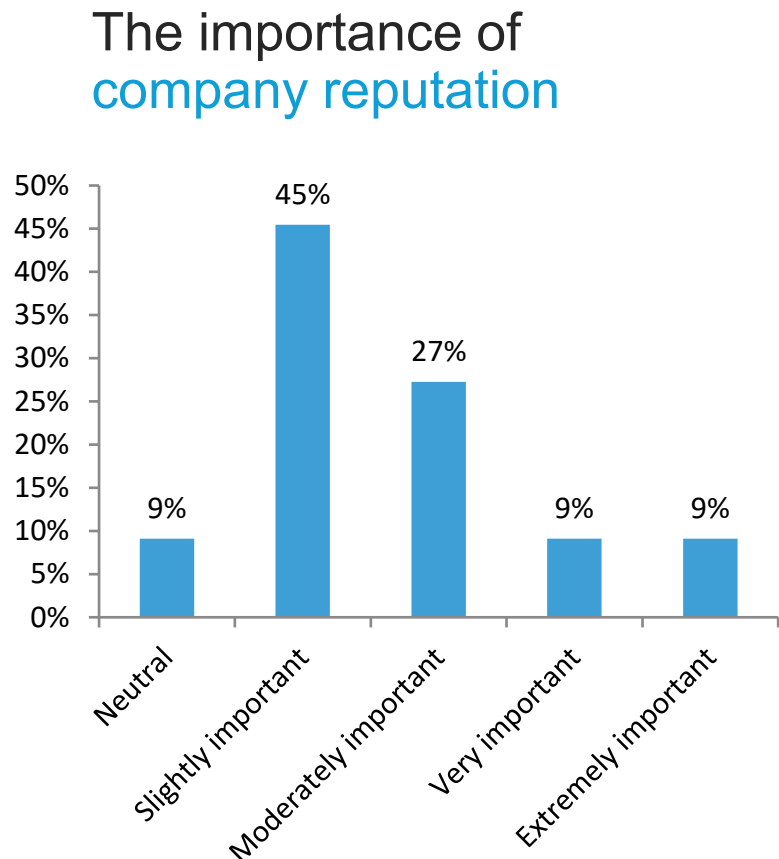
Employees w/annual salary
>USD 100,000

Ranked **salary**, **work-life balance**, **leadership** (transparency & style) and **training opportunities** as extremely important

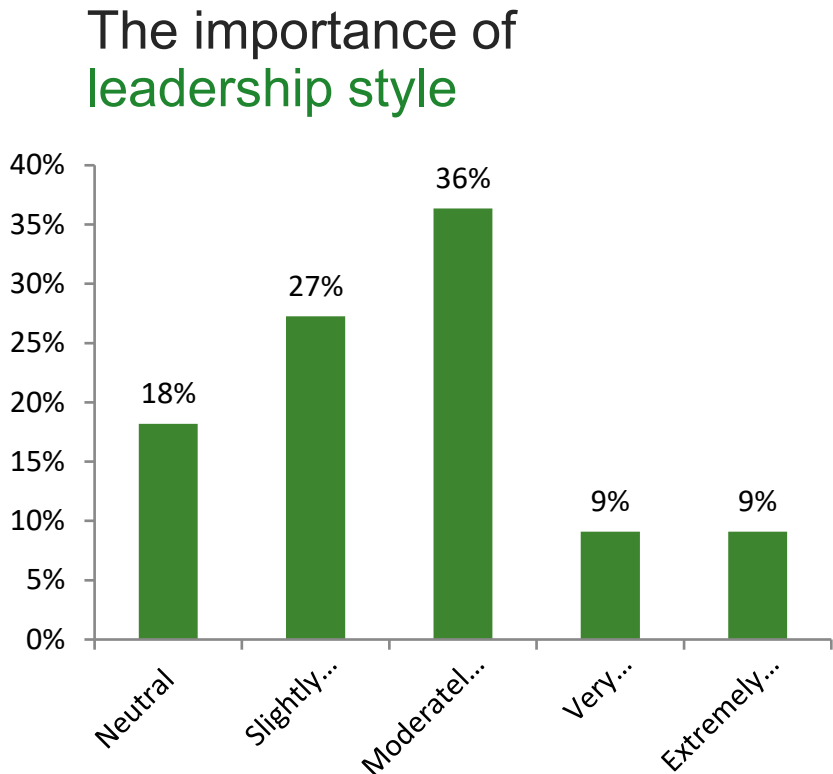
Management Findings – Southeast Asia



36% managers believed that their staff thought that salary was very important.



Only 18% of managers believed their staff thought that the company's reputation was very or extremely important



Most managers believed that their staff did not think leadership style to be very important.

Management and Employee Alignment

- Salary (*to a degree*)

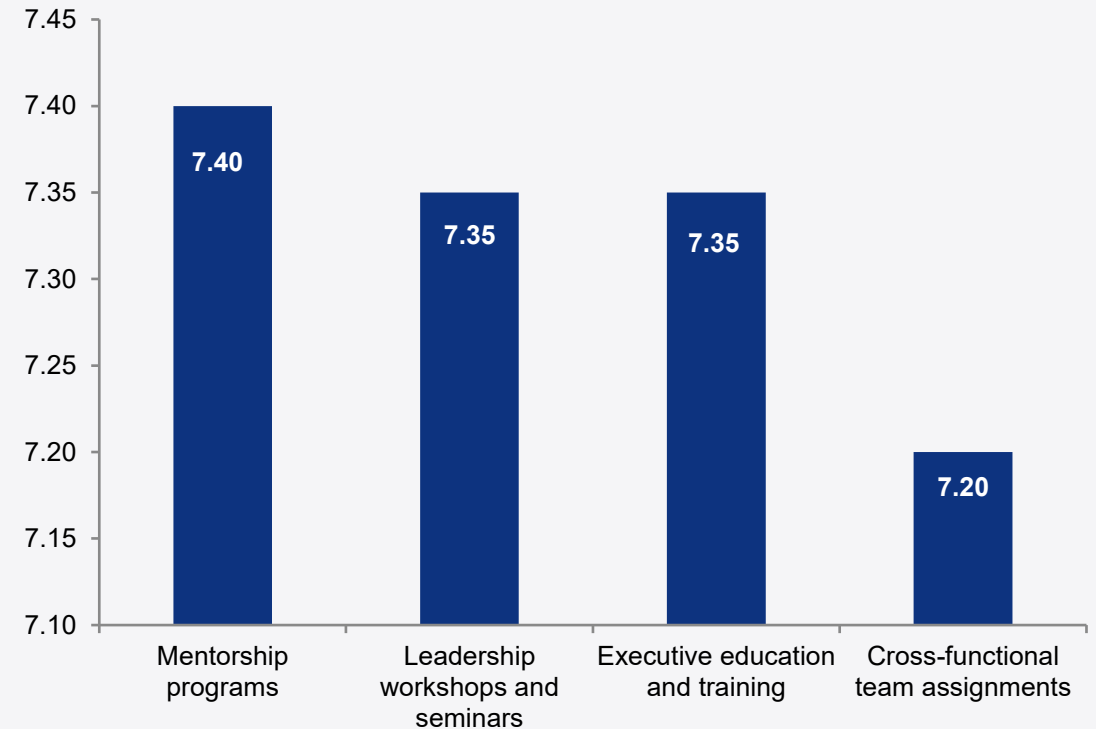
Management and Employee Divergence

- Company reputation
- Leadership style
- Company culture and values
- Opportunity to travel (favorable)
- Training opportunities
- Reputation of products

Management's Development Strategies & Leadership Tools

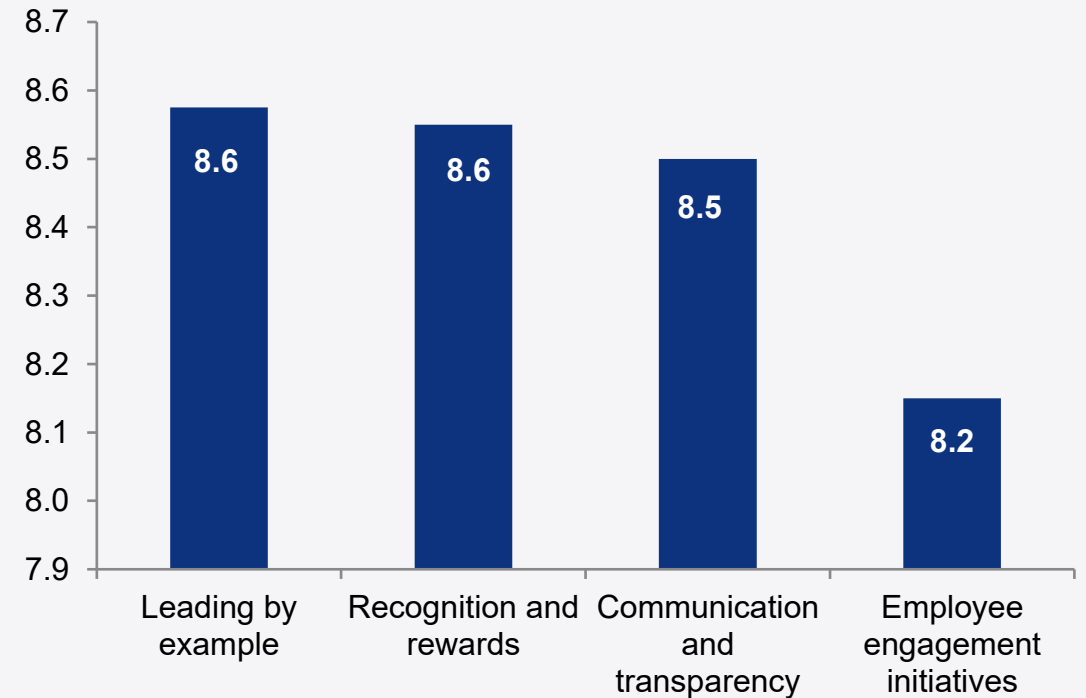
Development Strategies Ranked by Importance

- During our survey we asked management to rate the value that they placed on development programs for their staff.
- Managers favored development strategies such as:
 - Mentoring
 - Training focused on leadership development.



Best Leadership Tools Ranked by Importance

- Across the survey management was aligned with employees, ranking leading by example, recognition/rewards and communication/transparency as being very important leadership tools.
- Employee engagement initiatives were valued highly by Southeast Asian respondents, reflecting the importance of the “softer” aspects of management in this region.

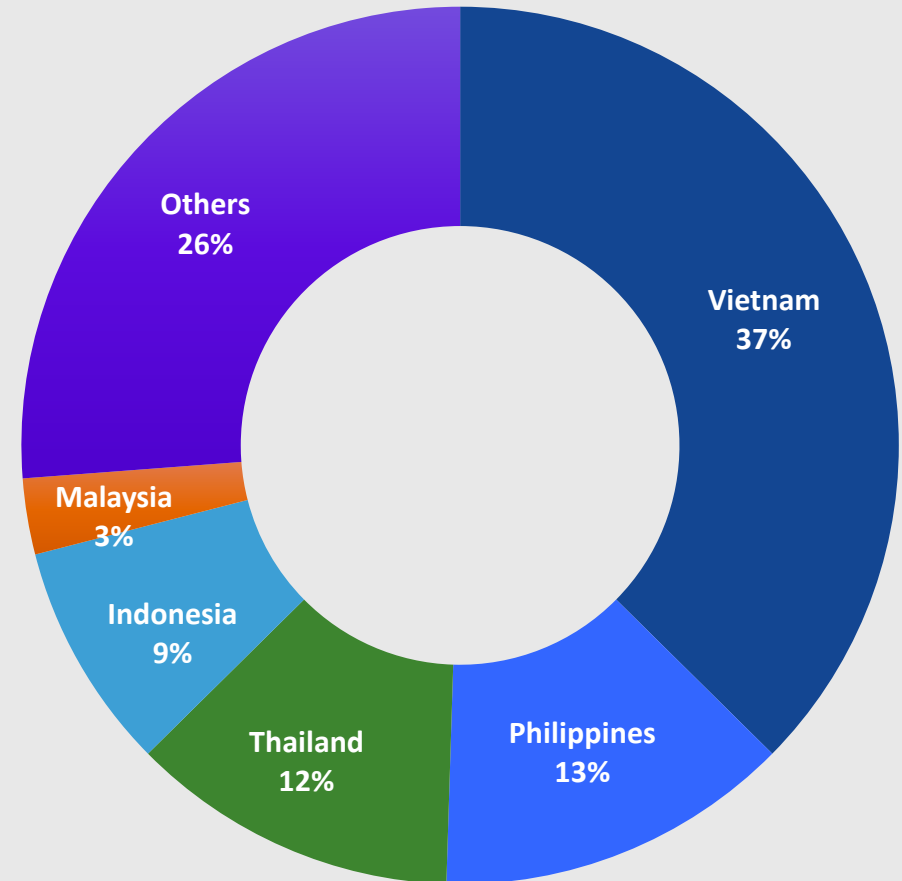


Attraction & Retention in Agriculture

- Online survey for people currently working in the livestock industry in China, Vietnam, Thailand, Malaysia and the Philippines.



Respondent breakdown in Southeast Asia



Attraction & Retention Survey Questions

Why did you enter the agricultural industry?

Why do you want to remain in this industry?

Did you study any agricultural related courses ?

Did you study overseas?

Which skills do you consider most valuable in your role?

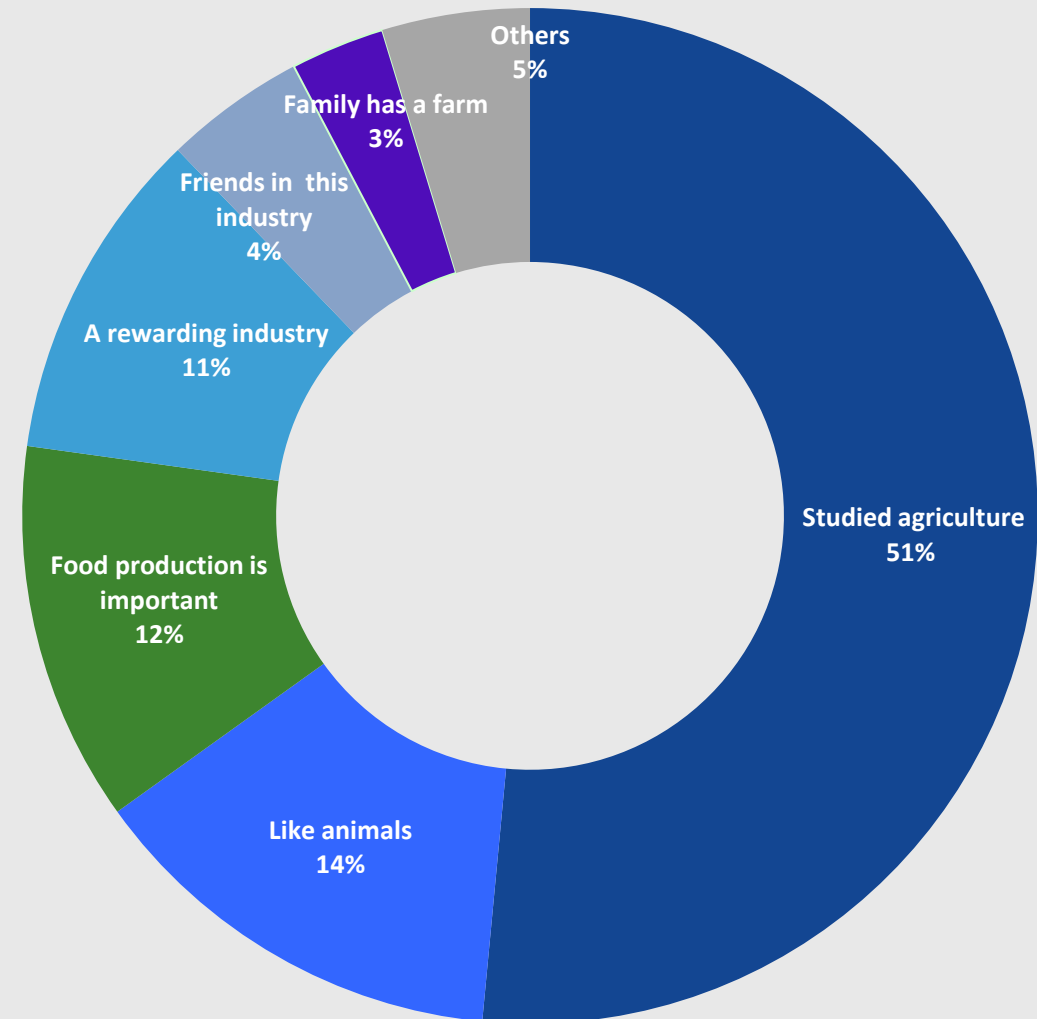
|
What is your perception of government policies regarding the agricultural sector?

Rate the level of importance from 10 to 1; where 10 is the most important and 1 is the lowest



Reasons to Enter The Agriculture Industry

- Education in agriculture is the predominant reason individuals enter the agricultural sector (51%)
- Secondary motivators include a fondness for animals and recognition of food production's societal importance.

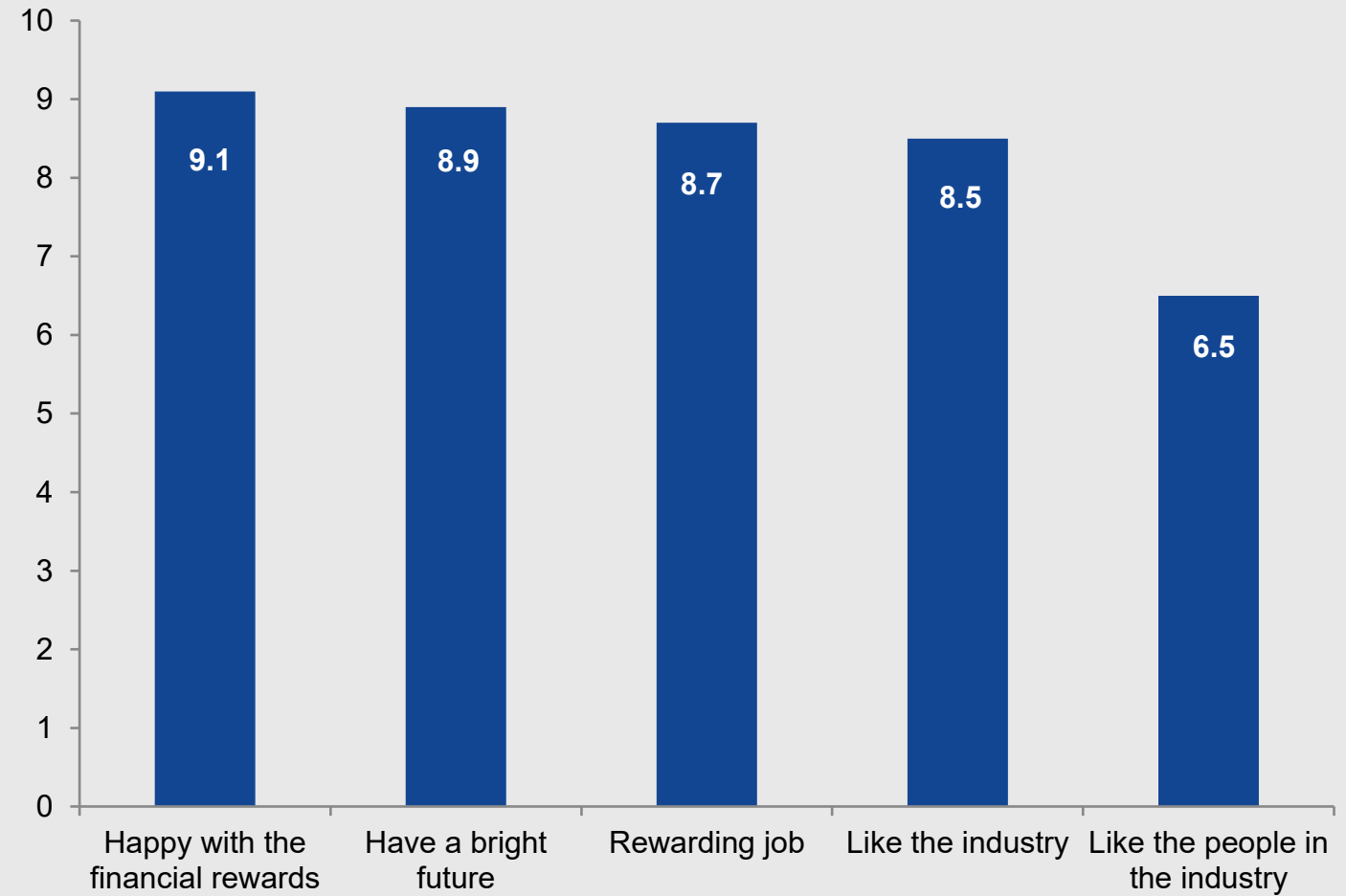




Reasons to Remain In The Agriculture Industry

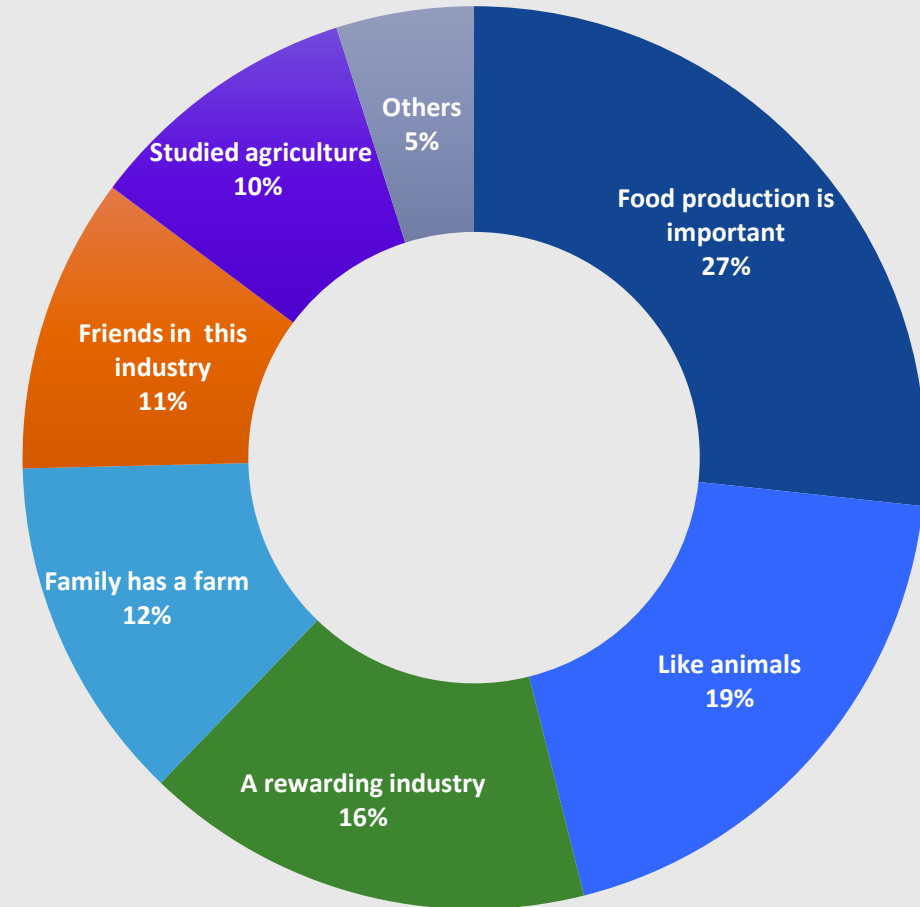
- The most important reasons to remain were factors such as:
 - Happy with the financial rewards
 - Bight future
 - Rewarding job

“Liking the people in the industry” was the least important reason to remain



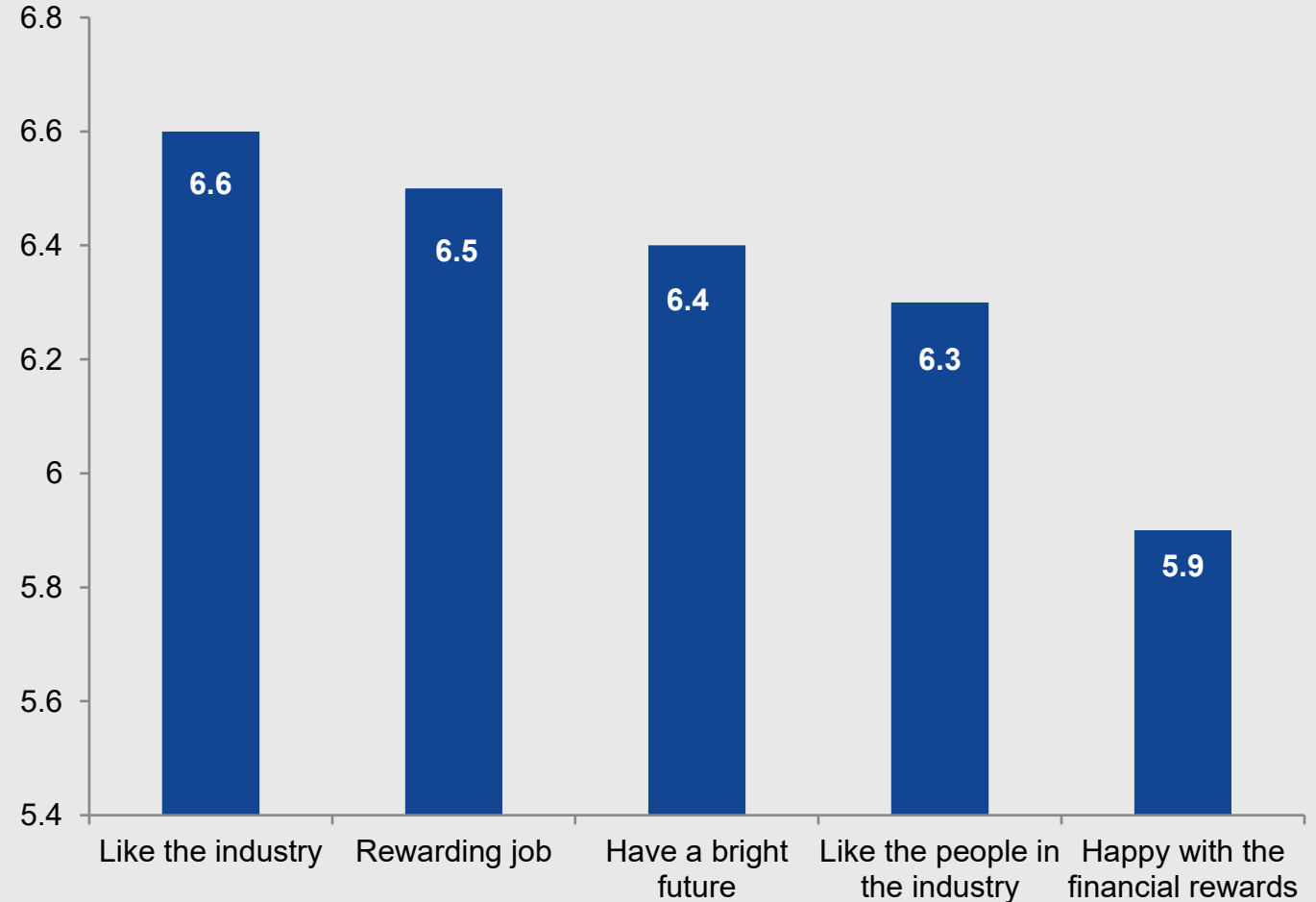
Reasons to Enter The Agriculture Industry

- Food production's importance was the predominant driver (27%).
- Affinity for working with animals ranked second most important at (19%)
- Perceptions of agriculture being a rewarding industry (16%)



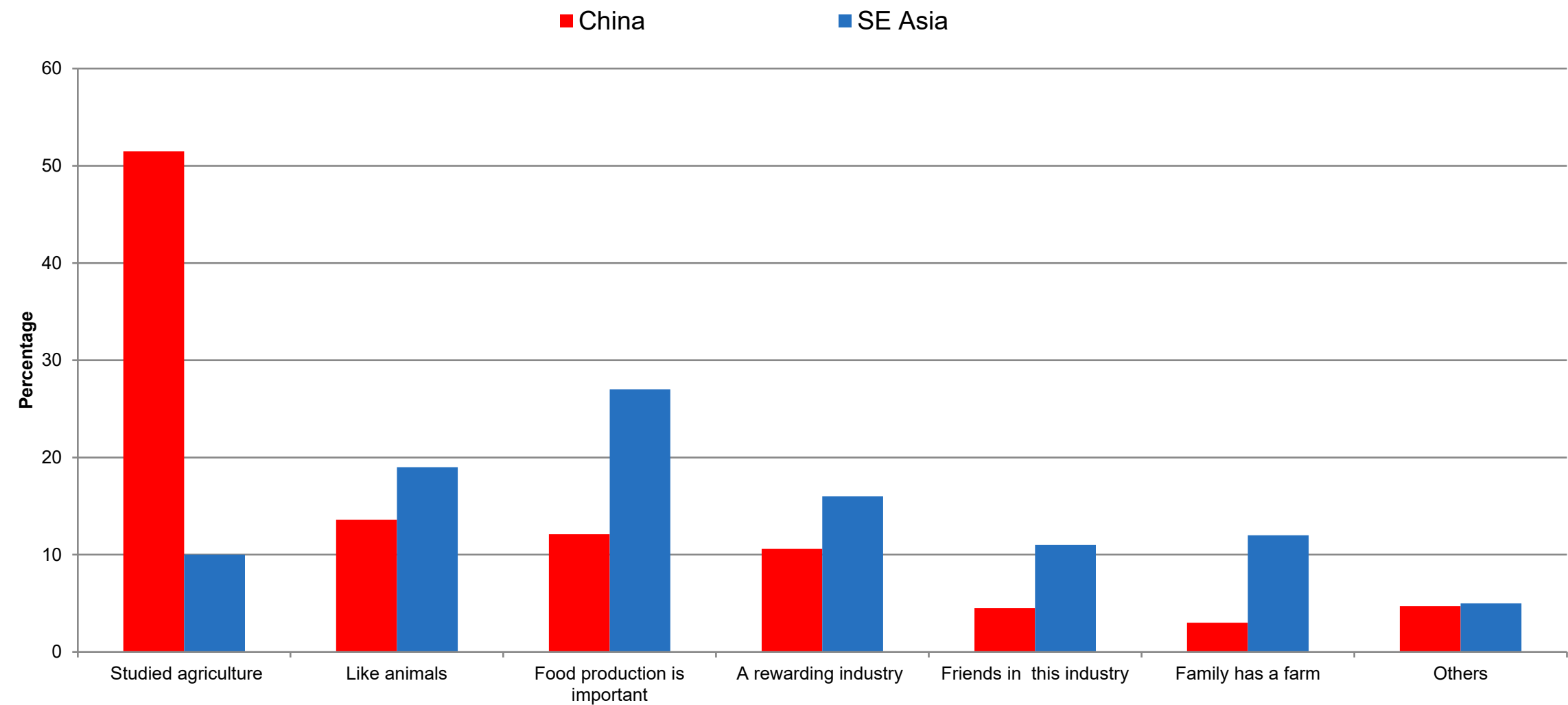
Reasons to Remain In The Agriculture Industry

- "Liking the industry" is the number one reason that respondents decide to remain in agribusiness!
- Having a "rewarding job" with a "bright future" were also important contributors to industry retention.
- "Happy with the financial rewards" ranked lowest, underscoring that economic incentives are less critical compared to emotional motivators for Southeast Asians.
- Overall convictions were moderate for Southeast Asian respondents compared to those in China

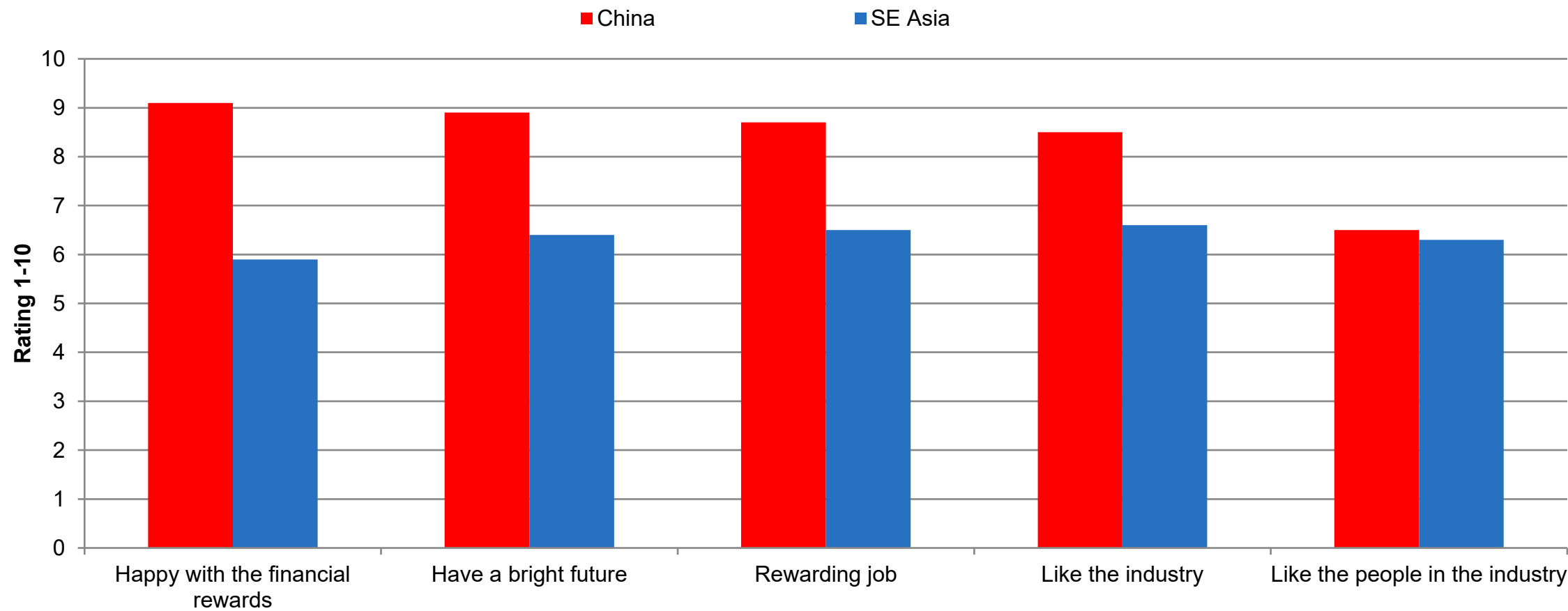


Comparisons Between China & Southeast Asia

Reasons to Enter The Agriculture Industry - Comparisons

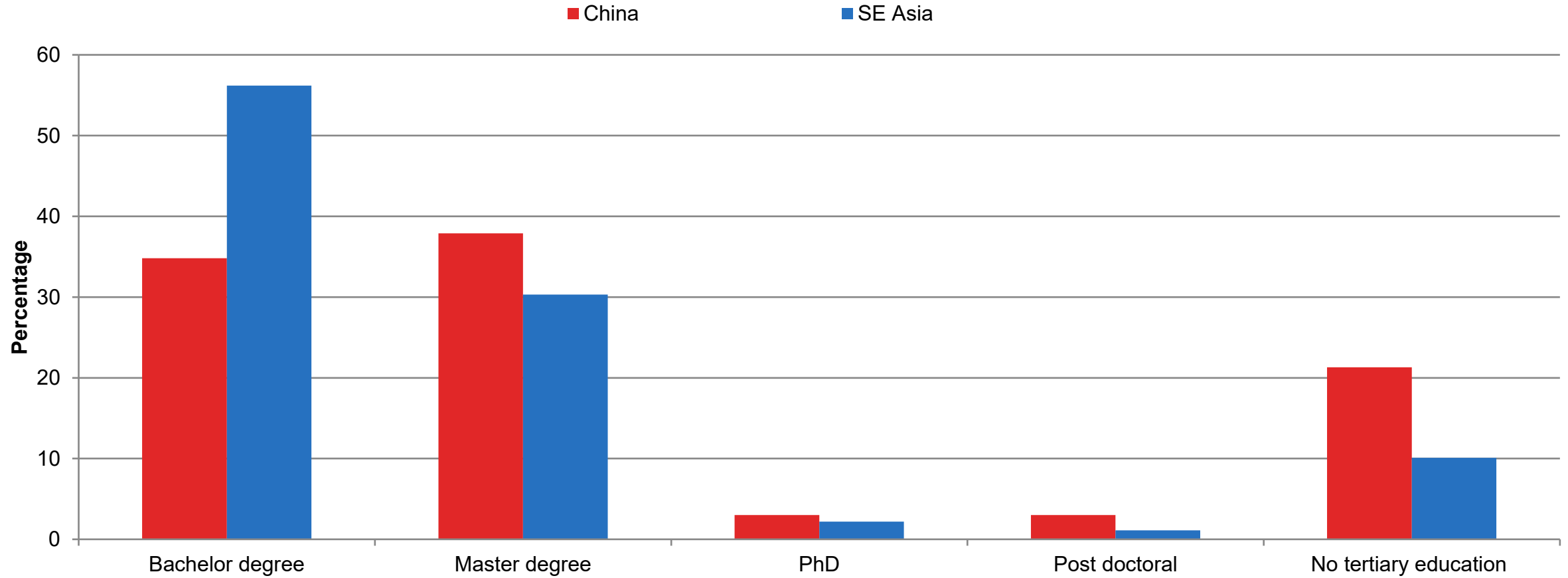


Reasons to Remain In The Agriculture Industry - Comparisons

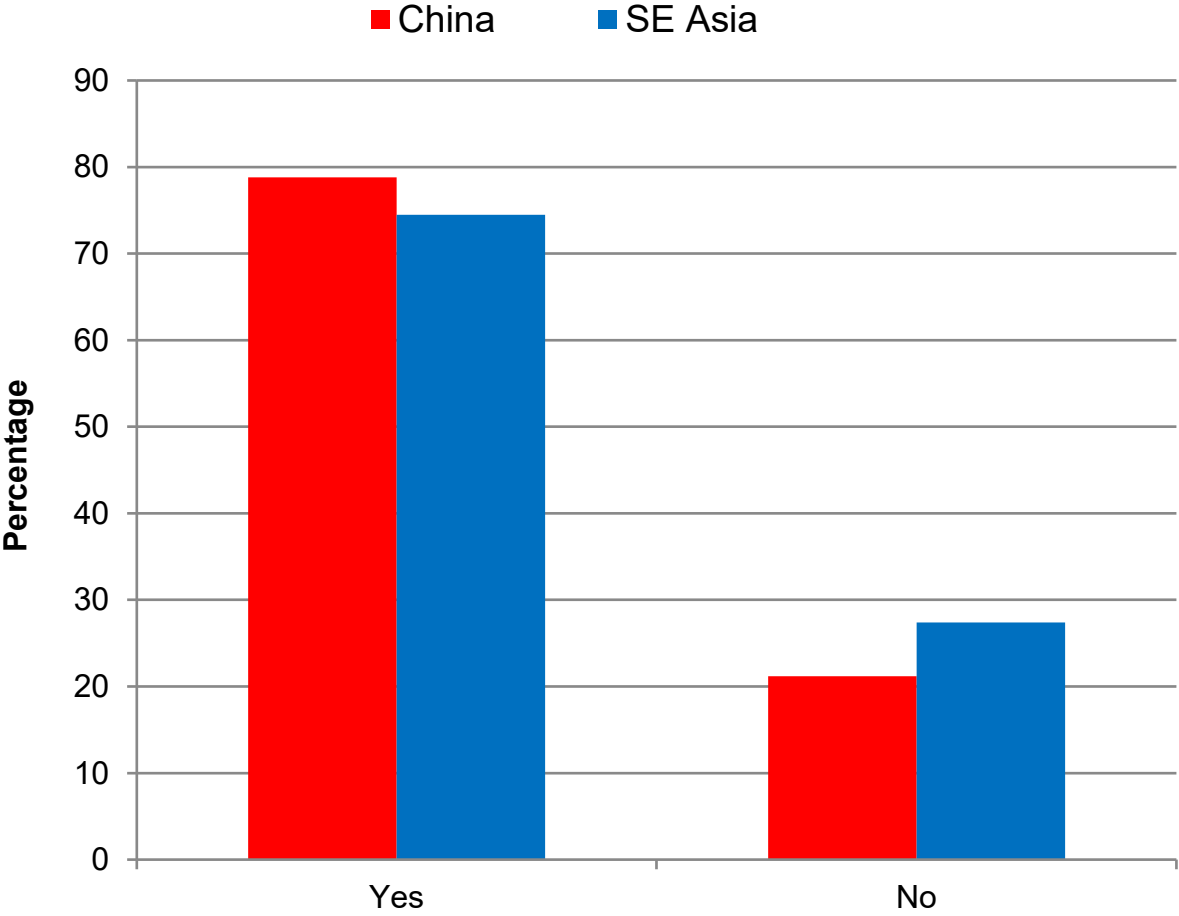


Scale: Candidates ranked their reasons from 10 being the highest through to 1 being the lowest

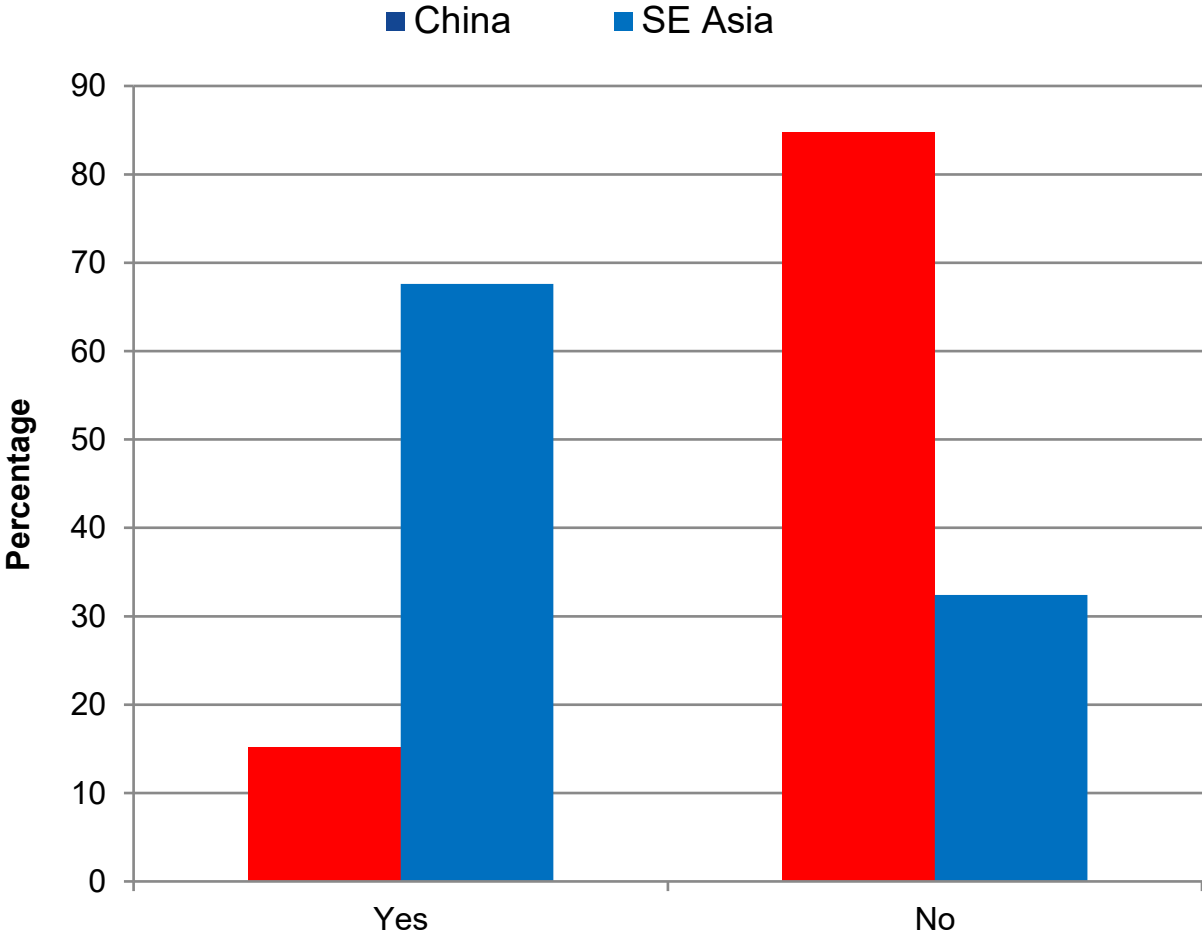
Highest Degree Achieved - Comparisons



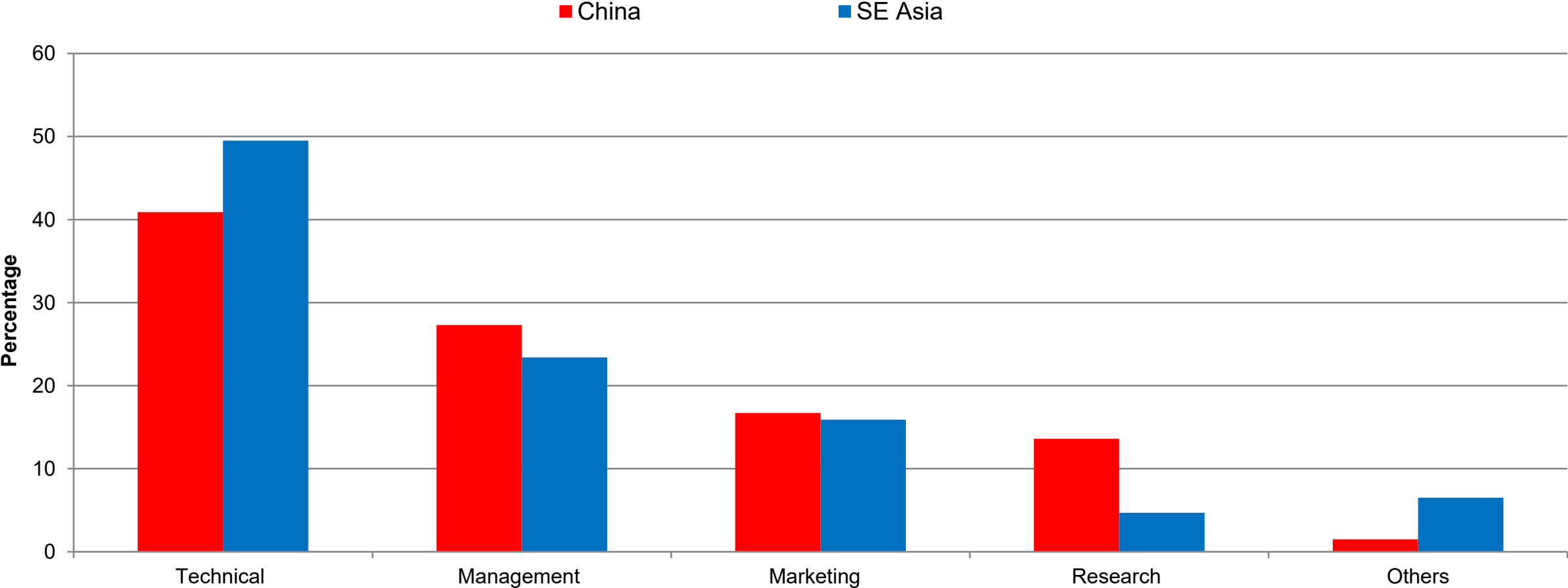
Studied Any Agriculture Related Courses - Comparisons



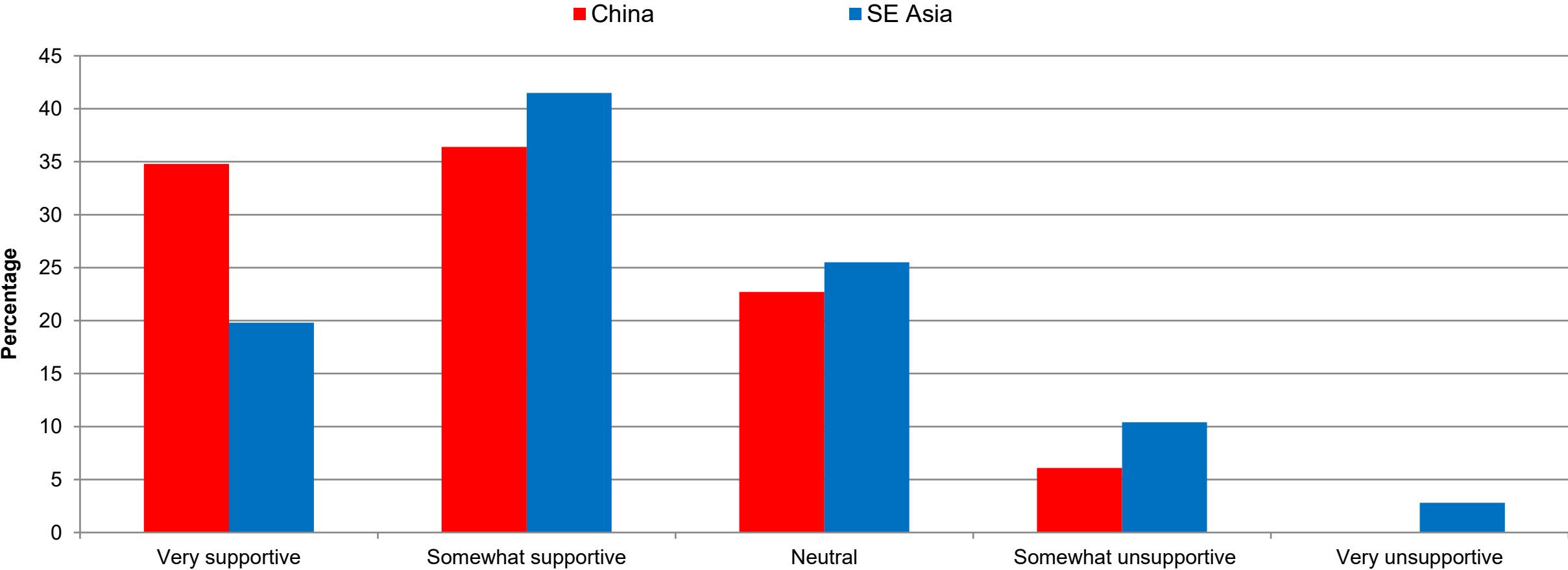
Studied Overseas - Comparisons



Most Valuable Skills for Your Role - Comparisons



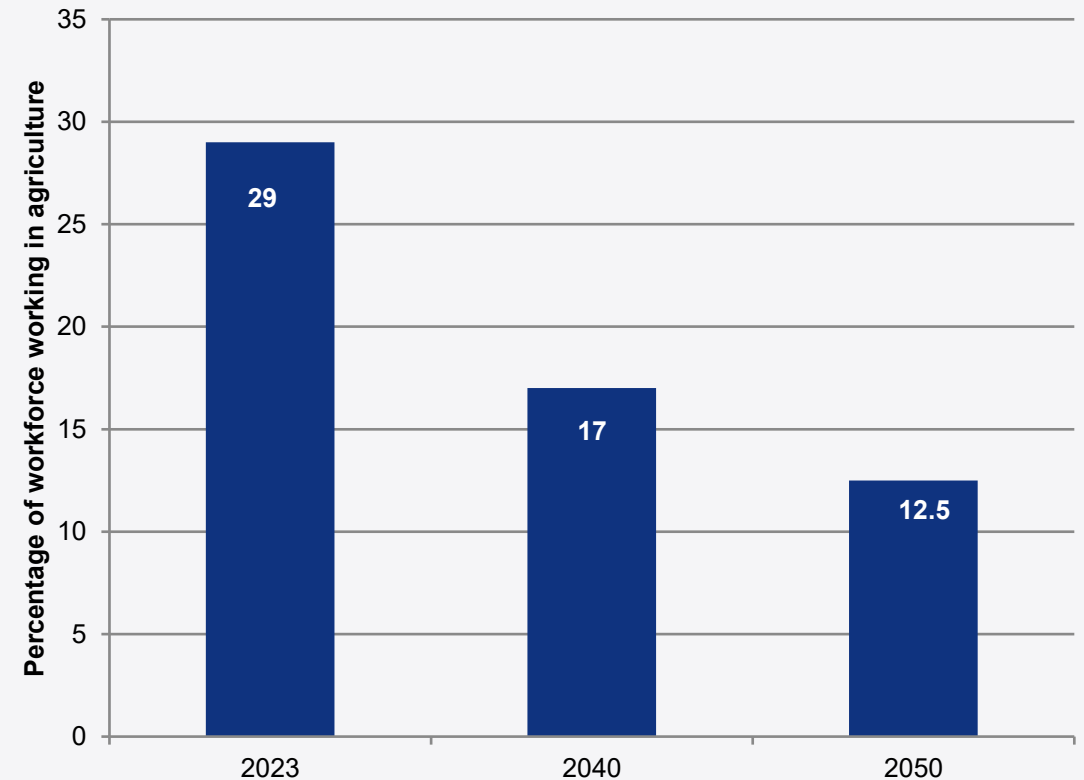
Perception of Government Policy - Comparisons



Considerations for Management

- Asian GDP growth will further drive animal protein consumption
- Disease, profitability, environment is driving industry consolidation
- Farms are larger, more complex, and often managed by hired staff, not family members
- Reduced number of the workforce working in agriculture (850M to 550M)

Reduction in Workforce Working in Agriculture in Asia



Source: Food and Agriculture Organization (2024)

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Industry attractiveness

- Talented people have options, no longer will farmers leave school and work on the family farm, that source of labor is reducing.
- Industry needs to carefully consider their message to tomorrow's employees, students, and adolescents:
 - What makes an industry attractive
 - What motivates people to study agriculture?
- Government support motivates people to join an industry. Industry leaders need to keep agriculture as an important industry in Asia.

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World Class Universities

- University education is an important funnel for the agricultural workforce
- The agricultural workforce today is more educated than before.
- Government and industry need to integrate with universities to ensure that they understand industry issues and future opportunities:
 - Sponsor research, students and consultancies
 - Closer collaboration during the education phase of students.
 - *Veterinary students reported a higher rate of industry participation if they were exposed to meaningful extra mural studies whilst studying as part of their course work.*

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Management Understanding

- Asia is complex, China is different to Southeast Asia, the countries within Southeast Asia are different, cultures and expectations vary
- Cross cultural understanding is important, if missing these skills should be taught across all levels.
- We encourage regular “touch points” and annual reviews of “motivating” factors to ensure alignment
- Ensure staff are rewarded with interesting and meaningful jobs a “Sense of Purpose”
- Encourage professional development and training programs
- Deliver timely recognition

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Competitive Salaries

- Agriculture and food production has often been viewed as an industry that offers only moderate financial rewards.
- Agricultural companies are evolving to integrated, branded food businesses, often publicly listed and with different profit margins.
- Companies should consider to benchmark salaries within industry and outside of industry to ensure salaries are competitive and attractive.

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Company and Product Reputation

- The workforce has choices, and the best people want to join the best companies, with the best products
- A consolidated industry results in fewer but larger customers that are more interested in business-to-business partnerships rather than transactional sales.
- Strong brands and reputations make it easier to open the door, secure a meeting, and start a relationship.
- Reputations are enhanced through product performance, research results and influencer opinions.
- Companies should consider their annual research investments not only as collecting valuable data but as a tool, to build brand value assisting in the attraction and retention of staff.

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Promotion of the Animal Protein Supply Chain

- It is an honor to produce food for people
- Industry to lead communication strategies to promote the benefits of the industry
- Environment sustainability, carbon, animal welfare and what consumers regard as important need to be understood, addressed and managed professionally, always enhancing the industry's image.
- Lastly, we work in one of the worlds friendliest and most rewarding industries, we want to encourage more people to join!

Thank You

Thank you, for the opportunity to participate today.

On behalf of AARTD, I would like to personally thank all our respondents. Thank you for taking the time to make this survey valuable for our industry.

Thank you to the Asian Agribusiness Recruitment and Asian Agribusiness Consulting Teams who helped with the research and the presentation.

