

Broken Promises:

Two years of corporate reporting under
Australia's Modern Slavery Act

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Contents

Executive summary	2
Key findings	4
Recommendations	10
Background	12
Methodology	14
Tracking progress	16
A. Are companies complying with the mandatory reporting requirements?	16
B. How well are companies disclosing modern slavery risks?	18
C. Are companies initiating effective actions to tackle modern slavery?	19
Looking forward, looking back	22
A. Highlights and lowlights	22
B. Are companies fulfilling promises and commitments?	23
Conclusion	24
Endnotes	25
Annex 1 Company Modern Slavery Act Statements assessed	26

About us

This report is the second publication issued as part a multi-year collaborative research project by academics and civil society organisations aimed at improving responses to modern slavery and access to remedy for affected workers.

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Acknowledgement of Country: We acknowledge the Traditional Owners of Country throughout Australia and recognise their continuing connection to land, waters and culture. We pay respect to elders and acknowledge the Traditional Owners who have cared for Country since time immemorial. Sovereignty over this land was never ceded – it always was, and always will be, Aboriginal land.

Disclaimer: The images used in this report are stock images used to illustrate the types of labour undertaken by workers in the four focus sectors reviewed. We make no suggestion that any of the workers depicted are victims of modern slavery. Information in the report is correct as at 1 November 2022.

Cover: Worker picks strawberries during harvest (bear_productions/Shutterstock.com)

Executive summary

Right:
Workers preparing
shrimp in a line in a
seafood factory in
Thailand (Ai Han/
Shutterstock.com)



This report is a follow up to our earlier report, *Paper Promises? Evaluating the early impact of Australia's Modern Slavery Act*. It evaluates the extent to which the *Modern Slavery Act 2018* (Cth) (MSA) is driving effective action by companies to address modern slavery, three years into the Act's operation.

Our first report analysed the 'first round' of statements made under the MSA by 102 companies sourcing from four high-risk sectors: garments from China, gloves from Malaysia, horticulture from Australia and seafood from Thailand.

For this report, we assessed 92 'second round' statements by these same companies (rather than 102, since some had not published statements)* to assess whether companies had improved their performance over time.

In Paper Promises, we wrote:

An analysis of the second round of company reporting is already underway... and it remains to be seen whether companies ultimately lift their game over time. So far, however, it seems that many company statements remain mere 'paper promises', with little evidence of effective action in the areas most likely to improve conditions for workers.

Unfortunately, one year on, this assessment still stands. While our analysis of second round statements reveals some improvement in the quality of reporting, this is generally limited to 'paper-based' responses (such as establishing policies and supplier codes of conduct, and conducting staff training). Meanwhile, there is glacial progress in the areas that are most likely to address risks to workers trapped in modern slavery.

Over half of the company statements we assessed still do not meet basic mandatory reporting requirements, with just a third evidencing some form of effective action to tackle modern slavery risks. Despite commitments to improvement, over half of the 'promises' to carry out future actions set out in first round modern slavery statements remain unfulfilled in the second year of reporting.

Summary of key findings

Companies are not fulfilling their promises

- 56% of commitments made by companies in their first round statements to improve their modern slavery responses remained unfulfilled in the second round of reporting.

Companies are still failing to comply with the mandatory reporting requirements of the MSA

- 66% of companies did not address all of the mandatory reporting requirements prescribed by the Act. While this was a modest improvement from the first year of corporate reporting (in which 77% failed to address all of the mandatory criteria), compliance rates remain extremely poor with most companies continuing to miss the mark.
- Of the 102 companies reviewed as part of our analysis of the first round of reporting, 10 statements were 'unavailable' on the public modern slavery register. It is likely that up to 7 companies failed to submit reports in accordance with legislative requirements.
- The average company improved its score by just 7% between first and second rounds of reporting, with some companies substantially recycling or 'rolling over' first round statements without any qualitative improvement.

Companies are still failing to demonstrate effective action to address risks

- Nearly one in two companies reviewed (43%) are still failing to identify obvious modern slavery risks in their supply chain, despite these being clearly identified in our previous report, extensive public reporting, exposés and inquiries.
 - Three in four companies sourcing garments from China still fail to mention the risk of Uyghur forced labour in their statements.
 - One in two healthcare companies sourcing personal protective equipment (PPE) from Malaysia still fail to identify this as a sector with high risks of modern slavery.
 - One in two food companies still fail to identify sourcing horticultural produce in Australia as high-risk for modern slavery practices.

- Two in five companies sourcing seafood from Thailand still fail to identify this as a high-risk product in their supply chain.
- Just a third of companies reviewed (33%) could demonstrate some form of effective action to address modern slavery risks, improve working conditions in their supply chains, or tackle root causes.
- Only a handful of leading companies (9%) demonstrated more meaningful engagement on addressing modern slavery risks as well as improvements over time.

Where to next?

Promises that exist only on paper will ultimately lead to broken promises. In a world where it is estimated that more people are facing conditions of modern slavery than ever before,¹ there has never been a more crucial time to ensure that Australia's modern slavery laws are working effectively.

At the time of writing, the MSA is being reviewed to assess its operation since its enactment three years ago, and look at options for improving it. This is a key opportunity to strengthen the law and shift corporate responses from policy to practice, and from paper to people.

As our research on the first two rounds of corporate reporting demonstrate, the MSA is currently failing to drive the changes in corporate behaviour needed to address modern slavery. Compliance with the legislation remains poor and too many companies are continuing to treat the reporting regime as a tick-box exercise.

In order to be effective, the MSA must evolve from prompting a paper-driven response, to a people-driven response to tackling modern slavery. It is simply not good enough for companies to continue to submit reports that lack key required information, fail to identify obvious risks or make vague promises that are never fulfilled.

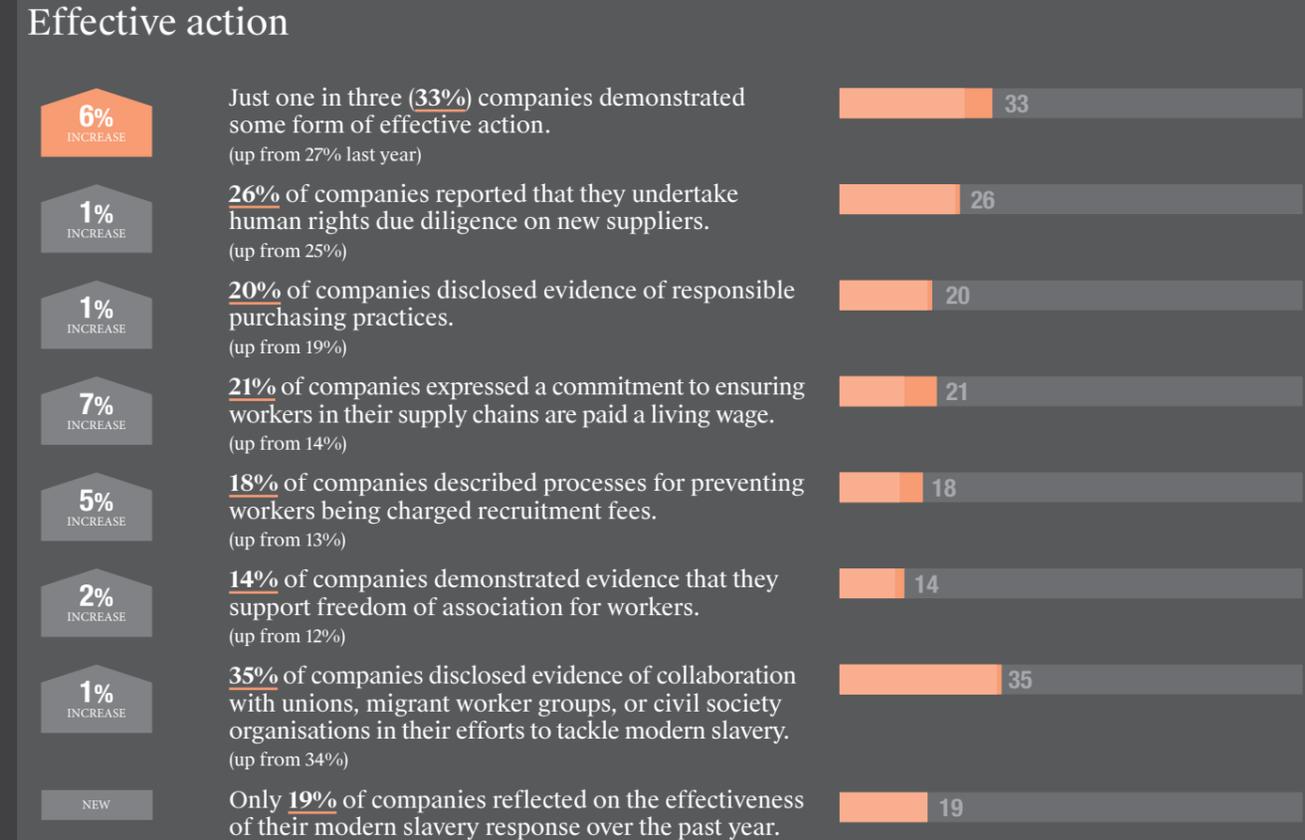
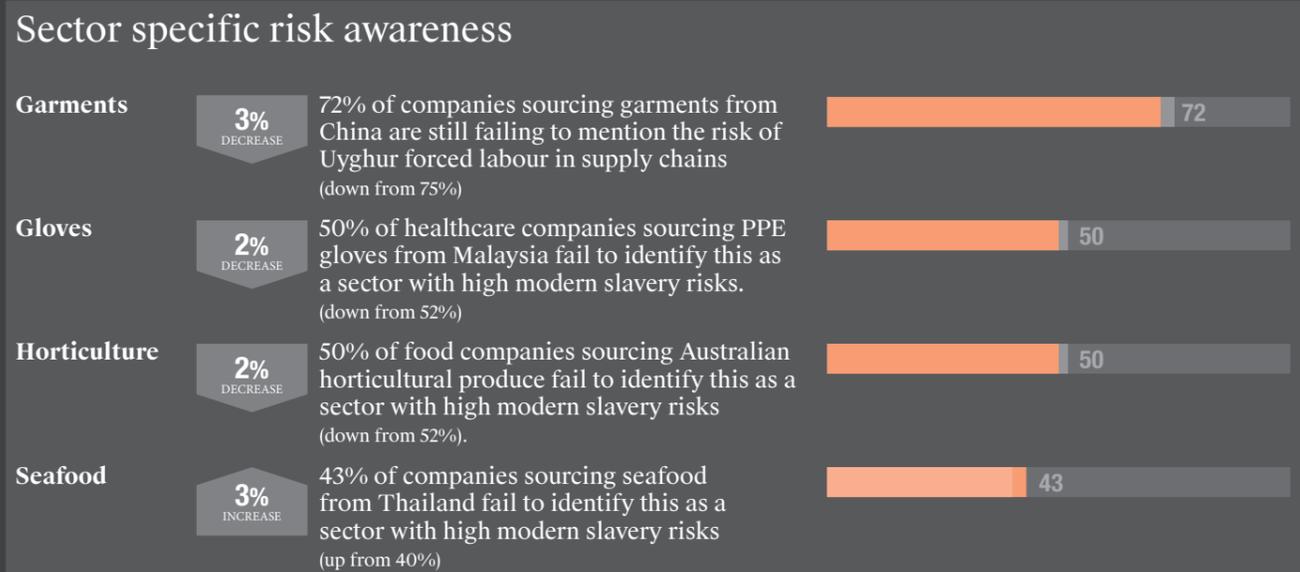
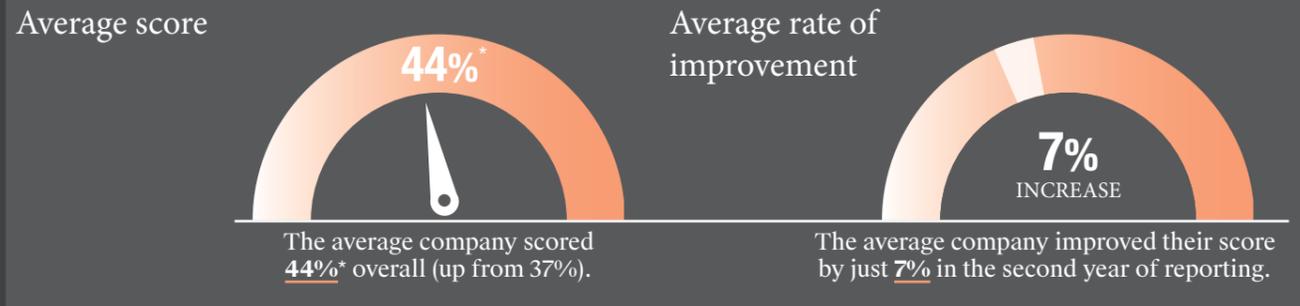
'Mandatory reporting' under the law must be made truly mandatory, through increased independent oversight and enforcement. The Labor government's proposal to introduce penalties and an independent Anti-Slavery Commissioner are a welcome start towards addressing some of the legislation's current failings.

More fundamentally, however, the MSA should be amended to require companies to take action to address modern slavery, not just to report on their current practices. The law should require companies to undertake human rights due diligence to identify and address modern slavery risks in their operations and supply chains and hold them accountable if they fail to do so.

The workers who make the clothes we wear, the food we eat, and the PPE that keeps us safe, have the right to expect that our laws will deliver more than mere 'paper promises' to end modern slavery. And businesses that are investing in real changes to improve workers' rights and safety should be able to expect a level playing field.

* As three companies confirmed they did not submit second round statements as required by the MSA, these were included in the review dataset (bringing the total number of companies reviewed to 95) and scored zero accordingly.

Key findings



Benchmark

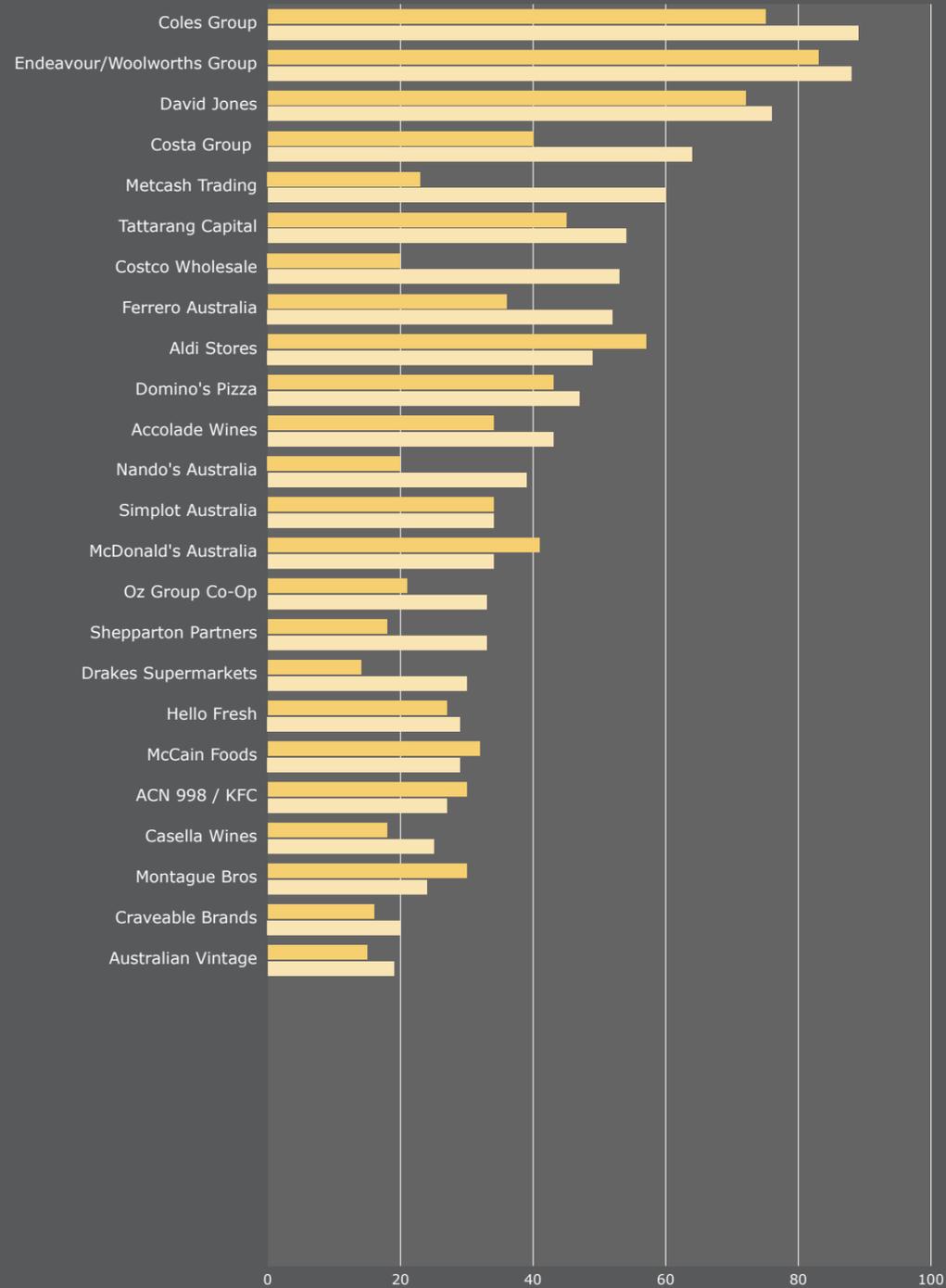
	Highest ranking scores		Lowest ranking scores (excluding non-submitters)	
Company	Nestle & Coles	Woolworths	Clifford Hallam Healthcare	Sigma Healthcare
	89%	88%	12%	13%
Sector	Garments		Healthcare	
	54%		34%	

* All percentages throughout this report refer to the review dataset of 95 companies rather than to reporting entities generally.

Key findings

How horticulture companies scored

■ Year 1 score %
■ Year 2 score %



Unpublished statements:

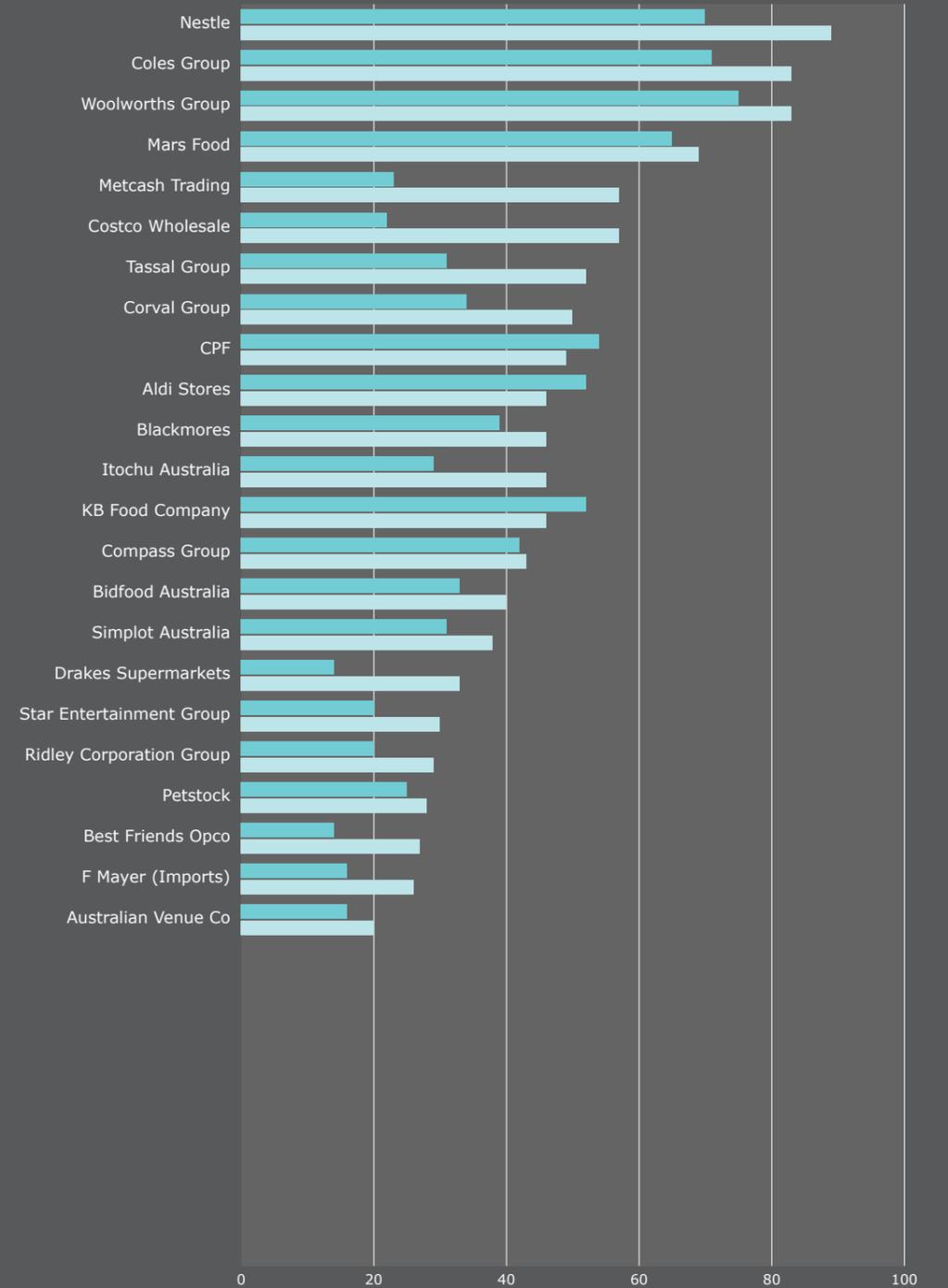
Ten company statements were excluded from second round benchmarks. Further information on this is set out in the Methodology section.

Companies with 'missing' statements are: Adcome Pty Ltd, Harris Farm Markets Pty Ltd, In2Food Australia Pty Ltd, JB Metropolitan Distributors Pty Ltd, Lite N' Easy Pty Ltd, Mulgowie Fresh Pty Ltd, and Vesco Foods Pty Ltd.

Other companies excluded from review are: Japara Healthcare Ltd, New Zealand King Salmon Pty Ltd, and Numen Pty Ltd.

How seafood companies scored

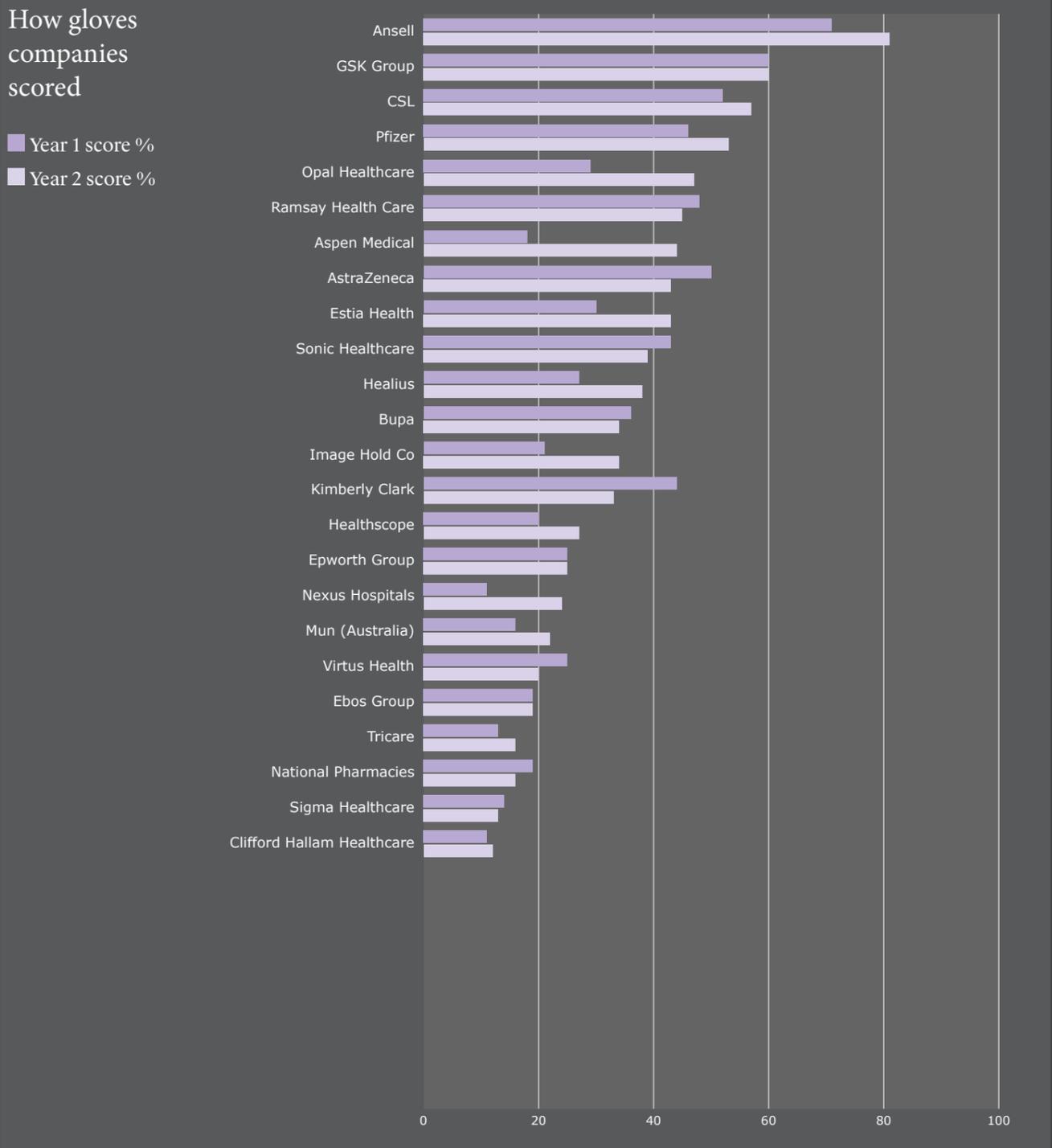
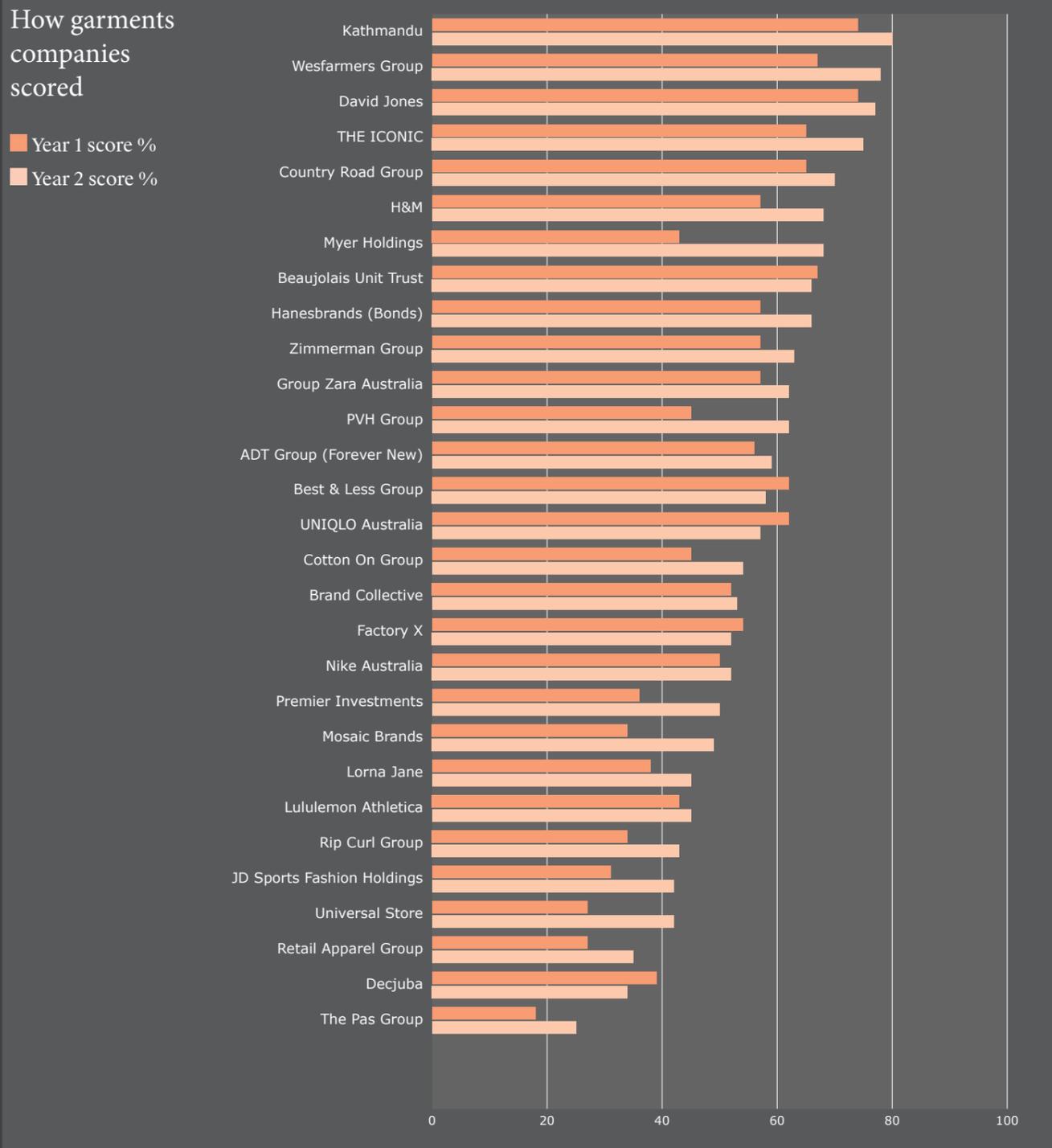
■ Year 1 score %
■ Year 2 score %



Disclaimer:

Those companies that have received higher scores in this assessment are those whose statements evidence greater transparency about their operations and supply chains, more careful identification of salient risks and which describe more meaningful actions to address these risks in a variety of ways. A higher score does not reflect an absence of modern slavery in a company's operations or supply chains. We would also reiterate that the scores are only based on a desktop analysis of company reporting. We have not attempted as part of this study to independently verify whether companies are in fact taking the actions they describe in their statements.

Key findings



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Recommendations

Our earlier report *Paper Promises* made a series of recommendations to both the Australian Government and companies to strengthen Australia’s legal framework for addressing modern slavery and improve corporate reporting and practices. Those recommendations still stand.

Our recommendations here focus on urgent reforms that are required to improve the effectiveness of the MSA.

- 1 Require reporting entities to undertake due diligence to address modern slavery**

Reporting in and of itself is unlikely to result in the transformative changes to corporate practices that are needed to eliminate modern slavery. The MSA should be amended to include a specific duty to prevent modern slavery, which requires companies to undertake human rights due diligence to identify and assess salient risks in their operations and supply chains that give rise to modern slavery and to take steps to mitigate and address them. Companies would have to show reasonable and appropriate due diligence as a defence to legal liability.
- 2 Make mandatory reporting mandatory by introducing penalties**

Many companies are still submitting reports that fail to address even the basic ‘mandatory’ reporting criteria. Companies that fail to report, repeatedly fail to address the mandatory criteria, or disclose information that is false or misleading should face consequences such as financial penalties, being listed on the Modern Slavery Register as a non-compliant entity, and being excluded from public tenders.
- 3 Provide for appropriate oversight and enforcement of the MSA**

Oversight of due diligence and reporting requirements should be undertaken by a well-resourced regulator with appropriate powers of investigation and enforcement. An independent Anti-Slavery Commissioner should be established to oversee the effectiveness of the MSA.
- 4 Provide for access to justice for exploited workers**

The MSA should include a specific cause of action so that workers experiencing modern slavery can seek redress in the event that reporting entities have failed to exercise adequate due diligence to prevent modern slavery in their operations and supply chains. Workers subjected to severe forms of labour exploitation should not have to rely on voluntary remediation processes by businesses to obtain remedy.

Right:

16 February 2016: Workers preparing shrimp in a factory in Samutprakarn, Thailand (Ai Han/ Shutterstock.com)



Incorporating human rights due diligence into the MSA

Human rights due diligence is the key means identified in the United Nations Guiding Principles on Business and Human Rights (UNGPs) by which businesses can identify, prevent and address human rights harms within their operations or supply chains. It involves companies identifying and assessing actual or potential harms that they may be causing or contributing to; taking appropriate action and tracking the effectiveness of these measures to assess whether they are working; and communicating with stakeholders about how the impacts are being addressed.

There is a growing global trend towards requiring companies to undertake human rights due diligence. Human rights due diligence laws have already been adopted in France, the Netherlands, Norway and Germany, with a draft Directive under consideration in the EU. Further laws are under active consideration in other countries too.

In February 2022, the European Commission published a draft Directive on Corporate Sustainability Due Diligence.² If adopted, it would require EU Member States to develop national laws that would require companies to conduct human rights and environmental due diligence, and ensure that companies prevent and mitigate adverse impacts. EU Member States would also need to ensure that companies can be held liable for damages if “an adverse impact that should have been identified, prevented, mitigated, brought to an end or its extent minimised ... occurred and led to damage”.³ This will have significant global impact as the Directive would apply to 27 EU Member States and potentially non-EU companies operating in the region. Australian suppliers to the EU will be expected to comply. In 2020, Australia had goods exports of \$11.9 billion, and services exports of \$5.1 billion to the EU.⁴

New Zealand is actively considering including human rights due diligence requirements in its proposed modern slavery law.⁵

Public consultation on the proposal has found high levels of support for the due diligence requirements.⁶ This is significant for Australia given that total bilateral trade between Australia and New Zealand amounts to over AUD \$16 billion and New Zealand is Australia’s fifth-largest trading partner.⁷

In order for Australia to play a leading role in helping to tackle the global problem of modern slavery, the MSA needs to be reorientated from focusing on reporting on risks and actions, to requiring companies to identify and take action to prevent and address key modern slavery risks to people. This is also consistent with Australia’s obligations under the 2014 Protocol to the ILO’s Forced Labour Protocol, ratified by Australia in March 2022,⁸ which requires states to take effective measures to prevent and suppress forced labour.

In order to promote an outcome-focused response to tackling modern slavery, the MSA should establish a duty on reporting entities to prevent modern slavery practices in their operations and supply chains. This would require reporting entities to undertake human rights due diligence to identify, prevent and mitigate modern slavery practices, and address harms where these arise. Reporting entities would fulfil the duty to prevent modern slavery by proving they took all reasonable steps to prevent, mitigate and remediate modern slavery practices in their operations and supply chains.

Incorporating due diligence requirements into the MSA has the potential to effectively address modern slavery and conditions for affected workers, as well as benefiting reporting entities and investors. In particular, requiring businesses to undertake human rights due diligence would provide increased legal certainty, level the playing field, and, importantly, will help ensure better respect for human rights by business (thereby mitigating associated reputational, legal and operational risks), leading to better outcomes for both reporting entities and workers.⁹

Background

Below left:
Uyghur women work in a cloth factory in Hotan county, Xinjiang province, China (Azamat Imanaliev/Shutterstock.com)
Below right:
A protest outside Ansell's Annual General Meeting in Melbourne, 2022 (Credit: Angela Iaria)

Below left:
Workers picking mandarins in New South Wales (Kevin Wells Photography/Shutterstock.com)
Below right:
5 April 2019: Burmese crew of Thai fishing boat sort fish in Koh Phayam, Thailand (iStock.com/KHellon)

Since our first report, human rights abuses have continued to surface in the four high-risk sectors of focus.



Garments from China

In 2022, there continue to be alarming reports of systemic repression against Uyghurs and other Turkic Muslims in the Xinjiang Uyghur Autonomous Region of China, including widespread use of forced labour in cotton and garment production (in addition to several other high-risk sectors).

In August 2022, the Office of the UN High Commissioner for Human Rights (OHCHR) found that the arbitrary and discriminatory detention of members of Uyghur and other predominantly Muslim groups may constitute crimes against humanity.¹⁰ The OHCHR also noted the presence of forced labour in “Vocational Education and Training Centres” facilities and “labour transfer” schemes.

Concerns over the pervasive use of Uyghur forced labour in China led to the introduction of the *US Uyghur Forced Labor Prevention Act*, which came into effect in June 2022.¹¹ The Act bans the import of all goods made in Xinjiang and presumes that any goods made in Xinjiang have been made using forced labour. In Europe, the European Commission has proposed regulations that would prohibit goods made with forced labour,¹² reportedly also issued in response to the situation in Xinjiang.¹³

Gloves from Malaysia

Labour exploitation remains widespread in the Malaysian glove manufacturing sector in 2022. In response, the US has placed several import bans on Malaysian rubber glove suppliers based on evidence of forced labour, withheld wages, debt bondage and physical violence. Most recently, this has included glove manufacturers YTY Group and Brightway Group.¹⁴

In April 2022, the UK *Health and Care Act* was also amended to ensure that procurement of goods and services by the National Health Service (NHS) avoids modern slavery,¹⁵ in response to rising reports of abuses in the Malaysian glove sector.

In August 2022, a group of former migrant workers employed by Brightway Group in Malaysia brought a legal claim against Ansell and Kimberly-Clark in US courts.¹⁶ The former workers allege they were subject to forced labour including: the payment of high recruitment fees; working 12+ hour days often with restricted access to food, water and restrooms; being subjected to physical and verbal abuse; receiving delayed or incomplete compensation; residing in overcrowded and unclean accommodation; having their passports seized by Brightway; and having limited ability to leave the facilities. The lawsuit alleges that Ansell and Kimberly-Clark knew, or should have known, about forced labour in their disposable gloves supply chains and that they have knowingly profited from the forced labour of individuals manufacturing and producing disposable gloves at Brightway Group. The case is currently before the courts.

Horticulture from Australia

In Australia, the horticulture sector has long been identified as a sector with systemic exploitation and abusive working conditions,¹⁷ particularly for migrant workers on temporary visas. A 2021 decision by the Fair Work Commission found that the piecework provisions in the Horticulture Award were not fit for purpose and did not provide a fair minimum safety net. The Commission ruled that workers on a piece rate must be guaranteed at least the equivalent of a minimum daily wage for each day they work.¹⁸ The Australian Government has also indicated it will implement reforms to address migrant worker exploitation.¹⁹

Seafood from Thailand

In a submission to the United States Department of State's 2022 Trafficking in Persons Report, it was noted that Thailand has long struggled to effectively manage migration and combat human trafficking and forced labour in a range of export industries, including the seafood processing and fishing.²⁰ However, in June 2022, the Royal Thai Police announced that it had established a taskforce to investigate forced labour and human trafficking on the fishing industry.²¹ In early 2022, the US Senate passed legislation designed to ensure that no seafood harvested or produced using forced labour enters the US.²²

For a fuller background of conditions in each of the sectors, please see pages 16 to 53 of our Paper Promises report.

Methodology

In conducting this research, we followed the methodology used in the *Paper Promises* report, with some adjustments to account for the second round of reporting. We assessed statements using a set of 63 indicators.

These indicators were used in our research in 2021, with minor refinements made to improve clarity and ease of use. A key change to the indicator set was the exclusion of COVID-19 related indicators that were used in reviewing first round statements. In evaluating the extent of change between rounds one and two, we have therefore excluded points awarded for those indicators in order to fairly compare the datasets.

In summary, our analysis centred on four key themes:

1. Are companies complying with the mandatory reporting requirements under the MSA?
2. How well are companies identifying and disclosing salient modern slavery risks?
3. Do modern slavery statements indicate that companies are initiating effective actions to respond to modern slavery risks, such as implementing policies and procedures, engaging with suppliers, improving working conditions and providing remedy?
4. Do modern slavery statements indicate that companies are meeting promises and commitments made in first round statements? Are companies substantially improving their statements?

Analysis of company statements followed a three-stage assessment, plus validation, process. Each statement was assessed by a trained team of assessors. Referencing a scoring guide, assessors awarded a score for each indicator of 0, 0.5, or 1. A secondary assessor reviewed and reconciled initial scoring. A further assessor reviewed scoring for consistency and validated the data recorded.

We assessed question 4 by identifying commitments made in first round statements concerning actions to be taken in the following reporting year. Of the 532 commitments identified, we assessed whether these commitments were in fact fulfilled on the basis of information included in second round statements. Where statements indicated some progress had been made against a given commitment, we generally assessed those commitments to be fulfilled unless the wording of the commitment was such that a clear action or milestone was to be completed by a certain date, in which case these were assessed as unfulfilled.

We also undertook some analysis to compare round one and round two statements (i.e., statements covering 2019-20 and 2020-21, respectively) to determine whether or not statements were recycled. Statements were viewed as recycled where there was minimum or no changes to the text of the statement, or where any changes made to the text did not reflect qualitative improvements to the statement (i.e., would not have altered scoring).

In our earlier report, we analysed the statements of 102 reporting entities published in the first reporting cycle of the MSA. However, as at 1 September 2022, only 92 second round statements, for these same reporting entities, were available on the Modern Slavery Register.

Of the 10 company statements that were unavailable:

- Two reporting entities had not issued statements likely due to structural changes (for example, changed corporate structure, acquisition by another entity, or falling below the reporting threshold);
- One submitted a report that was published late on the Modern Slavery Register after 1 September 2022, and therefore has been excluded from our findings;
- Seven statements were 'missing' for unexplained reasons from the Modern Slavery Register. We wrote to each company to confirm their reporting status. Of those companies, three confirmed to us their statements had not been submitted by the deadline.

We have therefore included 95 companies (based on the 92 available statements plus the three confirmed unsubmitted statements) in our dataset for the purposes of this report. The three unsubmitted statements were scored zero, on the basis that those companies failed to provide reports in accordance with legal requirements. The remaining four statements were not included in our analysis although no adequate explanation has been provided for their missing statements.

Eight companies source from more than one sector (for example, supermarkets sourcing both horticulture and seafood products). Where companies operated across more than one sector we analysed their statement from differing sectoral perspectives.

Statements assessed (by sector)

Sector	Total first round statements reviewed	Total second round statements reviewed	Missing statements in second reporting cycle
Garments (China)	30	29	1
Gloves (Malaysia)	25	24	1
Horticulture (Australia)	30	24	6
Seafood (Thailand)	25	23	2
Total	110	103*	10

*including 3 unsubmitted statements.

Missing pieces of the puzzle

Ten second round statements were not publicly available from the Modern Slavery Register at the time of our review. There are a variety of reasons why the statements may not have been published, including changes to the corporate structure, acquisition by another entity, or falling below the reporting threshold.

Of the seven statements deemed as 'missing' for unexplained reasons, one potential reason for non-publication is that the company failed to submit a report that was compliant with statutory reporting requirements, or simply failed to submit a report at all (in breach of statutory reporting requirements under the MSA).

Discerning compliance with the MSA is difficult. No regulator has been appointed to monitor reporting entities' statutory reporting obligations. There is no public list of reporting entities which are required to report. There is no public information about companies which have failed to report. Instead, compliance with the MSA relies on ad hoc market forces to monitor disclosure efforts. Reliance on market forces alone is an insufficient and unsustainable mechanism to engender compliance with the law. Missing statements send a signal that the Australian Government and companies are not taking seriously their responsibility to combat modern slavery.

The companies with 'missing' statements on the Modern Slavery Register are:

- Adcome Pty Ltd
ABN 99 110 315 681
- Harris Farm Markets Pty Ltd
ABN 79 093 040 754
- In2Food Australia Pty Ltd
ABN 17 609 288 360
- JB Metropolitan Distributors Pty Ltd
ABN 72 088 821 023
- Lite N' Easy Pty Ltd
ABN 33010 655 820
- Mulgowie Fresh Pty Ltd
ABN 63 100 928 014
- Vesco Foods Pty Ltd
ABN 23 008 726 878

Tracking progress

In this section, we look at the extent of change between first and second rounds of reporting in three key areas: compliance with mandatory reporting requirements, risk awareness, and evidence of effective action.

A. Are companies complying with the mandatory reporting requirements?

Section 16 of the MSA contains ‘mandatory criteria for modern slavery statements’; meaning companies must report against six prescribed factors when issuing their statements.

Only 34% of statements we assessed cover all the mandatory reporting areas prescribed by s 16. This means a clear majority of companies (66%) are still failing to meet the basic regulatory requirements of the MSA. This represents a slight improvement on the previous year where only one in four (23%) of the 102 companies assessed had addressed all the legally mandated reporting requirements in their statement.

Compliance with each of the mandatory criteria in the MSA varies. More than a quarter (29%, down from 36% in round one) fail to describe their structure, operations and supply chains. On the critical issue of identifying the risks of modern slavery in their operations and supply chains, 25% of companies (down from 37%) fail to provide this information. As in round one, reporting on risks in supply chains remains better than reporting on risks in entities’ own operations, at home in Australia, reflecting the view that modern slavery is an ‘offshore issue’.

Further, 33% of companies (compared with 40%) did not include information on actions taken to assess and address these risks. Two in five companies (40%, down from 47%) did not describe how they assess the effectiveness of its actions and one in five (22%, down from 39%) failed to describe internal company consultation processes.

The Australian Government’s Issues Paper on the three-year MSA review has also noted improvements in mandatory reporting standards across years one and two based on the Modern Slavery Business Engagement Unit’s review of all published statements, showing a decrease in non-compliance from 41% in the first reporting cycle to 28% in the second reporting cycle.²³ These figures are based on all statements received (1727 in the first round, 3429 in the second round), whereas the findings in this report focus solely on the rate of improvement within the same companies operating in high-risk sectors that were also reviewed in our earlier report. What is evident from both reviews is that, two rounds of reporting in, there are still a large number of companies that are failing to meet even the basic legal requirements of the MSA.

Mandatory criteria		Compliance
S16(1)(a)	Identifies the reporting entity	97%
S16(1)(b)	Describes the structure, operations and supply chains of the reporting entity	71%
S16(1)(c)	Describes the risks of modern slavery practices in the reporting entity’s operations and supply chains	75%
S16(1)(d)	Describes the actions taken to assess and address those risks, including due diligence and remediation	67%
S16(1)(e)	Describes how the reporting entity assesses the effectiveness of such actions	60%
S16(1)(f)	Describes the process of consultation with other related entities	78%

Right:

Vineyard worker harvesting grapes in the Barossa Valley (iStock.com/ MichaelMajor)



The limitations of the MSA: Deficiencies of transparency frameworks

The MSA is one of a growing number of national or regional regulatory regimes that seek to address human rights abuses in supply chains. These regimes currently fall broadly into three categories: disclosure or transparency based regimes; due diligence compliance regimes; and trade bans. Australia’s MSA is a disclosure-based regime, not requiring action but rather the publication of a report. It also lacks a holistic enforcement framework. Disclosure-based regulation has attracted questions as to whether it will ever be truly effective in reducing modern slavery.

Since the law was introduced, there has been consistent critiques about the MSA’s enforcement framework. No regulator has been appointed to monitor reporting entities’ statutory reporting obligations, which means compliance is difficult to discern. Compliance with the MSA relies principally on market forces: consumers, investors, civil society organisations, academics, and the media which are expected to monitor disclosure efforts. The idea is that corporate reporting on modern slavery enables stakeholders to expose poorly performing companies, potentially prompting a consumer or investor backlash. However, using the current reporting model, this is a complex task, certainly not achievable for consumers, and undertaken by civil society largely on a pro bono basis.

Rather than driving a ‘race to the top’, our findings show that improvements to corporate reporting are occurring at a staggeringly slow pace and, more importantly – are made from a low base. A significant number of entities are not technically compliant (they do not meet the mandatory criteria) and many are not substantively compliant (they do not disclose relevant information and effective action). However, even if reporting quality improves significantly, as long as the law can be met by a ‘tick-box’ approach to addressing modern slavery, there will be some companies that turn a blind eye to worker exploitation even though they technically comply with the MSA.

This weakness can be illustrated through the recent allegations of forced labour in glove manufacturing supply chains brought by former factory workers in Malaysia against Ansell and Kimberly-Clark in US courts (see page 12 above).

On paper, Ansell is a strong performer in reporting on its modern slavery risks. It ranks #6 in our overall assessment and #1 in the gloves sector. In its 2021 Modern Slavery statement, Ansell acknowledges that a “small number of our distribution sites are considered higher risk for human trafficking and forced labour” and acknowledges that such risks are “driven in large part by our use of migrant labour and recruitment agents”. Ansell does not identify any specific instances of modern slavery that it identified but refers generally to its Zero Recruitment Fee Policy and its actions to “initiate a reimbursement program for migrant workers in our employ who had paid recruitment fees”. Ansell notes that it had completed remediation by January 2021.

On paper, the process appears complete. In practice, workers in Ansell’s supply chain have brought legal action to demand redress for exploitative conditions far broader than the payment of recruitment fees. While the case is currently before the US courts and no findings have been made at the time of writing, this example demonstrates the clear limitations of the MSA’s paper-focused response to addressing modern slavery in supply chains. Under a strengthened MSA with due diligence requirements, Ansell’s actions would be scrutinised and there would be a more direct pathway for workers to access justice.

Tracking progress

Below:
15 November 2020:
Sanitation Operations
at Top Glove Factory
were carried out by
Hazmat Special Team
due to the increase in
COVID-19 cases in the
factory (Tok Anas/
Shutterstock.com)

B. How well are companies disclosing modern slavery risks?

While nearly all companies (96%) now ‘tick the box’ on mentioning supply chain risks in their statements (up from 79%), there continues to be a failure to more deeply engage with salient and obvious risks relevant to the sector within which they operate. 43% of companies still fail to identify obvious risks, with two in five companies (40%) failing to describe sector specific risks in any detail (compared with 53% last year). Overall, risk analysis remains poor with an average score of just 31% for awareness of modern slavery risks (up from 24%).

Just under a third of companies reviewed disclosed the countries of suppliers (up from 25%), with only 16% disclosing supplier lists, and 13% disclosing the countries of suppliers beyond Tier 1 or to raw materials stage. If companies have inadequate visibility of their high-risk supply chains, then meaningfully addressing modern slavery risks becomes incredibly difficult.

One area of improvement was in relation to companies disclosing actual instances or allegations of modern slavery, and responding to those instances. 14% of companies disclosed such instances in the second round of reporting, up from 8% in the first round. While the overall proportion of companies remains low, this demonstrates some improved efforts in transparency about risk identification, as well as a growing number of companies actually uncovering and addressing exploitation in their supply chains.



Across sectors, however, there continues to be a lack of engagement with underlying drivers of modern slavery risk, with minimal change in sector-specific scoring between reporting rounds. Factors such as low wages, downward cost pressures and lack of independent oversight are still rarely identified, with just 8% of companies (up from 6%) disclosing risks regarding lack of freedom of association or union coverage of workers.

Somewhat surprisingly, given the vast amount of media coverage in recent years of state repression in the Xinjiang Uyghur Autonomous Region of China, including systemic programs of forced labour, 72% of the garment companies we assessed (down slightly from 75%) still fail to disclose the risk of modern slavery linked to possible Uyghur forced labour in their supply chains. While it is apparent that there may be political or commercial reasons for failing to mention this risk in a company’s statement, the failure to disclose this key risk again highlights weaknesses in the MSA’s focus on transparency as Australia’s primary way to tackle supply chain modern slavery risks.

C. Are companies initiating effective actions to tackle modern slavery?

If the MSA is to have any real impact for people in situations of modern slavery it must drive companies to take effective action to address modern slavery in their operations and supply chains that supplements paper-based commitments. While there have been noticeable improvements in reporting on policies, procedures and training, our analysis shows that the pace of progress on translating policy to practice remains near static on most measures.

Policies and procedure

As in the first round of reporting, areas of higher performance include disclosing relevant internal policies (85%, up from 75%), policies setting out expectations of their suppliers and business partners to address modern slavery (65%, up from 52%) and stating that training is provided to staff and management (83%, up from 58%). Reporting on these measures improved generally, with more details provided, including how relevant policies were communicated to suppliers (46%, up from 27%).

Supplier engagement

With regard to managing supplier risk, there is a small increase in contractual expectations or requirements with regard to modern slavery in supply chains (49%, up from 46%), with only 18% of companies legally requiring suppliers to cascade modern slavery requirements down the supply chain. Still only one in four companies (26%, up from 25%) state they undertake human rights due diligence on new suppliers, with just 27% (unchanged) working proactively with suppliers to help ensure modern slavery policies are fulfilled down the supply chain.

Purchasing practices

There remains a distinct lack of action to examine or alter an entity’s own purchasing practices in order to address modern slavery risks such as downward cost pressures, unrealistic timeframes and order cancellations. Just one in five companies (20%, up from 19%) describe implementing responsible purchasing practices such as ensuring prompt payment, working collaboratively with suppliers to plan orders in a way that considers the interests of workers, and avoiding sudden changes in workload. Over half of the companies demonstrating action on improving purchasing practices are from the garment sector, demonstrating a continuing lack of progress on addressing modern slavery through one’s own operations from across the other high-risk sectors.

Living wages

Some positive progress was made with respect to recognising the importance of paying suppliers a living wage, with one in five companies (21%, up from 14%) now expressing living wage commitments. However, just 2% of companies (unchanged) have a time bound plan to ensure suppliers pay a living wage, and/or factored this into pricing indices. Without a plan to ensure living wages are being paid such commitments, while notable, risk only existing as ‘paper promises’ if these are not followed through with prompt and meaningful action.

Freedom of association

While 58% of companies continue to express support for freedom of association (up from 57%), only a small number of companies (14%, up from 12%) disclose the presence of, or collaboration with, independent trade unions in their high-risk operations and/or supply chains. This is particularly concerning in the horticultural sector, with just 7% of companies providing evidence in their statements of collaboration with unions to manage horticultural supply chain risks.

Stakeholder engagement also remains poor, with only 17% of companies (up from 13%) demonstrating evidence of stakeholder consultation in developing or reviewing relevant policies. Just over one in three companies (35%, up from 34%) report collaboration with unions, migrant worker groups, or civil society organisations in their efforts to tackle modern slavery, despite meaningful and safe stakeholder engagement being an important aspect of human rights due diligence particularly in high-risk sectors.

Remedy

Finally, there continues to be superficial engagement to provide access to remedy for impacted workers. Despite ‘remediation’ featuring in the mandatory reporting criteria, only 17% of companies (up from 16%) commit to providing remedy if they cause or contribute to modern slavery. A mere 7% (up from 4%) disclose commitments to provide compensation for harm suffered. While most companies disclose some form of grievance mechanism (82%, unchanged), only 17% (up from 13%) disclose how such mechanisms are accessible for vulnerable groups and those most at risk of finding themselves in situations of modern slavery and just 4% describe how potential or actual users of the grievance mechanism have been engaged in its design. 13% (up from 12%) disclose actions taken to address actual or potential modern slavery risks that are identified and any follow-up checks to ensure implementation.

Tracking progress

Effective action to address modern slavery

There are numerous actions that companies can take to effectively address modern slavery in their operations and supply chains. These include actions with regards to human rights due diligence, implementing company policies and procedures, supplier engagement, working conditions and remediation. These practices must become embedded in business operations in order to meaningfully address modern slavery.

Human rights due diligence:

- There is a continuous process embedded within the company that involves identifying, preventing and addressing human rights harms by business. This includes actual impacts occurring now and potential impacts that could happen in the future
- It prioritises meaningful and safe direct stakeholder engagement, including supply chain workers and other stakeholders possessing knowledge of local operating contexts to facilitate effective risk identification
- It involves collaboration with peers to investigate modern slavery risks in common supply chains and develop initiatives that can bring about industry-wide change
- It is embedded in strategic decision-making at board level, and integrated across company functions
- It informs the development of a company's responsible purchasing practices
- It feeds into effective remediation with concrete, appropriate outcomes for workers where a company is implicated in harm
- It involves companies examining the impacts of their own sourcing practices and models, as well as suppliers

Policies and procedures:

- There is a clear understanding of modern slavery, and a commitment to tackling it, among all stakeholders
- This is reflected in relevant company policies and in training
- Policies are clearly communicated to suppliers
- These policies are applied in practice
- The board and senior leadership are involved in the development and oversight of modern slavery policies and procedures
- Procedures are changed to ensure responsible purchasing practice
- Effective human rights diligence, that is worker centric and involves meaningful stakeholder consultation, is undertaken

Supplier engagement:

- The capacity of supplier to assess and address their modern slavery risks is supported
- Proactive work is done with suppliers to ensure that modern slavery standards can be fulfilled down the supply chain
- Suppliers are regularly monitored

Working conditions:

- Workers in company supply chains are paid a living wage
- There is support for freedom of association in company operations and supply chains
- Known risks in supply chains are mitigated, such as controls over supply chain recruitment practices, supply chain tracing, or multi-stakeholder collaboration to lift labour standards

Remediation:

- There is transparency about how instances of modern slavery will be addressed, including remediation processes for affected workers and communities
- Company grievance mechanisms are accessible, and work well in practice
- Worker representatives are engaged in remediation processes where appropriate



Above:
Workers planting strawberries at a strawberry farm in Queensland (Andres Ello/Shutterstock.com)

Looking forward, looking back

Right:
Burmese workers
transporting fish
in Thailand's
fishing industry
(bombermoon/
Shutterstock.com)

The MSA is premised on an iterative process of improvement: year-on-year entities are expected to demonstrate a more mature approach to identifying and managing modern slavery risks.

In this part we analyse whether second round modern slavery statements are living up to this expectation, and whether commitments set out in first round statements have been followed through with action in the second round of reporting.

A. Highlights and lowlights

In the second round of reporting, there are some companies that have experienced significant improvements to their first round scores, as well as several companies that either remained the same or faced minor decreases in score.

Concerningly, approximately 8% of statements appeared to be substantially recycled or 'rolled over' from first round statements without any qualitative improvements. While a degree of repetition in modern slavery statements is to be expected, the extent of recycling demonstrates that some entities have failed to more deeply engage in the second round of reporting, instead treating the MSA as a corporate compliance exercise.

On the other hand, some companies improved their scores by up to 36% in the second round of reporting, with Metcash Trading (IGA) and Costco Wholesale (horticulture / seafood) having some of the largest increases. Both these companies scored in the bottom-third of statements reviewed in the first round and are now in the top third, after having increased their scores by issuing more detailed statements in the second round.

Some of the highest scoring companies from round one, including Woolworths, Coles and Kathmandu, still improved by as much as 13%. This is a positive indication that some companies at least are investing in continuous improvement.



B. Are companies fulfilling promises and commitments?

Of the 532 commitments made in the first round modern slavery statements we reviewed, over half (56%) did not appear to be actioned in second round statements. When vague or 'self-fulfilling' commitments are excluded from the analysis, this figure drops to nearly two in three (64%) first round commitments remaining unfulfilled.

In our *Paper Promises* report, we found that 89% of all first round statements demonstrated a commitment to continuous improvement in their approach to tackling modern slavery – namely, by setting out future steps for action over the coming reporting period. The most common types of commitments made related to increased internal training or awareness building, reviewing or updating existing suites of contracts and policies, and further engaging with suppliers. Another common promise was for companies to join a third-party organisation or utilise its services (e.g., SEDEX) to enhance supply chain monitoring or risk assessment and management procedures. Notably, only one company (Woolworths Group) made a commitment to consult with affected groups (e.g., workers, unions) in the development of its policies (“*Design and pilot a mechanism for potentially affected groups to participate in program design and evaluation*”).

In the second round of statements, fewer companies identify areas for future improvement compared to in first round statements (78%, down from 89%), with many simply listing achievements for the last reporting year without outlining future commitments. Nearly one in five companies (19%) repeat either all or some of the same commitments they had made in the first round of reporting, without any change or action in second round statements.

Commitments made in first round statements ranged in terms of quality. Some commitments were specific or timebound and therefore meaningful and measurable – for example, “*identify types of purchases where ‘rush orders’ are common (quick turnaround time or limited due diligence conducted), including, for example, purchase of merchandise or in response to emergencies*” (Tattarang); or “*to develop strategies to protect and ensure fair recruitment of migrant workers, including the goal of no worker having to pay fees to get a job by 2025*” (H&M Group).

Approximately a third (32%) of the commitments made in first round statements were vague, open textured or generic in nature. Some were expressed to be ‘self-fulfilling’ – meaning that these could be easily satisfied without any tangible improvements being made by the company. Examples include “*ongoing engagement with supplier groups*” (Sonic Healthcare) or “*to further review suppliers*” (Uniqlo). Too often commitments were so unclear it was impossible to analyse if they were achieved.

In order to foster continual improvement and be able to meaningfully track progress, companies should commit to undertaking concrete actions to identify and address modern slavery. For example, instead of committing to ‘further review suppliers’ a more meaningful commitment might include a commitment to identify all Tier 1 and 2 suppliers, and to then develop a risk-based approach that prioritises high risk suppliers in company due diligence, and being clear what criteria is used to determine risk levels. Where possible, commitments should be measurable and timebound.

Conclusion

After two years of reporting cycles under Australia's MSA, our assessment of statements shows some progress in corporate understanding of modern slavery and the potential for its presence in operations and supply chains. This demonstrates the potential of the MSA to shape business awareness and action. However, consciousness of modern slavery has not yet resulted in effective practices to remediate and eliminate it for most companies, and the majority of promises made to address modern slavery remain unfulfilled.

Our report identifies a handful of leading companies whose statements suggest more effective actions to tackle modern slavery. The aim of the MSA is that business will learn and improve, year on year. Businesses who are early in their efforts to combat modern slavery are well advised to look at the actions described in these higher-ranked statements consult unions and civil society organisations about how to take real action.

In most cases, however, corporate statements show only superficial action to effectively address modern slavery. This reflects limited knowledge of how to enact human rights due diligence as a standard of business conduct. As we noted in our earlier *Paper Promises* report, action to ensure responsible purchasing remains rare, with only a small number of companies reporting efforts to stop downward pricing pressure resulting from irresponsible procurement. Few companies committed to paying a living wage, and fewer still have described processes for preventing workers being charged recruitment fees. Engagement levels with unions and workers remain low. Engagement with workers in remediation efforts is lacking. Many grievance mechanisms, in their current form appear to lack sufficient mechanisms or resourcing to identify or address modern slavery issues.

The evidence reveals an urgency to better equip the MSA to steer business action. At a minimum, there needs to be greater oversight and enforcement of the MSA, including through the establishment of an independent Anti-Slavery Commissioner and the introduction of penalties and other consequences for non-compliance. Further, a specific duty to prevent modern slavery should be added to the MSA, which requires companies to undertake mandatory human rights due diligence to identify and assess salient risks in their operations and supply chains that give rise to modern slavery and to take steps to mitigate and address them. Additional reforms are also required to provide for access to justice for exploited workers and victims of trafficking.



Evidence for the urgent need to better empower government bodies responsible for the MSA, and strengthen the MSA, comes at a time of opportunity, as it is currently under review. It was envisaged by its drafters that the MSA would be revised based on evidence of compliance and effectiveness. Australia is now out of step with other OECD countries who have already implemented more extensive human rights due diligence legislation or have bills in parliament, and Australian business is lagging behind responsible corporate behaviour elsewhere. There are now sound regulatory models to learn from for the improvement of the MSA at this opportune moment of regulatory review. The Australian Government can steer business from broken promises to effective action to end modern slavery in our operations and supply chains.

Below:
Farm worker picking strawberries in Victoria (Ian Crocker/Shutterstock.com)

Endnotes

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- 13 Foo Yun Chee, 'EU aims to ban products, imports made with forced labour - document', *Reuters* (online, 10 September 2022) <<https://www.reuters.com/markets/europe/exclusive-eu-seeks-ban-products-made-with-forced-labour-document-2022-09-09/>>.
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Appendix 1

Company Modern Slavery Act Statements assessed

No.	Company Name	Key Brands and Business Names (as per <u>Modern Slavery Register</u> as accessed on 01.11.22)	Country (as per Modern Slavery Register)
Garments			
1	<u>ADT and Forever New</u>	Forever New Forever New Curve Ever New	Australia
2	<u>Beaujolais Unit Trust</u>	APG & Co Saba Sportscraft NZ JAG Apparel Willow Apparel	Australia
3	<u>Best & Less Group</u>	Best & Less Postie	Australia New Zealand
4	<u>Brand Collective</u>	Julius Marlow Elwood ELWD Work Division Elka Collective Volley Grosby Superdry Clarks Hush Puppies Mossimo Shoes & Sox Shoe Warehouse Iconix	Australia
5	<u>COGI (Cotton On Group)</u>	Cotton On Kids Cotton On Body Cotton On Factorie Rubi Shoes Typo Supre Ceres Life Cotton On Foundation Southern Cross Shopfitting	Australia
6	<u>Country Road Group</u>	Country Road Witchery Mimco Trenery Politix	Australia
7	<u>David Jones</u>	David Jones	Australia
8	<u>Decjuba</u>	Decjuba D-LUXE Basics Decjuba Kids	Australia
9	<u>Factory X</u>	Gorman Dangerfield Alannah Hill Princess Highway L'urv Jack London	Australia

No.	Company Name	Key Brands and Business Names (as per <u>Modern Slavery Register</u> as accessed on 01.11.22)	Country (as per Modern Slavery Register)
10	<u>H&M Group</u>	H&M COS	Sweden
11	<u>Hanes Australasia</u>	Bonds Berlei Bras N Things Champion Dunlopillo Fairydown Jockey Australia & NZ Kayser Playtex Razzamatazz Rio Sheer Relief Sheridan Voodoo	Australia
12	<u>JD Sports Fashion Australia</u>	JD Sports	Australia
13	<u>Kathmandu</u>	Kathmandu	New Zealand
14	<u>Lorna Jane</u>	Lorna Jane Pty Ltd	Australia
15	<u>Lululemon Australia</u>	lululemon athletica Australia Holding Pty Ltd	Canada Australia
16	<u>Mosaic Brands</u>	Millers Rockmans NoniB Rivers Katies Autograph W.Lane Crossroads BeMe	Australia
17	<u>Myer</u>	Myer Sass & bide Marcs David Lawrence	Australia
18	<u>Nike</u>	NA	United States of America
19	<u>Premier Investments</u>	Premier Investments Limited Just Group Limited Just Jeans Jay Jays Portmans Smiggle Peter Alexander Dotti JacquiE	Australia

No.	Company Name	Key Brands and Business Names (as per <u>Modern Slavery Register</u> as accessed on 01.11.22)	Country (as per Modern Slavery Register)
20	<u>PVH Group</u>	PVH Calvin Klein Tommy Hilfiger Warner's Olga True&Co.	United States of America
21	<u>Retail Apparel Group</u>	TFG Retailers Pty Ltd Retail Apparel Group Pty Ltd Tarocash Pty Ltd Connor Clothing Pty Ltd Rockwear International Pty Ltd yd. Pty Ltd Johnny Bigg Pty Ltd	Australia
22	<u>Rip Curl Group</u>	Rip Curl	Australia
23	<u>The Iconic</u>	THE ICONIC	Australia
24	<u>The PAS Group</u>	Review Marco Polo Yarra Trail Black Pepper Designworks	Australia
25	<u>Uniqlo Australia</u>	UNIQLO	Australia
26	<u>Universal Store</u>	Universal Store Pty Ltd US Australia Pty Ltd US 1A Pty Ltd US 1B Pty Ltd	Australia
27	<u>Wesfarmers</u>	Bunnings Bunnings Warehouse Bunnings Trade Adelaide Tools Kmart Target Catch Officeworks Geeks 2 U Wesfarmers Chemical Energy and Fertilisers Wesfarmers Industrial and Safety Blackwoods New Zealand Safety Blackwoods Workwear Group Coregas Greencap	Australia
28	<u>Zara</u>	Zara	Australia
29	<u>Zimmerman</u>	NA	Australia

No.	Company Name	Key Brands and Business Names (as per <u>Modern Slavery Register</u> as accessed on 01.11.22)	Country (as per Modern Slavery Register)
Healthcare			
1	<u>Ansell Limited</u>	Ansell Healthcare	Australia Belgium Malaysia United States of America
2	<u>Aspen Medical</u>	NA	Australia
3	<u>AstraZeneca</u>	AstraZeneca Pty Limited SYmbicort Zoladex Brilinta Nexium Tagrisso Imfinzi Forxiga Fasenra Lynparza Calquence Nexium	Australia
4	<u>Bupa Australia Group</u>	Bupa	United Kingdom
5	<u>Clifford Hallam Healthcare</u>	Clifford Hallam Healthcare CH2 Bare Medical	Australia
6	<u>CSL</u>	CSL Behring Australia Seqirus Australia CSL Limited	Australia
7	<u>EBOS Group</u>	Allersearch Animates Aristopet Black Hawk Clinect Cryomed DoseAid EBOS Healthcare Endeavour Consumer	Australia New Zealand
8	<u>Epworth Group</u>	Epworth HealthCare	Australia
9	<u>Estia Health</u>	Estia Health	Australia
10	<u>GSK Group</u>	GSK GlaxoSmithKline Australia Pty Ltd GlaxoSmithKline Consumer Healthcare Australia Pty Ltd GlaxoSmithKline Holdings Pty Ltd GlaxoSmithKline Investments Pty Ltd	United Kingdom

No.	Company Name	Key Brands and Business Names (as per <u>Modern Slavery Register</u> as accessed on 01.11.22)	Country (as per Modern Slavery Register)
11	<u>Healius</u>	Laverty Pathology Dorevitch Pathology QML Pathology Western Diagnostic Pathology Abbott Pathology TML Pathology Lumus Imaging Healthcare Imaging Services Montserrat Day Hospitals Adora Fertility Vernostics	Australia
12	<u>Healthscope</u>	Healthscope	Australia
13	<u>Image Hold Co</u>	I-Med Radiology Networ	Australia
14	<u>Kimberly-Clark</u>	Huggies Kleenex Poise Depend U By Kotex Viva WypAll KleenGuard Kimberly-Clark Professional Scott	Australia
15	<u>Mun</u>	Mun Australia Mun Global GloveOn PrimeOn	Malaysia
16	<u>National Pharmacies</u>	National Pharmacies Optical National Pharmacies National Pharmacies Distribution	Australia
17	<u>Nexus Hospitals</u>	Nexus Hospitals	Australia
18	<u>Opal HealthCare</u>	Opal HealthCare	Australia
19	<u>Pfizer Australia</u>	Pfizer Australia Pty Ltd Pfizer (Perth) Pty Ltd Pfizer PFE Pty Ltd Pfizer Australia Investments Pty Ltd Hospira Australia Pty Ltd Hospira Adelaide Pty Ltd Hospira Holdings (S.A) Pty Ltd Pfizer Australia Holdings Pty Ltd	Australia
20	<u>Ramsay Health Care</u>	Ramsay Health Care	Australia
21	<u>Sigma Healthcare</u>	NA	Australia

No.	Company Name	Key Brands and Business Names (as per <u>Modern Slavery Register</u> as accessed on 01.11.22)	Country (as per Modern Slavery Register)
22	<u>Sonic Healthcare</u>	Sullivan Nicolaides Pathology Douglass Hanly Moir Pathology Capital Pathology Southern IML Pathology Melbourne Pathology Hobart Pathology Launceston Pathology North West Pathology Clinipath Pathology Barrett & Smith Pathology Queensland XRay Hunter Imaging Group Castlereagh Imaging Illawarra Radiology Group SKG Radiology IPN Medical Centres Sonic HealthPlus Sonic Clinical Services Epworth Medical Imaging Independent Practitioner Network	Australia
23	<u>TriCare</u>	TriCare Limited	Australia
24	<u>Virtus Health</u>	IVF Australia Queensland Fertility Group Pty Limited TasIVF Pty Limited Melbourne IVF Pty Limited Virtus Health Specialist Diagnostics Pty Limited Virtus Health Singapore Pte Limited Virtus Health Europe	Australia

No.	Company Name	Key Brands and Business Names (as per <u>Modern Slavery Register</u> as accessed on 01.11.22)	Country (as per Modern Slavery Register)
Horticulture			
1	<u>Accolade Wines Australia</u>	Accolade Wines Hardys Grant Burge St Hallett Petaluma Arras Mudhouse Banrock Station Jamshed	Australia
2	<u>Adcome</u>	Cornetts Supermarkets Everfresh Food Markets	Australia
3	<u>Aldi Stores</u>	NA	Australia
4	<u>Australian Vintage</u>	McGuigan Wines Tempus Two Nepenthe and Barossa Valley Wine Company Austflavor	Australia
5	<u>Casella Wines</u>	YellowTail Peter Lehmann Brandslaira Morris of Rutherglen Morris Whiskey Baileys of Glenrowan Australian Brewing Company	Australia
6	<u>Coles Group</u>	Coles Supermarkets Coles Local First Choice Liquor Market Vintage Cellars Liquorland Coles Express	Australia
7	<u>Costa Group</u>	Kangara Perino Lovacado Mush Boom Vitor 2PH	Australia
8	<u>Costco Wholesale Australia</u>	NA	Australia United States of America
9	<u>Craveable Brands Group</u>	Red Rooster Oporto Chicken Treat	Australia
10	<u>David Jones</u>	David Jones	Australia
11	<u>Domino's Pizza Enterprises</u>	Domino's	Australia
12	<u>Drakes Supermarkets</u>	NA	Australia

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13	<u>Ferrero Australia</u>	Nutella Tic Tac Ferrero Rocher Kinder Raffaello	Australia
14	<u>Harris Farm Markets</u>	Harris Farm Markets	Australia
15	<u>HelloFresh</u>	HelloFresh Everyplate YouFoodz	Australia Germany
16	<u>KFC Australia</u>	Kentucky Fried Chicken	Australia
17	<u>Lite N' Easy</u>	Lite N Easy	Australia
18	<u>McCain Foods</u>	McCain Finance (Aust) Pty. Ltd. Kitchens of Sara Lee Pty. Ltd. Weyville Holdings Limited McCain Foods (NZ) Limited Grower Foods Limited McCain Foods Taiwan Ltd.	Australia
19	<u>McDonald's Australia</u>	McDonald's Macca's	Australia
20	<u>Metcash Trading</u>	IGA Supermarkets Mitre10 Home Timber Hardware Total Tools	Australia
21	<u>Montague Bros</u>	NA	Australia
22	<u>Nando's Australia</u>	Nando's	Australia
23	<u>Oz Group Co-Op</u>	NA	Australia
24	<u>Shepparton Partners Collective (SPC)</u>	SPC Ardmona Provital Goulburn Valley Pomlife The Kuisine Co Helping Humans	Australia
25	<u>Simplot Australia</u>	Edgell Birds Eye I&J John West Leggo's Seakist Harvest Chiko Ally Five Tastes Chicken Tonight Raguletto	United States of America

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26	<u>Tattarang</u>	Tattarang Fiveight SFM Marine Squadron Energy Wyloo Metals Z1Z Western Force Harvest Road Harvest Road Beef Leeuwin Coast Harvest Road Horticulture R.M. Williams	Australia
27	<u>Woolworths Group</u>	Woolworths Supermarkets BIG W BWS Dan Murphy's Countdown CountdownX WooliesX Jimmy Brings Langton's Shorty's Liquor Metro	Australia
Seafood			
1	<u>Aldi Stores</u>	NA	Australia
2	<u>Australian Venue Co</u>	Australian Venue Co	Australia
3	<u>Best Friends Group</u>	Best Friends Pets My Pet Warehouse Pet Imports Pty Ltd Pet Wise Investments Pty Ltd Our Vet	Australia
4	<u>Bidfood Australia</u>	Bidfood Bidfood Foodservice Classic Meats	Australia South Africa
5	<u>Blackmores</u>	Blackmores BioCeuticals Pure Animal Wellbeing Impromy	Australia
6	<u>C.P. Merchandising Company (CP Foods)</u>	CP CP Authentic Asian Taste Inc Chillers Carisma CP Food Service Cape Merchant Captain's Pack Captain's Pride Meat Zero	Thailand

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7	<u>Coles Group</u>	Coles Supermarkets Coles Local First Choice Liquor Market Vintage Cellars Liquorland Coles Express	Australia
8	<u>Compass Group</u>	ESS Support Services Worldwide Medirest Eurest Chartwells Delta FM Restaurant Associates Omega Secutiry	Australia
9	<u>Corval Group</u>	Conga Foods Pty Ltd Dc Speciality Coffee Roasters Pakval	Australia
10	<u>Costco Wholesale Australia</u>	NA	Australia United States of America
11	<u>Drakes Supermarkets</u>	NA	Australia
12	<u>ITOCHU Australia</u>	NA	Australia
13	<u>KB Food Co</u>	KB Seafood Company Pty Ltd National Fisheries Pty Ltd Worldwide Importers Pty Ltd	Australia
14	<u>Mars Wrigley Australia</u>	Mars Wrigley Australia Mars Petcare Australia Mars Food Australia Royal Canin Australia	United States of America
15	<u>Mayers Fine Food (F Mayer Imports)</u>	San Pellegrino Arla	Australia
16	<u>Metcash Trading</u>	IGA Supermarkets Mitre10 Home Timber Hardware Total Tools	Australia
17	<u>Nestlé</u>	Milo Nescafe Uncle Tobys KitKat Maggi Nespresso S. Pellegrino NAN Purina Optifast Allen's	Australia

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18	<u>PETstock</u>	PETstock Retail PETstock VET PS Equine Equine Holdings Europa Holdings Syd Hill & Sons PETstock Industries Genuine Range 'Glow' PS Doggie Daycare PETstock Property	Australia
19	<u>Ridley Corporation Group</u>	Barastoc Cobber Rumevite Primo Aquaculture	Australia
20	<u>Simplot Australia</u>	Edgell Birds Eye I&J John West Leggo's Seakist Harvest Chiko Ally Five Tastes Chicken Tonight Raguletto	United States of America
21	<u>Tassal Group</u>	Tassal De Costi Seafoods	Australia
22	<u>The Star Entertainment Group</u>	The Star Entertainment Group Limited The Star Sydney The Star Gold Coast Treasury Brisbane	Australia
23	<u>Woolworths Group</u>	Woolworths Supermarkets BIG W BWS Dan Murphy's Countdown CountdownX WooliesX Jimmy Brings Langton's Shorty's Liquor Metro	Australia

